

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:
 - Traveler → Import traveler records
 - Car → 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 → Check Success & Error logs.

The screenshot displays the Salesforce Bulk Data Load Jobs interface. The left sidebar shows the navigation menu with 'Setup' selected. The main content area is titled 'Bulk Data Load Jobs' and contains a 'Bulk Data Load Job Detail' section. This section includes a 'Reload' button and a table of job details. Below this, there is a 'Batches' section with a table listing individual batches.

Bulk Data Load Job Detail		Job ID	Job Type	Bulk V1	Status	Closed
Submitted By	Purna Akshita Velivela	Operation	Upsert		Total Processing Time (ms)	54
Start Time	9/25/2025, 7:03 AM PST	Queued Batches	0		API Active Processing Time (ms)	21
End Time	9/25/2025, 7:03 AM PST	In Progress Batches	0		Apex Processing Time (ms)	0
Time to Complete (hh:mm:ss)	00:00	Completed Batches	1			
Object	Booking	Failed Batches	0			
External ID Field	Name	Progress	100%			
Content Type	CSV	Records Processed	2			
Concurrency Mode	Parallel	Records Failed	0			
API Version	64.0	Retries	0			

Batches										
View Request	View Result	Batch ID	Start Time	End Time	Total Processing Time (ms)	API Active Processing Time (ms)	Apex Processing Time (ms)	Records Processed	Records Failed	Retry Count
View Request	View Result	751gL00000BfN8v	9/25/2025, 7:03 AM	9/25/2025, 7:03 AM	54	21	0	2	0	0

2. Duplicate Rules (Prevent duplicate Travelers/Bookings)

Purpose: Ensure no duplicate records are created.

Steps:

1. Setup → Quick Find → Duplicate Rules → 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 → Activate

The screenshot displays the Salesforce Setup interface. The left sidebar shows the navigation menu with 'Setup' selected. The main content area is titled 'Duplicate Rules' and shows the configuration for a rule named 'TravelerDuplicates'. The rule is active and has a matching rule 'Traveler_Duplicates matching rule' which is mapped. The conditions are 'Traveler: Email EQUALS Email'. The actions on create and edit are 'Allow'. The alert text is 'Use one of these records?'. The matching criteria are 'Traveler: Email EXACT MatchBlank = TRUE'. The rule was created by 'Purva Akshita Velivela' on 9/25/2025, 7:09 AM.

Setup Home Object Manager

Q duplicat

▼ Data

▼ Duplicate Management

Duplicate Error Logs

Duplicate Rules

Matching Rules

Didn't find what you're looking for?
Try using Global Search.

SETUP

Duplicate Rules

Traveler Duplicate Rule

TravelerDuplicates

Help for this Page

Duplicate Rule Detail Edit Delete Clone Deactivate

Rule Name TravelerDuplicates Order 2 of 2 [Reorder] [i]

Description

Object Traveler

Record-Level Security Enforce sharing rules

Action On Create Allow Operations On Create ☒ Alert ☒ Report

Action On Edit Allow Operations On Edit ☐ Alert ☐ Report

Alert Text Use one of these records?

Active ☒

Matching Rule ☒ Traveler_Duplicates matching rule ☒ Mapped Matching Criteria Traveler: Email EXACT MatchBlank = TRUE

Conditions Traveler: Email EQUALS Email

Created By Purva Akshita Velivela 9/25/2025, 7:09 AM Modified By Purva Akshita Velivela 9/25/2025, 7:09 AM

Edit Delete Clone Deactivate

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

Purpose: Regular backup of your app data.

Steps:

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

The screenshot shows the Salesforce 'Data Export' setup page. The left sidebar contains a navigation menu with 'Data' expanded, showing options like 'Big Objects', 'Conversation Transcript Export', 'Data Export' (highlighted), 'Data Integration Metrics', 'Data Integration Rules', 'Duplicate Management', 'Duplicate Error Logs', 'Duplicate Rules', 'Matching Rules', 'Mass Delete Records', 'Mass Transfer Approval Requests', 'Mass Transfer Records', and 'Mass Update Addresses'. The main content area is titled 'Data Export' and 'Monthly Export Service'. It includes a description of the service, a 'Next scheduled export' status (None), and buttons for 'Export Now' and 'Schedule Export'. Below this, a table shows the scheduled export details: Scheduled By (Purva Akshita Velivela), Schedule Date (9/25/2025), and Export File Encoding (ISO-8859-1). At the bottom, a table lists the export file with columns for Action, File Name, and File Size, showing a download link for 'WE_00DgL000007SjkjUAK_1.ZIP' with a size of 1.1K.

Action	File Name	File Size
download	WE_00DgL000007SjkjUAK_1.ZIP	1.1K

4. Unmanaged Package (Share your app)

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

The screenshot shows the Salesforce Package Manager interface. On the left, a sidebar contains a search bar with 'pack' entered, and a list of 'Apps' including 'Packaging', 'Installed Packages', 'Package Manager' (highlighted), and 'Package Usage'. Below this is a message: 'Didn't find what you're looking for? Try using Global Search.'

The main content area is titled 'Package Manager' and 'Travel Booking App'. It includes a 'Help for this Page' link. Below the title is a 'Back to Package List' link. The 'Package Detail' section shows the package name 'Travel Booking App', type 'Unmanaged', language 'English', and a notification 'Notify on Apex Error'. It also displays the creator 'Purva Akshita Velivela' and the last modified date '9/25/2025, 7:52 AM'. A 'Description' field is present but empty.

The 'Components' tab is active, showing a table of components. The table has columns: Action, Component Name, Parent Object, Type, and Included By. The components listed are:

Action	Component Name	Parent Object	Type	Included By
All		Traveler	List View	Traveler
All		Booking	List View	Booking
All		Payment	List View	Payment
All		Trip	List View	Trip
All		Travel Request	List View	Travel Request
	Amount	Payment	Custom Field	Payment Payment amount must be pos Payment Compact Layout
	Approve	Travel Request	Action	Travel Request Travel Request Record Page
	Ranking		Tab	Travel Ranking App