EXPENSE TRACKER APP

Phase 8: Data Management & Deployment

Goal: Manage and migrate data efficiently, and prepare your Expense Tracker for deployment to production.

Step 1 — Data Import Wizard

Purpose

To quickly import small datasets such as demo Expense records or test users into Salesforce directly through the UI.

Navigation Path

Setup → Data → Data Import Wizard

Detailed Steps

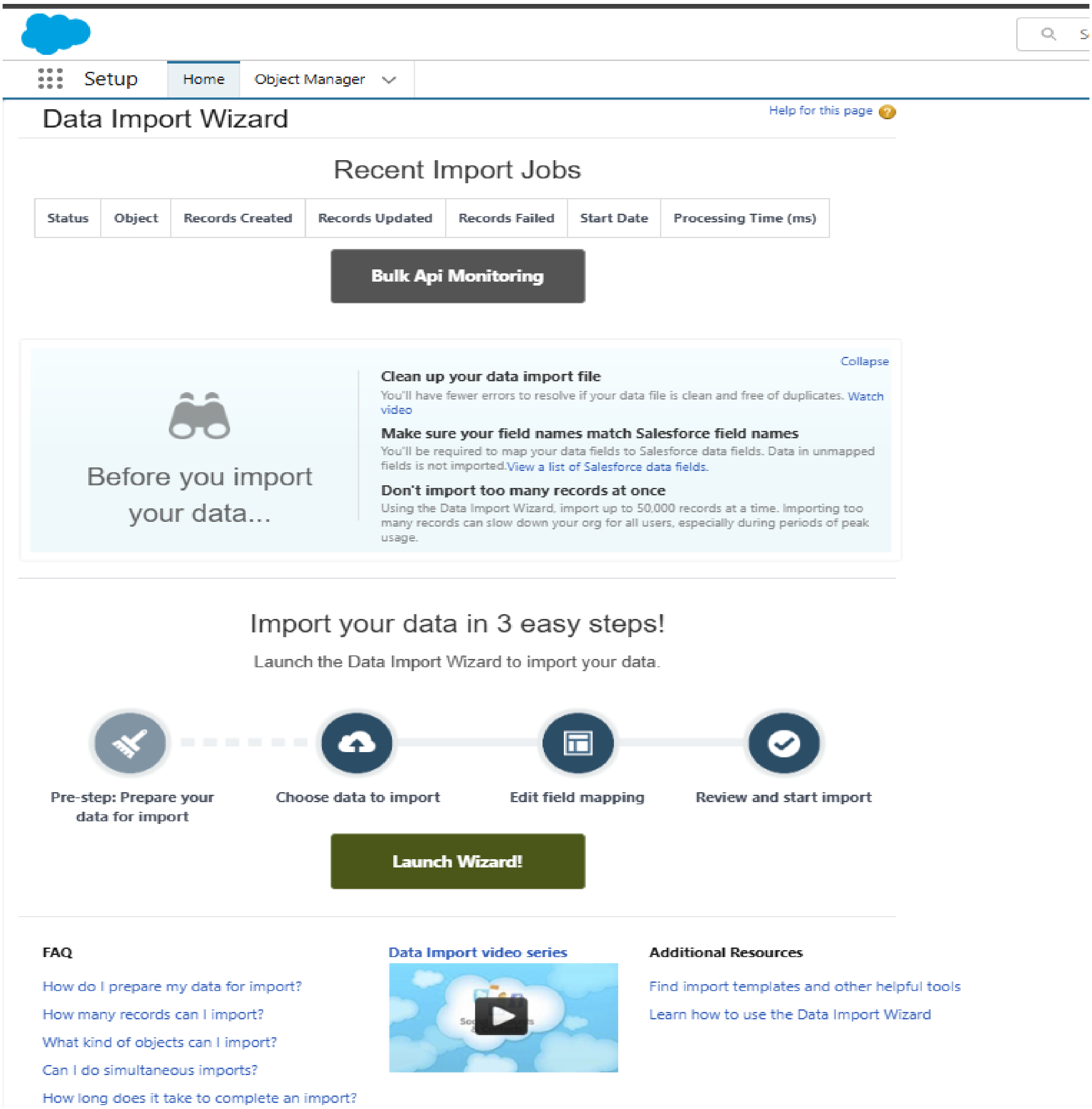
1. Go to Setup → Data Import Wizard.
2. Select the object type:
    - Custom Objects → Expense
3. Click Launch Wizard.
4. Choose Add New Records (for new imports) or Update Existing Records (to modify existing data).
5. Upload a CSV file with the following sample columns:
    - Expense_Number__c
    - Amount__c
    - Expense_Date__c
    - Category__c
    - Employee__c
    - Approval_Status__c
6. Map fields → Match CSV columns with Salesforce fields.

