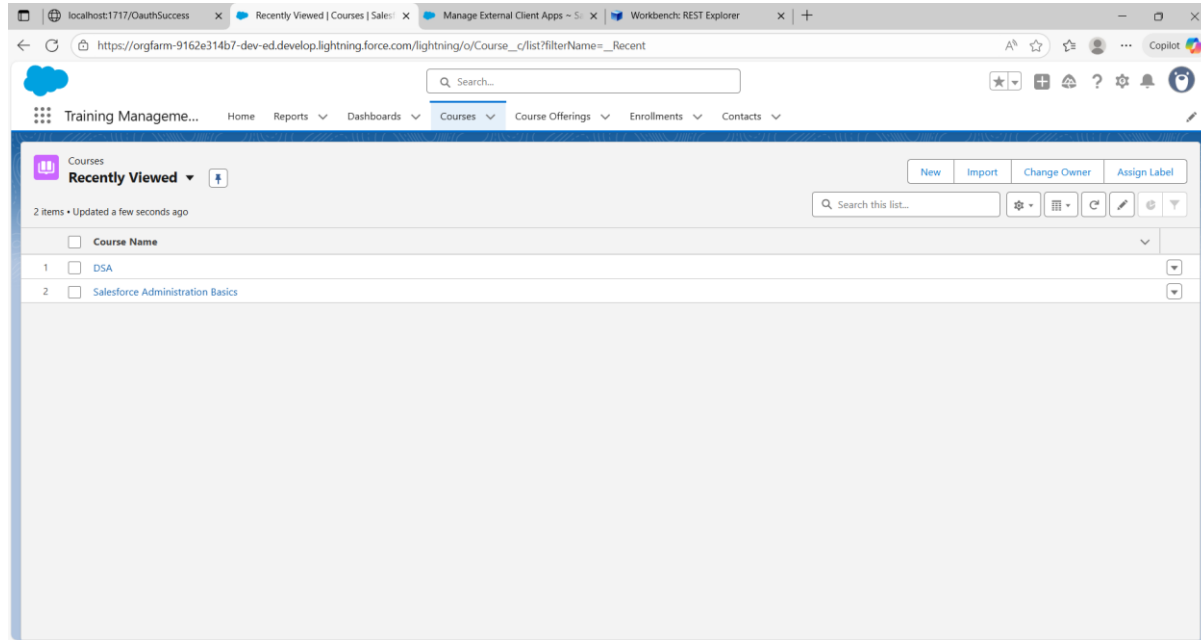


Phase 8: Data Management & Deployment

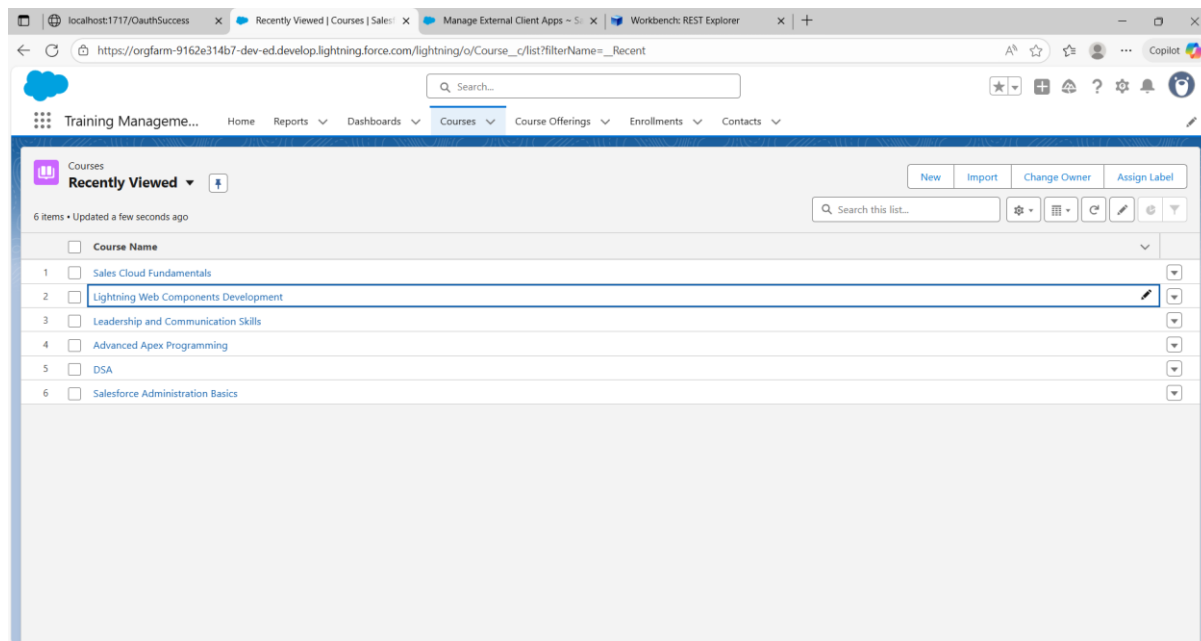
Section 1: Create Sample Data

Step:1 Creating courses



Added few more courses, they are:

