Phase 8: Data Management & Deployment

❖ **Duplicate Rules**

To maintain clean customer data and prevent duplicates, a Duplicate Rule was created on the Customer__c object. This rule checks for duplicate records based on Email and Phone Number.

A corresponding Matching Rule named Customer_Email_Phone_Match was created and activated. The matching rule compares the Email and Phone fields exactly and ignores blank values.

The Duplicate Rule actions are configured as follows:

- On Create: Alert the user if a duplicate Customer is found.

- On Edit: Alert the user if editing creates a duplicate.

- Alert Text: "A Customer with this Email and Phone already exists. Please check before creating a new record."

the matching rule and duplicate rule are active, Salesforce automatically prevents duplicate customer entries during record creation or updates, ensuring accurate and reliable customer data.

SETUP
Duplicate Rules

Customer Duplicate Rule
Customer Duplicate Rule

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Duplicate Rule Detail

[Edit] [Delete] [Clone] [Deactivate]

Rule Name	Customer Duplicate Rule	Order	1 of 1 [Reorder] ⓘ
Description			
Object	Customer		
Record-Level Security	Enforce sharing rules		
Action On Create	Allow	Operations On Create	✓ Alert ✓ Report
Action On Edit	Allow	Operations On Edit	✓ Alert ☐ Report
Alert Text	A Customer with this Email and Phone already exists. Please check before creating a new record.		
Active	✓		
Matching Rule	🟢 Customer_Email_Phone_Match 🟢 Mapped	Matching Criteria	(Customer: Email EXACT MatchBlank = TRUE) AND (Customer: Phone EXACT MatchBlank = TRUE)
Conditions			
Created By	Dhanshree Gawhale, 9/26/2025, 9:13 AM	Modified By	Dhanshree Gawhale, 9/26/2025, 9:23 AM

[Edit] [Delete] [Clone] [Deactivate]

SETUP
Matching Rules

All Matching Rules

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What Are Matching Rules? [Expand]

View: [All Matching Rules ▾] Create New View

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

[New Rule]

Action	Rule Name ↑	Object	Status	Description	Last Modified Date	Last Modified By
Del	Deactivate	Customer_Email_Phone_Match	Customer	Active		9/26/2025	dha
Deactivate	Standard Account Matching Rule	Account	Active	Matching rule for account records. More info	7/23/2025	OEPIC
Deactivate	Standard Contact Matching Rule	Contact	Active	Matching rule for contact records. More info	7/23/2025	OEPIC
Deactivate	Standard Lead Matching Rule	Lead	Active	Matching rule for lead records. More info	7/23/2025	OEPIC

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All