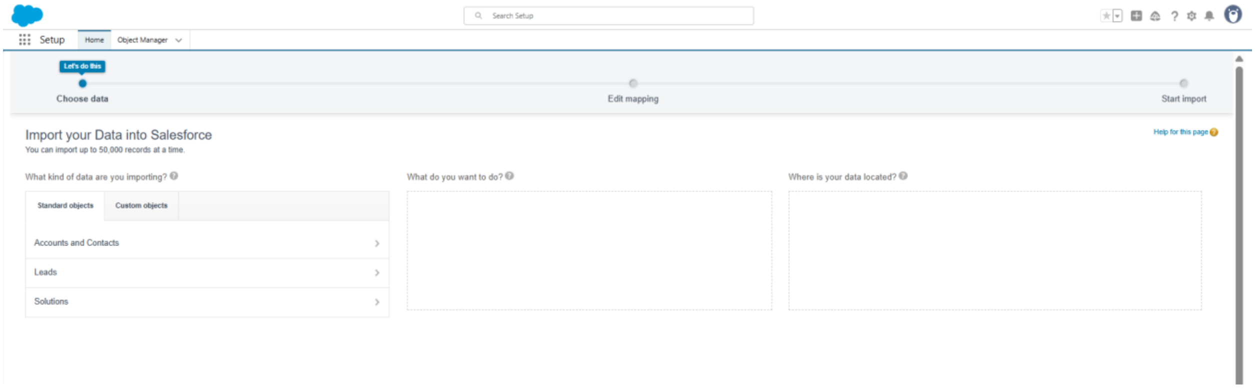
7. Click Start Import → wait for completion.

8. Review results → check success and error logs.

Why This Step Matters

- Easily imports test/demo data for validation and reports.
- Simple and intuitive — no need for external tools.





Step 2 — Data Loader

Purpose

To import or export large datasets (hundreds or thousands of records) for Expenses or Users.