1. Advanced Apex Programming
2. Leadership and Communication Skills
3. Lightning Web Components Development
4. Sales Cloud Fundamentals



Step 2: Create Course Offerings

The screenshot shows the Salesforce Training Management interface. The top navigation bar includes 'Home', 'Reports', 'Dashboards', 'Courses', 'Course Offerings' (selected), 'Enrollments', and 'Contacts'. The 'Course Offerings' section is titled 'Recently Viewed' and shows a list of 2 items. The list has columns for 'Offering Number' and 'Course Offering'. The first item is '1' with 'CO-0001' and the second is '2' with 'CO-0002'. The interface also includes a search bar, a 'New' button, and an 'Import' button.

Offering Number	Course Offering
1	CO-0001
2	CO-0002

The screenshot shows the 'New Course Offering' form in the Salesforce Training Management interface. The form is titled 'New Course Offering' and includes a section for 'Course Information' and a section for 'Schedule'. The 'Course Information' section includes fields for 'Course' (Sales Cloud Fundamentals), 'Instructor' (Sahithi Karise), and 'Location' (Conference Room B, Building 1, Floor 3). The 'Schedule' section includes fields for 'Start Date' (10/18/2025), 'End Date' (10/22/2025), and 'Start Time' (9:00:00 AM). The form also includes a 'Save' button and a 'Cancel' button.

Course Information

- * Course: Sales Cloud Fundamentals
- Instructor: Sahithi Karise
- * Location: Conference Room B, Building 1, Floor 3

Schedule

- * Start Date: 10/18/2025
- * End Date: 10/22/2025
- * Start Time: 9:00:00 AM

Buttons: Cancel, Save & New, Save

localhost:1717/OauthSuccess x Recently Viewed | Course Offerings x Manage External Client Apps ~ 5 x Workbench: REST Explorer x +

https://orgfarm-9162e314b7-dev-ed.develop.lightning.force.com/lightning/o/Course_Offering__c/list?filterName=_Recent

Training Manage... Home Reports Dashboards Courses Course Offerings Enrollments Contacts

Course Offerings Recently Viewed 7 items • Updated a few seconds ago

New Import Change Owner Assign Label

Offering Number

1	<input type="checkbox"/>	CO-0007	
2	<input type="checkbox"/>	CO-0006	
3	<input type="checkbox"/>	CO-0005	
4	<input type="checkbox"/>	CO-0004	
5	<input type="checkbox"/>	CO-0003	
6	<input type="checkbox"/>	CO-0001	
7	<input type="checkbox"/>	CO-0002	

Step 3: Create Contacts (Participants)

localhost:1717/OauthSuccess x Contact Intelligence View | Contacts x Manage External Client Apps ~ 5 x Workbench: REST Explorer x +

https://orgfarm-9162e314b7-dev-ed.develop.lightning.force.com/lightning/o/Contact/pipelineInspection?filterName=00BgK00000HTGu1UAH

Training Manage... Home Reports Dashboards Courses Course Offerings Enrollments Contacts

