Phase 8: Data Management & Deployment
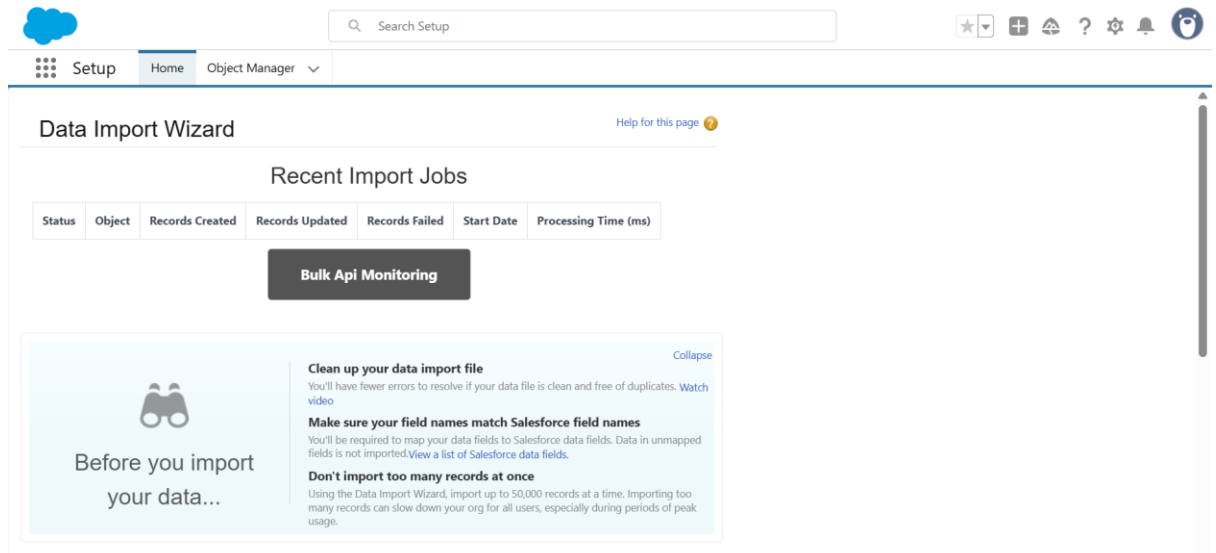
1. **Data Import Wizard**

Purpose: Import Policy, Claim, and Agent data into Salesforce.
Steps Performed:

1. Navigate to **Setup → Data Import Wizard**.

2. Select the object to import (e.g., Policy, Claim, Agent).

3. Upload the CSV file containing the records.

4. Map CSV columns to Salesforce fields.

5. Run the import and verify successful records in Salesforce.

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2. Duplicate Rules

Purpose: Prevent duplicate records and maintain data integrity.
Steps Performed:

1. Navigate to **Setup → Duplicate Rules**.

2. Create a new rule for the **Policy** and **Claim** objects.

3. Define matching criteria (e.g., Policy Number, Claim Number).

4. Activate the rule and test by attempting to insert duplicate records.

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3. Change Sets

Purpose: Deploy Salesforce components from Developer Sandbox to Production.
Steps Performed:

1. Navigate to **Setup → Outbound Change Sets** in Developer Org.

2. Click **New**, enter **Name**: Phase8_Deployment.

3. Add components:

   o **Apex Classes** (PolicyHandler, PolicyEmailHandler, etc.)

   o **Triggers** (PolicyTrigger)

   o **Custom Objects** (Policy__c, Claim__c, etc.)

   o **Flows, Validation Rules, Workflows**

4. Click **Add to Change Set → Upload to Production**.

5. In Production Org: Navigate to **Inbound Change Sets**, locate the uploaded set, and click **Validate → Deploy**.

6. Perform post-deployment testing to ensure functionality.