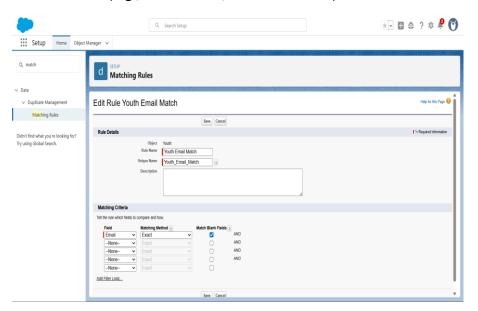
# **Phase 8: Data Management & Deployment**

# **Step 1: Duplicate Management**

Preventing duplicate records is critical, especially for **Youth** and **Job** objects.

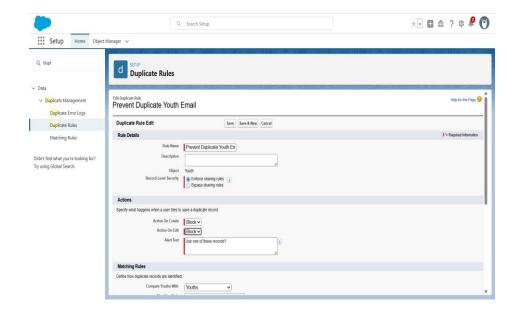
### A. Matching Rules

- Define the criteria to identify duplicates.
- Steps:
  - 1. Go to **Setup** → **Matching Rules** → **New**.
  - 2. Example: Match Youth c.Email c.
  - 3. Define criteria (e.g., exact match, case-insensitive)  $\rightarrow$  Save  $\rightarrow$  Activate.



#### **B. Duplicate Rules**

- Decide what happens when duplicates are detected.
- Steps:
  - 1. Go to Setup → Duplicate Rules → New.
  - 2. Apply your **Matching Rule** to the object (e.g., Youth\_\_c).
  - 3. Choose Action:
    - Block → Prevents user from creating duplicates.
    - Alert → Warns the user, but allows creation.
  - 4. Activate the rule.



## Step 2: Data Backup

Always back up before importing or deploying, in case something goes wrong.

#### Steps:

- 1. Go to **Setup** → **Data Export** → **Export Now**.
- 2. Choose objects to backup (e.g., Youth\_\_c, Job\_\_c, Interview\_\_c).
- 3. Download the zip files.

