

integrations, positioning the "Smart Recruiter" project for continued success.

- Link the candidate Portal -> <https://smartrecruiter-dev-ed.develop.my.site.com/careerconnect/s>

## **Phase 8: Data Management & Deployment**

### **1. Data Import Wizard**

To populate sample data for testing and demonstration, the Salesforce **Data Import Wizard** was used for both standard and custom objects.

## Steps Taken:

- Prepared CSV files for **Contacts** and **Job Postings** containing 5 records each.
- Uploaded CSVs via **Setup → Data Import Wizard → Launch Wizard**.
- Mapped CSV columns to Salesforce fields (e.g., FirstName → First Name, Location\_\_c → Location).
- Imported successfully to create initial test data for the project.

## Outcome:

- All sample Contacts and Job Postings are now available in Salesforce.
- Enabled creation of **Application** and **Interview** records for testing automation and flows.

The screenshot shows the Salesforce Setup interface. At the top, there's a navigation bar with 'Setup', 'Home', and 'Object Manager'. Below this, the 'Monitor Bulk Data Load Jobs' section is visible. It includes a 'Quota' section stating that the organization has processed 0 batches in the last 24 hours and can process up to 15,000 batches. Below the quota, there's an 'In Progress' section with a table that currently shows 'No records to display'. At the bottom, there's a 'Completed last 7 days' section with a table showing one completed job.

Job ID	Submitted By	Start Time	End Time	Status	Job Type	Operation	Object	Records Processed	Records Failed	Time to Complete (hh:mm:ss)
750VU00000UJWSB	Manager_HR	26/09/2025, 12:22 am	26/09/2025, 12:22 am	Closed	Bulk V1	Insert	Contact	5	0	00:01

Activate Windows  
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## 2. Duplicate Rules

To prevent accidental duplicate records and ensure data integrity:

### Implementation:


- Created **Matching Rules** on Contact object (Email equals).
- Created **Duplicate Rules** to **Alert** users if duplicate contacts are detected.
- Activated both rules.

## Outcome:

- Recruiters cannot create duplicate candidate records.

- Ensures clean and reliable test data for recruitment processes.

## Prevent Duplicate Application For the Same Job

 **SETUP**  
**Duplicate Rules**

Application Duplicate Rule

Prevent duplicate applicant for the same Job

Help for this Page

Duplicate Rule Detail


Edit Delete Clone Activate

Rule Name	Prevent duplicate applicant for the same Job	Order	1 of 2 [ Reorder ]
Description			
Object	Application		
Record-Level Security	Enforce sharing rules		
Action On Create	Block	Operations On Create	<input type="checkbox"/> Alert <input type="checkbox"/> Report
Action On Edit	Allow	Operations On Edit	<input checked="" type="checkbox"/> Alert <input type="checkbox"/> Report
Alert Text	Use one of these records?		
Active	<input type="checkbox"/>		
Matching Rule	<input checked="" type="checkbox"/> Prevent duplicate applicant for the same Job matching rule <input checked="" type="checkbox"/> Mapped	Matching Criteria	Application: Applicant_Email EXACT MatchBlank = TRUE
Conditions			
Created By	HR Manager, 25/09/2025, 11:24 pm	Modified By	HR Manager, 26/09/2025, 12:03 am

Edit Delete Clone Activate

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- Prevent Duplicate Contact

 **SETUP**  
**Duplicate Rules**

Contact Duplicate Rule

Prevent Duplicate Contact

Help for this Page

Duplicate Rule Detail

Edit Delete Clone Activate

Rule Name	Prevent Duplicate Contact	Order	2 of 2 [ Reorder ]
Description			
Object	Contact		
Record-Level Security	Enforce sharing rules		
Action On Create	Block	Operations On Create	<input type="checkbox"/> Alert <input type="checkbox"/> Report
Action On Edit	Allow	Operations On Edit	<input type="checkbox"/> Alert <input type="checkbox"/> Report
Alert Text	Use one of these records?		
Active	<input type="checkbox"/>		
Matching Rule	<input checked="" type="checkbox"/> Standard Contact Matching Rule <input checked="" type="checkbox"/> Mapped	Matching Criteria	Matching rule for contact records. <a href="#">More info</a>
Conditions			
Created By	HR Manager, 25/09/2025, 11:40 pm	Modified By	HR Manager, 25/09/2025, 11:40 pm

