

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:

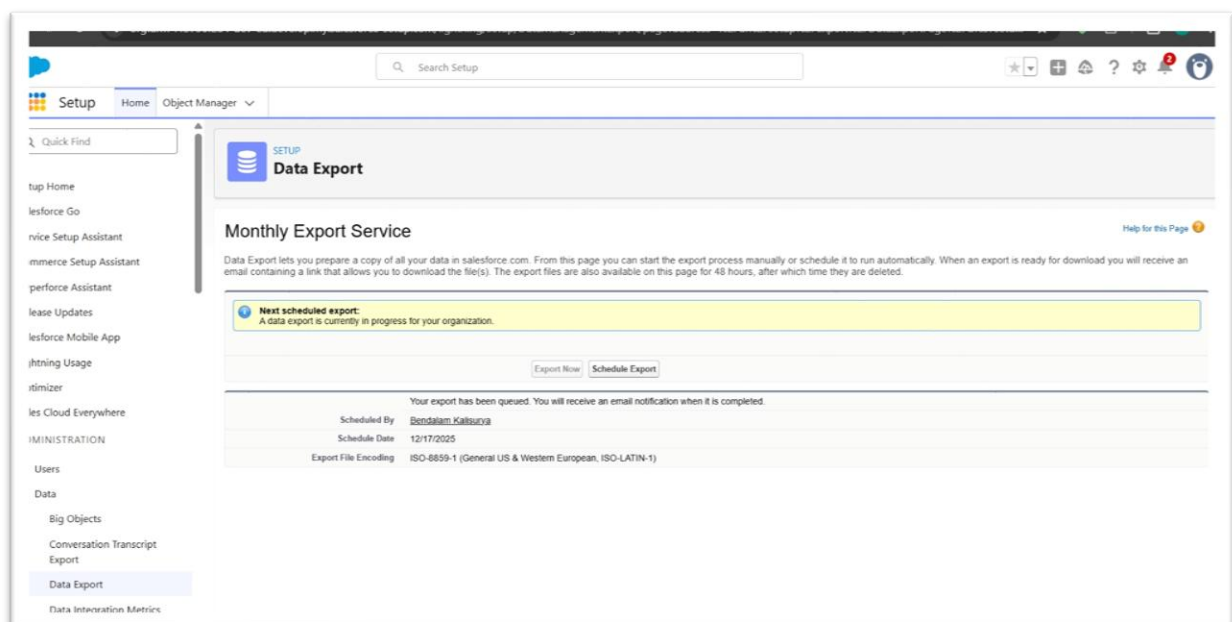
Matching Rules define how Salesforce identifies records that may already exist in the system.

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:

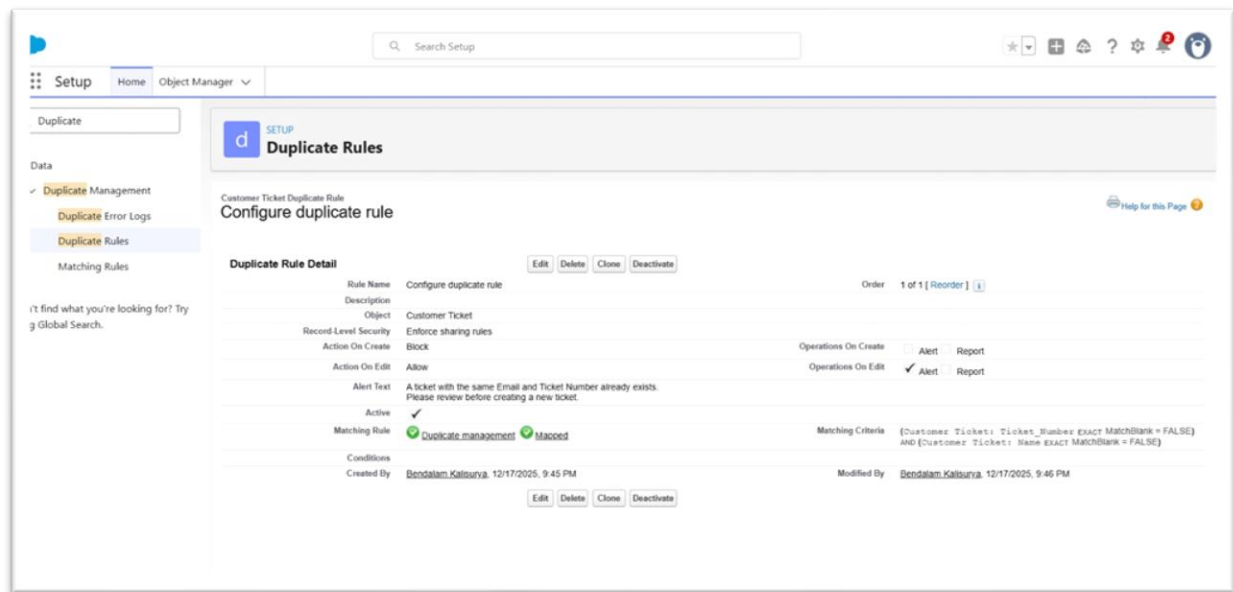
Duplicate Rules control the system's behavior when a potential duplicate is detected.

