

Community Fitness & Wellness Hub CRM Project

Phase 8: Data Management & Deployment

1.Data Import Wizard

The **Data Import Wizard** was used to load sample data for the project, successfully importing records for both the Trainer and Class custom objects. This provides a populated data set for testing and demonstration.

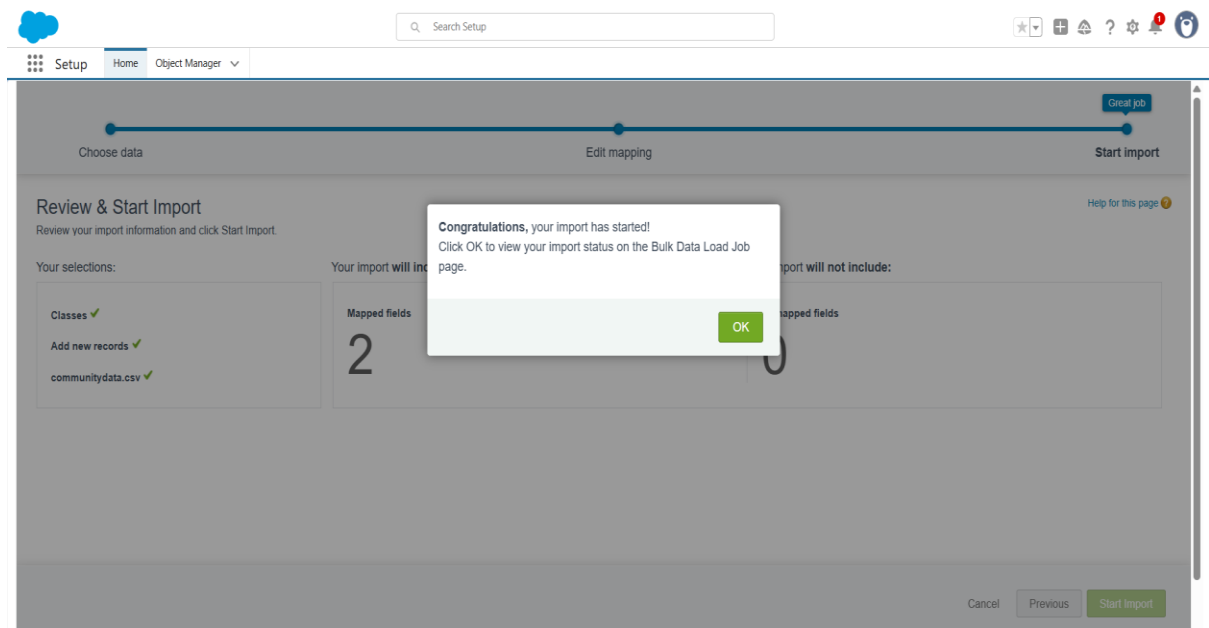
The screenshot shows the 'Choose data' step of the Salesforce Data Import Wizard. The progress bar indicates 'Getting closer'. The main heading is 'Import your Data into Salesforce' with a sub-note 'You can import up to 50,000 records at a time'. The interface is divided into three sections: 'What kind of data are you importing?', 'What do you want to do?', and 'Where is your data located?'. In the first section, 'Custom objects' is selected, and 'Classes' is chosen from the list. In the second section, 'Add new records' is selected, with 'Match by: Name' and 'Trainer Name' as options. In the third section, a CSV file 'communitydata.csv' is uploaded, with 'Character Code' set to 'ISO-8859-1' and 'Values Separated By' set to 'Comma'. At the bottom, there are 'Cancel', 'Previous', and 'Next' buttons.

From what kind of data your importing select custom objects then choose classes and in what do you want to do select add new records and then add the csv file you created in the spread sheet.click next

The screenshot shows the 'Edit mapping' step of the Salesforce Data Import Wizard. The progress bar indicates 'Almost done'. The main heading is 'Edit Field Mapping: Classes' with a sub-note 'Your file has been auto-mapped to existing Salesforce fields, but you can edit the mappings if you wish. Unmapped fields will not be imported.' Below this is a table with columns: 'Edit', 'Mapped Salesforce Object', 'CSV Header', and three 'Example' columns. The table contains two rows of mappings for 'Class Name' and 'Trainer'.

Edit	Mapped Salesforce Object	CSV Header	Example	Example	Example
Change	Class Name	Class Name	Yoga with Emily	Pilates with David	Cardio Blast
Change	Trainer	Trainer Name	Emily Davis	David Chen	John Smith

Then map the eliments we want to map.



