Project Title: Employee Wellness & Productivity Tracker

Phase 8 : Data Management & Deployment

DATA IMPORT WIZARD

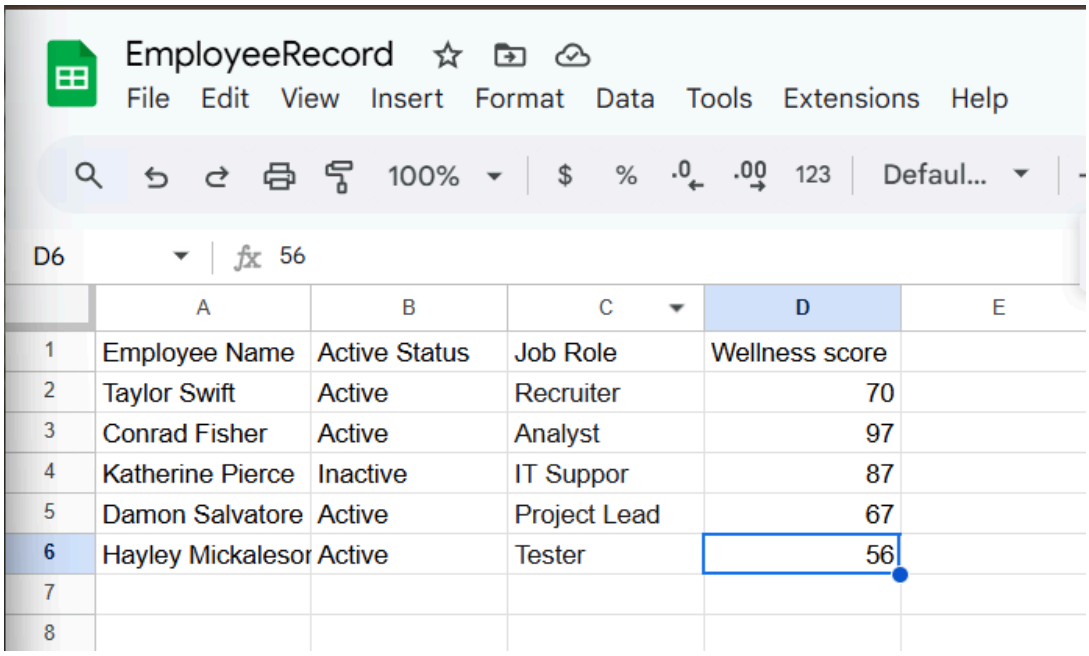
Purpose

1. Import Salesforce data **without writing code**.
2. Ideal for **small to medium datasets** (up to 50,000 records).
3. Prepares data for tracking **wellness scores, productivity, and activities**.

