

Library Management :- Phase 8: Data Management & Deployment

1. Create the Matching Rule

- Setup → Quick Find → Matching Rules → New Rule
- Object: Teacher
- Rule Name: Library Member Email Phone Match
- Add Matching Criteria:
 - Field = Email → Matching Method = Exact
 - Click Add Row → Field = Phone → Matching Method = Exact
- Click Save
- Click Activate

The screenshot displays the Salesforce Setup interface. The left sidebar shows the navigation menu with 'Setup' selected. The main content area is titled 'Matching Rules' and shows the configuration for a rule named 'Library Member Email Phone Match'. The rule is active and was created by Manjeet Urmaliya on 9/24/2025 at 8:44 AM. The matching criteria are defined as follows:

Field	Matching Method
Email	Exact
Phone	Exact

The rule description is: [Teacher: Name EXACT MatchBlank = FALSE] AND [Teacher: Contact EXACT MatchBlank = FALSE] AND [Teacher: Email EXACT MatchBlank = FALSE].

2. Create the Duplicate Rule

- Setup → Quick Find → Duplicate Rules → New Rule
- Object: Teacher
- Rule Label: LibraryMember_DuplicateRule
- Under Matching Rules: click Add and select the LibraryMember_Email_Phone_Match matching rule you activated in the previous step.
- Action on Create: choose Alert (recommended while testing so users are warned but not blocked).
- Action on Edit: choose Alert.

The screenshot shows the 'Duplicate Rules' configuration page in a software interface. The page is titled 'Duplicate Rules' and shows details for a rule named 'LibraryMember_DuplicateRule'. The rule is configured with the following settings:

- Rule Name: LibraryMember_DuplicateRule
- Description: (empty)
- Object: Teacher
- Record Level Security: Enforce sharing rules
- Action On Create: Allow
- Action On Edit: Allow
- Alert Text: Use one of these records?
- Active: ☒
- Matching Rule: ☒ Library Member Email Phone Match ☒ Mapped
- Matching Criteria: [Teacher: NAME EXACT MatchBlank = FALSE] AND [Teacher: CONTACT EXACT MatchBlank = FALSE] AND [Teacher: EMAIL EXACT MatchBlank = FALSE]
- Conditions: (empty)
- Created By: Manojet Urmaliya 9/24/2025, 9:01 AM
- Modified By: Manojet Urmaliya 9/24/2025, 9:01 AM

The page also includes buttons for 'Edit', 'Delete', 'Clone', and 'Deactivate'.

Step 2: Data Backup – Library Management

Goal: Regularly back up all key Library Management data (Teachers, Students, Books, Borrow Requests, etc.) for safety and compliance.

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 or monthly backups.
- Select the objects you want:
 - Library Members (Teachers/Students)
 - Books/Resources
 - Borrow Requests / Returns
 - Classes / Courses
 - Librarians (Users)

Any other standard objects you use (e.g., Users, Attachments).
- Click Start Export (for immediate) or Save (for scheduled).
- Wait — Salesforce will email you when the backup is ready.
- Download the .zip file from the export page → extract CSV files.
- Store the backup securely (encrypted drive, secure server, or trusted cloud storage).

Monthly Export Service

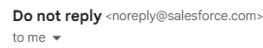
Data Export lets you prepare a copy of all your data in salesforce.com. From this page you can start the export process manually or schedule it to run automatically. When an export is ready for download you will receive an email containing a link that allows you to download the file(s). The export files are also available on this page for 48 hours, after which time they are deleted.

Next scheduled export:
None

[Export Now](#) [Schedule Export](#)

Action	File Name	File Size
download	WE_00DgL000007XhYPUA0_1.ZIP	1.4K

Inbox x



10:07 (17 minutes ago)



The export of your organization's data has been completed. Please click on the following link within the next 48 hours to receive the export.

<https://orgfarm-b173f695e9-dev-ed.develop.my.salesforce.com/ui/setup/export/DataExportPage/d>

Thank you,
Salesforce

← Reply

→ Forward

File

Home

Insert

Draw

Page Layout

Formulas

Data

Review

View

Help

Tell me what you want to do

Cut

Copy

Format Painter

Clipboard

Calibri

11

</

File Home Insert Draw Page Layout Formulas Data Review View Help Tell me what you want to do

Cut Copy Paste Format Painter Clipboard Font Alignment Number Styles Conditional Formatting Format as Table Cell Styles Insert Delete Format Cells Editing Add-ins

POSSIBLE DATA LOSS Some features might be lost if you save this workbook in the comma-delimited (.csv) format. To preserve these features, save it in an Excel file format. [Don't show again](#) [Save As...](#)

GET GENUINE OFFICE Your license isn't genuine, and you may be a victim of software counterfeiting. Avoid interruption and keep your files safe with genuine Office today. [Get genuine Office](#) [Learn more](#)

A1	B	C	D	E	F	G	H	I	J
Id	OwnerId	IsDeleted	Name	CreatedDate	CreatedById	LastModifiedDate	LastModifiedById	SystemModstamp	LastActivityDate
a02gl00000005DWjxQ			0 Librarian Admin	9/24/2025 6:10	005gl000005DWjxQM	9/24/2025 6:10	005gl000005DWjxQAG	9/24/2025 6:10	

Library_c