

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) → **Save** → **Activate**.

The screenshot shows the Salesforce 'Matching Rules' configuration page. The left sidebar contains navigation links for 'Setup', 'Home', and 'Object Manager'. The main content area is titled 'Edit Rule Youth Email Match'. It includes a 'Rule Details' section with fields for 'Object' (Youth), 'Rule Name' (Youth Email Match), 'Unique Name' (Youth_Email_Match), and 'Description'. Below this is the 'Matching Criteria' section, which allows users to define the rule's logic by selecting fields and matching methods. The criteria table shows 'Email' selected with an 'Exact' matching method. The 'Match Blank Fields' checkbox is checked. The page also includes 'Save' and 'Cancel' buttons at the top and bottom.

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.

