



# Salesforce PropertyHub

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## Phase 8 – Data Management & Deployment

### Data Import Wizard

**Purpose:** Easily load standard and custom object data without coding.

#### Key Features:

- Import up to 50,000 records at once.
- Supports Leads, Accounts, Contacts, and custom objects.
- Field mapping available in UI.

#### Business Impact:

- Reduces manual data entry.
- Simplifies onboarding of large property/lead datasets.

The screenshot shows the "Bulk Data Load Jobs" page in the Salesforce setup. A specific job is selected, identified by its ID: 750gL00000E6WTN. The job status is "Closed". The table below provides detailed information about the job's execution.

Bulk Data Load Job Detail		Reload			
Job ID	750gL00000E6WTN	Job Type	Bulk V1	Status	Closed
Submitted By	Sushmita Katariya	Operation	Upsert	Total Processing Time (ms)	0
Start Time	9/25/2025, 5:46 AM PST	Queued Batches	0	API Active Processing Time (ms)	0
End Time	9/25/2025, 5:46 AM PST	In Progress Batches	0	Apex Processing Time (ms)	0
Time to Complete ([hh]:mm:ss)	00:00	Completed Batches	0		
Object	Property	Failed Batches	0		
External ID Field	Name	Progress			
Content Type	CSV	Records Processed			
Concurrency Mode	Parallel	Records Failed			
API Version	64.0	Retries	0		

## Data Loader

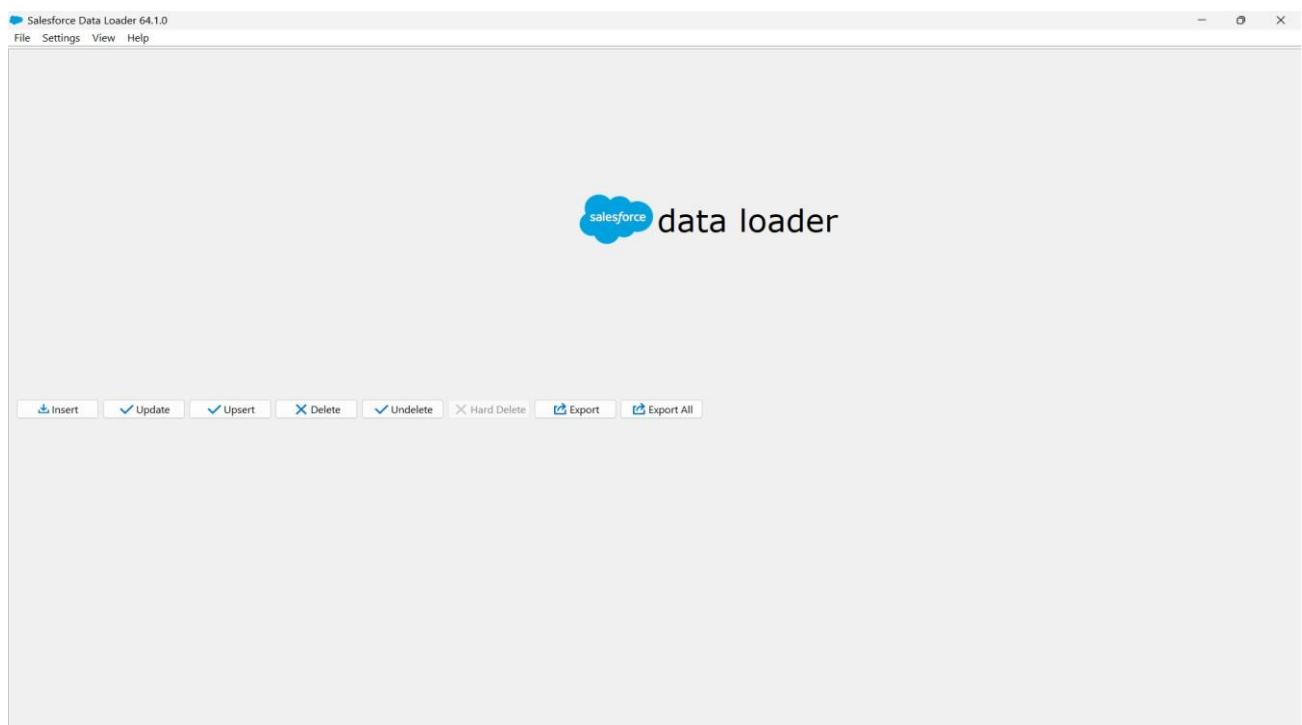
**Purpose:** Advanced tool for large-scale data operations.