Contacts My Contacts

Created This Quarter Owner Me

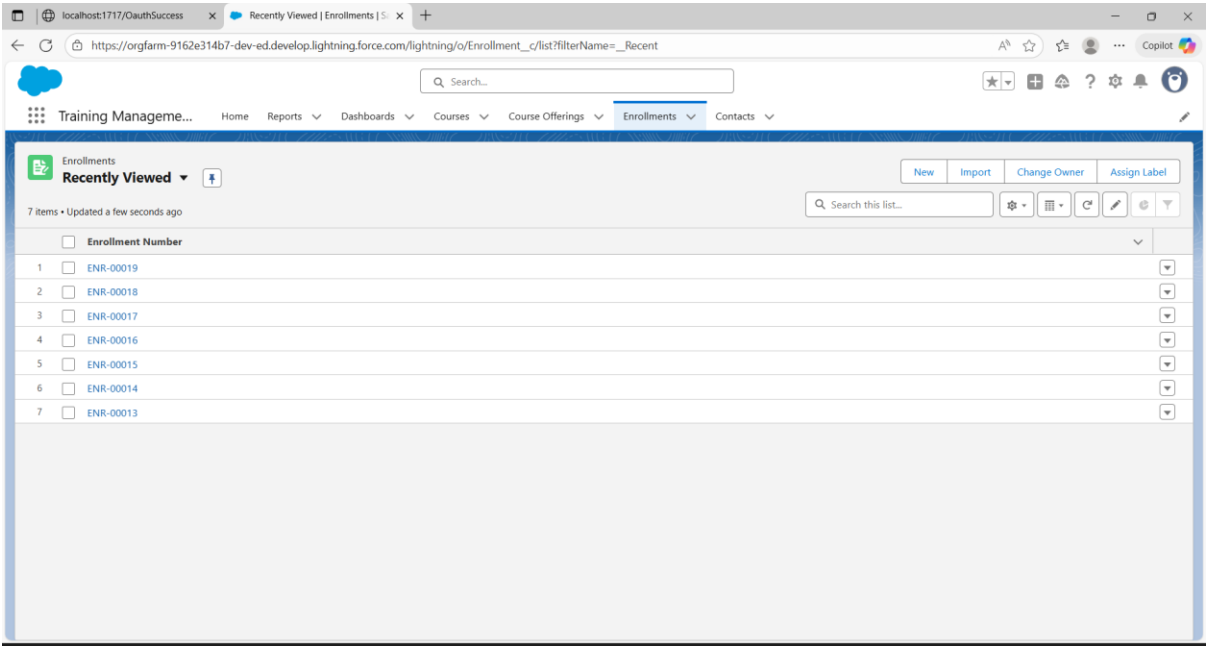
Total Contacts 11 No Activity 11 Idle 0 No Upcoming 0 Overdue 0 Due Today 0 Upcoming 0

11 items • Filtered by Created Date, Me, Total Contacts

Send Email Assign Label

	Name	Title	Account Name	Last Activity	Actions
1	<input type="checkbox"/> Test Participant	Student			
2	<input type="checkbox"/> Sahithi Karise	Teacher			
3	<input type="checkbox"/> Sathvi Karise	Student			
4	<input type="checkbox"/> Nithya Reddy	Student			
5	<input type="checkbox"/> Emily Davis	Sales Representative			
6	<input type="checkbox"/> Michael Williams	Team Lead			
7	<input type="checkbox"/> David Brown	Senior Developer			
8	<input type="checkbox"/> John Smith	Junior Developer			
9	<input type="checkbox"/> Sarah Johnson	System Administrator			

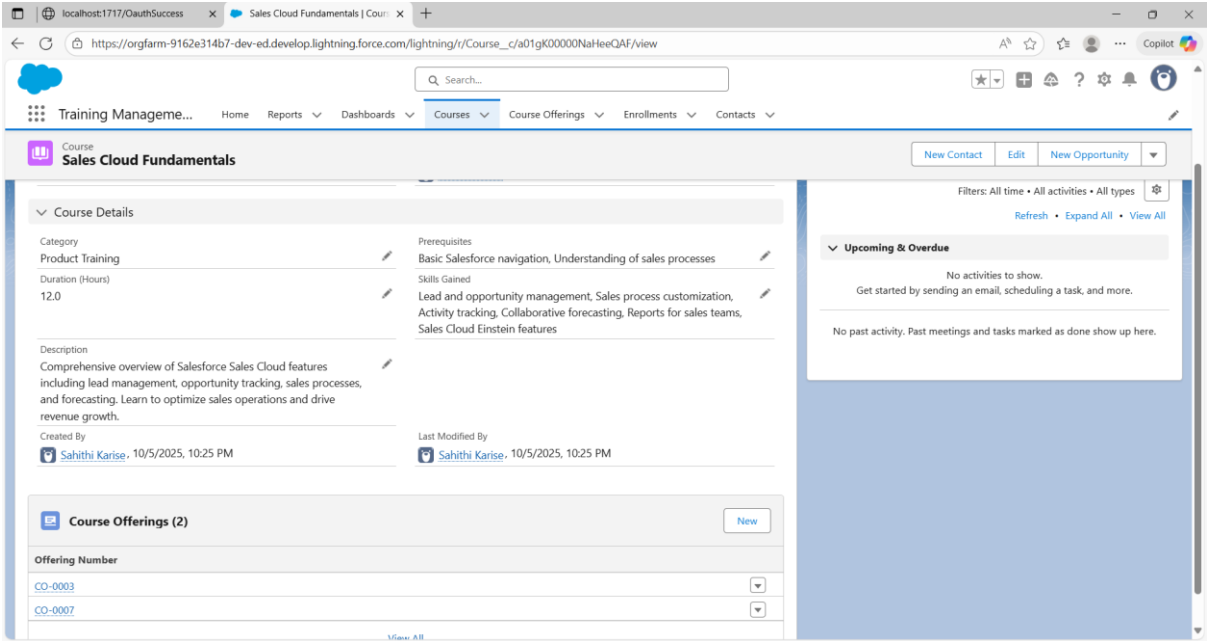
Step 4: Create Enrollments



Section 2:

Verify Data Relationships

Step 1: Verify Course → Course Offerings



Step 2: Verify Course Offering → Enrollments

Training Management System

Enrollment: **ENR-00017**

Related

Enrollment Information	
Participant Jennifer Garcia	Course Offering CO-0003
Enrollment Date 10/6/2025	Status Confirmed

Progress & Feedback	
Attendance Marked <input type="checkbox"/>	Completion Date
Certificate Sent <input type="checkbox"/>	Feedback
Enrollment Number ENR-00017	Owner Sahithi Karise
Created By Sahithi Karise , 10/6/2025, 2:31 AM	Last Modified By Sahithi Karise , 10/6/2025, 2:31 AM

No related lists to display

Activity

Filters: All time • All activities • All types

[Refresh](#) • [Expand All](#) • [View All](#)

Upcoming & Overdue

No activities to show.
Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

Step 3: Verify Contact → Enrollments

localhost:1717/OauthSuccess x Lisa Anderson | Contact | Salesforce x +

https://orgfarm-9162e314b7-dev-ed.develop.lightning.force.com/lightning/r/Contact/003gK0000003881QAB/view

Search...

Training Management... Home Reports Dashboards Courses Course Offerings Enrollments **Contacts**

Contact
Mrs. Lisa Anderson

+ Follow New Case New Note Submit for Approval

Opportunities (0) New

Cases (0) New

Campaign History (0) Add to Campaign

Notes & Attachments (0) Upload Files

Upload Files
Or drop files

Course Enrollments (2) New

Enrollment Number
ENR-00014
ENR-00018

View All

Upcoming & Overdue

No activities to show.
Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

Section 3:

Verify Automation Working

Step 1: Check Flow Automation

Verify Capacity Updates:

The screenshot shows the Salesforce Training Management interface for Course Offering CO-0005. The left sidebar contains fields for Start Date (10/16/2025), End Date (10/16/2025), Start Time (10:00:00 AM), End Time (6:00:00 PM), Enrollment (Capacity 30, Enrolled Count 3, Available Seats 27), Status (Open), Offering Number (CO-0005), and Owner (Sahithi Karise). The right sidebar shows a message: "No past activity. Past meetings and tasks marked as done show up here." The bottom section displays the Created By (Sahithi Karise, 10/6/2025, 2:10 AM) and Last Modified By (Sahithi Karise, 10/6/2025, 2:54 AM).

