

## **PHASE – 8 Data Management & Deployment**

In this phase, I worked on preparing data, preventing duplicates, backing up information, and setting up deployment for my Expense Tracker project. Below are the steps I followed.

## 1. Building Data Templates

I prepared two CSV files:

- budgets.csv
- expenses.csv

## 2. Importing Data

- For **Budgets**, I used **Data Import Wizard**. I mapped fields correctly and loaded budgets.csv.
- For **Expenses**, I used **Data Import Wizard**. I mapped fields correctly and loaded expenses.csv.

[illegible]

### 3. Preventing Duplicates

To avoid duplicate expenses:

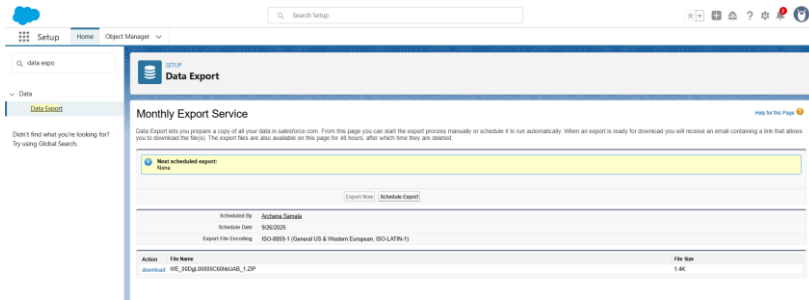
1. I created a Matching Rule on ET\_Expense\_\_c using Name, Amount, and Date.
2. I created a Duplicate Rule using this Matching Rule. I set the action to Alert, so Salesforce warns me if I enter a duplicate expense.

The screenshot displays the AWS IAM console interface for managing duplicate rules. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The left sidebar shows a tree view with 'Duplicate Management' expanded, containing 'Duplicate Error Logs' and 'Duplicate Rules'. The main content area is titled 'Duplicate Rules' and shows a list of rules. The selected rule, 'ET Expense Matching By Domain/Category', is highlighted in blue. The 'Duplicate Rule Detail' section shows the rule's configuration: Name (ET Expense Duplicate Check), Description (ET Expense Expense sharing rules), Action On Error (Allow), and Matching Rule (ET Expense Matching By Domain/Category, Approved). The rule was created by Arshana Saranya on 10/20/2015 at 11:42 AM.

#### 4. Data Backup

I performed both manual and scheduled backups:

- Used **Data Export (Setup → Data Export)** to download a ZIP of all data.
- Scheduled monthly exports for both ET Budget c and ET Expense c.



## 4.VSCode & SFDX Commands

- VSCode is for Salesforce development (Apex, Trigger, LWC, Metadata).
- SFDX: Command-line tool to retrieve, deploy and manage metadata between Salesforce org and local project.