### Key Features:

- Import/export up to 5 million records.
- Supports insert, update, upsert, delete, and export.
- Command-line automation supported.

### Business Impact:

- Ideal for admins handling large property databases.
- Enables repeatable, scheduled imports/exports.



## Duplicate Rules

**Purpose:** Prevent or alert on duplicate records.

### Key Features:

- Works for Leads, Contacts, and custom objects.
- Supports matching rules (Email, Phone, Address).

- Options: Block, Allow but Alert.

## Business Impact:

- Ensures clean, unique customer/property records.
- Reduces confusion and improves reporting accuracy.

The screenshot shows the 'Duplicate Rules' setup page for a 'Lead Duplicate Rule'. The page has a header with 'd SETUP' and 'Duplicate Rules'. Below the header, it says 'Lead Duplicate Rule' and 'Standard Lead Duplicate Rule'. There is a 'Help for this Page' link with a question mark icon. The main area is titled 'Duplicate Rule Detail' with tabs for 'Edit', 'Delete', 'Clone', and 'Deactivate'. It shows the rule's details: Rule Name is 'Standard Lead Duplicate Rule', Description is 'Identify leads that duplicate other leads and contacts', Object is 'Lead', Record-Level Security is 'Enforce sharing rules', Action On Create is 'Allow', Action On Edit is 'Allow', Alert Text is 'Use one of these records?', Active is checked, Matching Rule is 'Standard Contact Matching Rule' (Mapped), and Matching Rule is 'Standard Lead Matching Rule' (Mapped). Operations On Create include Alert and Report (both checked). Operations On Edit include Alert and Report (Alert is unchecked). Conditions show 'Created By' as OrgFarm EPIC, 9/8/2025, 3:16 PM and 'Modified By' as OrgFarm EPIC, 9/8/2025, 3:16 PM. At the bottom are 'Edit', 'Delete', 'Clone', and 'Deactivate' buttons.

## Data Export & Backup

**Purpose:** Ensure recoverability of Salesforce data.

### Key Features:

- Weekly/monthly scheduled data export.
- Full org data exported as ZIP with CSV files.
- API-based backup possible.

## Business Impact:

- Protects against accidental data loss.
- Provides compliance with backup policies.

The screenshot shows the 'Data Export' page in the Salesforce Setup. At the top, there's a message: 'Next scheduled export: A data export is currently in progress for your organization.' Below this are two buttons: 'Export Now' and 'Schedule Export'. A note says, 'Your export has been queued. You will receive an email notification when it is completed.' Under 'Scheduled By', it lists 'Sushmita Kataria'. Under 'Schedule Date', it shows '9/25/2025'. Under 'Export File Encoding', it says 'ISO-8859-1 (General US & Western European, ISO-LATIN-1)'.

## Change Sets

**Purpose:** Deploy customizations between Salesforce environments.

### Key Features:

- Outbound & Inbound Change Sets.
- Add components (Apex, Objects, Layouts).
- Validate & deploy in target org.

### Business Impact:

- Ensures smooth migration of customizations.
- Reduces manual errors in deployments.

## Outbound Change Sets

### Step 1

Setup → Outbound Change Sets → New

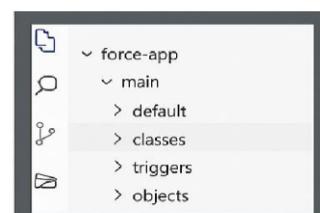


### Step 2 Add Components (Apex Classes, Triggers, Rules)

## VS Code / SFDX Deployment

1. Open VS Code & SFDX Project Explorer

2. Select Files / Folders to Deploy



## Unmanaged vs Managed Packages

**Purpose:** Package metadata for sharing & deployment.

### Key Features:

- Managed: Versioning, namespace, upgradeable.
- Unmanaged: Open, editable code.

### Business Impact:

- Managed: Best for app distribution (AppExchange).
- Unmanaged: Best for internal dev/test projects.

The screenshot shows the Salesforce Package Manager setup page. At the top, there's a header with 'SETUP' and a 'Package Manager' icon. Below the header, the main content area has a title 'Packages'. The first section is 'Namespace Settings', which includes a note about creating and registering namespaces for managed packages. The second section is 'Language Settings', with a note that language extension packages are enabled. The third section is 'First-Generation Packages', which contains a yellow warning box about transitioning to 2GP. It also includes a note to click 'New' to create a new package. At the bottom, there's a table titled 'Packages' with columns for Action, Package Name, and Description, showing one entry: 'Edit' for 'PropertyHub'.

