Phase 8: Data Management & Deployment

Goal: Efficiently manage property data and deploy metadata across environments using both admin tools and developer workflows

Data Import Wizard

Imported 50 demo Property records using Salesforce’s Data Import Wizard.

Fields included: Property Name, Location, Price, Status, Agent Assigned

Manual field mapping ensured accurate data alignment

Used for initial data seeding and UI testing

Data Loader

Used Salesforce Data Loader for bulk importing:

Appointment__c records for visit scheduling

Lead__c records for buyer interest tracking

Agent__c profiles for assignment and reporting

Ensured proper CSV formatting and field mapping   Verified success logs and error handling

Deployment Method: Data Loader → Insert → Select Object → Upload CSV → Map Fields → Finish

Duplicate Rules

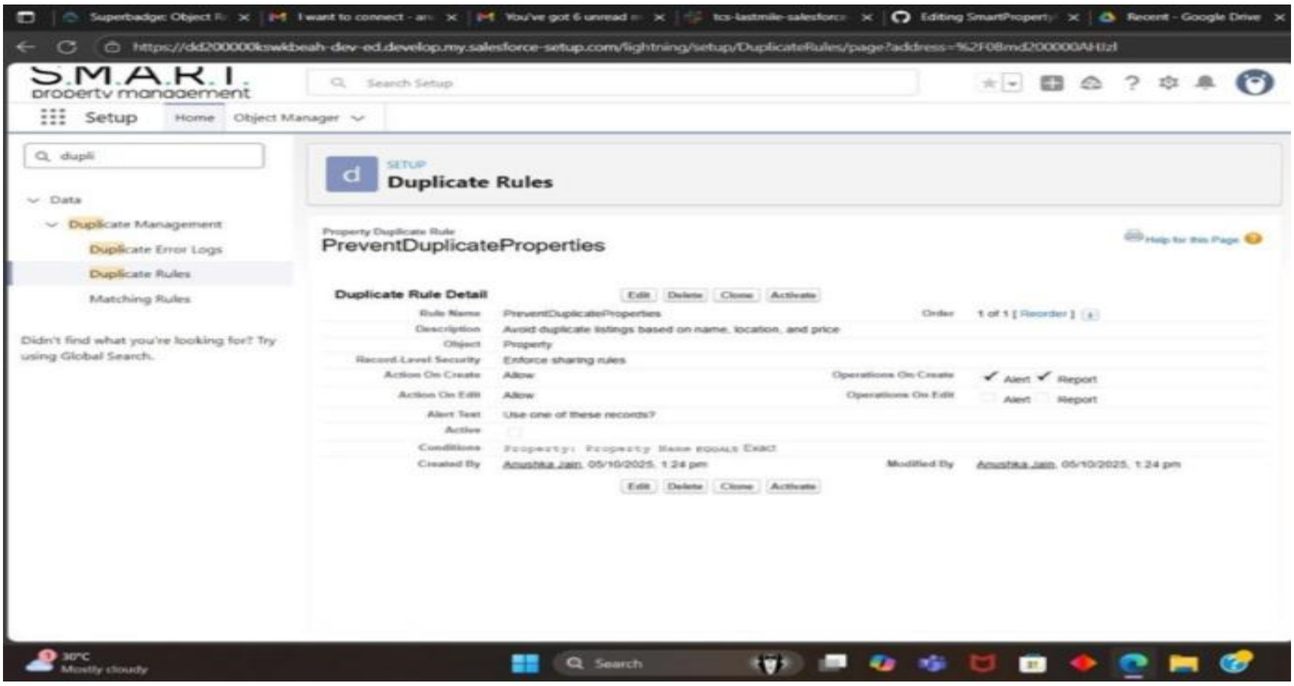
Created a Duplicate Rule for the Property object to maintain data integrity.

Matching Criteria: Property Name, Location, Price

Action: Allow with Alert

Alert Message: “Duplicate property exists”

Screenshot Added: Shows active rule setup with matching logic and alert configuration.



Property Duplicate Rule
PreventDuplicateProperties

Duplicate Rule Detail

Rule Name: PreventDuplicateProperties
Order: 1 of 1 [Reorder]
Description: Avoid duplicate listings based on name, location, and price
Object: Property
Record-Level Security: Enforce sharing rules
Action On Create: Allow
Operations On Create: ☑ Alert ☑ Report
Action On Edit: Allow
Operations On Edit: □ Alert □ Report
Alert Text: Use one of these records?
Active: □
Conditions: Property: Property Name EQUALS Exact
Created By: Anushka Jain, 05/10/2025, 1:24 pm
Modified By: Anushka Jain, 05/10/2025, 1:24 pm

image :
https://drive.google.com/file/d/1FDNat1DyQwNsAe7Rix_Ncm1DOU1jCyNA/view?usp=drive_link

Deployment Method: Setup → Duplicate Rules → New → Object: Property → Add Matching Rule → Configure Alert → Activate

