

# Project: RenewSure – Smart Contract Expiry & Renewal Tracker

## Phase 8: Data Management & Deployment

This phase covers all aspects of managing data and deploying changes in Salesforce, ensuring that the system remains consistent, reliable, and ready for production use.

### 1. Data Import Wizard

**Purpose:** Import sample contracts, accounts, and contacts into Salesforce without using code.

**Steps Followed:** 1. Setup → Data → Data Import Wizard

2. Selected **Standard Objects:** Accounts, Contacts, Contracts

3. Chose **CSV file** prepared with required fields

4. Mapped CSV columns to Salesforce fields:

- Account: Name, Industry, Phone, Email

- Contact: First Name, Last Name, Email, Related Account

- Contract: Contract Number, Name, Start Date, End Date, Status, Related Account

5. Reviewed and **started import**

6. Verified records in Salesforce

The screenshot shows the 'Bulk Data Load Jobs' page in the Salesforce setup. The top navigation bar has 'SETUP' and a gear icon. Below it, the title 'Bulk Data Load Jobs' is displayed. A backlink 'Back to List: Bulk Data Load Jobs' is present. The main content area is titled 'Bulk Data Load Job Detail' and contains a table with various job details. At the bottom, there are 'Abort' and 'Reload' buttons. A 'Batches' tab is visible at the bottom left.

Job ID	750gL00000E9PtD	Job Type	Bulk V1	Status	Closed
Submitted By	Rupal Parlewar	Operation	Insert	Total Processing Time (ms)	0
Start Time	9/26/2025, 1:52 AM PST	Queued Batches	1	API Active Processing Time (ms)	0
End Time		In Progress Batches	0	Apex Processing Time (ms)	0
Time to Complete ([hh:]mm:ss)		Completed Batches	0		
Object	Contract	Failed Batches	0		
External ID Field		Progress	0%		
Content Type	CSV	Records Processed	0		
Concurrency Mode	Parallel	Records Failed	0		
API Version	64.0	Retries	0		

## 2. Duplicate Rules

**Purpose:** Prevent duplicate Accounts, Contacts, or Contracts in the system.

**Steps Followed:** 1. Setup → Duplicate Management → Duplicate Rules

2. Created **Account Duplicate Rule:**

- Matching Rule: Match Account Name & Email
- Action: Alert and Block

3. Created **Contact Duplicate Rule:**

- Matching Rule: Match First Name, Last Name & Email
- Action: Alert only

4. Activated duplicate rules

5. Tested by attempting to create duplicate records

The screenshot shows the Salesforce 'Duplicate Rules' page under the 'Setup' menu. The page title is 'Duplicate Rules'. A sub-header 'All Duplicate Rules' is visible. A 'What Are Duplicate Rules?' help section is present with a 'Help for this Page' link. A 'View' dropdown is set to 'All Duplicate Rules'. The main content is a table listing six duplicate rules, each with a 'New Rule' button. The columns are: Rule Name, Description, Object, Matching Rule, Active, Last Modified By, and Last Modified Date.

Rule Name	Description	Object	Matching Rule	Active	Last Modified By	Last Modified Date
Contract_Duplicate_Rule	Prevent duplicate contracts based on Contract Number or Name.	Contract	Contract_Duplicate_Rule_matching_rule	<input checked="" type="checkbox"/>	par	9/25/2025
FollowUp_Duplicate_Rule		FollowUp		<input type="checkbox"/>	par	9/25/2025
Renewal_Duplicate_Rule	Avoid duplicate renewals for the same contract.	Renewal		<input type="checkbox"/>	par	9/25/2025
Standard_Account_Duplicate_Rule	Identify accounts that duplicate other accounts.	Account	Standard_Account_Matching_Rule	<input checked="" type="checkbox"/>	QEPIC	9/10/2025
Standard_Contact_Duplicate_Rule	Identify contacts that duplicate other contacts and leads.	Contact	Standard_Lead_Matching_Rule Standard_Contact_Matching_Rule	<input checked="" type="checkbox"/>	QEPIC	9/10/2025
Standard_Lead_Duplicate_Rule	Identify leads that duplicate other leads and contacts.	Lead	Standard_Lead_Matching_Rule Standard_Contact_Matching_Rule	<input checked="" type="checkbox"/>	QEPIC	9/10/2025