## ANT Migration Tool

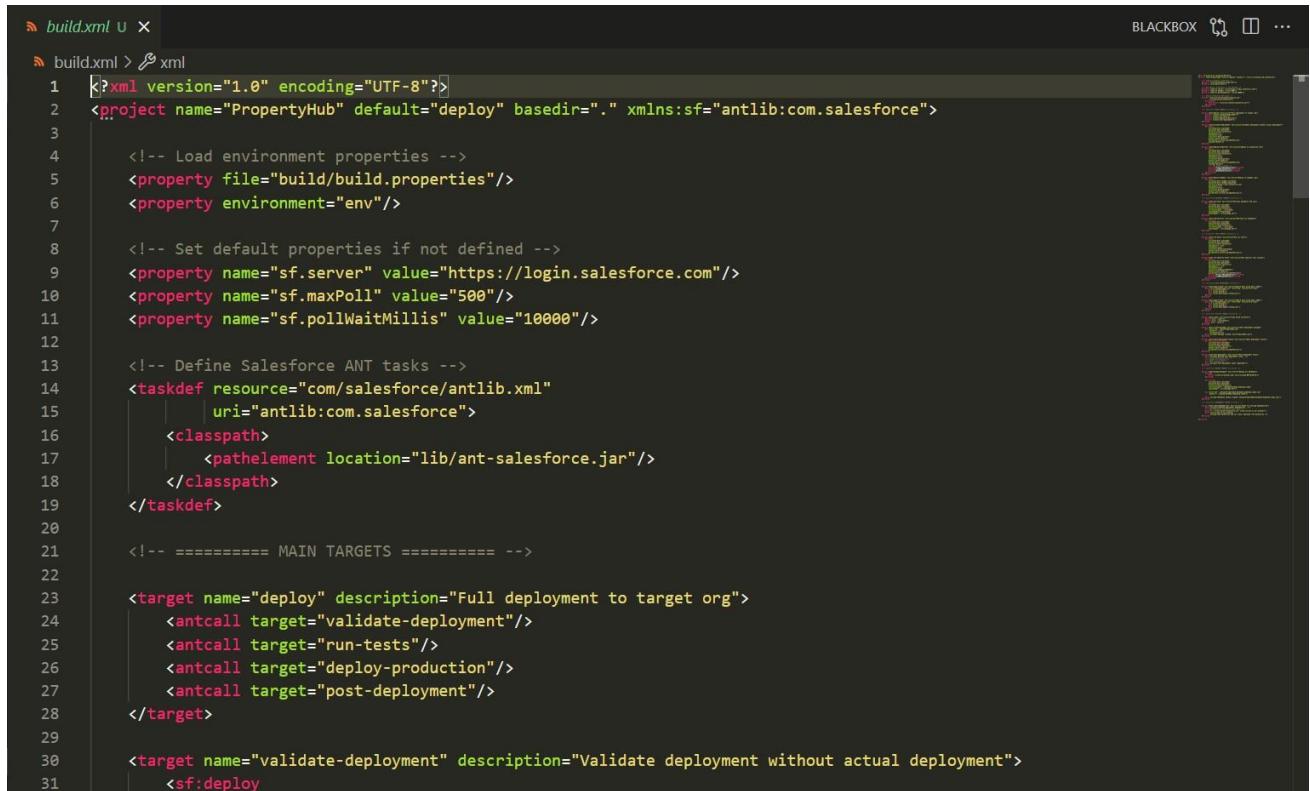
**Purpose:** Automate deployments with XML & scripts.

### Key Features:

- Command-line deployment using build.xml.
- Supports retrieve, validate, deploy, and delete.
- Useful for CI/CD pipelines.

## Business Impact:

- Enables automated, repeatable deployments.
- Saves admin/developer time.



```
build.xml
1 <?xml version="1.0" encoding="UTF-8"?>
2 <project name="PropertyHub" default="deploy" basedir=".">
3
4     <!-- Load environment properties -->
5     <property file="build/build.properties"/>
6     <property environment="env"/>
7
8     <!-- Set default properties if not defined -->
9     <property name="sf.server" value="https://login.salesforce.com"/>
10    <property name="sf.maxPoll" value="500"/>
11    <property name="sf.pollWaitMillis" value="10000"/>
12
13    <!-- Define Salesforce ANT tasks -->
14    <taskdef resource="com/salesforce/antlib.xml"
15              uri="antlib:com.salesforce">
16        <classpath>
17            <pathelment location="lib/ant-salesforce.jar"/>
18        </classpath>
19    </taskdef>
20
21    <!-- ===== MAIN TARGETS ===== -->
22
23    <target name="deploy" description="Full deployment to target org">
24        <antcall target="validate-deployment"/>
25        <antcall target="run-tests"/>
26        <antcall target="deploy-production"/>
27        <antcall target="post-deployment"/>
28    </target>
29
30    <target name="validate-deployment" description="Validate deployment without actual deployment">
31        <sf:deploy
```

