

# 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

[Help for this page](#) ?

#### 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.

<a href="#">Export Now</a> <a href="#">Schedule Export</a>	
Scheduled By	<u>Meher Srija Potnuru</u>
Schedule Date	9/26/2025
Export File Encoding	ISO-8859-1 (General US & Western European, ISO-LATIN-1)

Action	File Name
<a href="#">download</a>	WE_00DgL00000BmbYWUAZ_1.ZIP

## 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.

Package
AutomatedTaskManager\_Pkg
[Help for](#)

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Package Detail

Edit

Delete

Upload

Package Name

AutomatedTaskManager\_Pkg

Type

Unmanaged

Language

English

Notify on Apex Error

Created By

Meher Srija Potnuru

9/26/2025, 12:32 PM

Last Modified By

Meher Srija Potnuru

9/26/2025, 12:49 PM

Description

Unmanaged package containing Task automation flows, rules, and pages

Components

Versions

Component Name

Search this package

Search

Add

View Dependencies

Action	Component Name	Parent Object	Type	Included By	Owned By
All		Reminder Log	List View	<a href="#">Reminder Log</a>	
All		Task Escalation	List View	<a href="#">Task Escalation</a>	
	<a href="#">Automation Templates</a>		Lightning Email Template Folder	<a href="#">Task Reminder Email</a>	
	ENCODED:([FilterNames.Task_CompletedTasks])	Task	List View	<a href="#">Task Manager</a>	
	<a href="#">Escalated To</a>	Task Escalation	Custom Field	<a href="#">Task Escalation</a>	
	<a href="#">Escalation Date/Time</a>	Task Escalation	Custom Field	<a href="#">FLW Task Autolaunched Escalation v1</a>	
	<a href="#">Escalation Status</a>	Activity	Custom Field	<a href="#">Task Escalation</a>	
				<a href="#">FLW Task AfterSave Escalation v1</a>	
				<a href="#">FLW Task Screen Approval v1</a>	
				<a href="#">FLW Task BeforeSave Defaults v1</a>	
<a href="#">Remove</a>	<a href="#">FLW Task AfterSave Escalation v1</a>		Flow Definition	User Selected	
<a href="#">Remove</a>	<a href="#">FLW Task Autolaunched Escalation v1</a>		Flow Definition	User Selected	
<a href="#">Remove</a>	<a href="#">FLW Task BeforeSave Defaults v1</a>		Flow Definition	User Selected	
<a href="#">Remove</a>	<a href="#">FLW Task Scheduled Reminder v1</a>		Flow Definition	User Selected	
<a href="#">Remove</a>	<a href="#">FLW Task Screen Approval v1</a>		Flow Definition	User Selected	
	<a href="#">Reason</a>	Task Escalation	Custom Field	<a href="#">Task Escalation</a>	
				<a href="#">FLW Task AfterSave Escalation v1</a>	
<a href="#">Remove</a>	<a href="#">Record Page</a>		Lightning Page	User Selected	
<a href="#">Remove</a>	<a href="#">Reminder Log</a>		Custom Object	User Selected	
<a href="#">Remove</a>	<a href="#">Reminder Log</a>		Tab	User Selected	
	Reminder Log Layout	Reminder Log	Page Layout	<a href="#">Reminder Log</a>	
	<a href="#">Reminder Sent</a>	Activity	Custom Field	<a href="#">FLW Task BeforeSave Defaults v1</a>	
				<a href="#">FLW Task Screen Approval v1</a>	
				<a href="#">FLW Task Scheduled Reminder v1</a>	

Package Version
Automated Tasks Managment, Version 1.1
[Back to Package](#)

Upload Complete

Your package is now available for install using the installation URL below. To publish on [AppExchange](#), log on with your publisher login to access your public listings.

Version Detail

Deprecate

Package Name

Automated Tasks Managment

Uploaded By

Meher Srija Potnuru

9/26/2025, 1:08 PM

Version Name

Tasks

Version Number

1.1

Description

Password Protected

☐ [\[Change Password\]](#)

Installation URL

<https://login.salesforce.com/packaging/installPackage.apexp?p0=04tgL0000007Kl9>

# 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.