

Internal Job Application Management System CRM

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Phase 8:Data Management & Deployment


Batch : 4

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 → Quick Find → Matching Rules → New Rule
2. Object = Application
3. Rule Name = Application_Matching_Rule
4. Add Fields:
 - Candidate_Email__c → Exact Match
 - Job_Title__c → Exact Match


SETUP

Matching Rules

Matching Rule

Application_Matching_Rule

Help for this Page

Matching Rule Detail

Delete

Clone

Deactivate

Object	Application
Rule Name	Application_Matching_Rule
Unique Name	Application_Matching_Rule
Description	
Matching Criteria	(Application: Candidate_Email EXACT MatchBlank = FALSE) AND (Application: Job_Title EXACT MatchBlank = FALSE)
Status	Active
Created By	Gollapalli Lakshmi Tulasi Jyothi Sri 9/22/2025, 2:35 AM
Modified By	Gollapalli Lakshmi Tulasi Jyothi Sri 9/22/2025, 2:36 AM

5. Save → **Activate** the Matching Rule.

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

1. Setup → Quick Find → Duplicate Rules → 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

The screenshot shows the 'Duplicate Rules' setup page in Salesforce. The rule is named 'Application_Duplicate_Rule' and is currently active. It is configured for the 'Application' object with the purpose of enforcing sharing rules. The rule is set to 'Block' actions on create and 'Allow' actions on edit. It includes alert and report options for both create and edit operations. The matching criteria are defined as: (Application: Candidate_email EXACT MatchBlank = FALSE) AND (Application: Job_title EXACT MatchBlank = FALSE). The rule was created by Gollapalli Lakshmi Tulasi Jyothi Sri on 9/22/2025 at 2:40 AM.

Duplicate Rule Detail		Order
Rule Name	Application_Duplicate_Rule	1 of 1 [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 checked="" type="checkbox"/> Report
Alert Text	Use one of these records?	
Active	<input checked="" type="checkbox"/>	
Matching Rule	<input checked="" type="checkbox"/> Application_Matching_Rule <input checked="" type="checkbox"/> Mapped	Matching Criteria: (Application: Candidate_email EXACT MatchBlank = FALSE) AND (Application: Job_title EXACT MatchBlank = FALSE)
Conditions		
Created By	Gollapalli Lakshmi Tulasi Jyothi Sri 9/22/2025, 2:40 AM	
Modified By	Gollapalli Lakshmi Tulasi Jyothi Sri 9/22/2025, 2:40 AM	

7. Save → **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.