Data Export & Backup

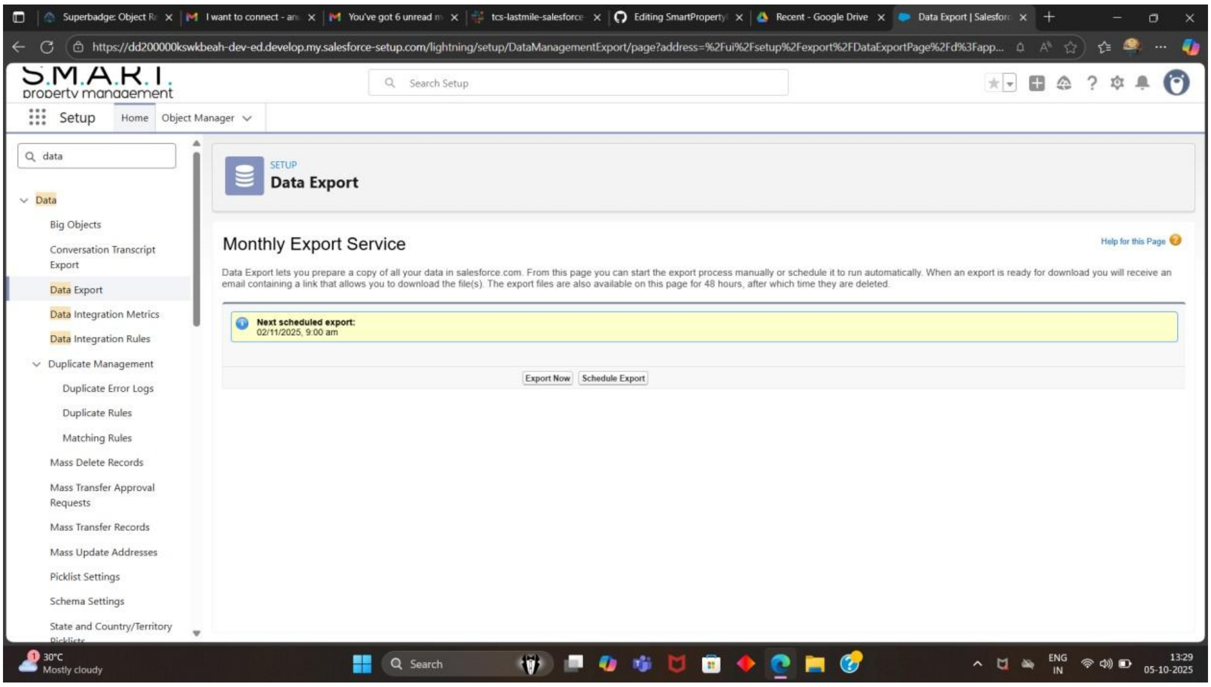
Scheduled weekly backups of all custom object data.

Exported: Property__c, Appointment__c, Lead__c

Format: CSV

Purpose: Archival, rollback readiness, and audit trail

Screenshot Added: Shows export scheduling interface with options for manual and automated exports.



Data Export

Monthly Export Service

Data Export lets you prepare a copy of all your data in salesforce.com. From this page you can start the export process manually or schedule it to run automatically. When an export is ready for download you will receive an email containing a link that allows you to download the file(s). The export files are also available on this page for 48 hours, after which time they are deleted.

Next scheduled export:
02/11/2025, 9:00 am

image : https://drive.google.com/file/d/140Voow5Co3pHoEKVhDvEa9BS3eaBrvak/view?usp=drive_link

Deployment Method: Setup → Data Export → Schedule Export → Select Objects → Save

Change Sets

Used Outbound Change Sets to deploy metadata from Sandbox to Production.

Components moved:

Custom Objects

Page Layouts

Validation Rules

Flows

Apex Classes

Deployment Method: Setup → Outbound Change Sets → New → Add Components → Upload → Inbound Change Sets → Deploy

Unmanaged vs Managed Packages

Created an Unmanaged Package for internal deployment and version tracking. Used for

SmartPropertyPortal components

Plan to convert to Managed Package for AppExchange publishing

Deployment Method: Setup → Packages → New → Add Components → Save & Distribute

ANT Migration Tool

Configured ANT tool for command-line deployment of metadata.

Used build.xml and package.xml to define deployment scope

Authenticated via build. Properties

Deployed using ant deploy Code

Deployment Method:

Bash ant deploy Code

Ideal for CI/CD pipelines and automated deployments

VS Code & SFDX

Set up VS Code with Salesforce DX for developer-friendly deployment.

Used sfdx force:source:push and pull to sync changes

Version-controlled metadata using Git

Enabled collaborative development and rollback capability

Deployment Commands:

```
bash sfdx force:auth:web:login -a
DevOrg sfdx force:source:push sfdx
force:source:pull
```

Ensured clean source tracking and modular deployment

“Executed full-scale data management and deployment for SmartPropertyPortal using Salesforce tools like Data Import Wizard, Data Loader, Duplicate Rules, and Data Export. Deployed metadata via Change Sets, ANT, and SFDX with Git version control. Screenshots validate real-time configuration and backup strategies.”