

Phase 8: Data Management & Deployment

1. Data Import Wizard

- Best for **small to medium datasets** (up to 50,000 records).
- Use Cases:
 - Import initial **property listings** with location, price, and features.
 - Import **prospective buyer leads** from Excel/CSV (web or offline inquiries).
- Supports **standard and custom objects** (Leads, Properties, Visits).

2. Data Loader

- Best for **large datasets** (millions of records).
- Use Cases:
 - Bulk upload **historic deals and bookings** from legacy systems.
 - Mass update **property status** (e.g., mark 5,000 records as “Available”).
 - Export all deals for monthly financial review.

3. Duplicate Rules

- Prevent duplicate records for:
 - Leads → Avoid same customer being entered twice.
 - Properties → Ensure no duplicate property listings (based on Location + Price + Name).
- Example Rule: If Email + Phone match → block duplicate lead creation.

4. Data Export & Backup

- Enable **Weekly Data Export** in Salesforce Setup.
- Store CSV backups of:
 - Leads, Properties, Deals, Visits, Bookings.
- For critical backups → integrate with **Google Drive or AWS S3**.

5. Change Sets

- Move configurations from **Sandbox → Production**.
- Use Cases:
 - Deploy custom objects (Properties, Visits, Bookings).
 - Deploy validation rules, flows, page layouts.
 - Deploy dashboards for managers.

6. Unmanaged vs. Managed Packages

- **Unmanaged Package:**
 - Used for this project → bundle Property Portal components for deployment.
- **Managed Package:**
 - Useful if we want to publish Smart Property Portal to **AppExchange**.

7. ANT Migration Tool

- For **script-based deployments** (CI/CD).
- Use Cases:
 - Automate deployment of large sets of metadata.
 - Useful if multiple developers are working on the portal.

8. VS Code & SFDX (Salesforce DX)

- **Developer-first approach** for deployment and version control.
- Use Cases:
 - Track metadata changes in GitHub.
 - Push & pull changes from Salesforce Org.
 - Deploy Smart Property Portal modules in stages (Leads → Properties → Visits → Deals).