## TourFlow: Real Estate Tour and Feedback Automator

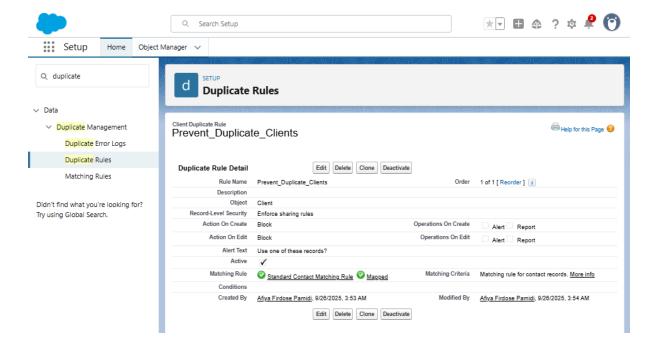
# **Phase 8: Data Management & Deployment Steps**

### 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.

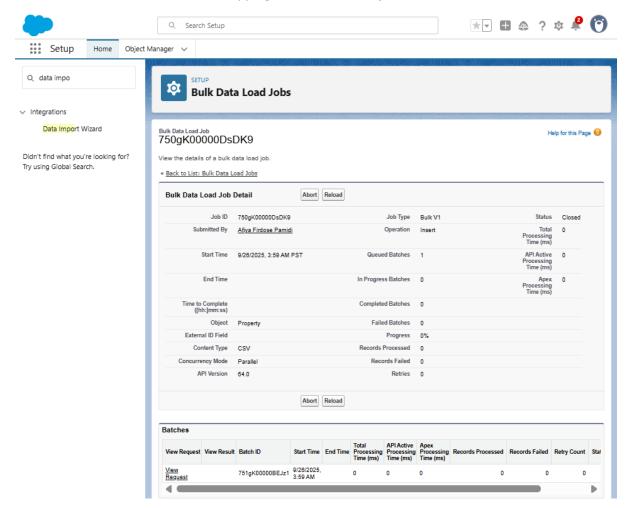


#### 2. Data Loading: Data Import Wizard

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 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.