If you click start import in the final after it completed youll see this pop up and it will redirected to the below page—

Data Import Wizard

[Help for this page](#)

Recent Import Jobs

Status	Object	Records Created	Records Updated	Records Failed	Start Date	Processing Time (ms)
Closed	Class	2	0	1	09-24-2025 06:54	165
Closed	Trainer	3	0	0	09-24-2025 06:31	160

SETUP

Bulk Data Load Jobs

Bulk Data Load Job Detail

Reload

Job ID	750gK00000Dloss	Job Type	Bulk V1	Status	Closed
Submitted By	Amin Sadik Shaik	Operation	Insert	Total Processing Time (ms)	165
Start Time	9/24/2025, 11:54 AM PST	Queued Batches	0	API Active Processing Time (ms)	86
End Time	9/24/2025, 11:54 AM PST	In Progress Batches	0	Apex Processing Time (ms)	0
Time to Complete (hh:mm:ss)	00:02	Completed Batches	1		
Object	Class	Failed Batches	0		
External ID Field		Progress	100%		
Content Type	CSV	Records Processed	3		
Concurrency Mode	Parallel	Records Failed	1		
API Version	64.0	Retries	0		

Reload

Batches

View Request	View Result	Batch ID	Start Time	End Time	Total Processing Time (ms)	API Active Processing Time (ms)	Apex Processing Time (ms)	Records Processed	Records Failed	Retry Count	State Message	Status
View Request	View Result	751gK00000B6esb	9/24/2025, 11:54 AM	9/24/2025, 11:54 AM	165	86	0	3	1	0		Completed

These are the reports after importing we done above.

Q Search...

Community Fitness ...

Classes
Trainers
Contacts
Reports
Loyalty Points
Class Bookings
Payments

Classes
All

New
Import
Change Owner
Printable View
Assign Label

3 items • Sorted by Class Name • Updated a few seconds ago

<input type="checkbox"/>	Class Name ↑	
1	<input type="checkbox"/> Pilates with David	
2	<input type="checkbox"/> Yoga with Emily	
3	<input type="checkbox"/> Yoga with Sarah	

The Classes we imported through Data Import Wizard.

Q Search...

Community Fitness ...

Classes
Trainers
Contacts
Reports
Loyalty Points
Class Bookings
Payments

Trainers
All

New
Import
Change Owner
Printable View
Assign Label

4 items • Sorted by Trainer Name • Updated a few seconds ago

<input type="checkbox"/>	Trainer Name ↑	
1	<input type="checkbox"/> David Chen	
2	<input type="checkbox"/> Emily Davis	
3	<input type="checkbox"/> John Smith	
4	<input type="checkbox"/> John Smith	

The Trainers we imported through Data Import Wizard.

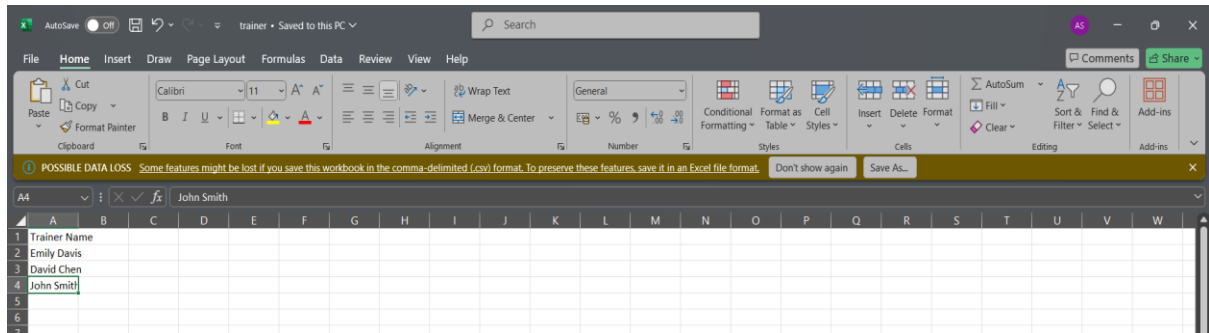
2.Data Loader & Duplicate Rules

These tools were considered for larger-scale data migration but were not implemented, as the Data Import Wizard was sufficient for the project's scope.

