

Phase 8: Data Management & Deployment

Step 1: Duplicate Management

Preventing duplicate records is critical, especially for **Youth** and **Job** objects.

A. Matching Rules

- Define the criteria to identify duplicates.
- **Steps:**
 1. Go to **Setup → Matching Rules → New**.
 2. Example: Match Youth__c.Email__c.
 3. Define criteria (e.g., exact match, case-insensitive) → **Save** → **Activate**.

The screenshot shows the Salesforce 'Matching Rules' configuration interface. The left sidebar contains a search bar and a navigation menu with 'Data', 'Duplicate Management', and 'Matching Rules'. The main content area is titled 'Edit Rule Youth Email Match' and includes 'Save' and 'Cancel' buttons. The 'Rule Details' section shows the 'Object' as 'Youth', the 'Rule Name' as 'Youth Email Match', and the 'Unique Name' as 'Youth_Email_Match'. The 'Matching Criteria' section allows defining the rule by selecting fields and matching methods. The first criterion is 'Email' with the 'Exact' matching method. There are also checkboxes for 'Match Blank Fields' and 'AND' logic. The bottom of the page has 'Add Filter Logic...' and 'Save'/'Cancel' buttons.

B. Duplicate Rules

- Decide what happens when duplicates are detected.
- **Steps:**
 1. Go to **Setup → Duplicate Rules → New**.
 2. Apply your **Matching Rule** to the object (e.g., Youth__c).
 3. Choose **Action**:
 - **Block** → Prevents user from creating duplicates.
 - **Alert** → Warns the user, but allows creation.
 4. Activate the rule.

The screenshot displays the Microsoft Excel 2019 application window. The title bar shows the file name 'Interview_CSV' and the status 'Saved to this PC'. The ribbon is set to the 'Home' tab, with the 'Font' group selected. The font face is 'Calibri', size is '11', and the color is 'Automatic'. The 'Paragraph' group shows 'Wrap Text' is checked. The 'Cells' group shows 'Merge & Center' is selected. The 'Formulas' group shows 'AutoSum' is selected. The 'Data' group shows 'Sort & Filter' is selected. The 'Review' group shows 'Find & Select' is selected. The 'Help' group shows 'Add-ins' is selected. The status bar at the bottom indicates 'Ready' and 'Accessibility: Unavailable'.

The data table is as follows:

Id	OwnerId	IsDeleted	Name	CreatedDate	CreatedBy	LastModified	LastModifiedBy	SystemModule	Interview_Status_c	Candidate_Job_c	Interview_Feedback_Result_c
a07gl.0000	a05gl.0000	0	IN-0001	#####	005gl.0000	#####	#####	Complete	a05gl.0000	a06gl.0000	a05gl.0000
a07gl.0000	a05gl.0000	0	IN-0002	#####	005gl.0000	#####	#####	Complete	a05gl.0000	a06gl.0000	a05gl.0000
a07gl.0000	a05gl.0000	0	IN-0003	#####	005gl.0000	#####	#####	Scheduled	a05gl.0000	a06gl.0000	a05gl.0000
a07gl.0000	a05gl.0000	0	IN-0004	#####	005gl.0000	#####	#####	Scheduled	a05gl.0000	a06gl.0000	a05gl.0000
a07gl.0000	a05gl.0000	0	IN-0006	#####	005gl.0000	#####	#####	Complete	a05gl.0000	a06gl.0000	a05gl.0000
a07gl.0000	a05gl.0000	0	IN-0005	#####	005gl.0000	#####	#####	Complete	a05gl.0000	a06gl.0000	a05gl.0000