Navigation Path

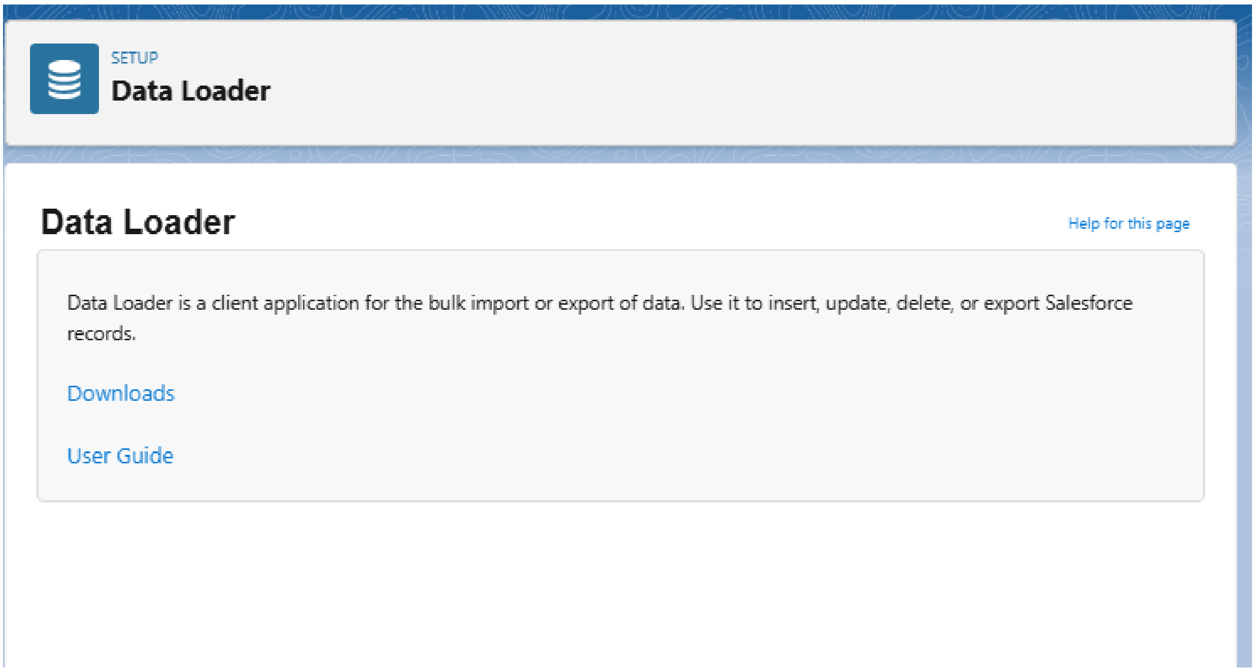
Install Salesforce Data Loader → Open → Log in with Salesforce credentials

Detailed Steps

1. Download and install Salesforce Data Loader (if not already installed).
2. Open it → Click Login.
3. Choose an operation:
   - Insert (for new records)
   - Update (for existing records)
   - Export (to download data)
4. Select Expense__c as the object.
5. Browse and upload your CSV file.
6. Map the CSV fields to Salesforce fields.
7. Run the operation → review the success and error logs.

Why This Step Matters

- Supports bulk operations that can't be done in the UI.
- Allows exporting data for backup or migration



Step 3 — Duplicate Rules

Purpose

Prevent duplicate expense records for the same employee or date.

