

## Phase 8: Data Management & Deployment

### 1. Data Import Wizard

- Used to import **Contacts, Equipments, Rental Plans, and other objects**.
- Ideal for small to medium data loads (< 50,000 records).
- Mapped fields manually and auto-matched when possible.
- Supported creation and update of records.
- Email confirmation received after each import.

### 2. Data Loader

- Installed via [developer.salesforce.com/tools/data-loader](https://developer.salesforce.com/tools/data-loader).
- Used for **bulk imports/exports (> 50k records)** and for maintaining **object relationships (lookups)**.
- Steps included:
  - Exporting existing IDs (Contacts, Instruments, Rental Plans).
  - Preparing CSV files with IDs.
  - Performing **Insert** and **Upsert** operations.
  - Verifying **formula fields** (End Date, Total Amount) and related records (Payments, Maintenance).
- Successfully imported:
  - 10 Contacts
  - 7 Equipments
  - 4 Rental Plans
  - 4 Rental Agreements
  - 4 Payments
  - 3 Maintenance Records

### 3. Duplicate Rules

- Matching Rule created on **Contact**:
  - Fields: Email (Exact match) and Phone (Fuzzy match)
  - Logic: Email OR Phone must match.
- Duplicate Rule:
  - Blocks creation when duplicate found.
  - Warns on edit.
  - Generates duplicate-record reports.

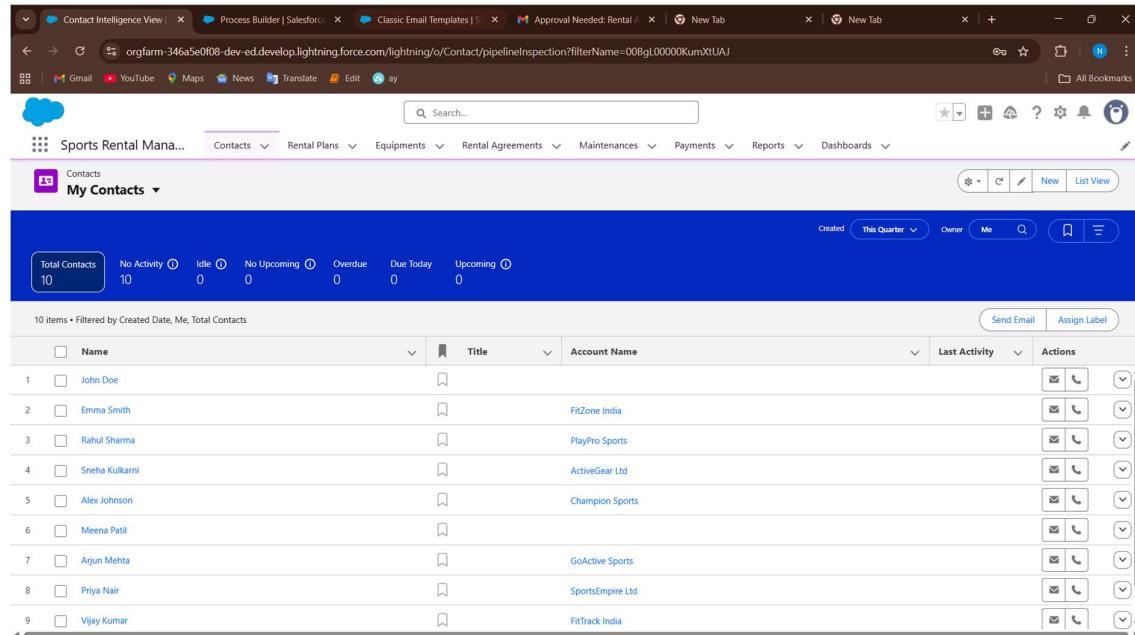
## Create a Duplicate Rule

**Purpose:** Define what happens when a duplicate is found.

1. Go to **Setup → Duplicate Rules**.
2. Click **New Rule**.
3. **Object:** Contact
4. **Rule Name:** Customer\_Duplicate\_Rule
5. (Optional) Add a description:  
*"Prevent duplicate contacts using Email or Phone matching."*
6. Under **Actions:**
  - **Action on Create:**  
Select **Block** (to stop duplicates from being created)  
→ OR choose **Alert** (to warn user but allow save).
  - **Action on Edit:**  
Select **Allow** (so users can still update existing records).
  - **Check Report** (to log duplicates for reporting).
7. In **Matching Rules section**, click **Add** → select your **Customer\_Matching\_Rule**.
8. (Optional) Add a custom **alert message**:

"A Contact with this Email or Phone already exists in the system."

