

PHASE 8: Data Management & Deployment

Step 1: Duplicate Management

To maintain data accuracy and avoid repeated ticket creation, Salesforce duplicate management features were implemented.

1) Matching Rules

Objective:

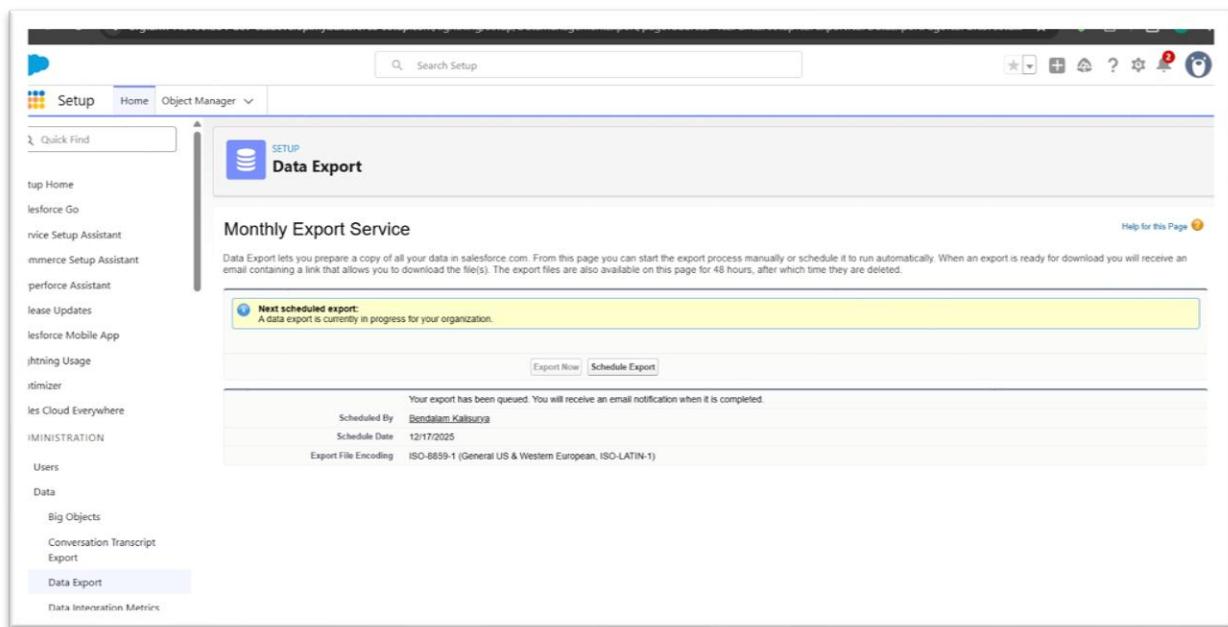
Matching Rules define how Salesforce identifies records that may already exist in the system.

Implementation:

- Configured matching criteria using critical fields such as:
 - Customer Email
 - Ticket Number
- Whenever a new ticket is created, Salesforce checks existing records using these conditions.

Benefit:

This helps prevent multiple tickets being raised for the same issue and ensures clean, consistent data.



2) Duplicate Rules

Objective:

Duplicate Rules control the system's behavior when a potential duplicate is detected.

Implementation in the Project:

- Duplicate rules were linked to the matching rules.
- Defined system actions as follows:
 - Block creation of tickets with the same Email and Ticket Number.
 - Display a warning message when a possible duplicate is detected.
 - Allow agents to override the warning if the ticket is genuinely different.

Outcome:

This approach improves agent efficiency while maintaining high data quality.

The screenshot shows the Salesforce Setup interface with the 'Duplicate Rules' page open. The page title is 'Customer Ticket Duplicate Rule' under 'Configure duplicate rule'. On the left, there's a sidebar with 'Duplicate Management', 'Duplicate Error Logs', and 'Duplicate Rules' selected. The main area displays a 'Duplicate Rule Detail' section with the following configuration:

Setting	Value
Rule Name	Configure duplicate rule
Description	
Object	Customer Ticket
Record Level Security	Enforce sharing rules
Action On Create	Block
Action On Edit	Allow
Alert Text	A ticket with the same Email and Ticket Number already exists. Please review before creating a new ticket.
Active	<input checked="" type="checkbox"/>
Matching Rule	<input checked="" type="checkbox"/> Duplicate management Mapped
Conditions	
Created By	Bendalam Kalsurya, 12/17/2025, 9:45 PM
Modified By	Bendalam Kalsurya, 12/17/2025, 9:46 PM

At the bottom right, there are buttons for 'Edit', 'Delete', 'Clone', and 'Deactivate'.

