


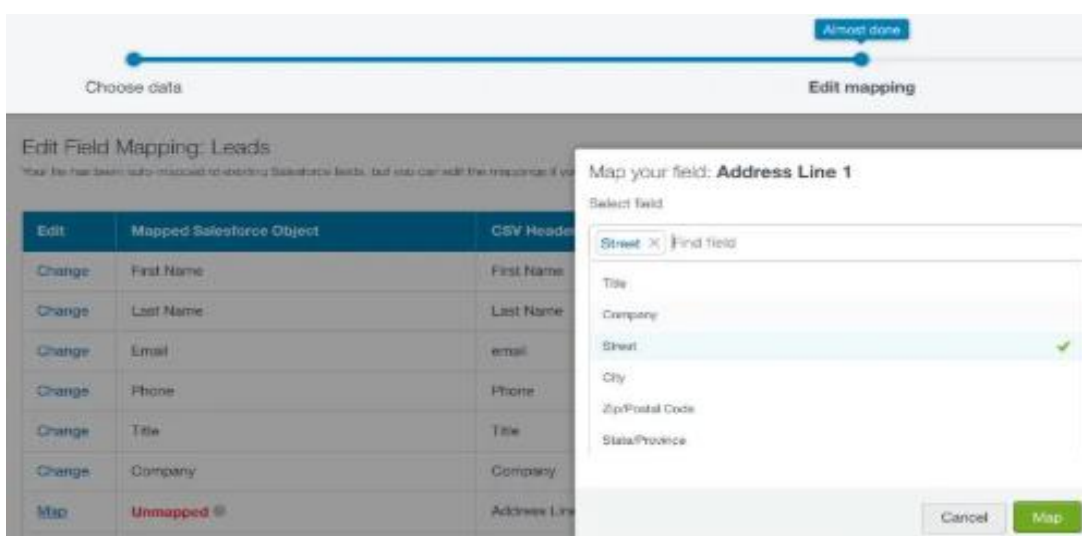
Corporate Travel & Expense Management System Project

Phase 8: Data Management & Deployment

 **Goal:** Manage travel & expense data effectively and deploy configurations securely.

1. Data Import Wizard

- Use to load small sets of Travel Requests (**Travel_Request__c**) and Expense Claims (**Expense_Claim__c**) from CSV.
- Great for employee test data (10–20 records).



2. Data Loader

- Use for bulk uploads (e.g., 5,000+ Expense Claims).
- Supports Insert, Update, Upsert, Delete.
- Example: Import historical expense records into **Expense_Claim__c.Amount__c** and **Status__c**.

3. Duplicate Rules

- Rule on **Travel_Request__c**: Prevent duplicate requests with same **Start_Date__c**, **End_Date__c**, and **OwnerId**.
- Rule on **Expense_Claim__c**: Prevent duplicate claims for same **Date__c** + **Category__c**.

The screenshot shows the Salesforce Setup interface. On the left, the 'Setup' menu is open, and 'Home' is selected. The main content area is titled 'Duplicate Rules' and shows a table with one rule: 'PreventDuplicateTravelRequests'. The rule details are as follows:

Duplicate Rule Detail		Order	1 of 1 [Reorder]
Rule Name	PreventDuplicateTravelRequests		
Description			
Object	Travel Request		
Record-Level Security	Enforce sharing rules		
Action On Create	Allow	Operations On Create	<input checked="" type="checkbox"/> Alert <input checked="" type="checkbox"/> Report
Action On Edit	Allow	Operations On Edit	<input type="checkbox"/> Alert <input type="checkbox"/> Report
Alert Text	Use one of these records?		
Active	<input type="checkbox"/>		
Conditions	Travel Request: Start Date NOT EQUAL TO NULL		
Created By	Samridh Maurya, 9/26/2025, 4:50 AM	Modified By	Samridh Maurya, 9/26/2025, 4:50 AM

The screenshot shows the Salesforce Setup interface. On the left, the 'Setup' menu is open, and 'Home' is selected. The main content area is titled 'Duplicate Rules' and shows a table with one rule: 'PreventDuplicateExpenseClaims'. The rule details are as follows:

Duplicate Rule Detail		Order	1 of 1 [Reorder]
Rule Name	PreventDuplicateExpenseClaims		
Description			
Object	Expense Claim		
Record-Level Security	Enforce sharing rules		
Action On Create	Block	Operations On Create	<input type="checkbox"/> Alert <input type="checkbox"/> Report
Action On Edit	Allow	Operations On Edit	<input type="checkbox"/> Alert <input type="checkbox"/> Report
Alert Text	Use one of Duplicate Expense Claim: same date and category already exist. these records?		
Active	<input type="checkbox"/>		
Conditions	Expense Claim: Expense Claim Name EQUALS NULL		
Created By	Samridh Maurya, 9/26/2025, 4:55 AM	Modified By	Samridh Maurya, 9/26/2025, 4:55 AM