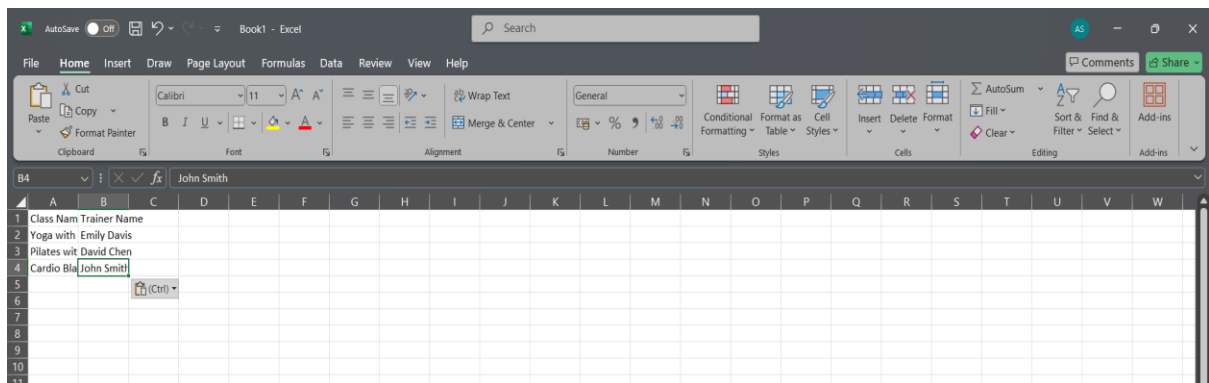
3.Data Export & Backup

This was not implemented. Data export and backup are critical for data security and business continuity in a live production environment.

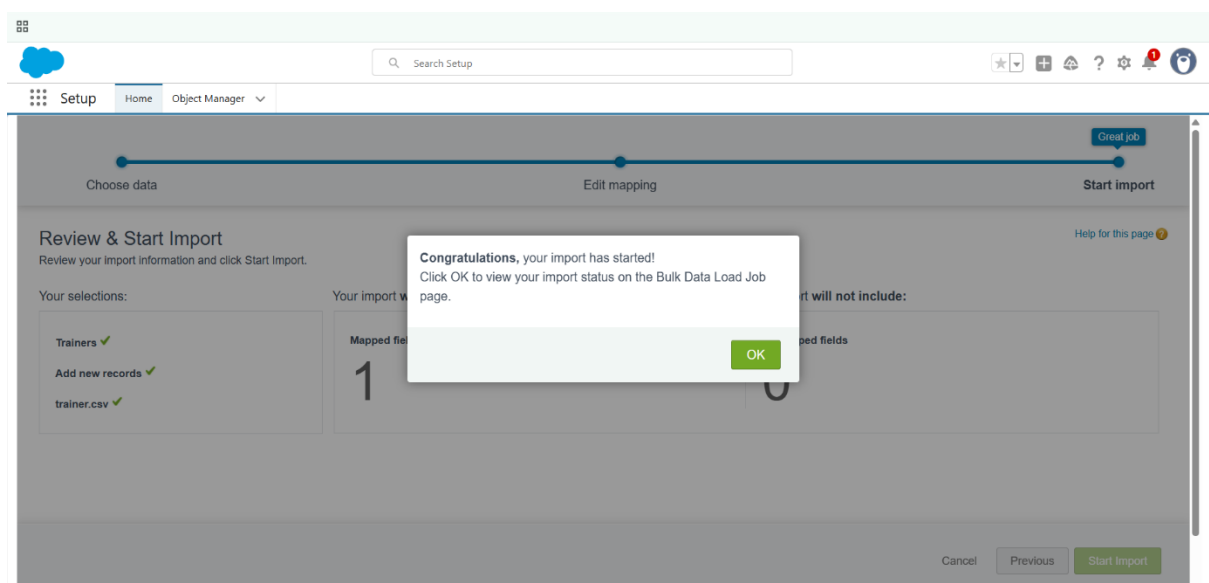
4.Data Management



A CSV file was prepared with a single column for Trainer Name to import initial trainer records.



A second CSV file was prepared to import Class records, including both Class Name and the Trainer Name for linking.




The Trainer records were successfully imported, confirming that the data was correctly prepared and uploaded.

Recent Import Jobs

Status	Object	Records Created	Records Updated	Records Failed	Start Date	Processing Time (ms)
Closed	Trainer	3	0	0	09-24-2025 06:31	160

A summary of the Trainer data import job, showing that 3 records were created successfully without any failures.

