


# Corporate Travel & Expense Management System Project

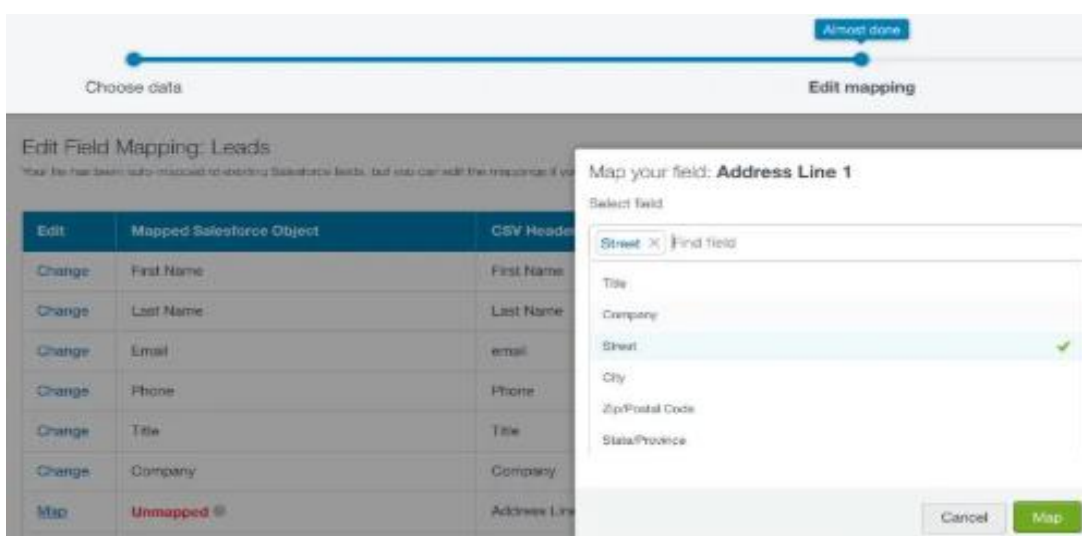
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## Phase 8: Data Management & Deployment

 **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. The left sidebar contains navigation links: Setup Home, Salesforce Go, Service Setup Assistant, Commerce Setup Assistant, Field Service Setup Home (Beta), Hyperforce Assistant, Release Updates, Salesforce Mobile App, Lightning Usage, Optimizer, Sales Cloud Everywhere, ADMINISTRATION, > Users, > Data, Big Objects, and Conversation Transcript Export. The main content area is titled 'Duplicate Rules' and shows the 'Travel Request Duplicate Rule' configuration. The rule name is 'PreventDuplicateTravelRequests'. The object is 'Travel Request'. The record-level security is 'Enforce sharing rules'. The action on create is 'Allow'. The action on edit is 'Allow'. The alert text is 'Use one of these records?'. The alert is active. The conditions are 'Travel Request: Start Date NOT EQUAL TO NULL'. The rule was created by Samridh Maurya on 9/26/2025 at 4:50 AM. The rule is currently active.

The screenshot shows the Salesforce Setup interface. The left sidebar contains navigation links: Setup Home, Salesforce Go, Service Setup Assistant, Commerce Setup Assistant, Field Service Setup Home (Beta), Hyperforce Assistant, Release Updates, Salesforce Mobile App, Lightning Usage, Optimizer, Sales Cloud Everywhere, ADMINISTRATION, > Users, > Data, Big Objects, and Conversation Transcript Export. The main content area is titled 'Duplicate Rules' and shows the 'Expense Claim Duplicate Rule' configuration. The rule name is 'PreventDuplicateExpenseClaims'. The object is 'Expense Claim'. The record-level security is 'Enforce sharing rules'. The action on create is 'Block'. The action on edit is 'Allow'. The alert text is 'Use one of Duplicate Expense Claim: same date and category already exist. these records?'. The alert is active. The conditions are 'Expense Claim: Expense Claim Name EQUALS NULL'. The rule was created by Samridh Maurya on 9/26/2025 at 4:55 AM. The rule is currently active.

