

Phase 8: Data Management & Deployment

Objective

To ensure smooth handling of data (donations, volunteers, events) and deliver a **fully functional, tested, and secure Salesforce application** into the target environment.

Data Management

1. Sample Data Creation

- Created **10 Donations, 10 Volunteers, 7 Events** for testing.
- Test data covered **One-Time vs Monthly Donations, Volunteer Registration vs Feedback, and Event Assignments**.

2. Data Quality Rules

- Enforced through **Validation Rules & FLS**:
 - Valid email format.
 - Phone must be 10 digits.
 - Donation amount > 0 (if type = Money).
 - Occasion date required if selected.

3. Test Cases Executed

- **Donation Creation** → Correct email triggered.
- **Monthly Reminder Flow** → Sent reminders at 8 AM daily.
- **Occasion Emails** → Triggered for birthdays/anniversaries.
- **Volunteer Registration** → Sent welcome email.
- **Volunteer Participation** → Sent thank-you email after event.
- **Validation Rules** → Blocked invalid entries.

Deployment Process

Step 1: Development in Salesforce Developer Org

- Created **custom objects, fields, page layouts, and record types**.
- Set up **profiles and permissions** for Admin, Donor Manager, and Volunteer Coordinator.

- Built **flows, validation rules, email templates, and dashboards.**

Step 2: Component-Level Testing

- Verified objects, record types, and layouts.
- Tested record-triggered and scheduled flows.
- Checked email templates with dynamic content.

Step 3: Data Validation with Sample Records

- Created donor and volunteer records to simulate real-world operations.
- Validated dashboards and reports with sample data.

Step 4: Finalization

- Activated Flows and Validation Rules.
- Enabled Email Alerts.
- Set **Tab Visibility & Profile Access** as per role.

Step 5: Documentation & Demo Preparation

- Prepared **system architecture document.**

Deployment Notes

- No Change Sets used (developed in Developer Org).
- Manual testing performed with sample data.
- All flows, validations, and email alerts working as expected.
- Documentation finalized for presentation.

Tabular Summary

Deployment Step	Action Taken
Org Setup	Developer Org created, objects, fields, and profiles configured.
Data Preparation	Sample records (Donations, Volunteers, Events) created for testing.
Validation & Rules	Applied business rules (email, phone, donation amount, occasion).
Process Automation	Flows (thank-you, reminders, volunteer emails) activated.
Testing	Manual test cases executed for all flows, rules, and dashboards.

Deployment Step Action Taken

Deployment Method Direct deployment in Developer Org (no change sets used).

Final Documentation Architecture, flows, profiles, and test results documented for demo.

Benefits

- Ensures **clean and validated data** in Salesforce.
- Provides a **tested and stable version (v1.0)** ready for presentation.
- Role-based access ensures **secure deployment**.
- Deployment documentation helps in **future scaling** to sandbox/production.