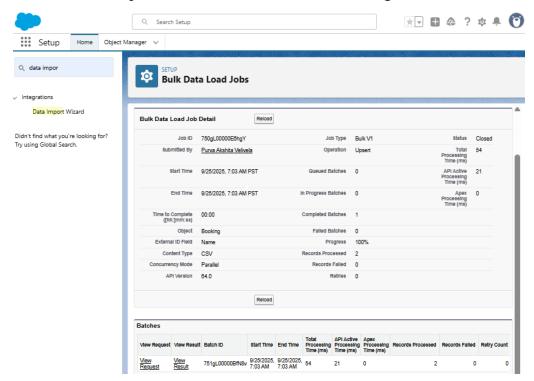
Phase 8: Data Management & Deployment

1. Data Import Wizard (Add Travelers, Cars, Bookings)

Purpose: Import CSV data into Salesforce.

Steps:

- 1. Setup → Quick Find → Data Import Wizard → Launch Wizard
- 2. Select object to import:
 - o Traveler → Import traveler records
 - \circ Car \rightarrow Import car records
 - Booking → Import booking records
- 3. Choose Add new records (or Update existing records if you have IDs)
- 4. Upload CSV file
- 5. Map CSV columns → Salesforce fields (e.g., Traveler Name → Name, Email → Email, Phone → Phone)
- 6. Click Start Import
- 7. Wait for completion \rightarrow Check Success & Error logs.



2. Duplicate Rules (Prevent duplicate Travelers/Bookings)

Purpose: Ensure no duplicate records are created.

Steps:

1. Setup \rightarrow Quick Find \rightarrow Duplicate Rules \rightarrow New Rule

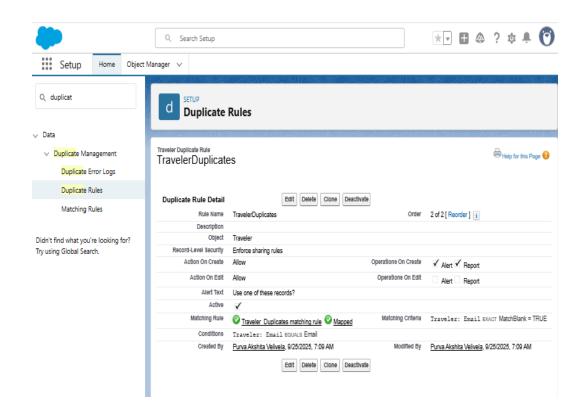
2. Select Object: Traveler

3. Rule Name: Traveler Duplicates

4. Conditions: e.g., Email equals Email

5. Action on Create/Edit: Alert or Block

6. Save \rightarrow Activate

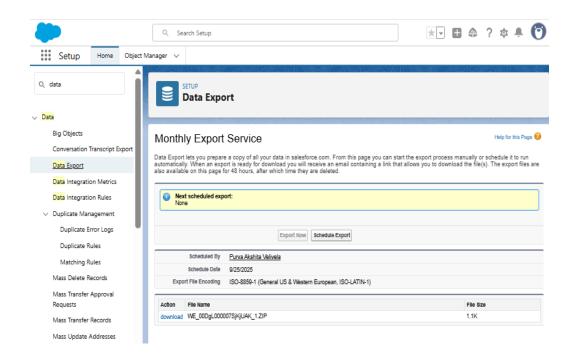


3. Data Export & Backup (Backup your project data)

Purpose: Regular backup of your app data.

Steps:

- 1. Setup \rightarrow Quick Find \rightarrow Data Export \rightarrow Export Now
- 2. Select objects:
 - Traveler
 - Car
 - Booking
- 3. Click Start Export
- 4. Download zip files \rightarrow Store safely



4. Unmanaged Package (Share your app)

- 1. Setup \rightarrow Quick Find \rightarrow Packages \rightarrow New
- 2. Package Name: Travel Booking App
- 3. Add Components:
 - o Objects → Traveler, Car, Booking
 - o Fields, Record Types, Page Layouts
 - o Flows, Email Alerts, Tasks, Notifications
- 4. Save \rightarrow Upload
- 5. Share generated link with other orgs/users

