Phase 8: Data Management & Deployment

Step 1:Duplicate Management

Prevent duplicate **GoldenEra Customer** records (by Email/Phone/Name) and surface potential duplicates during data entry or import.

1) Create the Matching Rule

1. Setup → Quick Find → **Matching Rules** → **New Rule**.
2. **Object:** `GoldenEra Customer` (GoldenEra_Customer__c).
3. **Rule Name:** `GEC_Email_Phone_Match` (or any clear name).
4. **Add Matching Criteria:**
o Field = **Email** → Matching Method = **Exact**.
o Click **Add Row** → Field = **Phone** → Matching Method = **Exact**.
5. **Save** the rule.
6. Click **Activate** (only active rules can be used by Duplicate Rules).

2) Create the Duplicate Rule

1. Setup → Quick Find → **Duplicate Rules** → **New Rule**.
2. **Object:** `GoldenEra Customer`.
3. **Rule Label:** `GEC_DuplicateRule`.
4. Under **Matching Rules**, click **Add** and select the `GEC_Email_Phone_Match` matching rule you just activated.
5. **Action on Create:** choose **Alert** (start in Alert mode while testing).
6. **Action on Edit:** choose **Alert**.
7. (Optional) Scope: set record types or profiles if you want the rule to apply only to some users.
8. **Save**, then click **Activate**.
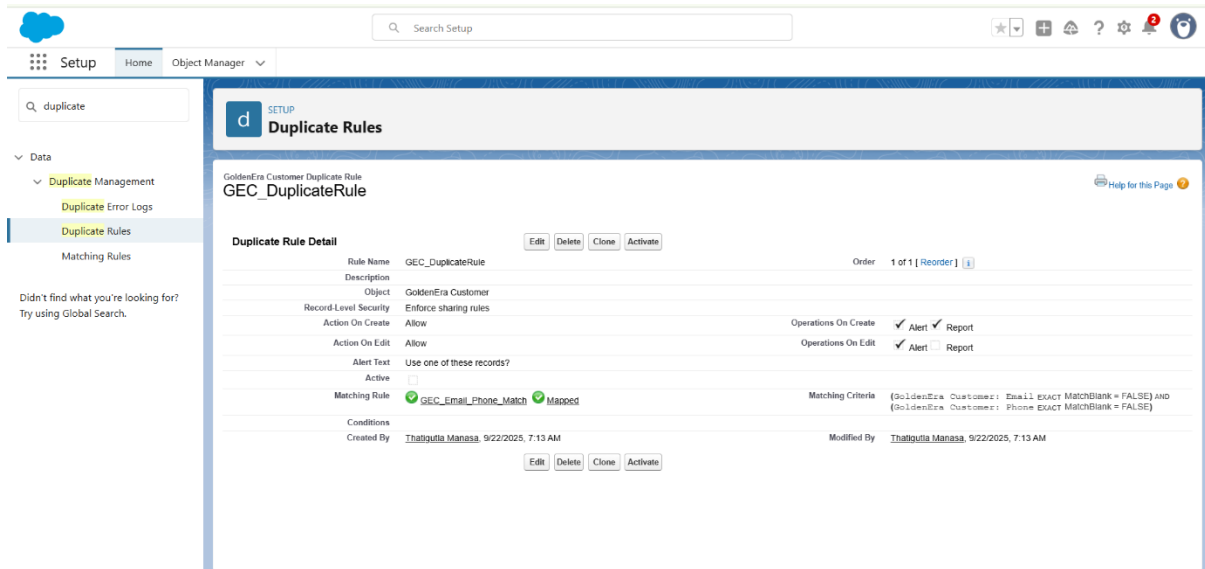
Step 2:Data Backup

Steps:

- Go to **Setup**.

- In Quick Find, type **Data Export** → click **Data Export**.

- Choose one:

    - **Export Now** → run a one-time backup.
    - **Schedule Export** → set weekly/monthly backups.

- Select the objects you want:

    - **GoldenEra Customer, GoldenEra Product, GoldenEra Order, GoldenEra Inventory, GoldenEra Marketing Campaign, GoldenEra Service Request**, and any standard objects you use (e.g., Users).

- Click **Start Export** (for immediate) or **Save** (for scheduled).

- Wait → Salesforce emails you when the backup is ready.

- Download the **.zip file** from the export page → extract CSV files.

- **Store the backup securely** (encrypted drive, company server, cloud storage).

GoldenEra_Customer__c.csv [Read-Only] - Excel

Id	OwnerId	IsDeleted	Name	CreatedDa	CreatedBy	LastModifi	LastModif	SystemMo	Email__c	Phone__c	Loyality_S	FirstName	LastName	Total_Purchases__c
a00gL0000	005gL0000	0	Varshitha	########	005gL0000	########	005gL0000	########	manasatha	1E+10	Gold	Varshitha	sundari	1000
a00gL0000	005gL0000	0	Manasa	########	005gL0000	########	005gL0000	########	manasatha	7.78E+09	Platinum	manasa	thatigutla	500

GoldenEra_Customer__c

GoldenEra_Order__c.csv [Read-Only] - Excel

Id	OwnerId	IsDeleted	Name	CreatedDa	CreatedBy	LastModifi	LastModif	SystemMo	GoldenEra	GoldenEra	Status__c	Quantity_	Total_Amc	Customer_Email__c
a02gL0000	005gL0000	0	O-0001	########	005gL0000	########	005gL0000	########	a01gL0000	a00gL0000	Confirmed	1	10000	varshitha123@gmail.com
a02gL0000	005gL0000	0	O-0002	########	005gL0000	########	005gL0000	########	a01gL0000	a00gL0000	Confirmed	1	20000	manasathatigutla@gmail.com
a02gL0000	005gL0000	0	O-0003	########	005gL0000	########	005gL0000	########	a01gL0000	a00gL0000	Pending	3	30000	manasathatigutla@gmail.com
a02gL0000	005gL0000	0	O-0004	########	005gL0000	########	005gL0000	########	a01gL0000	a00gL0000	Confirmed	3	30000	varshitha123@gmail.com

GoldenEra_Order__c

GoldenEra_Product__c

Id	OwnerId	IsDeleted	Name	CreatedDa	CreatedBy	LastModifi	LastModifi	SystemMo	SKU__c	Price__c	Stock_Quantity__c
a01gL0000	005gL0000	0	Gold Ring	########	005gL0000	########	005gL0000	########	2	20000	1
a01gL0000	005gL0000	0	Gold Chair	########	005gL0000	########	005gL0000	########	1	10000	15

GoldenEra_Inventory__c

Id	IsDeleted	Name	CreatedDa	CreatedBy	LastModifi	LastModifi	SystemMo	GoldenEra	Stock_Qua	Warehouse__c
a03gL0000	0	I -0001	########	005gL0000	########	005gL0000	########	a01gL0000	12	Kalyan Jewellers
a03gL0000	0	I -0002	########	005gL0000	########	005gL0000	########	a01gL0000	4	Manasa store