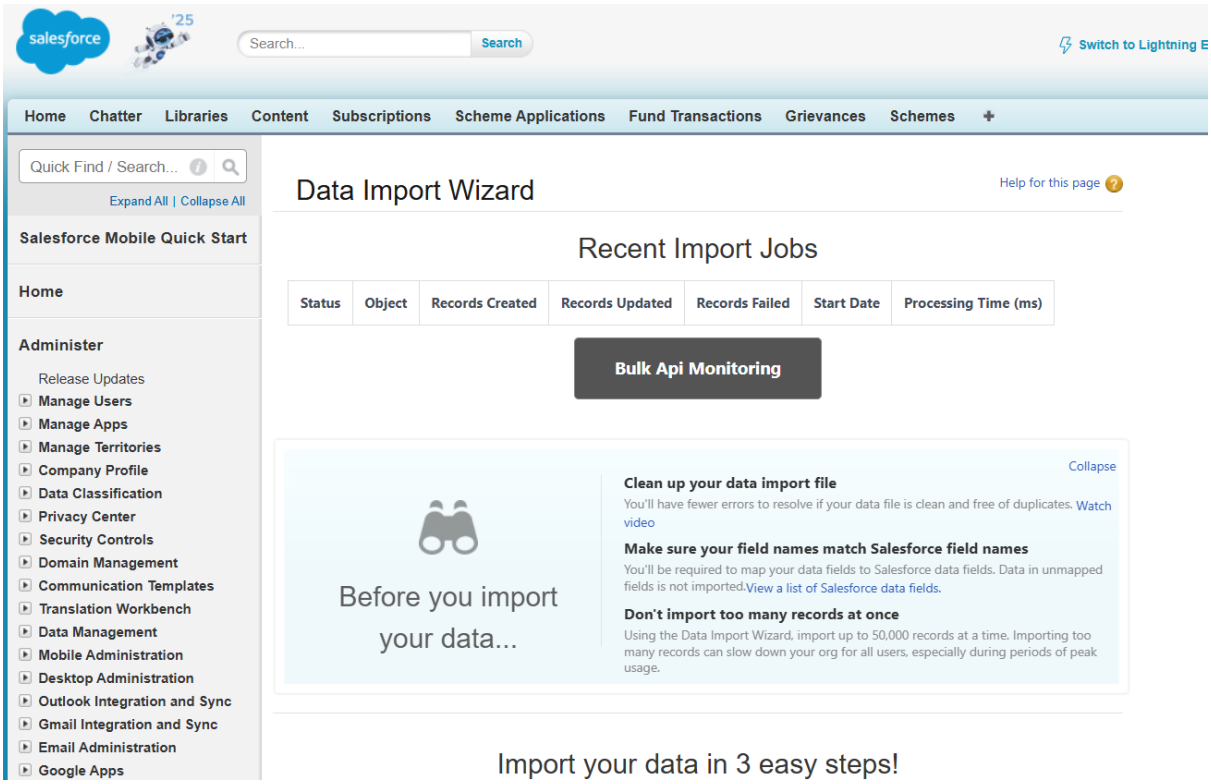
Phase 8: Data Management & Deployment

Data Import Wizard

The Data Import Wizard in Salesforce allows importing records for standard and custom objects.
For this project, government scheme-related data such as **Schemes, Scheme Applications, Fund Transactions, and Grievances** can be imported into their respective custom objects with the defined fields:

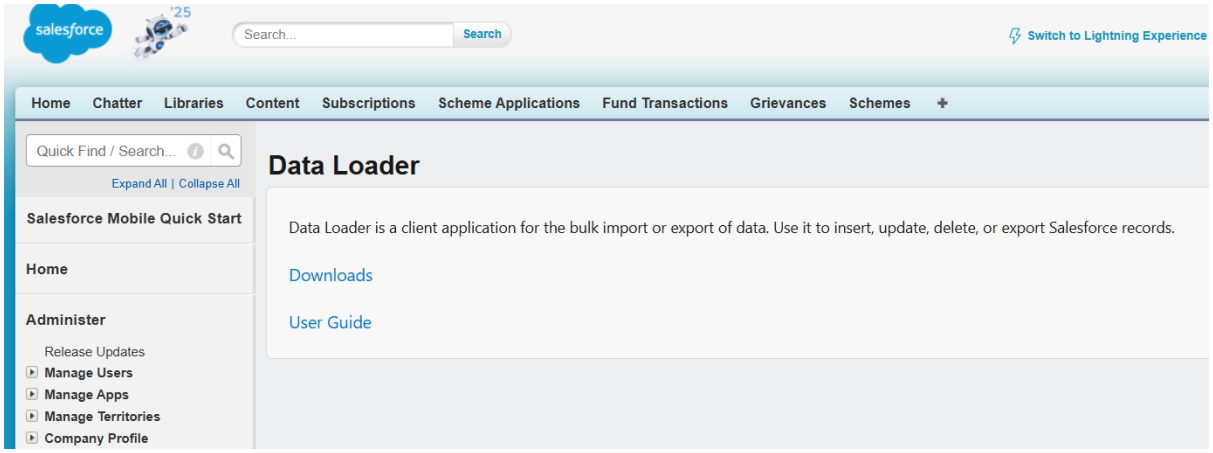
- **Schemes**: Scheme Code, Scheme Name, Description, Eligibility Criteria, Start Date, End Date, Max Amount, Active
- **Scheme Applications**: Application Name, Citizen Email, Citizen User, Contact, Requested Amount, Approved Amount, Date, Stage, Scheme
- **Fund Transactions**: Fund Transaction Name, Amount, Payment Date, Payment Status, Scheme Application
- **Grievances**: Grievance Name, Category, Contact, Resolution Notes, Scheme Application