Use Case

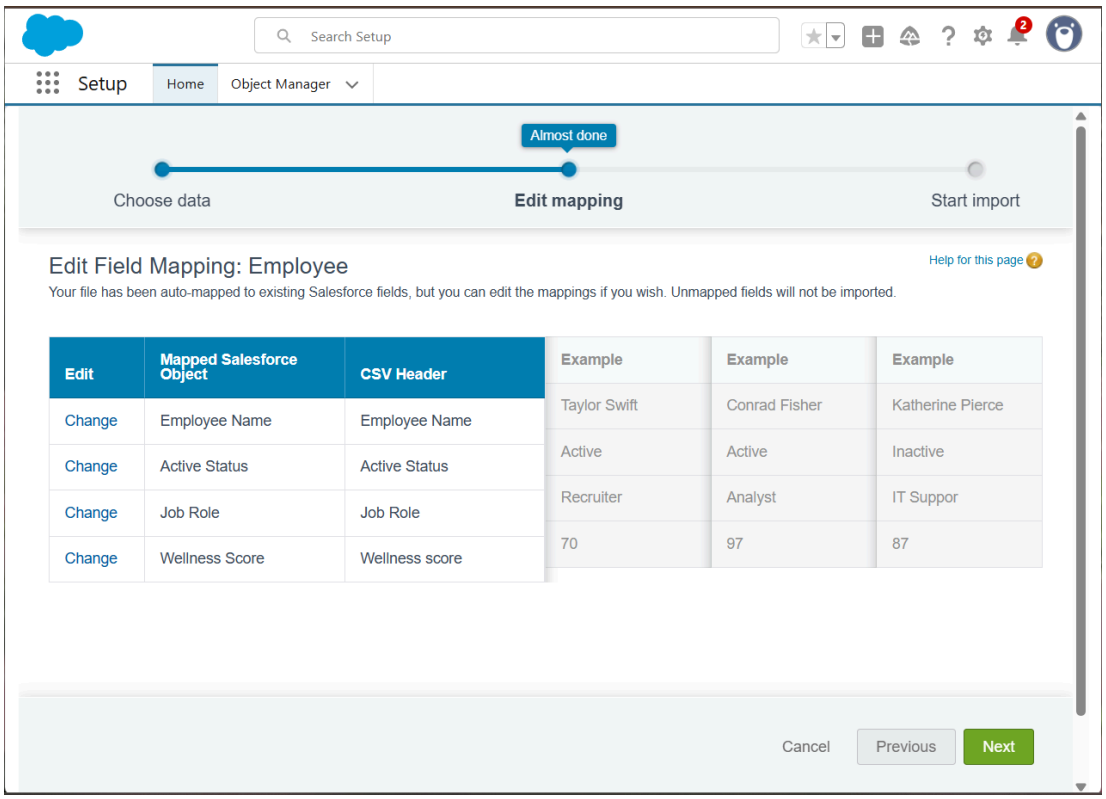
Your HR team has a CSV file of new employees. Instead of entering records manually, the Data Import Wizard lets you **bulk upload employees**, ensuring data is ready for dashboards, reports, and LWCs.

