Phase 8: Data Management & Deployment

Objective

To ensure smooth handling of **event registrations, attendee feedback, and event data** while delivering a fully functional, tested, and secure Salesforce application into the target environment.

Data Management

1. Sample Data Creation

- Created **10 Attendees** and **7 Events** for testing.

- Test data covers:

    o **Event Registration vs Feedback** record types.

    o Event capacity logic and duplicate registrations.

    o Feedback submission after event completion.

2. Data Quality Rules

- Enforced through **Validation Rules** and **Field-Level Security (FLS)**:

    o Email must be in correct format.

    o Phone number must be 10 digits.

    o Event is required for all registrations.

    o Feedback can only be submitted **after the event date**.

3. Test Cases Executed

Scenario	Result
Attendee Registration	Confirmation email triggered, duplicate prevented
Event Feedback Submission	Feedback email triggered only after event
Event Capacity Check	Registration blocked when full

Scenario	Result
Validation Rules	Blocked invalid emails, phone numbers, and empty event fields
Reports & Dashboards	Correctly display registration status, feedback, and departmental summaries

Deployment Process

Step 1: Development in Salesforce Developer Org

- Created **custom objects**: Event__c, Attendee__c.

- Configured **fields, page layouts, record types, profiles, and permissions**.

- Built **Flows, Validation Rules, Email Templates, and Dashboards**.

Step 2: Component-Level Testing

- Verified **objects, record types, and layouts**.

- Tested **record-triggered flows** for registration, feedback, and duplicate checks.

- Checked email templates with dynamic content.

Step 3: Data Validation with Sample Records

- Registered sample attendees for events.

- Validated **dashboards and reports** with the sample data.

Step 4: Finalization

- Activated all **Flows and Validation Rules**.

- Enabled **Email Alerts**.

- Configured **Tab Visibility** and **Profile Access** according to roles.

Step 5: Documentation & Demo Preparation

- Prepared system architecture and **flow diagrams**.

- Compiled test results and screenshots for presentation.

Deployment Notes

- **Deployment Method:** Direct deployment in Developer Org (no Change Sets used).

- **Manual testing** performed with sample data.

- All flows, validations, and email alerts functioning as expected.

- Documentation finalized for presentation/demo.

Tabular Summary

Deployment Step	Action Taken
Org Setup	Developer Org created; objects, fields, and profiles configured
Data Preparation	Sample records (Attendees, Events) created for testing
Validation & Rules	Business rules applied (email, phone, event requirement, feedback date)
Process Automation	Flows for registration confirmation, feedback acknowledgment, and duplicate checks activated
Testing	Manual test cases executed for all flows, rules, and dashboards
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, validated data** in Salesforce.

- Provides a **stable and tested version (v1.0)** ready for presentation.

- **Role-based access** ensures secure and controlled deployment.

- Documentation facilitates **future scaling** to sandbox or production environments.