9. Click **Save** and then **Activate**.



The screenshot shows the Salesforce Lightning interface for the 'Sports Rental Mana...' organization. The 'My Contacts' page is displayed. At the top, there's a summary bar with counts for Total Contacts (10), No Activity (10), Idle (0), No Upcoming (0), Overdue (0), Due Today (0), and Upcoming (0). Below this is a search bar and a toolbar with filters for Created (This Quarter), Owner (Me), and search functions. The main area shows a list of 10 contacts, each with a checkbox, name, title, account name, last activity, and action buttons for email and phone. The contacts listed are John Doe, Emma Smith, Rahul Sharma, Sneha Kulkarni, Alex Johnson, Meena Patil, Arjun Mehta, Priya Nair, and Vijay Kumar. The account names for these contacts are FitZone India, PlayPro Sports, ActiveGear Ltd, Champion Sports, GoActive Sports, SportsEmpire Ltd, and FitTrack India.

	Name	Title	Account Name	Last Activity	Actions
1	John Doe		FitZone India		[Email, Phone]
2	Emma Smith		PlayPro Sports		[Email, Phone]
3	Rahul Sharma		ActiveGear Ltd		[Email, Phone]
4	Sneha Kulkarni		Champion Sports		[Email, Phone]
5	Alex Johnson		GoActive Sports		[Email, Phone]
6	Meena Patil		SportsEmpire Ltd		[Email, Phone]
7	Arjun Mehta		FitTrack India		[Email, Phone]
8	Priya Nair				[Email, Phone]
9	Vijay Kumar				[Email, Phone]

The screenshot shows a Salesforce Lightning interface for the 'Sports Rental Management' application. The top navigation bar includes links for Recently Viewed, Process Builder, Classic Email Templates, Approval Needed, and New Tab. The main header has a cloud icon and the title 'Sports Rental Mana...'. A search bar at the top right contains the placeholder 'Search...'. Below the header, a navigation menu lists Contacts, Rental Plans, Equipments, Rental Agreements, Maintenances, Payments, Reports, and Dashboards.

The main content area displays a 'Recently Viewed' list for 'Rental Plans'. It shows 4 items updated a few seconds ago:

	Rental Plan Name
1	<input type="checkbox"/> Special Discount
2	<input type="checkbox"/> 1 Month Plan
3	<input type="checkbox"/> 1 Week Plan
4	<input type="checkbox"/> 1 Day Plan

At the bottom of the list are standard Salesforce actions: New, Import, Change Owner, and Assign Label. There is also a search bar labeled 'Search this list...' and a set of filter and sort icons.

This screenshot shows the same Salesforce Lightning interface for the 'Sports Rental Management' application, specifically the 'Equipments' section. The top navigation bar and header are identical to the first screenshot.

The main content area displays a 'Recently Viewed' list for 'Equipments'. It shows 7 items updated a few seconds ago:

	Equipment Name
1	<input type="checkbox"/> Badminton
2	<input type="checkbox"/> Basketball
3	<input type="checkbox"/> Volleyball
4	<input type="checkbox"/> Football
5	<input type="checkbox"/> Gym Mat
6	<input type="checkbox"/> Cricket Bat
7	<input type="checkbox"/> Tennis Racket

At the bottom of the list are standard Salesforce actions: New, Import, Change Owner, and Assign Label. There is also a search bar labeled 'Search this list...' and a set of filter and sort icons.

