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

1. Data Import Wizard

- Used to **bulk upload initial records** for:

    o Service Categories (Service_Category__c)

    o Lawyers (Lawyer__c) with fields like Name, Email, Experience__c, Location__c, Hourly_Cost__c

    o 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.

2. Data Loader

- Used for **large-scale data operations** when Import Wizard was insufficient.

- Inserted, updated, or deleted records for:

- - o Contacts
  - o Lawyers
  - o 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.
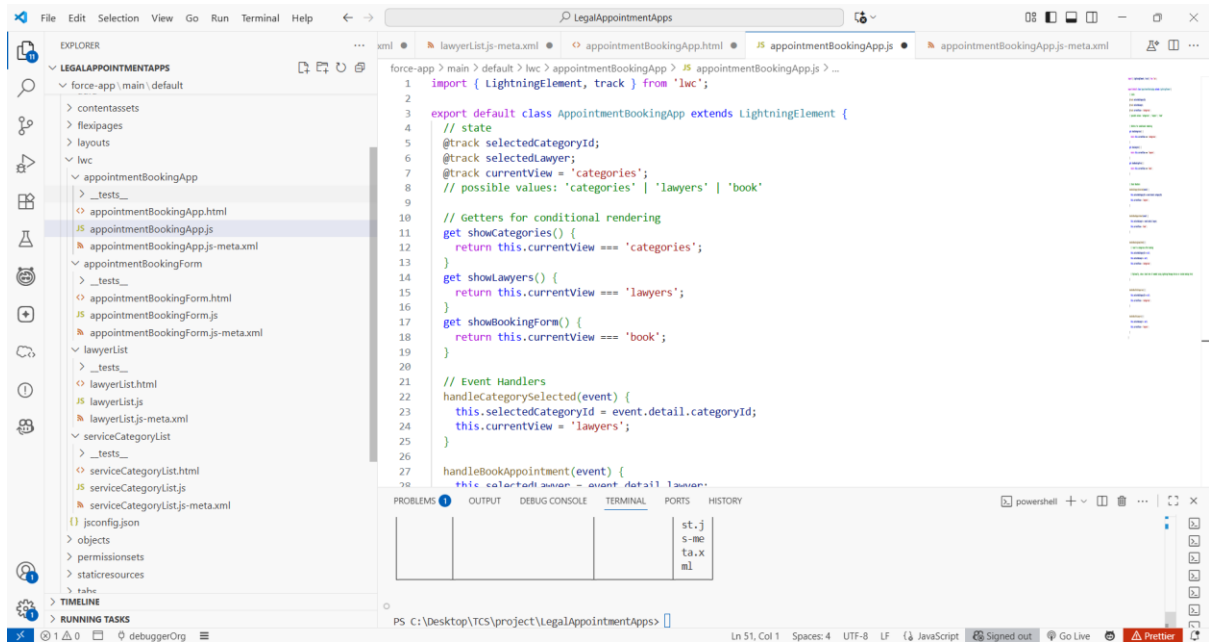
5. Change Sets

- 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:
  - o Creating and editing Apex classes, LWCs, and metadata
  - o Deploying to Scratch Org, Sandbox, or Production
  - o 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.