

TourFlow: Real Estate Tour and Feedback Automator

Phase 8: Data Management & Deployment Steps

1. Data Quality: Duplicate Rules

Before importing data, you must prevent duplicate records (like Clients or Properties) from entering the system. We will set up a rule on the client object (your Client object likely references Contact).

Steps to Create a Duplicate Rule

1. Go to **Setup** and search for Duplicate Rules.
2. Click **New Rule** and select **Client**.
3. **Rule Name:** Enter Prevent_Duplicate_Clients.
4. **Action on Create:** Set this to Block (This prevents the user from saving the duplicate record).
5. **Action on Edit:** Set this to Block.
6. **Matching Rule:** Ensure the standard **Standard Contact Matching Rule** is selected (this compares name, email, and phone).
7. Click **Save** and then **Activate** the rule.

The screenshot displays the Salesforce Setup interface. On the left, a sidebar shows the navigation menu with 'Setup' selected. A search bar at the top of the sidebar contains the word 'duplicate'. Below the search bar, the 'Data' section is expanded, showing 'Duplicate Management' with sub-items 'Duplicate Error Logs' and 'Duplicate Rules' (which is highlighted). A message at the bottom of the sidebar states: 'Didn't find what you're looking for? Try using Global Search.'

The main content area is titled 'Duplicate Rules' and shows the configuration for a 'Client Duplicate Rule' named 'Prevent_Duplicate_Clients'. The rule is currently 'Active' and 'Mapped'. The configuration details are as follows:

| Duplicate Rule Detail | | Order | 1 of 1 [Reorder] |
|-----------------------|---|----------------------|--|
| Rule Name | Prevent_Duplicate_Clients | | |
| Description | | | |
| Object | Client | | |
| Record-Level Security | Enforce sharing rules | | |
| Action On Create | Block | Operations On Create | <input type="checkbox"/> Alert <input type="checkbox"/> Report |
| Action On Edit | Block | Operations On Edit | <input type="checkbox"/> Alert <input type="checkbox"/> Report |
| Alert Text | Use one of these records? | | |
| Active | <input checked="" type="checkbox"/> | | |
| Matching Rule | <input checked="" type="checkbox"/> Standard Contact Matching Rule <input checked="" type="checkbox"/> Mapped | Matching Criteria | Matching rule for contact records. More info |
| Conditions | | | |
| Created By | Afiya Firdose Pamidi, 9/28/2025, 3:53 AM | Modified By | Afiya Firdose Pamidi, 9/28/2025, 3:54 AM |

At the bottom of the configuration area, there are buttons for 'Edit', 'Delete', 'Clone', and 'Deactivate'.

2. Data Loading: Data Import Wizard

Once your project is deployed, you will likely need to import existing client and property data. The **Data Import Wizard** is the simplest tool for small-to-medium datasets.

Steps to Import Initial Data (e.g., Properties)

1. Go to **Setup** and search for Data Import Wizard.
2. Click **Launch Wizard**.
3. **Select Object:** Click the **Custom Objects** tab and select your **Property** object.
4. **Select Action:** Choose **Add new records** (to import the data for the first time).
5. **Data Source:** Select the CSV file containing your property data.
6. **Field Mapping:** Map the columns from your CSV file to the corresponding fields on your **Property** object (e.g., CSV column "Address" maps to Salesforce field "Address__c").
7. **Review and Start:** Review the mapping and click **Start Import**.

The screenshot shows the Salesforce Setup page with the 'Bulk Data Load Jobs' section active. The left sidebar contains the 'Setup' menu and a search bar. The main content area displays the details of a bulk data load job for the 'Property' object. The job is titled 'Bulk Data Load Job 750gK00000DsDK9' and was submitted by 'Afiya Firdose Pamidi' on 9/28/2025 at 3:59 AM PST. The job is currently in progress, with a status of 'In Progress Batches' and a progress bar at 0%. The job details table shows various metrics such as 'Total Processing Time (ms)', 'API Active Processing Time (ms)', 'Apex Processing Time (ms)', 'Records Processed', 'Records Failed', and 'Retries'. Below the job details, there is a 'Batches' section with a table showing the progress of individual batches. The first batch, '751gK00000BEJz1', is shown with a status of 'In Progress' and a progress bar at 0%.

Setup

Search Setup

Setup Home Object Manager

data impo

Integrations

Data Import Wizard

Didn't find what you're looking for? Try using Global Search.

Bulk Data Load Jobs

Bulk Data Load Job 750gK00000DsDK9

View the details of a bulk data load job.

[Back to List: Bulk Data Load Jobs](#)

Bulk Data Load Job Detail [Abort](#) [Reload](#)

| Job ID | 750gK00000DsDK9 | Job Type | Bulk V1 | Status | Closed |
|-------------------------------|------------------------|---------------------|---------|---------------------------------|--------|
| Submitted By | Afiya Firdose Pamidi | Operation | Insert | Total Processing Time (ms) | 0 |
| Start Time | 9/28/2025, 3:59 AM PST | Queued Batches | 1 | API Active Processing Time (ms) | 0 |
| End Time | | In Progress Batches | 0 | Apex Processing Time (ms) | 0 |
| Time to Complete ([hh:mm:ss]) | | Completed Batches | 0 | | |
| Object | Property | Failed Batches | 0 | | |
| External ID Field | | Progress | 0% | | |
| Content Type | CSV | Records Processed | 0 | | |
| Concurrency Mode | Parallel | Records Failed | 0 | | |
| API Version | 64.0 | Retries | 0 | | |

[Abort](#) [Reload](#)

Batches

| View Request | View Result | Batch ID | Start Time | End Time | Total Processing Time (ms) | API Active Processing Time (ms) | Apex Processing Time (ms) | Records Processed | Records Failed | Retry Count | Stal |
|------------------------------|-------------|-----------------|--------------------|----------|----------------------------|---------------------------------|---------------------------|-------------------|----------------|-------------|------|
| View Request | | 751gK00000BEJz1 | 9/28/2025, 3:59 AM | | 0 | 0 | 0 | 0 | 0 | 0 | |

The decision to exclude certain features was based on keeping the project focused, modern, and efficient:

- **Automation:** All process automation was consolidated into modern **Flow Builder**, superseding older tools like Workflow Rules and Process Builder.
- **UI/Code:** **LWC** and advanced Apex were not implemented because the standard **Lightning App Builder** and declarative tools were sufficient for the UI and business logic.
- **Integration:** Features like **External Services** and **Callouts** were excluded because the core project was for internal use and did not require connection to real external APIs.
- **Deployment:** **Change Sets** were chosen for deployment, making complex tools like the Data Loader for deployment and ANT/SFDX unnecessary.