

Phase 8: Data Management & Deployment

❖ Duplicate Management

Prevent duplicate **Farmer** records (by Email/Phone/Name) and surface potential duplicates during data entry or import.

1) Create the Matching Rule

1. Setup → Quick Find → **Matching Rules** → **New Rule**.

2. **Object: Farmer**

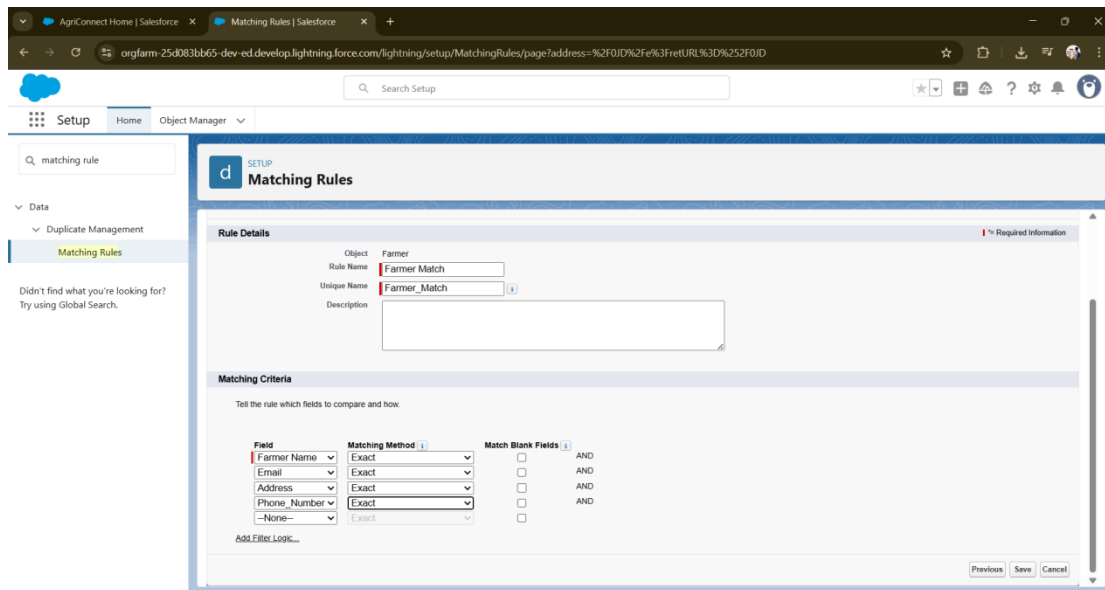
3. **Rule Name: Farmer Match** (or any name).

4. **Add Matching Criteria:**

- Field = **Farmer Name** → Matching Method = **Exact**.
- Field = **Email** → Matching Method = **Exact**.
- Field = **Address** → Matching Method = **Exact**.
- Field = **Phone** → Matching Method = **Exact**.

5. **Save** the rule.

6. Click **Activate** (only active rules can be used by Duplicate Rules).



2) Create the Duplicate Rule

1. Setup → Quick Find → **Duplicate Rules** → **New Rule**.
2. **Object: Farmer**. (same as that of matching rule)
3. **Rule Label: Farmer Duplication Rule**
4. Under **Matching Rules**, click **Add** and select the 'Farmer Match' matching rule you just activated.
5. **Action on Create:** choose **Alert** (start in Alert mode while testing).
6. **Action on Edit:** choose **Alert**.
7. **Save**, then click **Activate**.

The screenshot shows the Salesforce 'Duplicate Rules' setup page. The left sidebar contains a navigation menu with 'Setup', 'Home', and 'Object Manager'. Under 'Data', there are links for 'Duplicate Management', 'Duplicate Error Logs', 'Duplicate Rules', and 'Matching Rules'. The main content area is titled 'Duplicate Rules' and has a 'Matching Rules' section. It includes a 'Compare Farmers With' dropdown set to 'Farmers', a 'Matching Rule' dropdown set to 'Farmer Match', and a 'Matching Criteria' section with a text area containing a complex formula. Below this is a 'Field Mapping' section with a 'Matching Selected' status. At the bottom, there is a 'Conditions' section with a table for specifying conditions. The table has columns for 'Field', 'Operator', and 'Value'. The 'Field' column has a dropdown menu with options like '--None--', and the 'Operator' column has a dropdown menu with options like '--None--'. The 'Value' column is empty. The table is followed by an 'Add Filter Logic...' link and 'Save', 'Save & New', and 'Cancel' buttons.

