

## 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

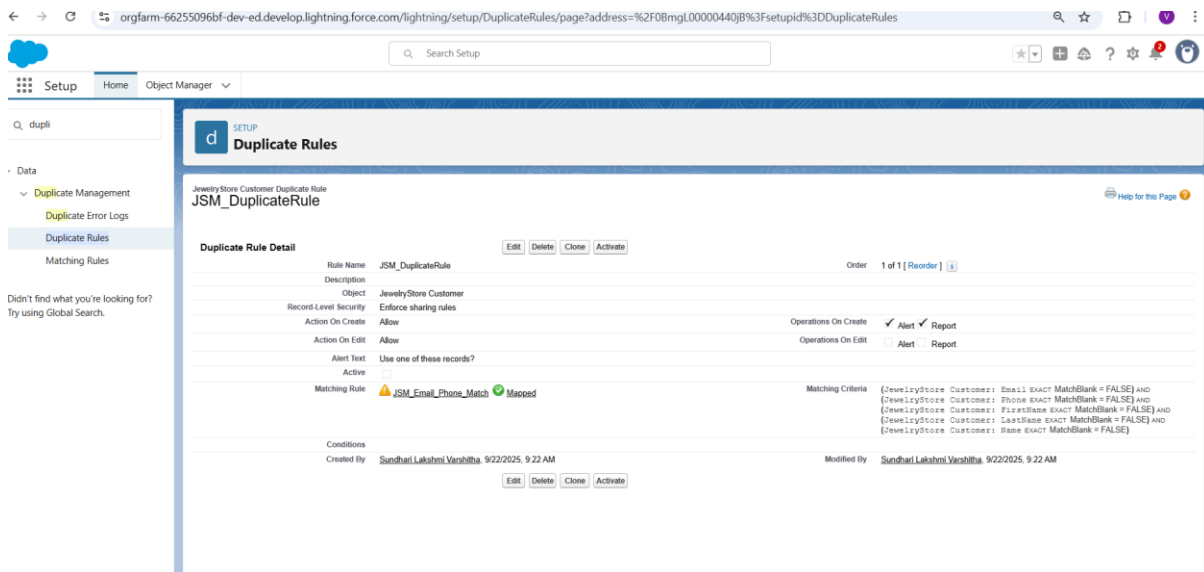
1. Setup → Quick Find → **Matching Rules** → **New Rule**.
2. **Object:** GoldenEra Customer (Jewelrystore\_Customer\_\_c).
3. **Rule Name:** GEC\_Email\_Phone\_Match (or any clear name).
4. **Add Matching Criteria:**
  - Field = **Email** → Matching Method = **Exact**.
  - Click **Add Row** → Field = **Phone** → Matching Method = **Exact**.
5. **Save** the rule.
6. Click **Activate** (only active rules can be used by Duplicate Rules).

7.

Field	Matching Method	Match Blank Fields	AND
Email	Exact	<input type="checkbox"/>	AND
Phone	Exact	<input type="checkbox"/>	AND
FirstName	Exact	<input type="checkbox"/>	AND
LastName	Exact	<input type="checkbox"/>	AND
Customer Name	Exact	<input type="checkbox"/>	AND

#### 2) Create the Duplicate Rule

1. Setup → Quick Find → **Duplicate Rules** → **New Rule**.
2. **Object:** Jewelrystore Customer.
3. **Rule Label:** JSM\_DuplicateRule.
4. Under **Matching Rules**, click **Add** and select the JSM\_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:
  - **JewelleryStore Customer, JewelleryStore Product, JewelleryStore Order, JewelleryStore Inventory, JewelleryStore Marketing Campaign, JewelleryStore 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\_Product\_ccav (Read-Only) - Excel

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Id

Id	OwnerId	IsDeleted	Name	CreatedDa	CreatedBy	LastModifi	LastModifi	SystemMo	SKU__c	Price__c	Stock_Quantity__c
a01gL000C	005gL000C	0	Gold Ring	#####	005gL000C	#####	005gL000C	#####	2	20000	1
a01gL000C	005gL000C	0	Gold Chair	#####	005gL000C	#####	005gL000C	#####	1	10000	15

GoldenEra\_Product\_c

GoldenEra\_Product\_ccav (Read-Only) - Excel

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Id

Id	IsDeleted	Name	CreatedDa	CreatedBy	LastModifi	LastModifi	SystemMo	GoldenEra	Stock_Quz	Warehouse__c
a03gL000C	0	1-0001	#####	005gL000C	#####	005gL000C	#####	a01gL000C	12	Kalyan Jewellers
a03gL000C	0	1-0002	#####	005gL000C	#####	005gL000C	#####	a01gL000C	4	Manasa store

GoldenEra\_Inventory\_c