Navigation Path

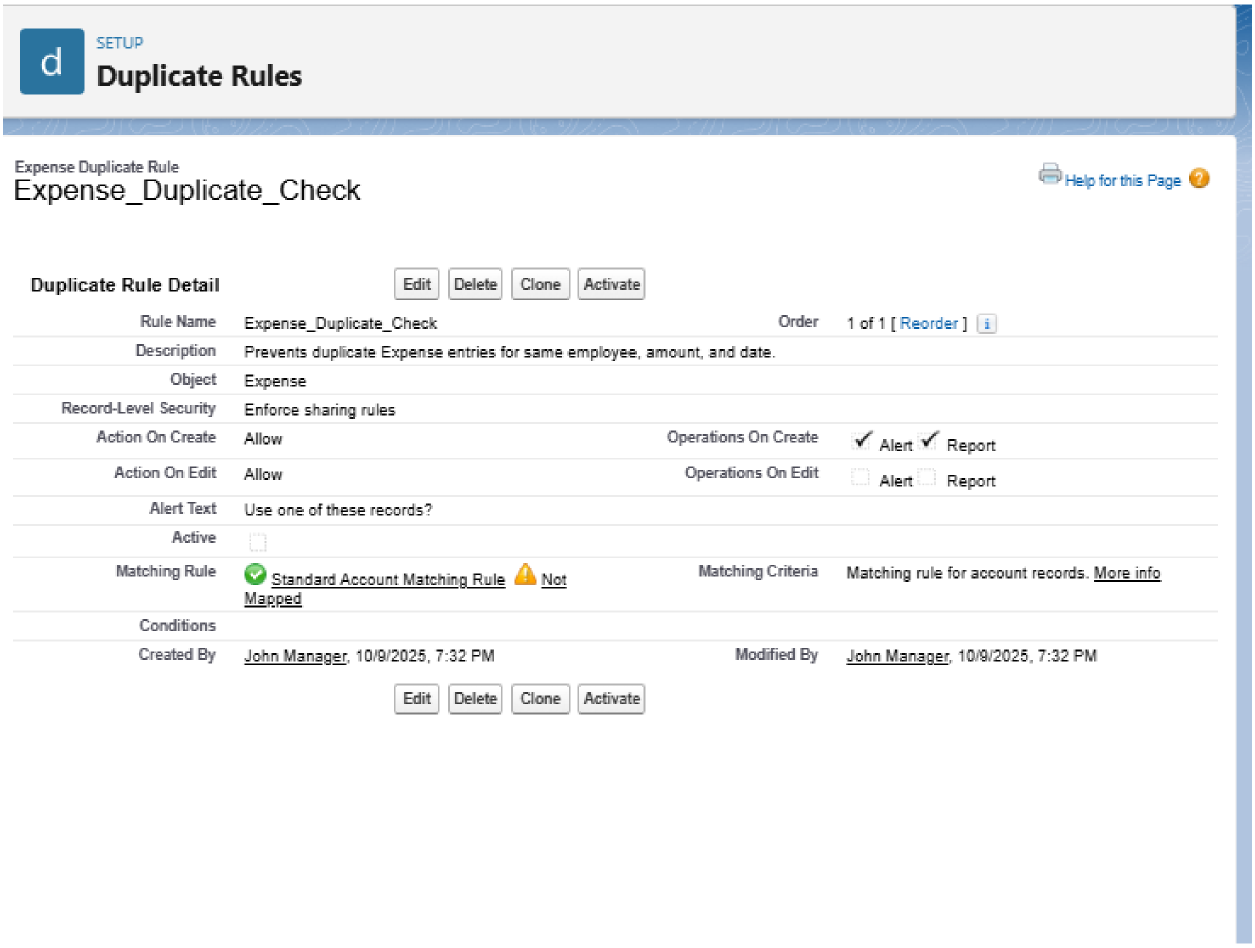
Setup → Duplicate Management → Duplicate Rules → New Rule

Detailed Steps

1. Click New Rule → Select Object = Expense__c.
2. Name the rule: Expense Duplicate Check.
3. Under Matching Criteria, add:
   - Amount__c = Exact Match
   - Expense_Date__c = Exact Match
   - Employee__c = Exact Match
4. Choose Action on Create: Block or Allow with Alert.
5. Optionally, add Alert Message: “Duplicate expense detected for this employee and date.”
6. Click Activate.

Why This Step Matters

- Prevents duplicate entries in reports or approvals.
- Keeps data clean and reliable.•



Step 4 — Data Export & Backup

Purpose

Back up your Expense Tracker data weekly or on-demand.