### 3. Data Export & Backup

**Purpose:** Ensure data safety by performing scheduled or manual backups.

**Steps Followed:** 1. Setup → Data → Data Export

2. Selected objects: Accounts, Contacts, Contracts, Renewals, FollowUps

3. Scheduled weekly export

4. Exported and downloaded CSV backup

The screenshot shows the Salesforce Data Export page. At the top, there's a header with a gear icon labeled 'SETUP' and the title 'Data Export'. Below the header, the page title is 'Monthly Export Service'. On the right, there's a 'Help for this Page' link with a question mark icon. The main content area has a yellow banner at the top stating 'Next scheduled export: None'. Below this, there are two buttons: 'Export Now' and 'Schedule Export'. Underneath these buttons, there are three lines of information: 'Scheduled By: Runal Parlewar', 'Schedule Date: 9/25/2025', and 'Export File Encoding: ISO-8859-1 (General US & Western European, ISO-LATIN-1)'. At the bottom, there's a table with one row showing a download action for a file named 'WE\_00DgL00000BJUTIUAP\_1.ZIP' which is 6.9K in size. The URL 'htning.force.com/lightning/setup/DataManagementExport/home' is visible at the very bottom of the page.

Action	File Name	File Size
download	WE_00DgL00000BJUTIUAP_1.ZIP	6.9K

## 5. VS Code & SFDX

**Purpose:** Version control, development, and deployment using Salesforce DX.

**Steps Followed:** 1. Installed **VS Code** and **Salesforce Extension Pack**

2. Installed **Salesforce CLI (SFDX)**

3. Connected org:

```
bash sfdx auth:web:login -d -a RenewSureDevHub
```

4. Created SFDX project and retrieved metadata

5. Deployed Apex classes, LWC, and Flows using CLI:

```
bash sfdx force:source:deploy -p force-app/main/default
```

6. Verified deployment in Salesforce

The screenshot shows the VS Code interface with the following details:

- EXPLORER:** Shows the project structure for "RENEWSURE". It includes a ".vscode" folder, "config", "classes" (containing "ContractsDashboardController.cls" and its metadata file), "contentassets", "flexipages", "layouts", "lwc" (containing "contractsDashboard" and its files), "objects", "permissionsets", "staticresources", "tabs", "triggers", and various configuration files like ".forceignore", ".gitignore", ".prettierrc", ".eslint.config.js", "jest.config.js", and "package.json".
- TERMINAL:** Displays the command: `sfdx force:source:deploy -p force-app/main/default`. Below it, the deployment process is shown:
  - Deploying Metadata
  - Deploying v64.0 metadata to parlewarrun12211656@agentforce.com using the v64.0 SOAP API.
  - Preparing 425ms
  - Waiting for the org to respond - Skipped
  - Deploying Metadata 1.15s
    - Components: 2/2 (100%)
    - Running Tests - Skipped
    - Updating Source Tracking - Skipped
  - Done 0ms
- STATUS:** Status: **Succeeded**
  - Deploy ID: 0Af10000AhbD6AJ
  - Target Org: parlewarrun12211656@agentforce.com
  - Elapsed Time: 1.59s
- Bottom Status Bar:** Shows "Ln 20, Col 5 Spaces: 4 UTF-8 LF ⚡ HTML 🌐 Signed out 🛡️ Prettier 🎨"

**✓ Completion Status:** All data management and deployment tasks have been configured and verified in the **RenewSure Dev Org**, ready for production usage.