This helps in populating sample/test data during development.



Data Loader

Data Loader is used for bulk data import, export, update, and deletion.
In this project, **bulk Scheme Applications, Fund Transactions, and Grievances** can be uploaded through Data Loader using CSV files mapped to the above fields.



Duplicate Rules

Duplicate rules prevent the creation of duplicate records in the system. Duplicate Rules were created for each custom object to ensure no duplicate entries are allowed.

1. Scheme Duplicate Rule

- Prevent duplicate scheme records based on Scheme Code.
- **Action on Create:** Alert
- **Action on Edit:** Alert
- **Matching Criteria:** Scheme Code__c field checked to prevent duplication

2. Scheme Application Duplicate Rule

- Prevent duplicate applications for the same citizen and scheme.
- **Action on Create:** Alert
- **Action on Edit:** Alert
- **Matching Criteria:** Citizen Email__c + Scheme__c fields checked to prevent duplication

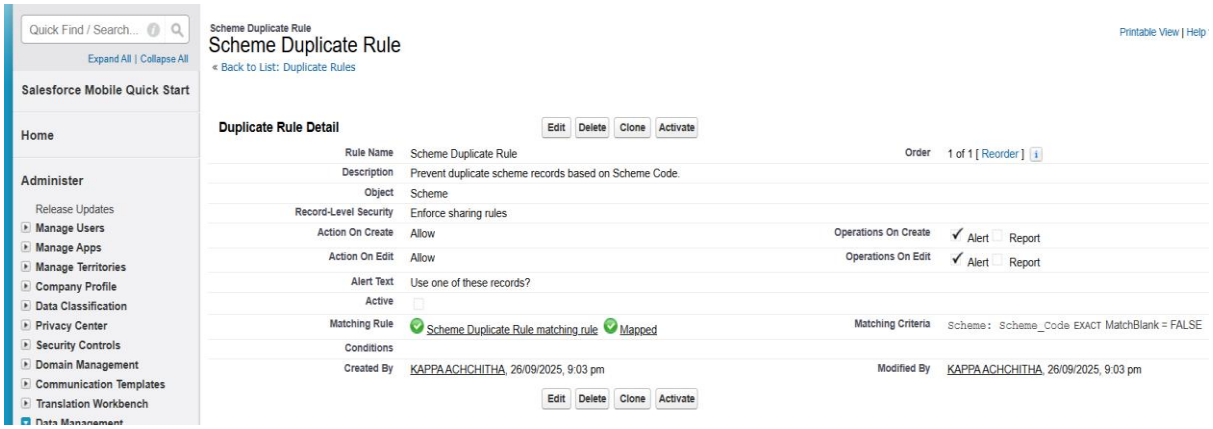
3. Fund Transaction Duplicate Rule

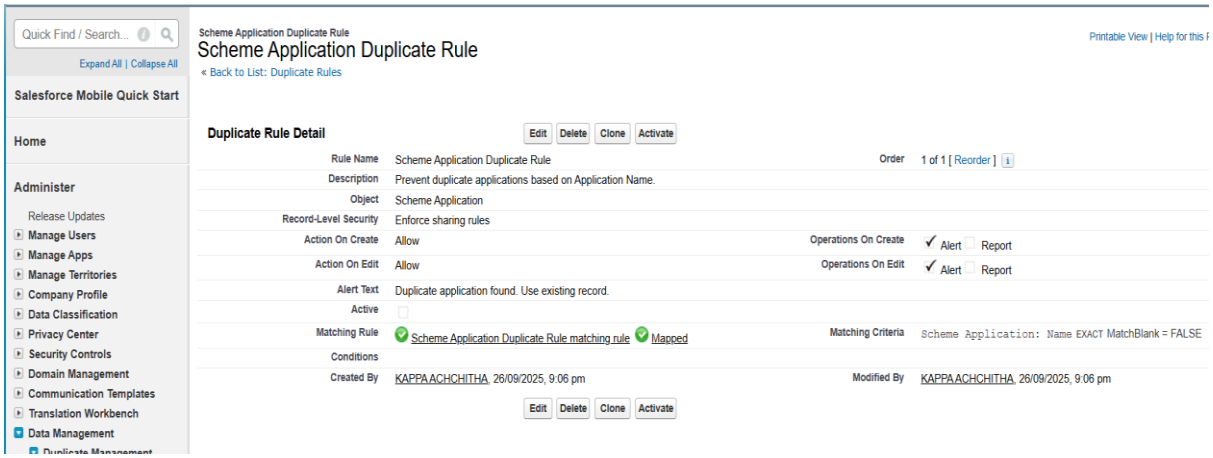
- Prevent duplicate fund transactions for the same application on the same date and amount.
- **Action on Create:** Alert