CSV File

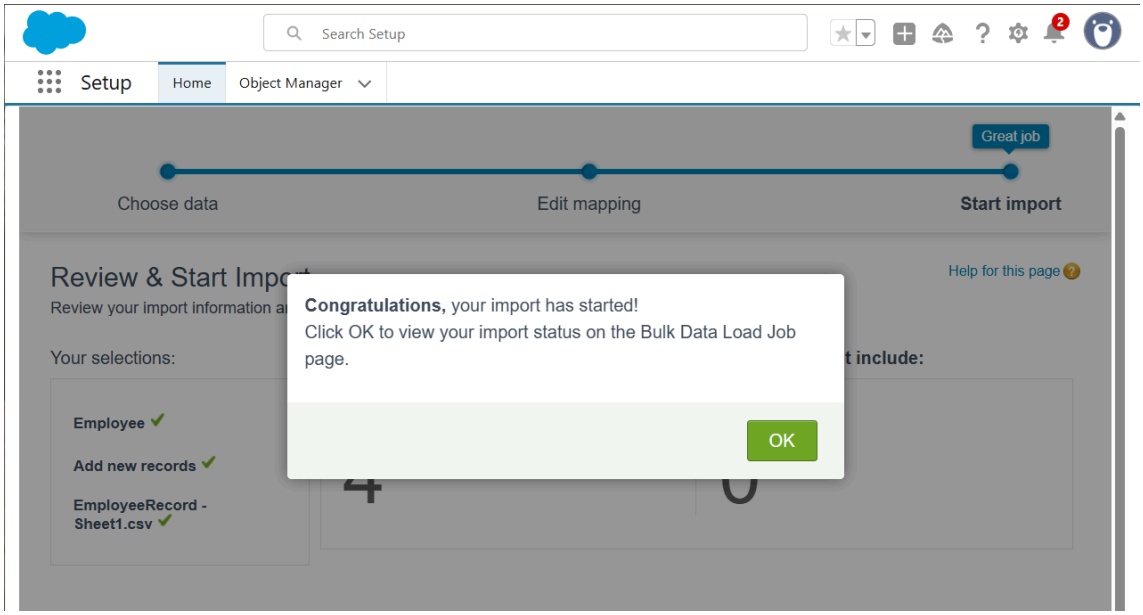


	A	B	C	D	E
1	Employee Name	Active Status	Job Role	Wellness score	
2	Taylor Swift	Active	Recruiter	70	
3	Conrad Fisher	Active	Analyst	97	
4	Katherine Pierce	Inactive	IT Suppor	87	
5	Damon Salvatore	Active	Project Lead	67	
6	Hayley Mickalesor	Active	Tester	56	
7					
8					