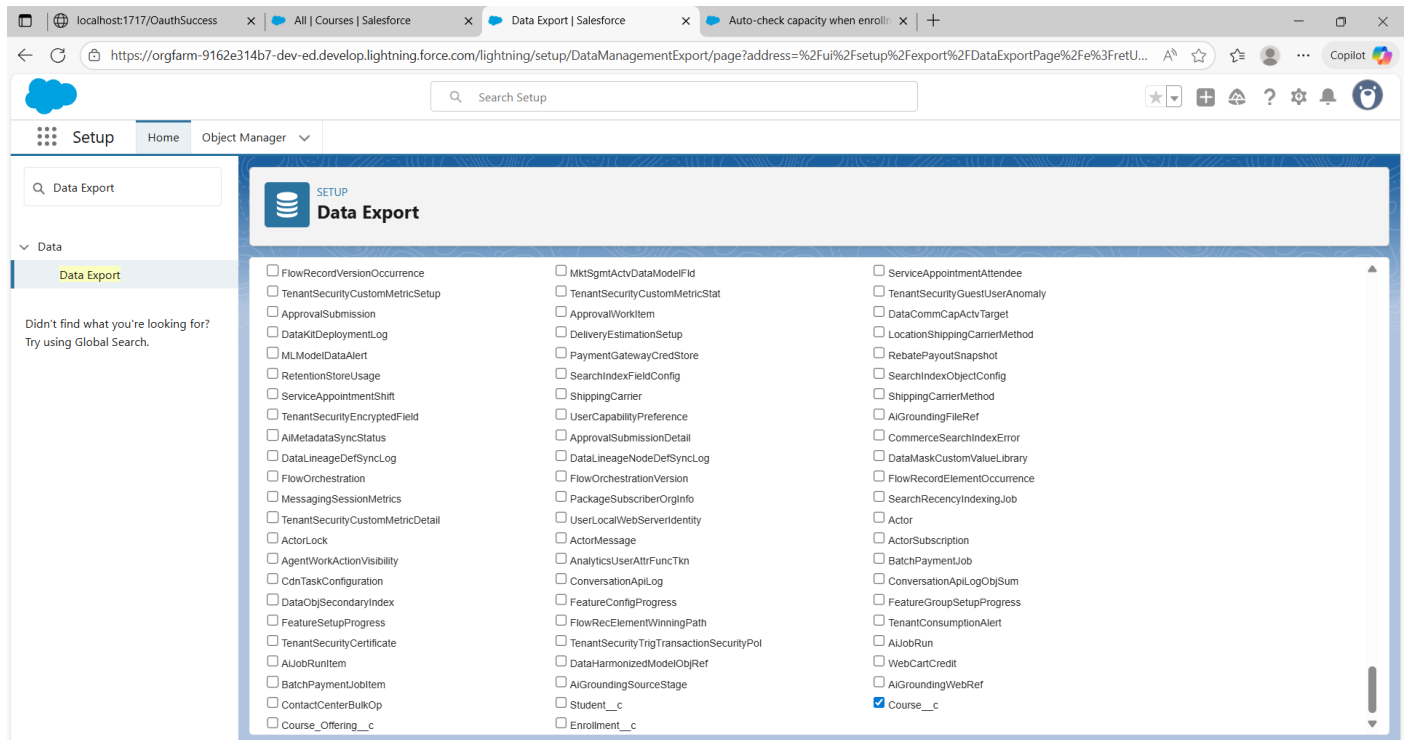
Step 2: Check Validation Rules

The screenshot shows the Salesforce Training Management interface with a validation error message. The error message is: "We hit a snag. Review the errors on this page. End Date must be on or after Start Date. End Time must be after Start Time." The background shows the Course Information form with fields for Course (DSA), Instructor (John Instructor), Location (Conference Hall-3), Start Date (10/7/2025), End Date (10/3/2025), Start Time (8:00 AM), and End Time (12:00 AM). The error message is displayed over the End Date field.

"End Date must be on or after Start Date"