Step 2: Data Backup and Recovery

To protect customer and ticket data, multiple backup strategies were considered.

A) Manual Data Export (Data Export Service)

- Salesforce's built-in Data Export Service was used.
- Exports data in CSV format.
- Suitable for manual, on-demand backups.

B) Scheduled Data Export

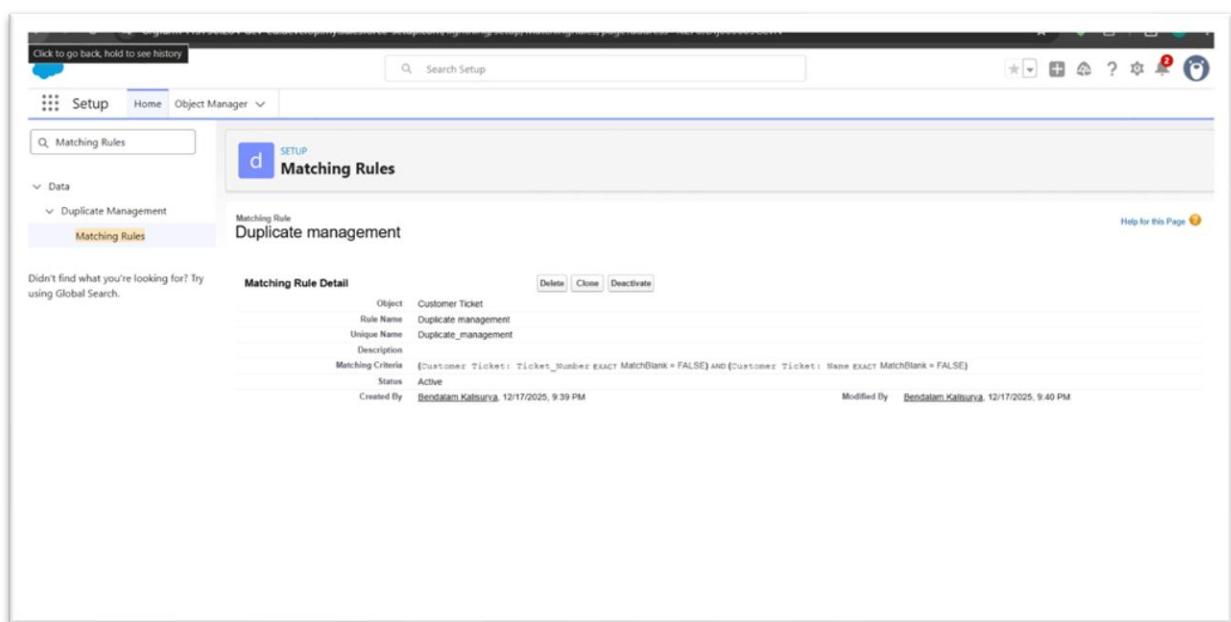
- Automated exports can be scheduled weekly or monthly.
- Ideal for regularly backing up Customer Tickets and related records without manual effort.

C) Third-Party Backup Tools

- External tools such as **OwnBackup** can be used.
- Provide:
 - Automated scheduled backups
 - Metadata backup
 - Faster and more flexible data restoration options

D) Data Loader / API-Based Export

- Salesforce Data Loader was used to export data programmatically.
- Supports bulk extraction of objects using APIs.
- Useful for migration, archival, and advanced backup requirements.



Benefits of Phase 8 Implementation

- Prevents duplicate and inconsistent ticket records
- Improves reporting and analytics accuracy
- Protects critical business data
- Ensures recovery readiness in case of data loss
- Supports scalable and reliable system deployment