Navigation Path

Setup → Data → Data Export

Detailed Steps

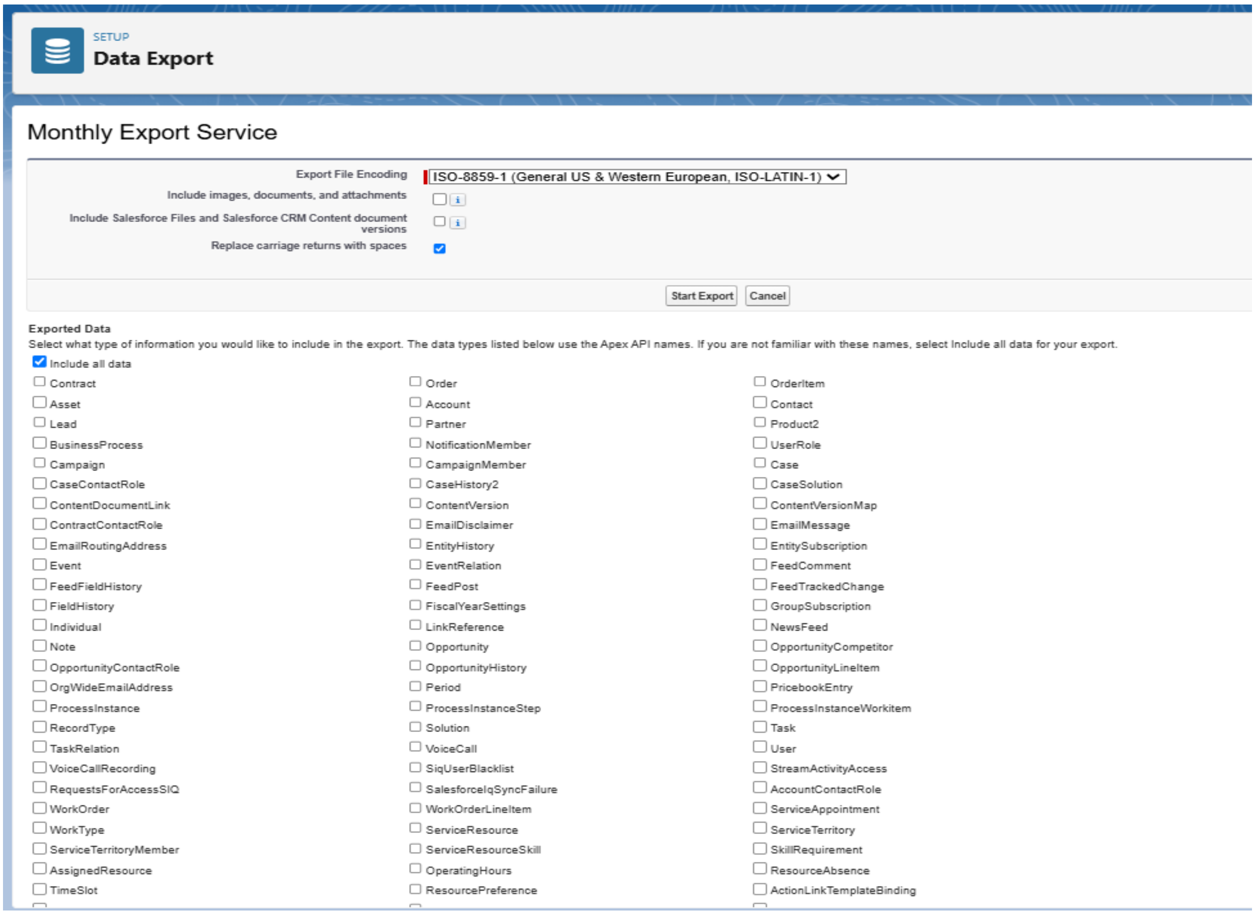
1. Go to Setup → Data Export.
2. Choose Export Now or Schedule Export (weekly).
3. Select objects:
   - Expense__c
   - User
   - Approval History (optional)
4. Choose .CSV as file format.
5. Click Start Export or Save Schedule.
6. Download the .zip file from the email link when ready.

7. Store it securely in company storage or backup system.

Why This Step Matters

- Protects against data loss or accidental deletions.

Required for audit compliance and data recovery



Step 5 — Change Sets (Deployment to Production)

Purpose

Deploy all configurations, objects, and automations from Sandbox to Production.

Navigation Path

Setup → Outbound Change Sets

Detailed Steps

1. In Sandbox, go to Setup → Outbound Change Sets → New.

2. Enter:

   - Name: Expense_Tracker_Deployment

    - Description: Deploy Expense Tracker setup to production.

