

Phase 8 Report: Data Management & Deployment

1. Introduction

This phase focuses on **managing data efficiently** and deploying the Salesforce project from the **development org to production**.

It ensures that all data, configurations, and customizations are **migrated securely** and are functional in the live environment.

2. Data Management Requirement

Scenario:

- Populate the **Event** and **Attendee** objects with sample data
- Ensure **data integrity** with relationships (Attendee → Event)
- Prepare the org for **testing, reporting, and dashboards**

Tools Used:

- Data Import Wizard
 - Data Loader
 - Salesforce Reports
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3. Data Import / Export

Importing Data:

1. **Events:** Imported using **Data Import Wizard**
 - Fields: Event Name, Event Date, Location, Capacity, Description
2. **Attendees:** Imported with **Lookup Relationship to Events**
 - Fields: Name, Email, Contact Number, Registered Event

Exporting Data:

- Exported sample data using **Data Loader** for backup or migration
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4. Deployment Strategy

- Deployment from **Sandbox / Developer Org** → **Production**
 - Included Components:
 - Custom Objects: Event & Attendee
 - Flows & Automation
 - Apex Classes & Triggers
 - Lightning Pages & App Configuration
 - Email Templates & Alerts
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5. Change Sets / Salesforce CLI

- Created **Outbound Change Set** in the source org
- Added all **components to deploy**
- Uploaded **Change Set to target org**
- Validated components in **sandbox or production**

Alternative: Use **Salesforce CLI (sfdx)** for more advanced deployments

6. Testing & Validation

- Verified **Event and Attendee records** after deployment
 - Tested **automation** (Flow & Email Alerts) in production
 - Checked **Apex triggers** for event capacity validation
 - Ensured **page layouts, Lightning Pages, and apps** function correctly
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7. Conclusion

- Data is successfully **imported and exported** with relationships intact
 - Deployment strategy ensures all **components are migrated safely**
 - The Salesforce org is now **ready for reporting, dashboards, and security review** in Phase 9
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