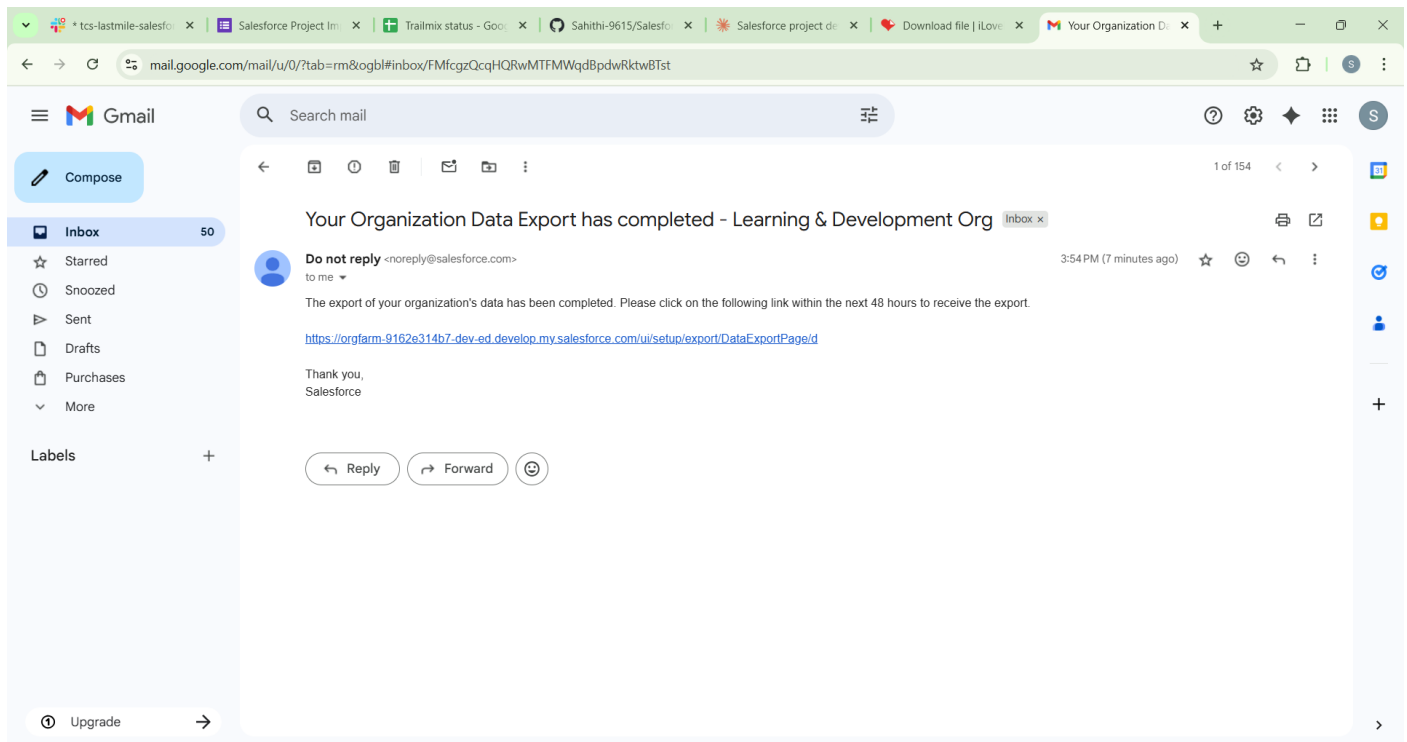
Section 4: Data Export

Step 1: Export Course Data

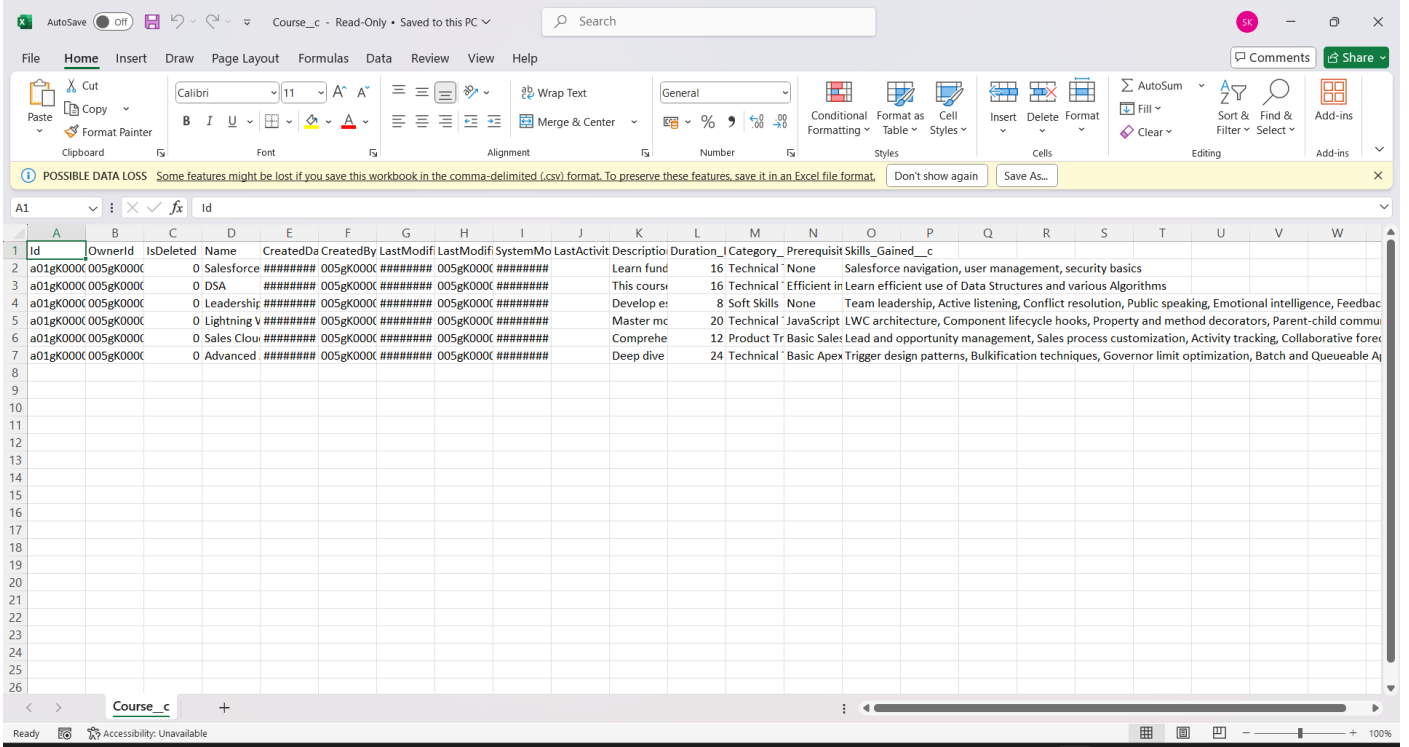


The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with "Data Export" entered. The main content area is titled "Data Export" and displays a list of objects with checkboxes. The "Course__c" checkbox is selected.

