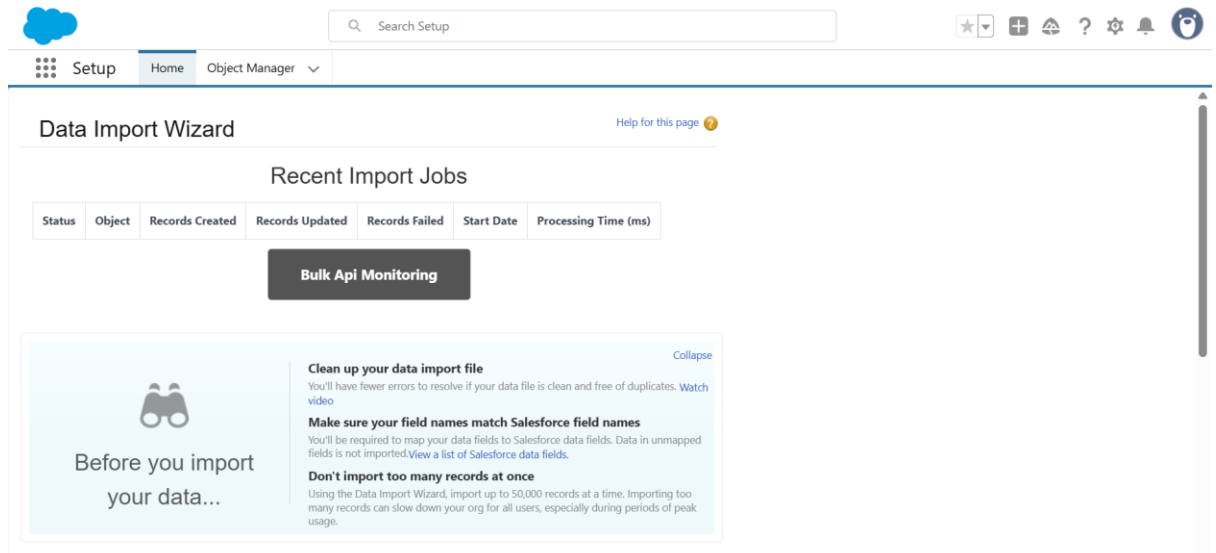


Phase 8: Data Management & Deployment

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.

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.
-

3. Change Sets

The screenshot shows the 'Outbound Messages' setup page in Salesforce. At the top, there's a 'SETUP' header with a gear icon and the title 'Outbound Messages'. Below this, the main heading is 'All Outbound Messages', with a 'Help for this Page' link. A descriptive text states: 'Outbound Messages are SOAP transactions that Salesforce automatically sends to external systems when triggered.' Below the text, there's a 'View:' dropdown set to 'All Outbound Messages' and links for 'Edit' and 'Create New View'. A navigation bar contains letters A through Z and 'Other', with 'All' selected. Below this is a table with columns: 'Action', 'Name', 'Endpoint URL', 'Object', and 'Last Modified Date'. The table contains one entry: 'Phase5_Deployment' with the URL 'https://dummyendpoint.com/api' and object 'Policy', last modified on '9/24/2025'. Above the table are buttons for 'View Message Delivery Status' and 'New Outbound Message'. Another navigation bar with letters A through Z and 'Other' is at the bottom of the table area, with 'All' selected.

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:
 - **Apex Classes** (PolicyHandler, PolicyEmailHandler, etc.)
 - **Triggers** (PolicyTrigger)
 - **Custom Objects** (Policy__c, Claim__c, etc.)
 - **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.