PHASE - 8

Data Management & Deployment

Introduction

Phase 8 of a typical Salesforce project covers data handling, backup, and deployment activities. These ensure that sample data is available for testing, metadata is backed up, and the project can be shared or redeployed in other Salesforce orgs.

Since this project was implemented entirely in a Developer Edition org, there was no Sandbox–to–Production deployment. Instead, all development, testing, and demonstration were performed directly in Developer Edition. Data import, export, and unmanaged packaging were used to manage the project.

Activities Performed

- 1. Data Import (Sample Records)
 - Created CSV files for Tasks, Reminder Logs, and Escalations.
 - Used Data Import Wizard to add new records:
 - Tasks_Sample.csv → created demo Task records.
 - ReminderLogs_Sample.csv → created demo Reminder Logs with Name,
 Reminder Date c, and Status c.
 - TaskEscalations_Sample.csv → created demo Escalations with Name, Escalation_Date_Time__c, and Reason__c.
 - Field mappings were verified in the wizard before import.
 - This ensured test data was available to validate Flows, Approvals, and Notifications.

Data Import Wizard

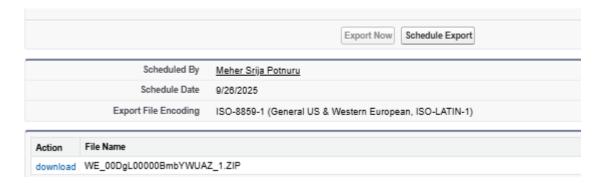


Recent Import Jobs

	Status	Object	Records Created	Records Updated	Records Failed	Start Date	Processing Time (ms)
	Closed	Task Escalation	2	0	0	09-26-2025 07:21	97
	Closed	Reminder Log	0	0	2	09-26-2025 07:19	71

2. Data Export & Backup

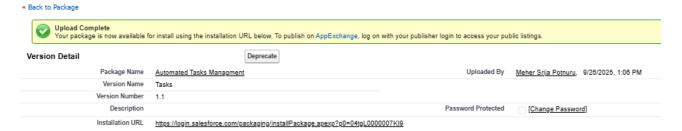
- Used Data Export in Setup to download records from Task, Reminder_Log__c, and Task_Escalation__c.
- Export produced a ZIP of CSV files which were saved as backup.
- This provided a simple rollback mechanism and ensured data could be restored if needed.



3. Unmanaged Package (Metadata Backup & Sharing)

- Created an Unmanaged Package named AutomatedTaskManager_Pkg.
- Added all key components:
 - Custom Objects: Reminder_Log__c, Task_Escalation__c.
 - Flows: FLW_Task_Screen_Approval_v1, FLW_Task_Scheduled_Reminder_v1, FLW_Task_BeforeSave_Defaults_v1, FLW_Task_AfterSave_Escalation_v1, FLW_Task_Autolaunched_Escalation_v1.
 - Validation Rules, Approval Process, Email Templates, and Alerts.
 - Lightning Pages (Task Record Page, Task Manager Home).
 - Custom Tabs for Reminder Logs and Escalations.
- Uploaded the package as Unmanaged, generating an installation link.
- This ensures the project can be ported to another org or restored later.





Project Alignment

By completing Phase-8, the project achieved:

- Availability of demo data for Tasks, Reminders, and Escalations.
- A backup of all data for safety.
- A metadata package for portability and long-term documentation.

These activities make the Automated Task Manager project reliable, reproducible, and easy to demonstrate in different environments.