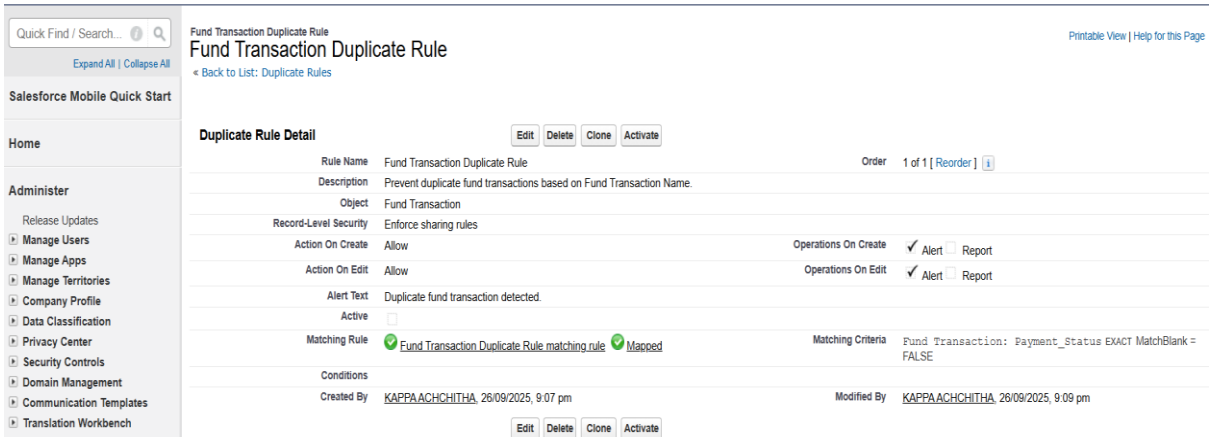
- **Action on Edit:** Alert
- **Matching Criteria:** Payment Date__c + Amount__c + Scheme Application__c fields checked to prevent duplication

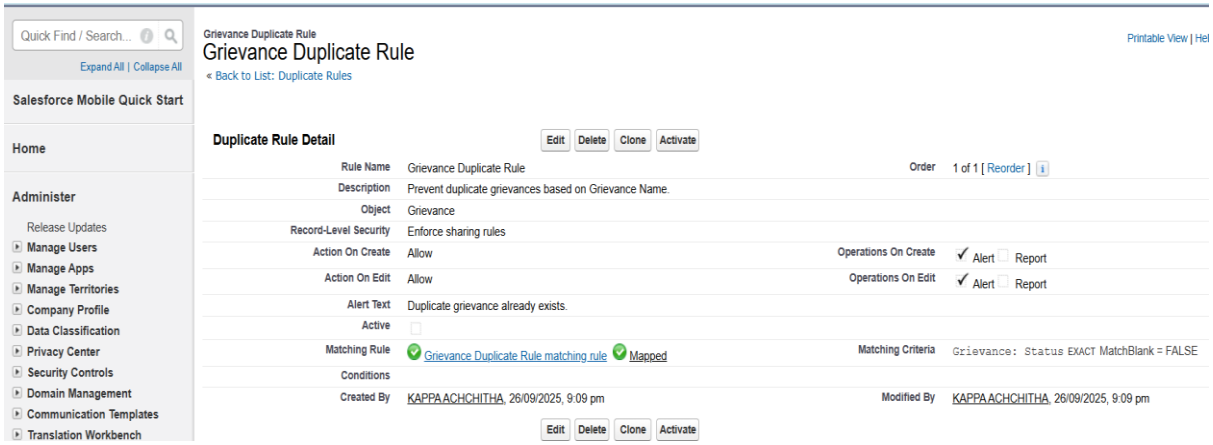
4. Grievance Duplicate Rule

- Prevent duplicate grievances for the same citizen, scheme application, and category.
- **Action on Create:** Alert
- **Action on Edit:** Alert
- **Matching Criteria:** Citizen__c + Scheme Application__c + Category__c fields checked to prevent duplication