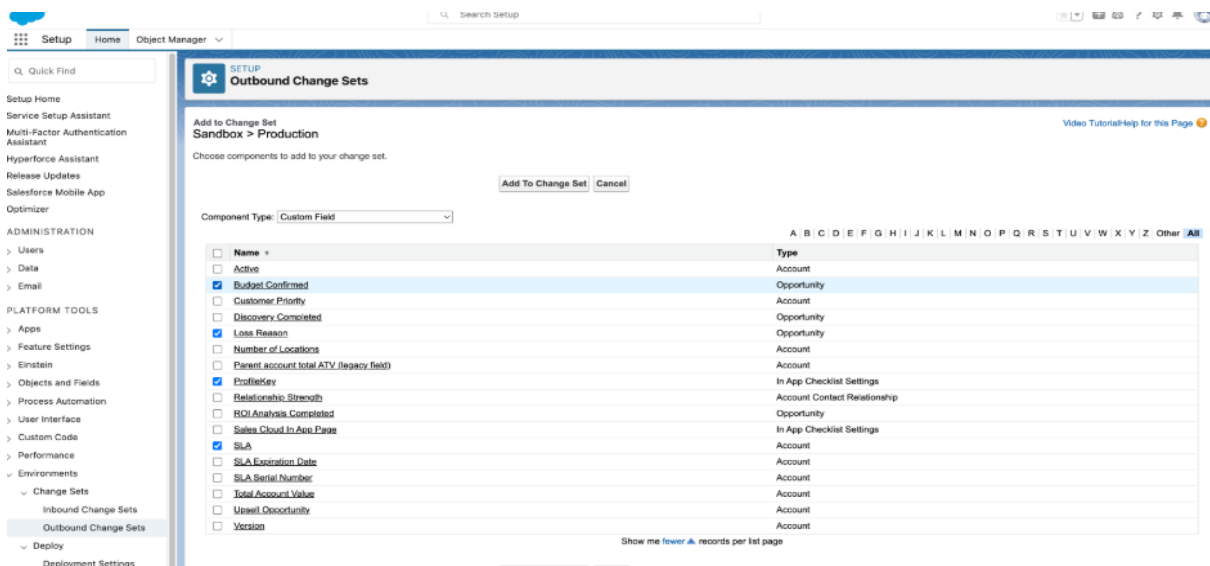
4. Data Export & Backup

- Weekly export of all data (**Travel Requests** + **Expense Claims**).
- Store CSV backups for audit.

- Use Setup → Data Export.

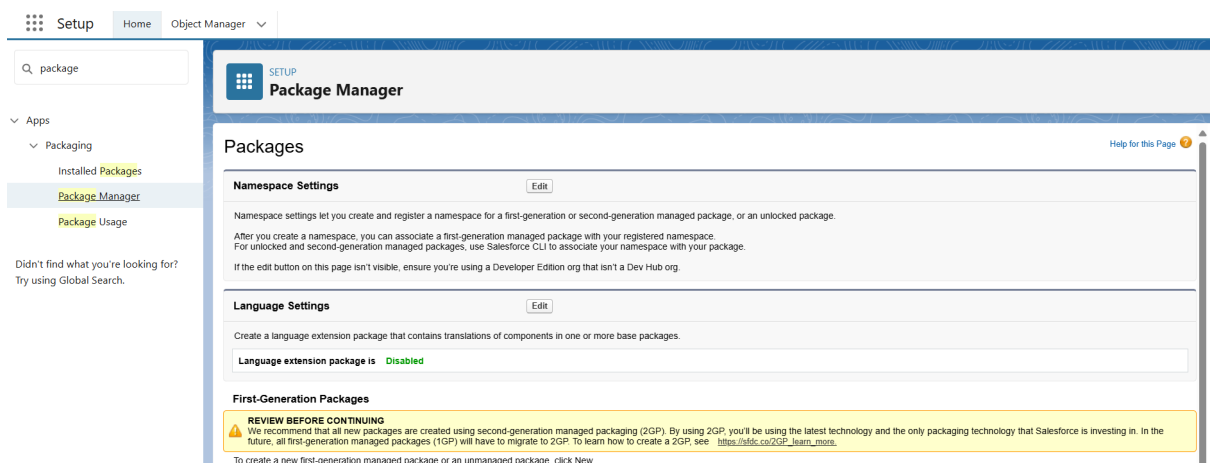
5. Change Sets

- Deploy Flows, Validation Rules, Objects (**Travel_Request__c**, **Expense_Claim__c**) from Sandbox → Production.
- Include Approval Processes for Manager/Finance.



6. Unmanaged vs Managed Packages

- **Unmanaged** → For project demo (all metadata editable).
- **Managed** → Future marketplace app version (locked metadata).



7. ANT Migration Tool

- For developers: Deploy metadata (flows, objects, fields) via command line.
- Example: Migrate **Travel_Request__c** and related automation XML files.

8. VS Code & SFDX

- Use Salesforce CLI (**sfdx**) to push/pull metadata.
 - Example commands:
 - **sfdx force: source: push** → deploy Travel & Expense objects.
 - **sfdx force: data:tree: import** → load Travel Request + Expense Claim sample data.
-