Data Import Wizard Mapping Screen



Import Success Page



DATA LOADER

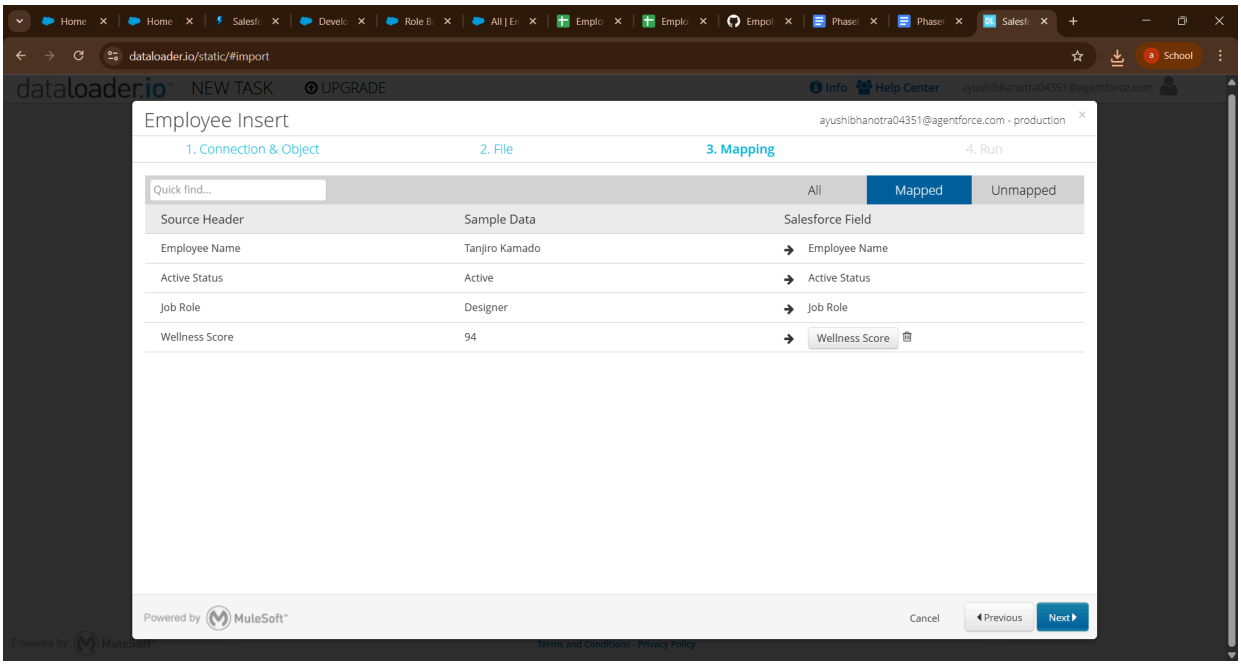
Purpose

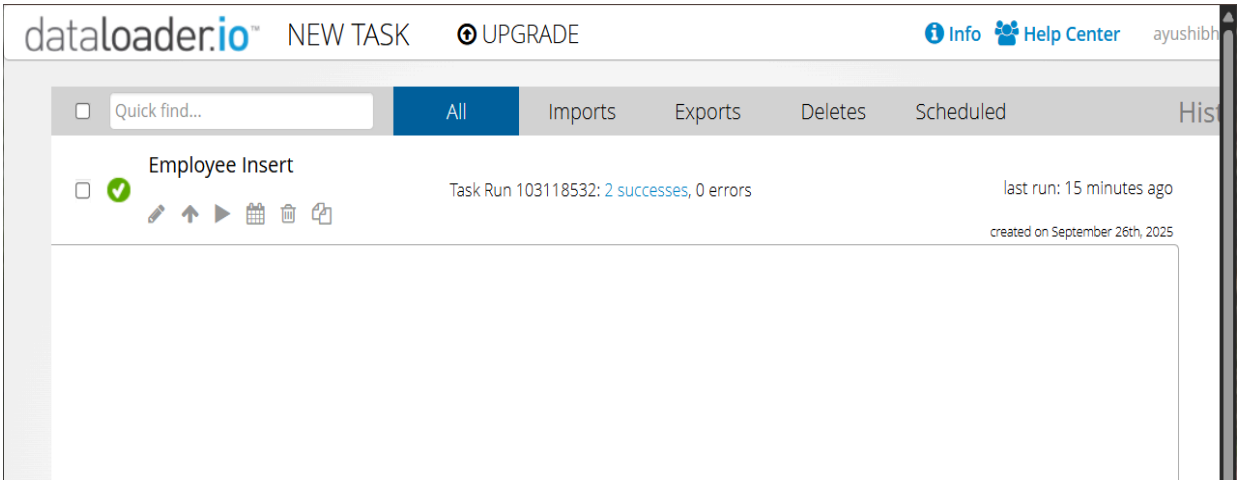
- Manage **large datasets** in Salesforce (more than 50,000 records).
- Supports **Insert, Update, Delete, and Export** operations.
- Ideal for **bulk importing employees, wellness activities, or productivity tasks**.

Use Case

Your HR team has a **large list of employees** in CSV format. Instead of manually adding records, **Data Loader allows bulk insertion, updates, or deletions**, ensuring data is consistent and accurate.

OPERATION : Insert





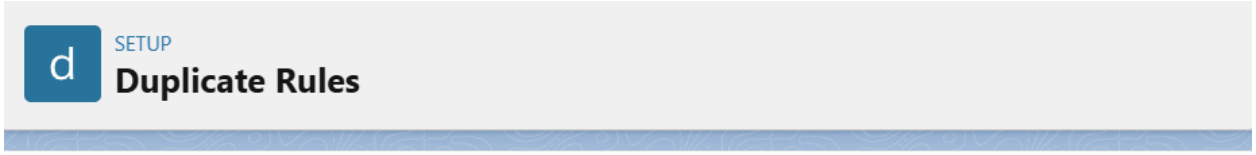
DUPLICATE RULES

Purpose

- Prevent **duplicate records** in Salesforce.
- Ensure **data quality**, e.g., no two employees have the same **Email** or **Employee Name**.

Use Case

- When HR imports or adds employees, **duplicate emails or IDs can cause confusion**.
- Duplicate Rules automatically **block or alert** the user when trying to create a duplicate.



Employee Duplicate Rule

Employee Email Duplicate Rule

Help for this Page

Duplicate Rule Detail

Edit | Delete | Clone | Deactivate

Rule Name	Employee Email Duplicate Rule	Order	1 of 1 [Reorder]
Description	Prevents employees from being created with duplicate emails.		
Object	Employee		
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	✓		
Matching Rule	Employee Email Exact Match Mapped	Matching Criteria	`Employee: Email EXACT` MatchBlank = TRUE
Conditions			
Created By	Ayushi Bhanotra, 9/26/2025, 2:32 AM	Modified By	Ayushi Bhanotra, 9/26/2025, 2:35 AM

Edit | Delete | Clone | Deactivate

Matching Rule

Employee Email Exact Match

Help for this Page

Matching Rule Detail

Delete | Clone | Deactivate

Object	Employee		
Rule Name	Employee Email Exact Match		
Unique Name	Employee_Email_Exact_Match		
Description			
Matching Criteria	`Employee: Email EXACT` MatchBlank = TRUE		
Status	Active		
Created By	Ayushi Bhanotra, 9/26/2025, 2:32 AM	Modified By	Ayushi Bhanotra, 9/26/2025, 2:34 AM

