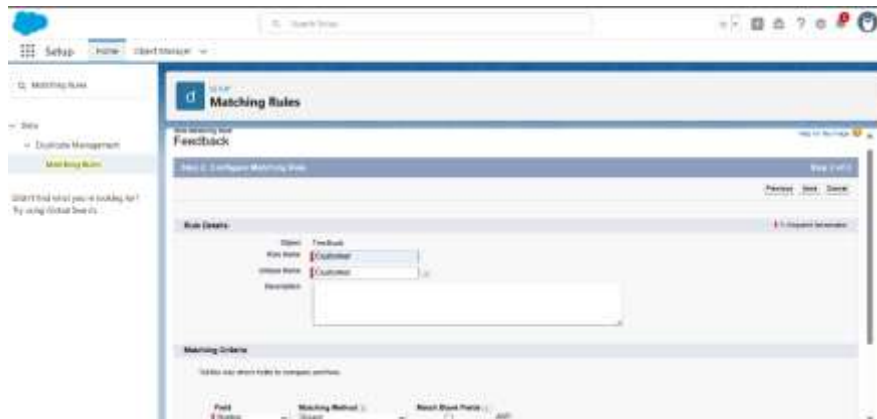# Phase 8: Data Management & Deployment

This screenshot shows the Salesforce setup interface for configuring a Matching Rule for the *Feedback* object, specifically focused on identifying duplicate records. The rule is named *Customer*, and the matching criteria target the Rating field using an Exact match method. Blank fields are excluded from matching, and fuzzy logic is disabled, ensuring strict comparison. This configuration helps maintain data integrity by preventing duplicate feedback entries based on identical ratings, especially useful in systems where customer sentiment and input are tracked for loyalty analysis.
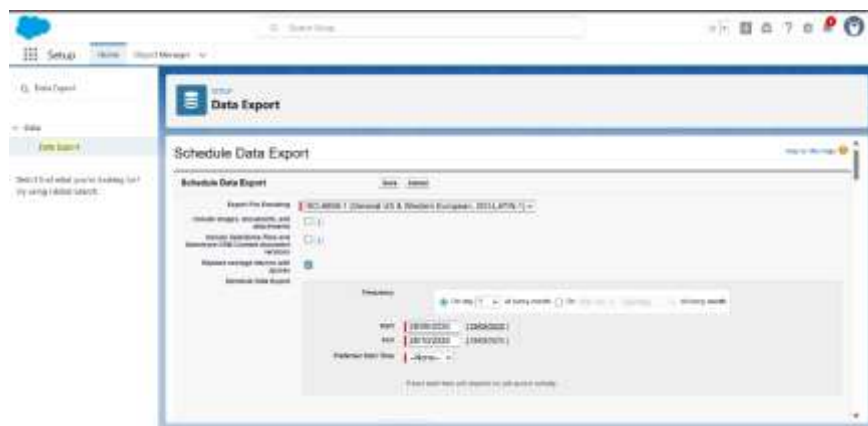

This screenshot shows the Schedule Data Export interface in Salesforce Setup, used to automate regular data backups. The export encoding is set to *ISO-8859-1*, suitable for U.S. and Western European formats. Options are enabled to include images, documents, Salesforce Files, and CRM Content versions. The export is scheduled to run monthly, from *28/09/2015* to *28/09/2016*, with no preferred start time selected. A note confirms that the export will be placed in the job queue. This setup ensures consistent data archiving for analysis, compliance, or recovery purposes.
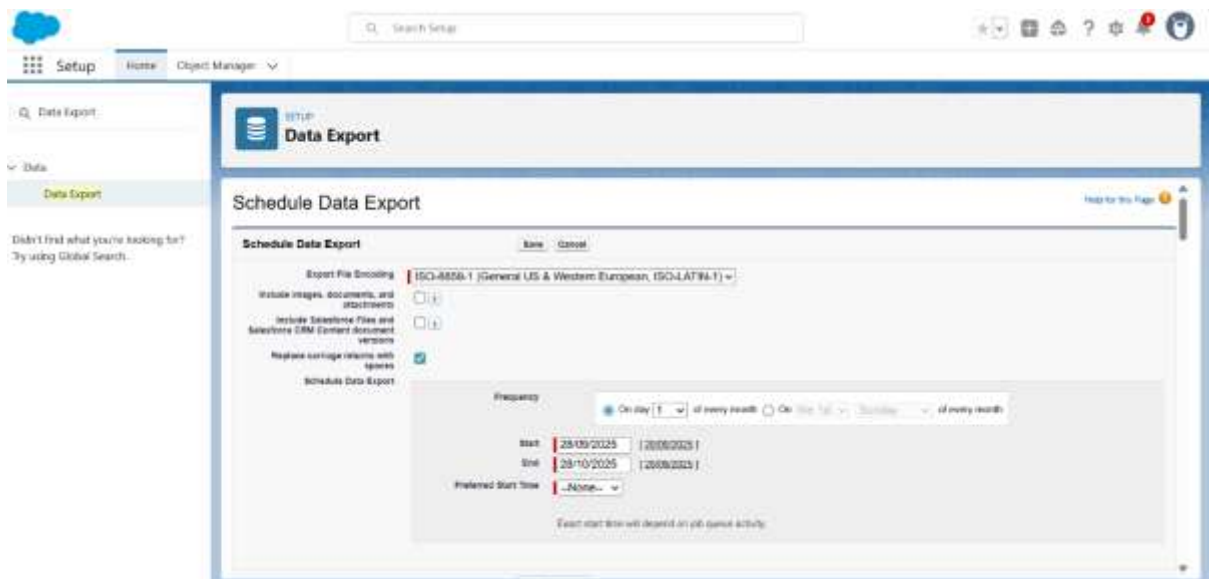
This screenshot shows the Data Export setup screen in Salesforce, where a recurring export job is being configured for long-term data backup. The export encoding is set to *ISO-8859-1*, suitable for U.S. and Western European formats. Options are enabled to include images, documents, Salesforce Files, CRM Content, and Chatter files. Carriage returns will be replaced with spaces to ensure cleaner formatting. The export is scheduled to run weekly, every Monday, from *28/09/2023* to *28/09/2025*, with a preferred start time of 12:00 AM. This setup ensures consistent, automated data archiving for analysis, compliance, or recovery.