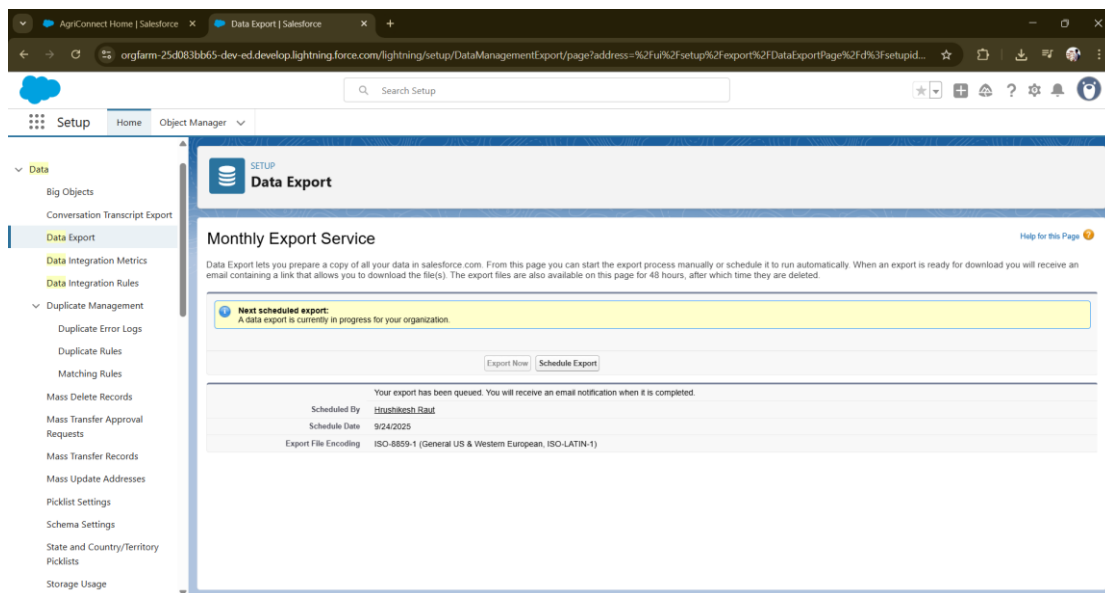
It will look like this after Activation

The screenshot shows the Salesforce 'Duplicate Rules' setup page after activation. The left sidebar is the same as in the previous screenshot. The main content area is titled 'Duplicate Rules' and has a 'Farmer Duplicate Rule' section. It includes a 'Duplicate Rule Detail' section with a table showing the rule's details. The table has columns for 'Rule Name', 'Description', 'Object', 'Record-Level Security', 'Action On Create', 'Action On Edit', 'Alert Text', 'Alert Active', 'Matching Rule', 'Matching Criteria', 'Conditions', 'Created By', and 'Modified By'. The 'Rule Name' is 'Farmer Duplicate Rule', the 'Object' is 'Farmer', and the 'Matching Rule' is 'Farmer Match'. The 'Matching Criteria' section contains a complex formula. The 'Conditions' section shows the rule was created by 'Hrushikesh Raut' on 9/24/2025 at 8:41 AM. At the bottom, there are 'Edit', 'Delete', 'Clone', and 'Deactivate' buttons.

❖ Data Backup

Steps:

- ☐ Go to **Setup**.
- ☐ In Quick Find, type **Data Export** → click **Data Export**.
- ☐ Choose one:
 - ☐ **Export Now** → run a one-time backup.
 - ☐ **Schedule Export** → set weekly/monthly backups.
- ☐ Select the objects you want:
 - ☐ **Farmer, Visit, crop, Deal, Buyer** and any standard objects you use (e.g., Users).
- ☐ Click **Start Export** (for immediate) or **Schedule Export** (for scheduled).



- ☐ Wait → Salesforce emails you when the backup is ready.
- ☐ Download the **.zip file** from the export page → extract CSV files.

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crop_c.csv

The screenshot shows an Excel spreadsheet with the following data in the first two rows:

Id	IsDeleted	Name	CreatedDate	CreatedBy	LastModified	SystemMod	Quantity	Harvest_Tin	Prize	Master_det	Status	c
a05gK0000C	0	Cotton	#####	005gK0000C	#####	005gK0000C	#####	10	#####	a04gK0000014YybQAE		c

Deal_c.csv

[illegible]

Visit_c.csv

[illegible]

Buyer_c.csv

The screenshot displays the Microsoft Excel application window. The title bar shows multiple open files: 'Phase 8(1).pdf', 'Document1', 'Salesforce_Project_Phases_Admin-D...', and 'Buyer_c.csv (Read-Only)'. The 'Buyer_c.csv' window is active. The ribbon at the top includes 'File', 'Home', 'Insert', 'Page Layout', 'Formulas', 'Data', 'Review', 'View', 'Tools', 'Smart Toolbox', and a search icon. The 'Home' ribbon is selected, showing options for font, paragraph, and styles. The data table has the following structure:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U
	Id	OwnerId	IsDeleted	Name	CreatedDate	CreatedBy	LastModifiedDate	LastModifiedBy	SystemMod	LastActivity	Contact_c										
1	a07gK00000c005gK00000c			0 Sample Buy	#####	005gK00000c	#####	005gK00000c	#####		1.235E+09										

The status bar at the bottom indicates the active cell is 'Buyer_c' and the sheet contains 100% zoom.

Farmer_c.csv

[illegible]