Internal Job Application Management System CRM

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Phase 8:Data Management & Deployment

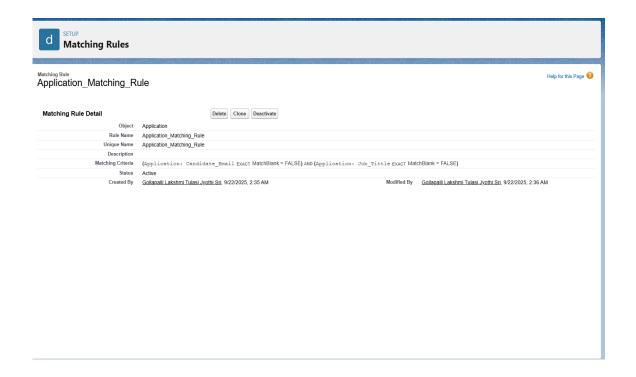
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1.Overview

Phase 8 ensured clean and reliable data through record imports, duplicate rules, and matching rules. Additionally, deployment readiness was achieved with change set preparation, aligning the solution with enterprise migration practices.

2. Create Matching Rule (defines duplicate condition)

- 1. Setup \rightarrow Quick Find \rightarrow Matching Rules \rightarrow New Rule
- 2. Object = Application
- 3. Rule Name = Application_Matching_Rule
- 4. Add Fields:
 - \circ Candidate Email $c \rightarrow Exact Match$
 - $\circ \ \ Job_Title__c \to Exact\ Match$



5. Save \rightarrow **Activate** the Matching Rule.

3. Create Duplicate Rule (what to do when duplicate found)

- 1. Setup \rightarrow Quick Find \rightarrow Duplicate Rules \rightarrow New Rule
- 2. Object = Application
- 3. Rule Name = Application_Duplicate_Rule
- 4. Record-Level Security = Enforce Sharing Rules
- 5. Actions:
 - Action On Create = Block
 - Action On Edit = Allow & Alert (optional: so user gets warning)
- 6. Matching Rule = Select your Application_Matching_Rule



7. Save \rightarrow **Activate**

Why

- Import records, Duplicate & Matching Rules.
- Why: Maintain clean data.
- Use: Prevents duplicate entries & supports migration.

Phase 8 Outcome:

- Imported sample application data (5–10 records) using Data Import Wizard.
- Implemented Duplicate & Matching Rules → prevented multiple applications from same candidate for same role.
- Prepared Change Set package for migration demo.
- Ensures data accuracy, easy data loading, and secure deployment practices.