

# SafeCity Salesforce Project:

## Phase 8: Data Management & Deployment

### 1. Data Import

- Imported **50 Complaint\_\_c** records using **Data Loader**.
- CSV included dummy Salesforce IDs for:
  - Assigned\_To\_\_c (Users)
  - Citizen\_\_c (Citizens)
  - Department\_\_c (Departments)
- Key imported fields: Category, Priority, Status, Reported Date, SLA Due Date, Description, Owner.
- Results Folder** in Data Loader captured:
  - success.csv** → records successfully inserted.
  - error.csv** → records that failed (if any).
- Purpose:** Populate initial data for testing automations and reports.

#### Documentation Notes:

- Include screenshot of Data Loader field mapping.
- Include screenshot of **success.csv**.
- Include screenshot of sample imported record in Salesforce.

The screenshot shows the Salesforce Setup page for field mapping. The top navigation bar includes Setup, Home, and Object Manager. A search bar is present. The main content area is titled 'Edit Field Mapping: Complaints' and shows a progress bar with three steps: 'Choose data', 'Edit mapping' (current step), and 'Start import'. Below the progress bar, there is a table with columns: Edit, Mapped Salesforce Object, CSV Header, and three Example columns. The table lists various fields and their mappings, with some fields marked as 'Unmapped'.

Edit	Mapped Salesforce Object	CSV Header	Example	Example	Example
Map	Unmapped ⓘ	Name			
Map	Unmapped ⓘ	Assigned_To__c	0051x000000abcd003	0051x000000abcd003	0051x000000abcd002
Change	Category	Category__c	Traffic Signal	Water Leakage	Pothole
Map	Unmapped ⓘ	Citizen__c	0031x000000xyz003	0031x000000xyz002	0031x000000xyz003
Map	Unmapped ⓘ	CreatedById	0051x000000abcd003	0051x000000abcd002	0051x000000abcd002
Map	Unmapped ⓘ	Department__c	a011x000000dep001	a011x000000dep003	a011x000000dep003
Change	Description	Description__c	Complaint about Traffic Signal at a public	Complaint about Water Leakage at a public	Complaint about Pothole at a public area
Change	Record Owner	OwnerId	0051x000000abcd001	0051x000000abcd001	0051x000000abcd003

At the bottom right, there are buttons for 'Cancel', 'Previous', and 'Next'.

Setup

Home

Object Manager

data im

Integrations

Data Import Wizard

Didn't find what you're looking for?

Try using Global Search.

Search Setup

## 2. Duplicate Rules

- **Purpose:** Prevent creation of duplicate records to maintain data quality.
- **Rules Implemented:**
  1. **Citizen Duplicate Rule**
    - Matching field: Email\_\_c (Exact Match)
    - Action: Alert user if duplicate exists.
    - Prevents multiple citizen records with same email.
  2. **Complaint Duplicate Rule**
    - Matching fields: Title\_\_c + Reported\_Date\_\_c (Exact Match)
    - Action: Alert user on potential duplicate complaint.
    - Prevents duplicate complaints for the same issue on the same date.

### Documentation Notes:

- Screenshot of Matching Rule setup.
- Screenshot of Duplicate Rule setup.
- Brief explanation of why each rule is necessary.

Setup

Home

Object Manager

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Search Setup

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duplicate

▼ Data

▼ Duplicate Management

Duplicate Error Logs

Duplicate Rules

Matching Rules

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

SETUP

Matching Rules

New Matching Rule

Complaint

Step 2: Configure Matching Rule

Step 2 of 2

Previous

Save

Cancel

Rule Details

Object: Complaint

Rule Name: Complaint\_Title\_Date\_Match

Unique Name: Complaint\_Title\_Date\_Match

Description:

Matching Criteria

Tell the rule which fields to compare and how:

Field

Matching Method

Match Blank Fields

AND

Setup

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Object Manager

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duplicate

▼ Data

▼ Duplicate Management

Duplicate Error Logs

Duplicate Rules

Matching Rules

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

SETUP

Matching Rules

Matching Rule

Citizen\_Email\_Match

Help for this Page

Matching Rule Detail

Object: Citizen

Rule Name: Citizen\_Email\_Match

Unique Name: Citizen\_Email\_Match

Description: Citizen\_Email\_Match

Matching Criteria: CITIZEN: EMAIL EXACT MatchBlank = FALSE

Status: Active

Created By: Ahmad... 9/25/2025, 9:42 AM

Modified By: Ahmad... 9/25/2025, 9:42 AM

Setup

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Object Manager

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Search Setup

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duplicate

▼ Data

▼ Duplicate Management

Duplicate Error Logs

Duplicate Rules

Matching Rules

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

SETUP

Duplicate Rules

New Duplicate Rule

Complaint

Help for this Page

Duplicate Rule Edit

Save

Save & New

Cancel

Rule Details

Rule Name: Complaint\_Duplicate\_Rule

Description: Prevent duplicate complaints with same title and reported date

Object: Complaint

Record-Level Security: Enforce sharing rules

Actions

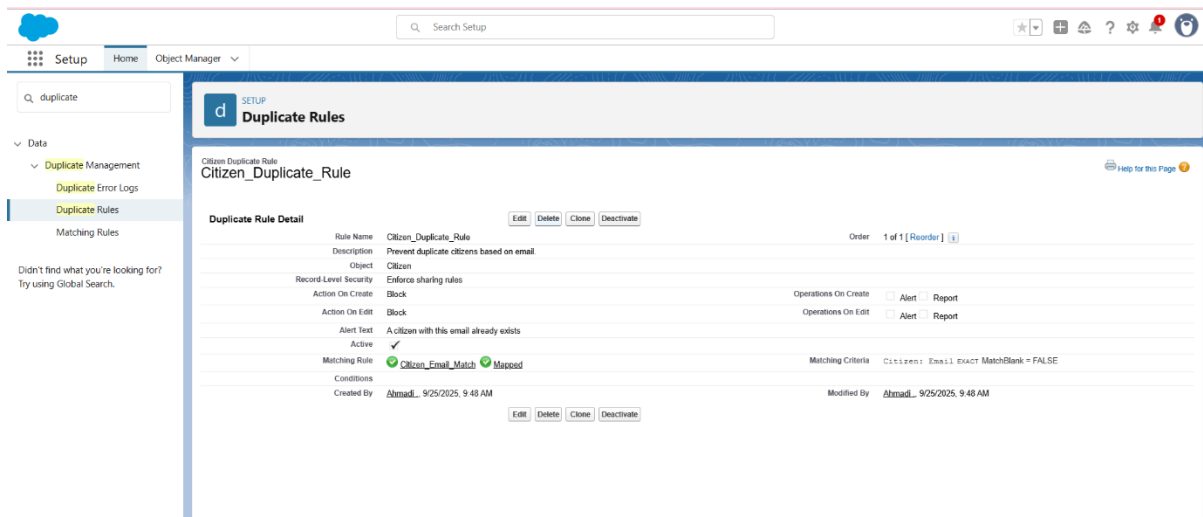
Specify what happens when a user tries to save a duplicate record.

Action On Create: Block

Action On Edit: Allow

Alert Text: A complaint with the same Title and Reported Date already exists.

Matching Rules



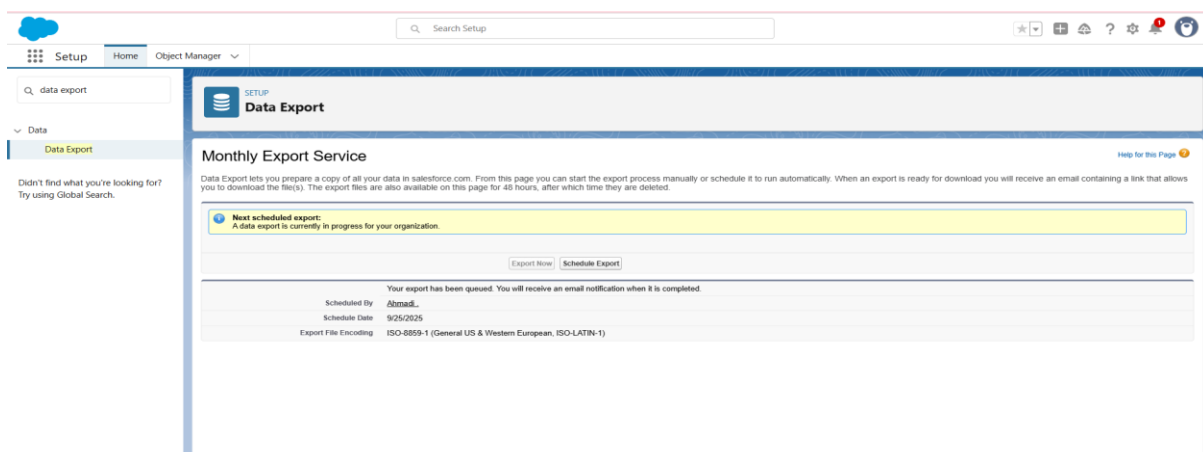
The screenshot shows the Salesforce Setup interface for the 'Duplicate Rules' section. The left sidebar contains a search bar with 'duplicate' and a navigation menu with 'Data', 'Duplicate Management', 'Duplicate Error Logs', 'Duplicate Rules' (selected), and 'Matching Rules'. The main content area is titled 'Duplicate Rules' and shows a table of rules. The first rule, 'Citizen\_Duplicate\_Rule', is expanded to show its details. The rule is active and has a matching rule 'Citizen\_Email\_Match' mapped to it. The rule's description is 'Prevent duplicate citizens based on email' and its object is 'Citizen'. The rule's action on create is 'Block' and its action on edit is 'Block'. The rule's alert text is 'A citizen with this email already exists'. The rule's matching criteria is 'Citizens: Email exact MatchBlank = FALSE'. The rule was created by 'Ahmad...' on 9/25/2025 at 9:48 AM and was last modified by the same user at the same time.