3. Click Save.

4. Click Add → select components to include:

    - Custom Object: Expense__c

    - Fields, Validation Rules, Flows, Approval Processes

    - Apex Classes, Triggers, Lightning Pages

5. Upload the change set to the production org.

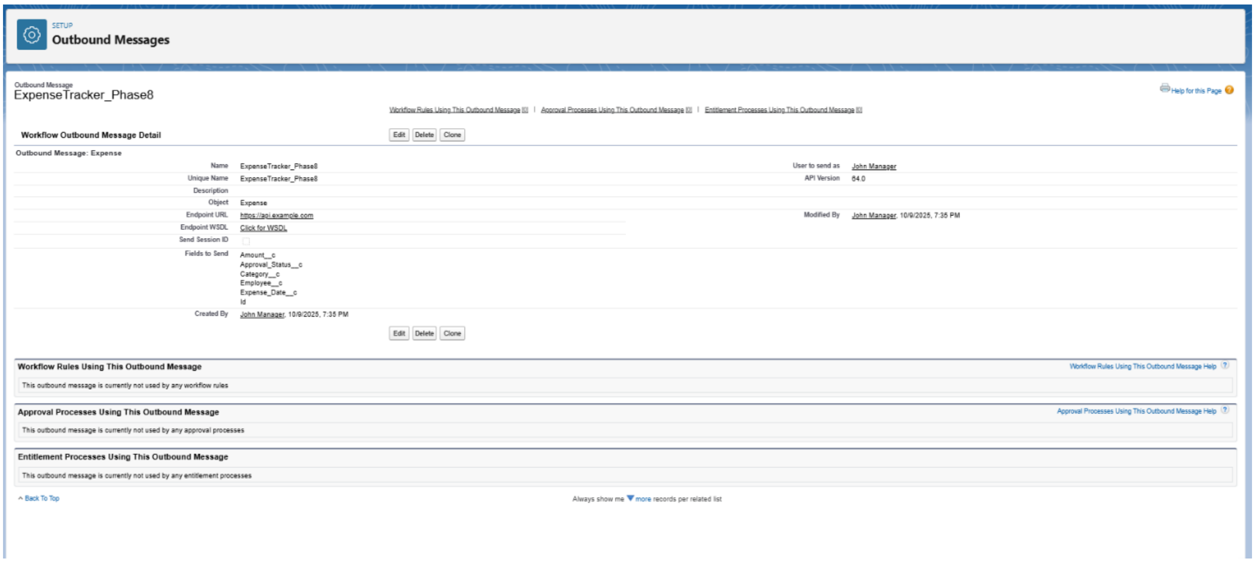
6. In Production, go to Inbound Change Sets.

7. Validate and Deploy the change set.

Why This Step Matters

- Moves your work safely between orgs.

- Ensures consistent configurations in testing and production.



Step 6 — Package Deployment (Optional)

Purpose

Use Managed or Unmanaged Packages for sharing or reuse.

Navigation Path

Setup → Package Manager → New Package

Detailed Steps

1. Click New Package.

2. Enter Name: Expense Tracker Package.

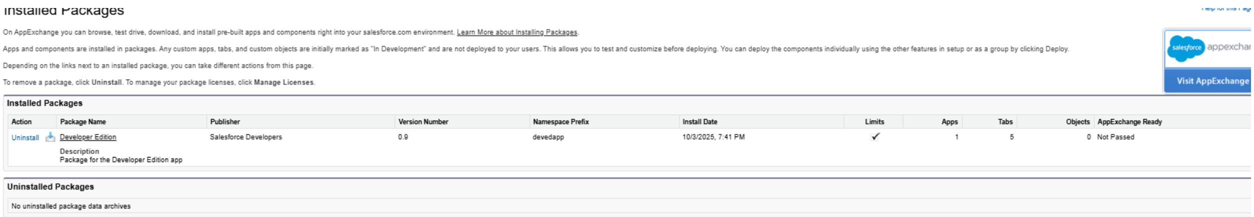
3. Add all related components (Expense object, triggers, classes, flows).

4. Choose Managed (for publishing) or Unmanaged (for personal migration).

5. Click Upload.

Why This Step Matters

- Packages are reusable and ideal for version control or sharing your app.



Step 7 — SFDX / VS Code Deployment (Developer Optional)

Purpose

Enable developers to manage deployments using CLI tools.

Steps

1. Install Salesforce CLI (SFDX) and VS Code.

2. Connect your org using:

   sfdx auth:web:login -a DevHub

3. Retrieve metadata:

   sfdx force:source:retrieve -m CustomObject:Expense__c

4. Deploy changes to another org:

   sfdx force:source:deploy -u Production