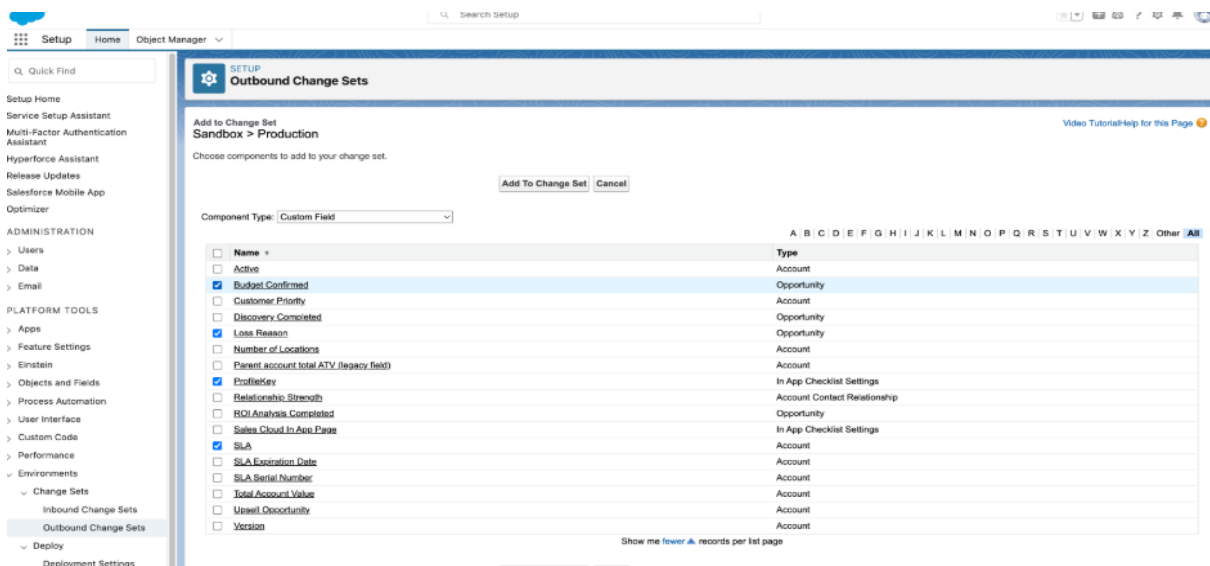
### 4. Data Export & Backup

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

- Use Setup → Data Export.

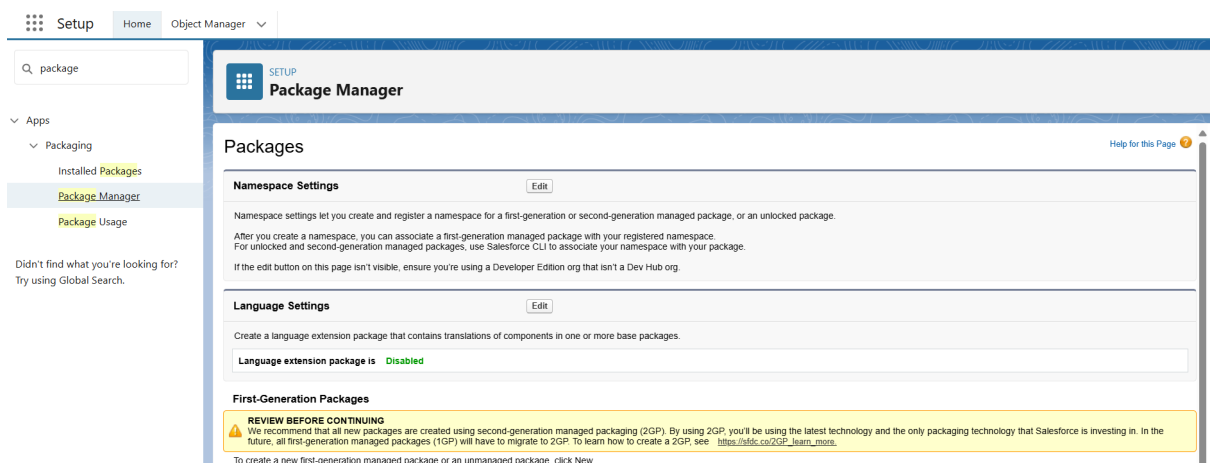
## 5. Change Sets

- 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.
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