

# Phase 8 — Data Management & Deployment(Online Appointment Booking for Legal Services)

## 1. Data Import Wizard

- Used to **bulk upload initial records** for:
  - Service Categories (Service\_Category\_\_c)
  - Lawyers (Lawyer\_\_c) with fields like Name, Email, Experience\_\_c, Location\_\_c, Hourly\_Cost\_\_c
  - Appointments (Appointment\_\_c) for testing, including Appointment\_Date\_\_c, Appointment\_Time\_\_c, Status\_\_c, Contact\_\_c, Lawyer\_\_c
- Enabled **easy mapping of fields** and validation during import.

SETUP > OBJECT MANAGER					
Appointment					
Details	Fields & Relationships 11 Items, Sorted by Field Label				
	Q, Quick Find				
	New Deleted Fields Field Dependencies Set History Tracking				
Fields & Relationships	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Page Layouts	Appointment Date	Appointment_Date__c	Date		
Lightning Record Pages	Appointment Name	Name	Text(80)		✓
Buttons, Links, and Actions	Appointment Time	Appointment_Time__c	Time		
Compact Layouts	Booking Source	Booking_Source__c	Picklist		
Field Sets	Contact	Contact__c	Lookup(Contact)		✓
Object Limits	Created By	CreatedById	Lookup(User)		
Record Types	Duration Minutes	Duration_Minutes__c	Number(3, 0)		
Related Lookup Filters	Last Modified By	LastModifiedById	Lookup(User)		
Restriction Rules	Lawyer	Lawyer__c	Lookup(Lawyer)		✓
Scoping Rules	Owner	OwnerId	Lookup(User,Group)		✓
Object Access	Status	Status__c	Picklist		
Triggers					
Flow Triggers					
Validation Rules					
Conditional Field Formatting					

SETUP > OBJECT MANAGER					
Lawyer					
Details	Fields & Relationships 12 Items, Sorted by Field Label				
	Q, Quick Find				
	New Deleted Fields Field Dependencies Set History Tracking				
Fields & Relationships	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Page Layouts	Created By	CreatedById	Lookup(User)		
Lightning Record Pages	Email	Email__c	Email		
Buttons, Links, and Actions	Experience	Experience__c	Number(2, 0)		
Compact Layouts	Hourly Cost	Hourly_Cost__c	Currency(16, 2)		
Field Sets	Is Active	Is_Active__c	Checkbox		
Object Limits	Last Modified By	LastModifiedById	Lookup(User)		
Record Types	Lawyer Name	Name	Text(80)		✓
Related Lookup Filters	Location	Location__c	Text(255)		
Restriction Rules	Owner	OwnerId	Lookup(User,Group)		✓
Scoping Rules	Phone	Phone__c	Phone		
Object Access	Service Category	Service_Category__c	Lookup(Service Category)		✓
Triggers	User	User__c	Lookup(User)		✓
Flow Triggers					
Validation Rules					
Conditional Field Formatting					

## 2. Data Loader

- Used for **large-scale data operations** when Import Wizard was insufficient.
- Inserted, updated, or deleted records for:

- Contacts
- Lawyers
- Appointments
- Handled **CSV files** and automated repetitive imports for testing and migration.

### 3. Duplicate Rules

- Configured **duplicate management** to prevent duplicate Contacts and Appointments.
- Example: check for existing Contact by **Email** before inserting a new record.
- Ensured **data integrity** in the booking system.

### 4. Data Export & Backup

- Scheduled **regular backups** of key objects: Appointment\_\_c, Contact, Lawyer\_\_c, Service\_Category\_\_c.
- Exported data via **Data Export Wizard** or **Data Loader** for disaster recovery.

### 5. Change Sets

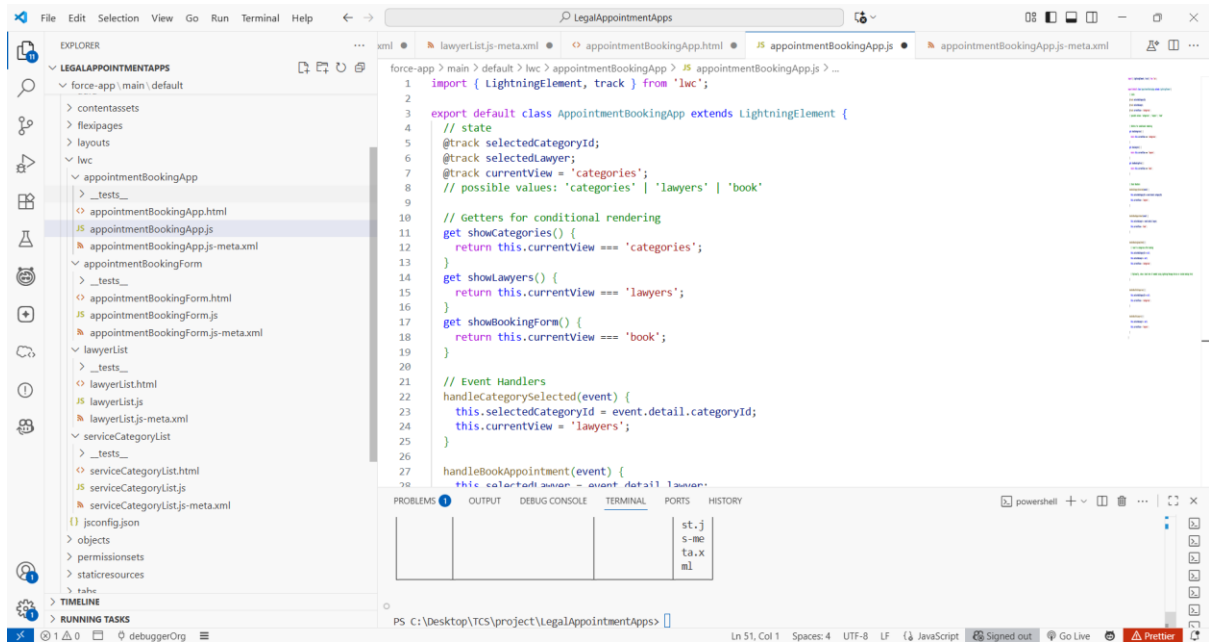
- Used **Change Sets** for deploying metadata (objects, fields, flows, Apex classes, LWCs) from Sandbox to Production.
- Included **custom objects, email templates, and Record-Triggered Flows**.

### 6. Unmanaged vs Managed Packages

- Created and installed **unmanaged packages** for moving components between orgs during development.
- Noted that **managed packages** could be used for commercial distribution, but not required for internal deployment.

### 7. VS Code & SFDX

- Used **VS Code with Salesforce Extension Pack** and **SFDX CLI** for:
  - Creating and editing Apex classes, LWCs, and metadata
  - Deploying to Scratch Org, Sandbox, or Production
  - Retrieving and pushing source code (sfdx force:source:push / sfdx force:source:retrieve)



## Outcome:

- Initial data for services, lawyers, and appointments was loaded efficiently.
- Duplicate records were prevented, maintaining data integrity.
- Metadata and custom components were deployed securely to production.
- The system was ready for live usage with consistent data and functional flows.