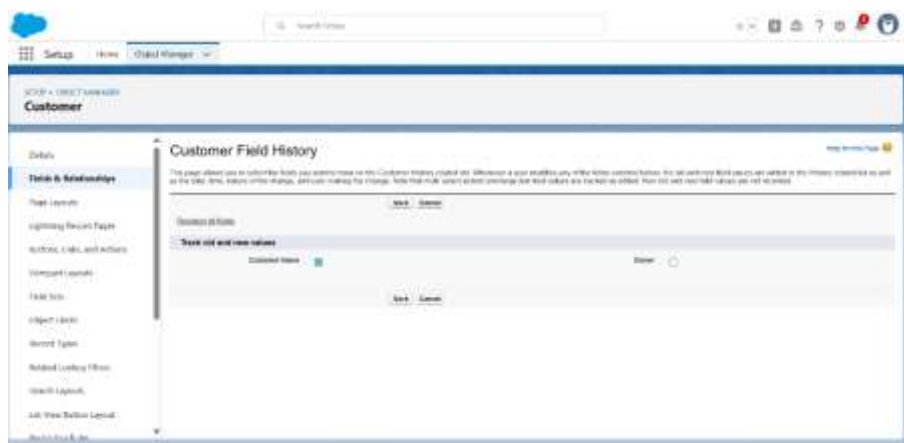
This screenshot shows the Customer Field History settings in Salesforce Object Manager, where field tracking is being configured for the *Customer* object. The interface allows administrators to select up to 20 editable fields whose changes will be logged in the History related list and included in reports. In this setup, the Customer Name field is selected for tracking, while Owner remains unselected. When a user modifies the tracked field, both the old and new values are recorded, supporting audit trails and data integrity. This feature is especially useful for monitoring key customer updates in CRM workflows.
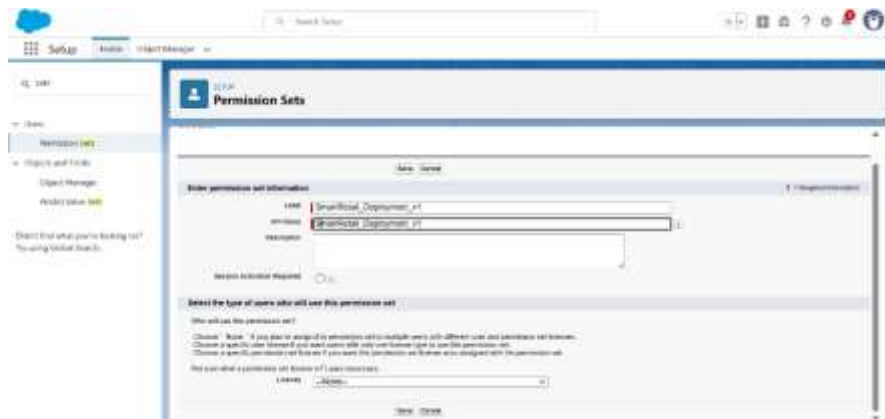
This screenshot shows the Salesforce setup screen for creating a Permission Set named *SharedRetail_Deployment_v1*. It's designed to manage user access and capabilities within the platform. The API name matches the label, and no license is assigned yet. The "Session Activation Required" checkbox is left unchecked, meaning users won't need an active session to use this permission set. Once saved, it can be used to assign specific privileges—ideal for deployment roles in a shared retail environment.
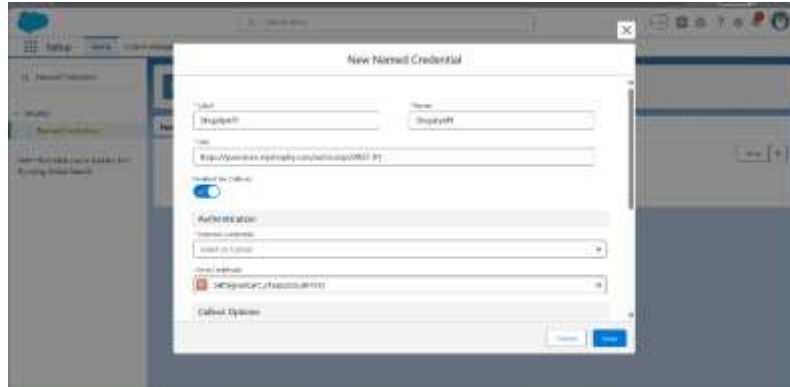
This screenshot shows the creation of a Named Credential in Salesforce for integrating with the Shopify API. The credential is labeled *ShopifyAPI* and points to the endpoint https://yourstore.myshopify.com/admin/api/2023-01, with callouts enabled for secure external communication. A self-signed certificate named *SelfSignedCert_SalesApp256_SHA256* is selected to authenticate the connection. The External Credential field is still pending configuration. This setup simplifies authentication and ensures secure API access between Salesforce and Shopify.