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.



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

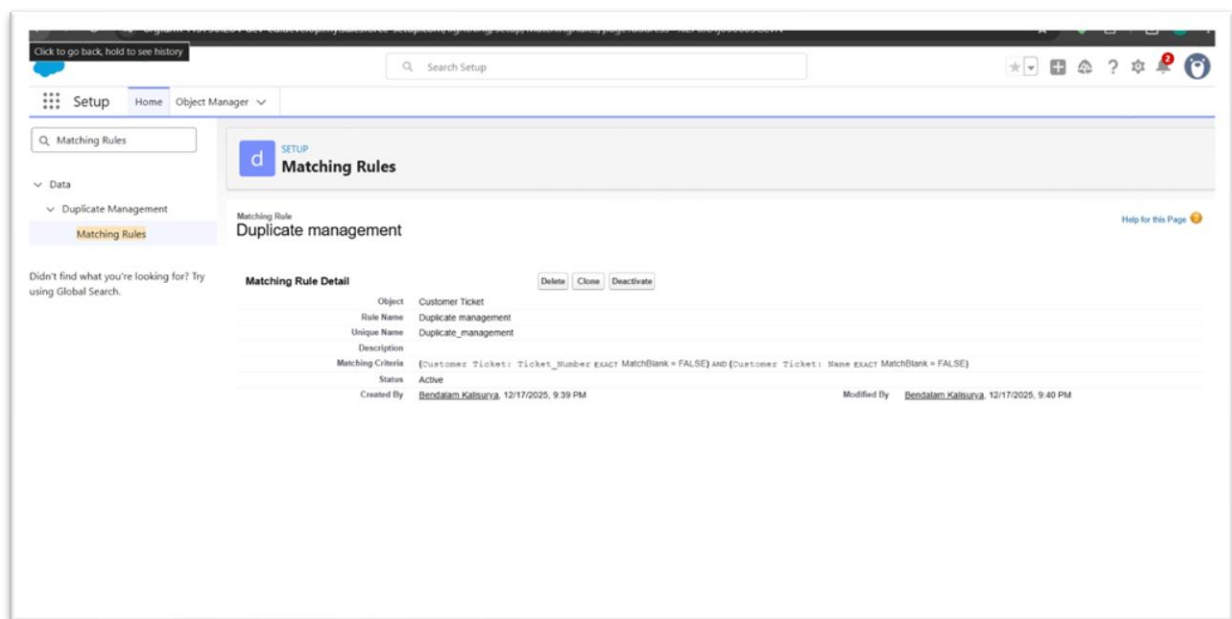
- Automated exports can be scheduled weekly or monthly.
- Ideal for regularly backing up Customer Tickets and related records without manual effort.

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