## VS Code & SFDX

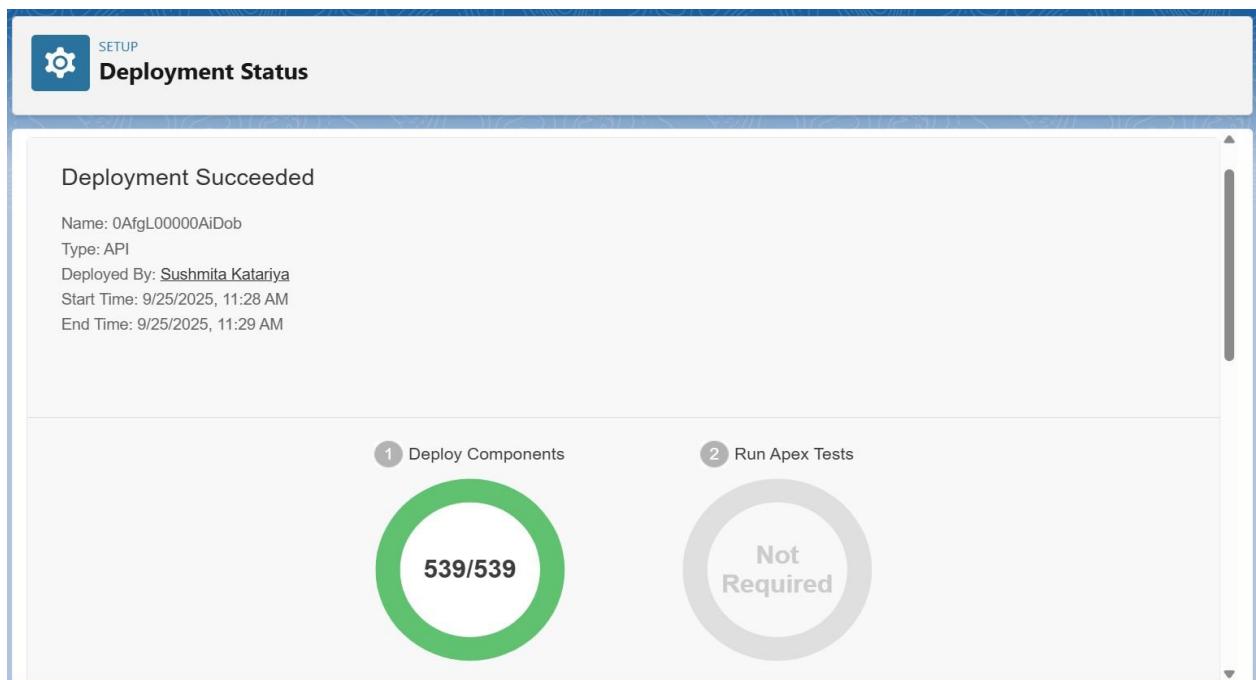
**Purpose:** Modern CLI and IDE-based development.

### Key Features:

- sfdx commands for push, pull, deploy, test.
- Source tracking with scratch orgs.
- Integration with Git for version control.

## Business Impact:

- Faster development cycles.
- Seamless collaboration across teams.



A screenshot of a deployment status report. At the top left is a blue gear icon labeled "SETUP". To its right is the title "Deployment Status". Below the title, the message "Deployment Succeeded" is displayed. Underneath this, deployment details are listed: Name: 0AfgL00000AiDob, Type: API, Deployed By: Sushmita Katariya, Start Time: 9/25/2025, 11:28 AM, and End Time: 9/25/2025, 11:29 AM. At the bottom, there are two circular progress indicators. The first, labeled "1 Deploy Components", is green and shows "539/539". The second, labeled "2 Run Apex Tests", is grey and shows "Not Required".

## 🏆 Outcomes of Phase 8

- Duplicate Rules activated for Leads & Properties.
- Data import/export streamlined via Wizard & Data Loader.
- Backup strategy implemented with scheduled exports.
- Deployments managed via Change Sets, ANT, and SFDX.
- Packages structured for future scalability.
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## ➡️ soon Next Steps: Phase 9 – Reporting, Dashboards & Security Review

- Build dashboards for property sales & lead funnel.
- Implement field-level and record-level security.
- Configure audit and login history tracking.