Object	Selected
FlowRecordVersionOccurrence	<input type="checkbox"/>
TenantSecurityCustomMetricSetup	<input type="checkbox"/>
ApprovalSubmission	<input type="checkbox"/>
DataKitDeploymentLog	<input type="checkbox"/>
MLModelDataAlert	<input type="checkbox"/>
RetentionStoreUsage	<input type="checkbox"/>
ServiceAppointmentShift	<input type="checkbox"/>
TenantSecurityEncryptedField	<input type="checkbox"/>
AIMetadataSyncStatus	<input type="checkbox"/>
DataLineageDefSyncLog	<input type="checkbox"/>
FlowOrchestration	<input type="checkbox"/>
MessagingSessionMetrics	<input type="checkbox"/>
TenantSecurityCustomMetricDetail	<input type="checkbox"/>
ActorLock	<input type="checkbox"/>
AgentWorkActionVisibility	<input type="checkbox"/>
CdnTaskConfiguration	<input type="checkbox"/>
DataObjSecondaryIndex	<input type="checkbox"/>
FeatureSetupProgress	<input type="checkbox"/>
TenantSecurityCertificate	<input type="checkbox"/>
AUJobRunItem	<input type="checkbox"/>
BatchPaymentJobItem	<input type="checkbox"/>
ContactCenterBulkOp	<input type="checkbox"/>
Course_Offering__c	<input type="checkbox"/>
MktSgmtActvDataModelFId	<input type="checkbox"/>
TenantSecurityCustomMetricStat	<input type="checkbox"/>
ApprovalWorkItem	<input type="checkbox"/>
DeliveryEstimationSetup	<input type="checkbox"/>
PaymentGatewayCredStore	<input type="checkbox"/>
SearchIndexFieldConfig	<input type="checkbox"/>
ShippingCarrier	<input type="checkbox"/>
UserCapabilityPreference	<input type="checkbox"/>
ApprovalSubmissionDetail	<input type="checkbox"/>
DataLineageNodeDefSyncLog	<input type="checkbox"/>
FlowOrchestrationVersion	<input type="checkbox"/>
PackageSubscriberOrgInfo	<input type="checkbox"/>
UserLocalWebServerIdentity	<input type="checkbox"/>
ActorMessage	<input type="checkbox"/>
AnalyticsUserAttrFuncTkn	<input type="checkbox"/>
ConversationApiLog	<input type="checkbox"/>
FeatureConfigProgress	<input type="checkbox"/>
FlowRecElementWinningPath	<input type="checkbox"/>
TenantSecurityTrigTransactionSecurityPol	<input type="checkbox"/>
DataHarmonizedModelObjRef	<input type="checkbox"/>
AIGroundingSourceStage	<input type="checkbox"/>
Student__c	<input type="checkbox"/>
Enrollment__c	<input type="checkbox"/>
ServiceAppointmentAttendee	<input type="checkbox"/>
TenantSecurityGuestUserAnomaly	<input type="checkbox"/>
DataCommCapActvTarget	<input type="checkbox"/>
LocationShippingCarrierMethod	<input type="checkbox"/>
RebatePayoutSnapshot	<input type="checkbox"/>
SearchIndexObjectConfig	<input type="checkbox"/>
ShippingCarrierMethod	<input type="checkbox"/>
AIGroundingFileRef	<input type="checkbox"/>
CommerceSearchIndexError	<input type="checkbox"/>
DataMaskCustomValueLibrary	<input type="checkbox"/>
FlowRecordElementOccurrence	<input type="checkbox"/>
SearchRecencyIndexingJob	<input type="checkbox"/>
Actor	<input type="checkbox"/>
ActorSubscription	<input type="checkbox"/>
BatchPaymentJob	<input type="checkbox"/>
ConversationApiLogObjSum	<input type="checkbox"/>
FeatureGroupSetupProgress	<input type="checkbox"/>
TenantConsumptionAlert	<input type="checkbox"/>
AUJobRun	<input type="checkbox"/>
WebCartCredit	<input type="checkbox"/>
AIGroundingWebRef	<input type="checkbox"/>
Course__c	<input checked="" type="checkbox"/>