The screenshot shows the Salesforce Lightning interface with the following details:

- Page Header:** Recently Viewed | Rental, Process Builder | Salesforce, Classic Email Templates | S, Approval Needed: Rental, New Tab.
- Page Title:** orgfarm-346a5e0f08-dev-ed.develop.lightning.force.com/lightning/o/Rental\_Agreement\_c/list?filterName=\_Recent
- Page Content:** Sports Rental Mana... (dropdown), Contacts, Rental Plans, Equipments, Rental Agreements (selected), Maintenances, Payments, Reports, Dashboards.
- Section:** Rental Agreements, Recently Viewed (dropdown).
- List:** 4 items • Updated a few seconds ago.

	Rental Agreement Name	Actions
1	<input type="checkbox"/> Arjun Aggrement	<input checked="" type="checkbox"/>
2	<input type="checkbox"/> Sneha Kulkarni Aggrement	<input checked="" type="checkbox"/>
3	<input type="checkbox"/> Rahul Sharma Aggrement	<input checked="" type="checkbox"/>
4	<input type="checkbox"/> John Doe Agreement	<input checked="" type="checkbox"/>
- Buttons:** New, Import, Assign Label, Search this list..., List View, Card View, Create, Edit, Delete, Filter, Sort, Refresh.

The screenshot shows the Salesforce Lightning interface with the following details:

- Page Header:** Recently Viewed | Mainten..., Process Builder | Salesforce, Classic Email Templates | S, Approval Needed: Rental, New Tab.
- Page Title:** orgfarm-346a5e0f08-dev-ed.develop.lightning.force.com/lightning/o/Maintenance\_c/list?filterName=\_Recent
- Page Content:** Sports Rental Mana... (dropdown), Contacts, Rental Plans, Equipments, Rental Agreements, Maintenances (selected), Payments, Reports, Dashboards.
- Section:** Maintenances, Recently Viewed (dropdown).
- List:** 3 items • Updated a few seconds ago.

	Maintenance Name	Actions
1	<input type="checkbox"/> Rahul Maintenance	<input checked="" type="checkbox"/>
2	<input type="checkbox"/> Sneha Maintenance	<input checked="" type="checkbox"/>
3	<input type="checkbox"/> John Maintenance	<input checked="" type="checkbox"/>
- Buttons:** New, Import, Change Owner, Assign Label, Search this list..., List View, Card View, Create, Edit, Delete, Filter, Sort, Refresh.

The screenshot shows the 'Payments' section of the 'Recently Viewed' list in the Salesforce interface. The list contains four items, all of which were updated a few seconds ago. The items are:

- 1 Sneha Payment
- 2 Rahul Payment
- 3 Arjun Payment
- 4 john doe payment

At the top right of the list, there are buttons for 'New', 'Import', 'Change Owner', and 'Assign Label'. Below the list is a search bar labeled 'Search this list...' and a set of filter and sort icons.

The screenshot shows the 'Duplicate Rules' setup page in the Salesforce interface. The page title is 'Customer Duplicate Rule'. The 'Duplicate Rule Detail' section displays the following configuration:

- Rule Name:** Customer Duplicate Rule
- Description:** Contact
- Object:** Contact
- Record-Level Security:** Enforce sharing rules
- Action On Create:** Block
- Action On Edit:** Allow
- Alert Text:** A contact with this email or phone already exists in the system.
- Active:** ✓
- Matching Rule:** [Customer Matching Rule](#) (Mapped)
- Matching Criteria:** (Contact: Email EXACT MatchBlank = FALSE) OR (Contact: Phone FUZZY MatchBlank = FALSE)
- Conditions:** None
- Created By:** Neha Kulkarni, 10/15/2025, 9:45 PM
- Modified By:** Neha Kulkarni, 10/15/2025, 9:45 PM

At the bottom of the detail section, there are 'Edit', 'Delete', 'Clone', and 'Deactivate' buttons. The page also includes a sidebar with a search bar and a list of duplicate management options: Data, Duplicate Management, Duplicate Error Logs, Duplicate Rules, and Matching Rules. A global search bar at the top left is also visible.