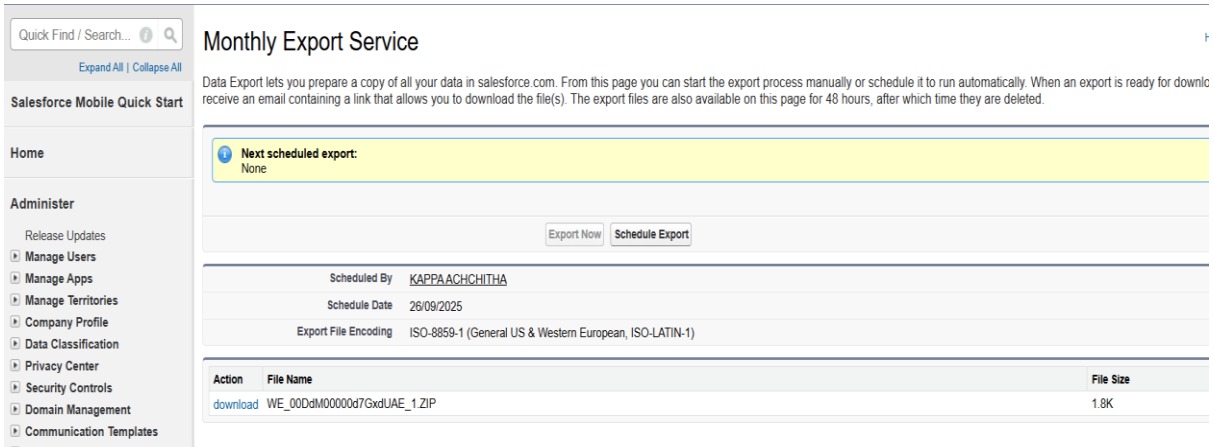


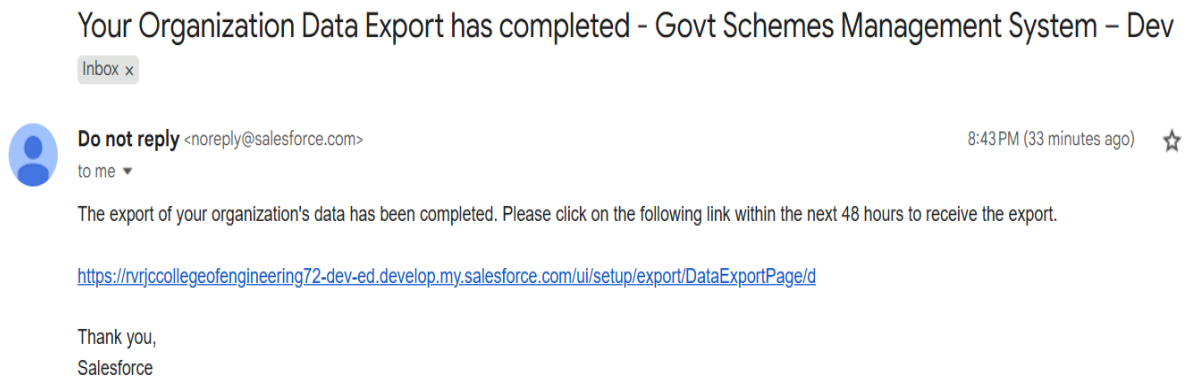




Data Export & Backup

Regular data exports are required for backup.
For this project, **Schemes, Scheme Applications, Fund Transactions, and Grievances** data can be exported periodically to maintain historical records and ensure data safety.




Your Organization Data Export has completed - Govt Schemes Management System – Dev

Inbox ×

Do not reply <noreply@salesforce.com> 8:43 PM (33 minutes ago)

to me

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://rvrjccollegeofengineering72-dev-ed.develop.my.salesforce.com/ui/setup/export/DataExportPage/d

Thank you,
Salesforce

Change Sets

Change Sets are used to migrate metadata between orgs (Sandbox → Production).
For this project, Change Sets can be used to deploy:

- Custom objects (**Schemes, Scheme Applications, Fund Transactions, Grievances**)
- Custom fields defined in each object
- Flows, email alerts, and other automation

Unmanaged vs Managed Packages

- **Managed Packages**: Pre-built solutions from Salesforce AppExchange with limited customization.
- **Unmanaged Packages**: Provide full access to configuration and code.

For this project, no external packages were used. All objects, fields, and automation were custom-built.

ANT Migration Tool

The ANT Migration Tool is a command-line utility for metadata deployment.
For this project, it was **not required**, as all development was done in a single Salesforce org.

VS Code & SFDX

VS Code with Salesforce DX allows advanced development and deployment.
In this project, **all development was done directly in Salesforce UI**, so VS Code and SFDX were not used.