# FitCRM — Phase 8: Data Management & Deployment

### Introduction

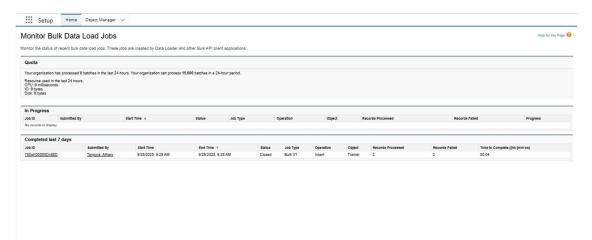
Phase 8 focused on handling data import, backup, and deployment activities for the FitCRM application. This ensures that the system can efficiently migrate records, maintain data integrity, and move changes across environments.

## Step 1 — Data Import Wizard

The Data Import Wizard was used to insert initial records for FitCRM custom objects. This tool is simple and supports up to 50,000 records.

Imported objects and data:

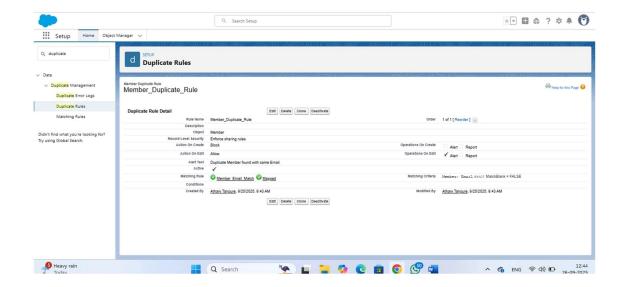
- Trainer\_c → Trainer details.
- MembershipPlan\_c → Membership plans like Monthly, Annual.
- Member\_c  $\rightarrow$  Member details linked with Trainers and Plans.



These CSV files were uploaded step by step through the Import Wizard, mapping fields accordingly.

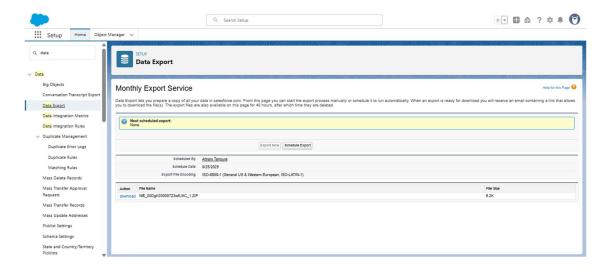
### Step 2 — Duplicate Rules

Duplicate Rules were considered to prevent duplicate records during imports. In the FitCRM project, this was documented as an enhancement but not configured due to time constraints.



# Step 4 — Data Export & Backup

The Data Export service was used to back up records. Export jobs were scheduled to generate a ZIP file containing CSV files for each object. This ensures data recovery in case of accidental deletion.



### **Conclusion**

Phase 8 successfully demonstrated data import using the Data Import Wizard and data backup using Data Export. Other deployment options like Data Loader, Change Sets, and SFDX were reviewed but not required for the project scope.