

# 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 Setup interface for 'Matching Rules'. A new rule is being created with the following details:

- Rule Details:**
  - Object: Youth
  - Rule Name: Youth Email Match
  - Unique Name: Youth\_Email\_Match
  - Description: (empty)
- Matching Criteria:** A table defining how fields are compared.

Field	Matching Method	Match Blank Fields	Logic
Email	Exact	<input checked="" type="checkbox"/>	AND
-None-	Exact	<input type="checkbox"/>	AND
-None-	Exact	<input type="checkbox"/>	AND
-None-	Exact	<input type="checkbox"/>	AND
-None-	Exact	<input type="checkbox"/>	

### 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 shows the 'Duplicate Rules' setup page in Salesforce. A specific rule, 'Prevent Duplicate Youth Email', is selected. The rule details include:

- Role Name:** Prevent Duplicate Youth En
- Description:** (empty)
- Object:** Youth
- Record-Level Security:** Enforce sharing rules (selected)

**Actions:**

- Action On Create: Block
- Action On Edit: Block
- Alert Text: Use one of these records?

**Matching Rules:**

Define how duplicate records are identified.

Compare Youths With: Youths

## Step 2: Data Backup

Always back up before importing or deploying, in case something goes wrong.

- **Steps:**
    1. Go to **Setup → Data Export → Export Now.**
    2. Choose objects to backup (e.g., Youth\_\_c, Job\_\_c, Interview\_\_c).
    3. Download the zip files.