### 3. Data Export & Backup

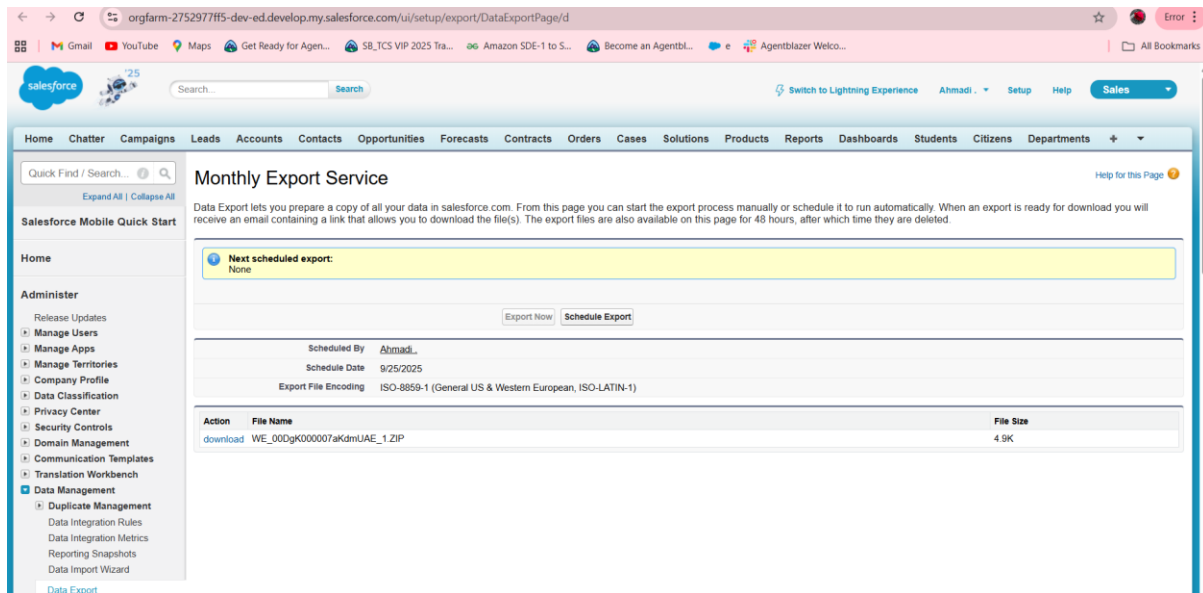
- **Purpose:** Backup Salesforce data for disaster recovery.
- **Steps:**
  - Setup → Data Export → Select objects: Complaint\_\_c, Citizen\_\_c, Department\_\_c, User.
  - Export scheduled manually or periodically.
  - Downloaded CSV ZIP contains all object records.

#### Documentation Notes:

- Screenshot of Data Export setup.
- Mention backup frequency and importance.



The screenshot shows the Salesforce Setup interface for the 'Data Export' section. The left sidebar contains a search bar with 'data export' and a navigation menu with 'Data' and 'Data Export' (selected). The main content area is titled 'Data Export' and shows the 'Monthly Export Service' page. The page displays a status message: 'Next scheduled export: A data export is currently in progress for your organization.' Below this message are buttons for 'Export Now' and 'Schedule Export'. The page also shows a table with the following information: 'Your export has been queued. You will receive an email notification when it is completed.' The table includes columns for 'Scheduled By' (Ahmad...), 'Schedule Date' (9/25/2025), and 'Export File Encoding' (ISO-8859-1 (General US & Western European, ISO-LATIN-1)).



## 4. Deployment Using Change Sets / Metadata

Note: Developer Edition does not support Change Sets; documented as pseudo-deployment.

- **Purpose:** Deploy customizations (Apex Classes, Flows, Lightning Pages, Validation Rules) from Sandbox → Production.
- **Components Included:**

### Component Type Component Name / Description

Apex Class	ComplaintManager, CloseResolvedComplaints
Flow	SLA Assignment & Escalation Flow
Validation Rule	Citizen Email Required, Complaint Status Checks
Lightning Page	Complaint Record Page
Lightning App	SafeCity App

### Documentation Notes:

- Screenshot of each component in Salesforce Setup.
- List components with short description.
- Explain deployment approach using VS Code / SFDX if moving to another org.

## 5. Tools & Methodology

- **Data Loader:** Bulk import of records with lookup fields.
- **Results Folder:** Captured **success** and **error** files.
- **VS Code & SFDX:** Metadata retrieval and deployment in absence of Change Sets.
- **Duplicate Rules:** Maintains clean data.
- **Data Export:** Ensures data backup before deployment