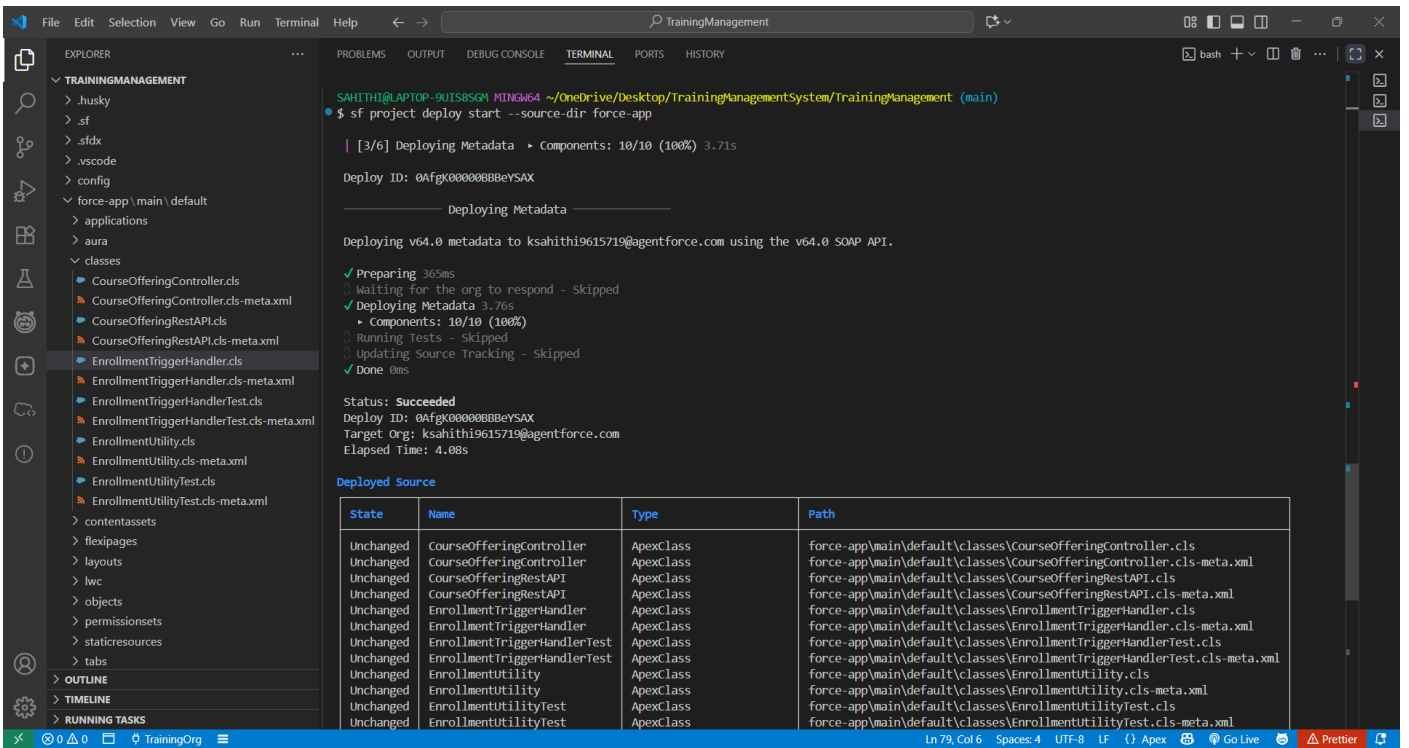
The screenshot shows a Gmail inbox. The selected email is from "Do not reply <noreply@salesforce.com>" with the subject "Your Organization Data Export has completed - Learning & Development Org". The email body states: "The export of your organization's data has been completed. Please click on the following link within the next 48 hours to receive the export." and includes the link <https://orgfarm-9162e314b7-dev-ed.develop.my.salesforce.com/ui/setup/export/DataExportPage/d>. The email is dated "3:54 PM (7 minutes ago)".



Section 5:

Deployment Documentation

Deployed all source code



Summary:

Section 1: Sample Data Creation

Created comprehensive test data:

- 5 Courses: Salesforce Admin Fundamentals, Advanced Apex Programming, Leadership Skills, LWC Development, Sales Cloud Fundamentals
- Multiple Course Offerings: Created offerings for each course with instructors, dates, locations, and capacity
- Contact Records: Added participant contacts for enrollment testing
- Enrollment Records: Created enrollments linking participants to course offerings

Section 2: Data Relationship Verification

Validated all object relationships:

- Course → Course Offerings (one-to-many)
- Course Offering → Enrollments (one-to-many)
- Contact → Enrollments (one-to-many)
- All related lists displaying correctly on record pages

Section 3: Automation Verification

Tested business logic:

- Flow Automation: Verified Enrolled Count auto-updates when enrollments created
- Capacity Calculation: Confirmed Available Seats formula field working (Capacity - Enrolled Count)
- Validation Rules: Tested "End Date must be on or after Start Date" validation working correctly

Section 4: Data Export

Exported all data for backup:

- Exported Course, Course Offering, Contact, and Enrollment data
- Created backup CSV files for disaster recovery
- Documented export process for future reference

Section 5: Deployment

Deployed all components to Salesforce:

- Successfully deployed all custom objects, fields, flows, validation rules, and code
- Verified deployment success with no errors
- System ready for production use

Result: Training Management System fully populated with test data, all automations working, and successfully deployed.