 **SETUP**
Bulk Data Load Jobs

Bulk Data Load Job Detail

Job ID750gK00000Dkoss

Submitted ByAmin Sadik Shaik

Start Time9/24/2025, 11:54 AM PST

End Time9/24/2025, 11:54 AM PST

Time to Complete (hh:mm:ss)00:02

ObjectClass

External ID Field

Content TypeCSV

Concurrency ModeParallel

API Version64.0

Job TypeBulk V1

OperationInsert

Queued Batches0

In Progress Batches0

Completed Batches1

Failed Batches0

Progress100%

Records Processed3

Records Failed1

Retries0

StatusClosed

Total Processing Time (ms)165

API Active Processing Time (ms)86

Apex Processing Time (ms)0

Reload

Batches

View Request	View Result	Batch ID	Start Time	End Time	Total Processing Time (ms)	API Active Processing Time (ms)	Apex Processing Time (ms)	Records Processed	Records Failed	Retry Count	State Message	Status
View Request	View Result	751gK00000B6esb	9/24/2025, 11:54 AM	9/24/2025, 11:54 AM	165	86	0	3	1	0		Completed

The bulk data load job detail, confirming the import of Class records. A minor data validation error caused one record to fail, which is common in real-world data imports.

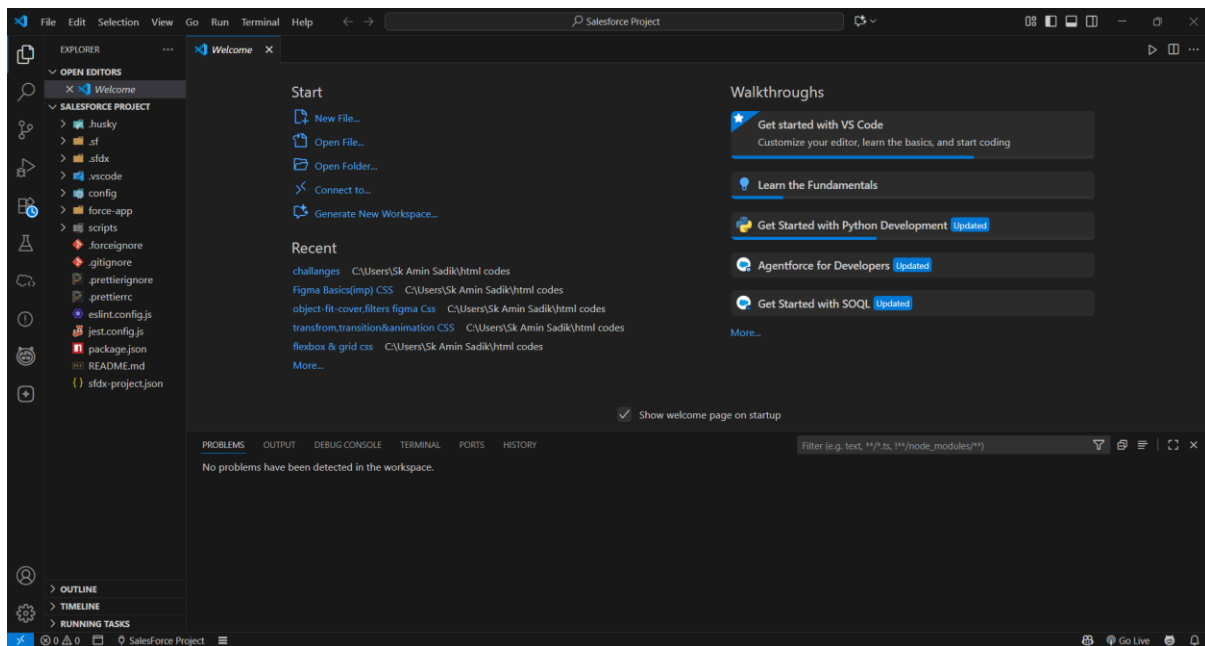
Recent Import Jobs

Status	Object	Records Created	Records Updated	Records Failed	Start Date	Processing Time (ms)
Closed	Class	2	0	1	09-24-2025 06:54	165
Closed	Trainer	3	0	0	09-24-2025 06:31	160

A summary of all recent import jobs, confirming that both Trainer and Class records were processed.

5. Deployment & Packages

- The project was built in a single Developer Edition org. However, in a professional environment, Change Sets would be used to deploy the declarative changes (objects, fields, flows) from a development sandbox to a production org.
- The final project would be delivered as an Unmanaged Package if it were being given to a client for their own use, allowing them to modify the components. A Managed Package would be created if the solution were intended to be a commercial app for the AppExchange.
- VS Code & SFDX would be the preferred tools for source control and deployment in a code-based project.



The Developer Org Connected to VS code.