Edit Delete Clone Activate

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## Prevent Duplicate Job Opening

SETUP

**Duplicate Rules**

Job Opening Duplicate Rule

Prevent Duplicate Job Opening

Help for this Page

Duplicate Rule Detail

EditDeleteCloneDeactivate

Rule Name	Prevent Duplicate Job Opening	Order	1 of 1 [Reorder] [i]
Description			
Object	Job Opening		
Record-Level Security	Bypass sharing rules		
Action On Create	Block	Operations On Create	<input type="checkbox"/> Alert <input type="checkbox"/> Report
Action On Edit	Allow	Operations On Edit	<input checked="" type="checkbox"/> Alert <input checked="" type="checkbox"/> Report
Alert Text	Use one of these records?		
Active	<input checked="" type="checkbox"/>		
Matching Rule	<input checked="" type="checkbox"/> Prevent Duplicate Job Opening matching rule <input checked="" type="checkbox"/> Mapped	Matching Criteria	Job Opening: Name EXACT MatchBlank = FALSE
Conditions			
Created By	HR Manager, 25/09/2025, 10:26 pm	Modified By	HR Manager, 25/09/2025, 10:37 pm

EditDeleteCloneDeactivate

Activate Windows  
Go to Settings to activate Windows.

## Prevent Multiple Application for the same job

Application Duplicate Rule

Prevent Multiple Application For the same Job

Help for this Page

Duplicate Rule Detail

EditDeleteCloneActivate

Rule Name	Prevent Multiple Application For the same Job	Order	2 of 2 [Reorder] [i]
Description			
Object	Application		
Record-Level Security	Enforce sharing rules		
Action On Create	Block	Operations On Create	<input type="checkbox"/> Alert <input type="checkbox"/> Report
Action On Edit	Allow	Operations On Edit	<input checked="" type="checkbox"/> Alert <input type="checkbox"/> Report
Alert Text	Use one of these records?		
Active	<input type="checkbox"/>		
Matching Rule	<input checked="" type="checkbox"/> Standard Contact Matching Rule <input checked="" type="checkbox"/> Mapped	Matching Criteria	Matching rule for contact records. <a href="#">More info</a>
Conditions			
Created By	HR Manager, 25/09/2025, 11:28 pm	Modified By	HR Manager, 26/09/2025, 12:01 am

EditDeleteCloneActivate

Activate Windows  
Go to Settings to activate Windows.

## 3. Data Loader

- Although the **Data Import Wizard** was sufficient for small datasets, **Data Loader** can be used for bulk insert, update, or export of records.
- In this project, small datasets were handled manually or via the Import Wizard due to time constraints.

## 4. Data Export & Backup

- Regular backups are critical for data safety.
  - Salesforce **Data Export** feature can be used to export all records and metadata.
  - For the project, manual export of Contacts, Job Postings, Applications, and Interviews was demonstrated.
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- I Have Exported All the data in this Zip File.
  - [WE\\_00DWU00000VnOdg2AF\\_1.ZIP](#)

## 6. VS Code & SFDX

- **VS Code** with Salesforce Extensions was used for development and deployment of:
  - Apex Classes & Triggers
  - Lightning Web Components
  - Metadata retrieval
- **SFDX Commands** help in pushing/pulling changes between local and org.

### **Outcome:**

- Demonstrates modern Salesforce development practices.
- Enables easy tracking, version control, and deployment of all project components.
- I have imported all the data of salesforce in the vs code of connecting vs code to my org and pushed it in the project GitHub repository. This was Done by me in the previous phase only .