Phase 8: Data Management & Deployment

☐ **Goal:** Ensure smooth data handling, backups, and move changes from development to production.

Data Import Wizard

Use for small data loads (up to 50,000 records).

Example: Import sample **Policy__c** and **Claim__c** records for testing.

Data Loader

For bulk imports/exports (more than 50k records).

Example: Load thousands of customer records with insurance history.

Duplicate Rules

Prevent duplicate entries:

Duplicate **Policy Numbers**.

Duplicate **Claim References**.

Data Export & Backup

Weekly scheduled backup of:

Customer Data (Contact).

Policies & Claims.

Payment Records.

Change Sets

Deploy configuration changes from **Sandbox → Production**.

Example: Deploy new **Claim Approval Process** from sandbox.

Unmanaged vs Managed Packages

Unmanaged: For internal project sharing (your dev team).

Managed: If you plan to publish the Insurance Portal on AppExchange.

ANT Migration Tool

Command-line tool for scripted deployments.

Example: Automate deployment of **custom objects & Apex classes**.

VS Code & SFDX (Salesforce DX)

Developer-friendly deployments.

Version control using GitHub (track Policy__c and Claim__c object changes).

Run **SFDX CLI commands** for metadata push/pull.

☐ With this phase, the **Insurance Portal** ensures:

Clean and accurate data.

No duplication in policies/claims.

Smooth movement of updates from development → testing → production.