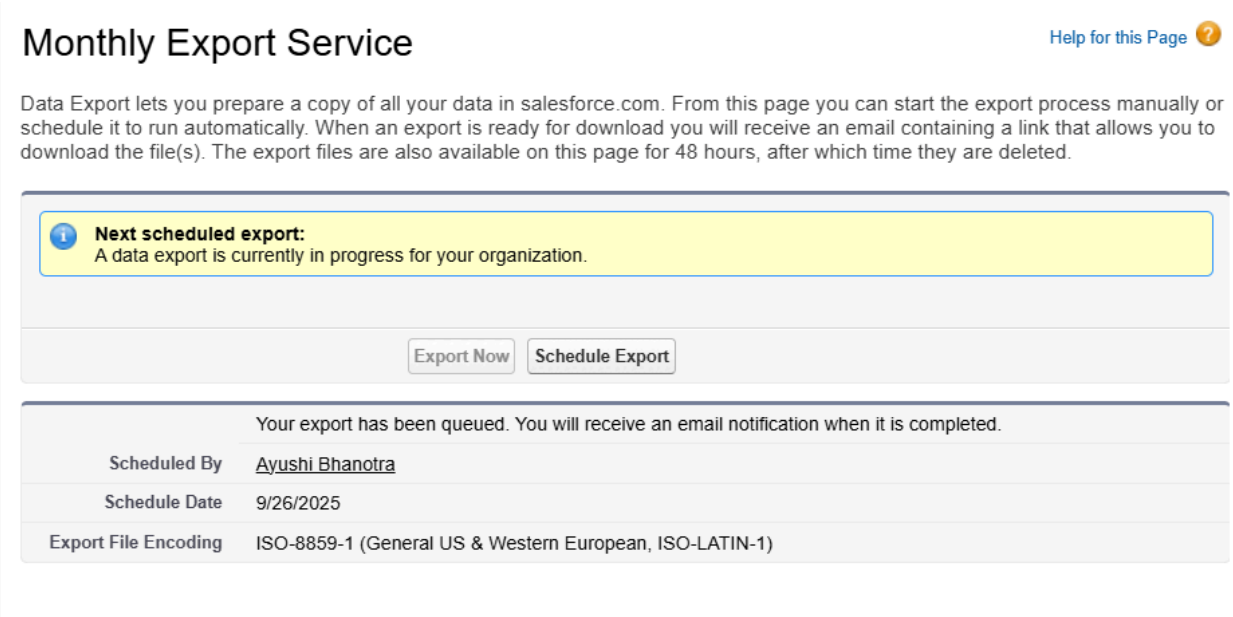
DATA EXPORT & BACKUP

Purpose

- Regularly backup Salesforce data to prevent loss.
- Ensures Employee, Wellness, and Productivity data is **safe and recoverable**.
- Useful before major updates, imports, or deployment.

Use Case

- HR wants to maintain a **backup of all employee records and wellness activities**.
- Allows recovery in case of accidental deletion or data corruption.



CHANGE SETS

Purpose

- Change Sets are used to **deploy metadata** (objects, fields, LWCs, Apex classes, Record Pages) from one Salesforce org to another (e.g., Sandbox ➜ Production).
- They ensure **safe, consistent, and easy migration** of project components between orgs.

Use Case

- If you had multiple orgs, Change Sets would let you move your **Employee object, Record Pages, Dashboards, and LWCs** from a development sandbox to production.
- Helps avoid **manual recreation** and reduces errors.

Current Project Status

- This project is built in **a single Salesforce org**.
- **No deployment is performed**.
- In a multi-org setup, Change Sets could be used in the future.

MANAGED & UNMANAGED PACKAGES

Purpose

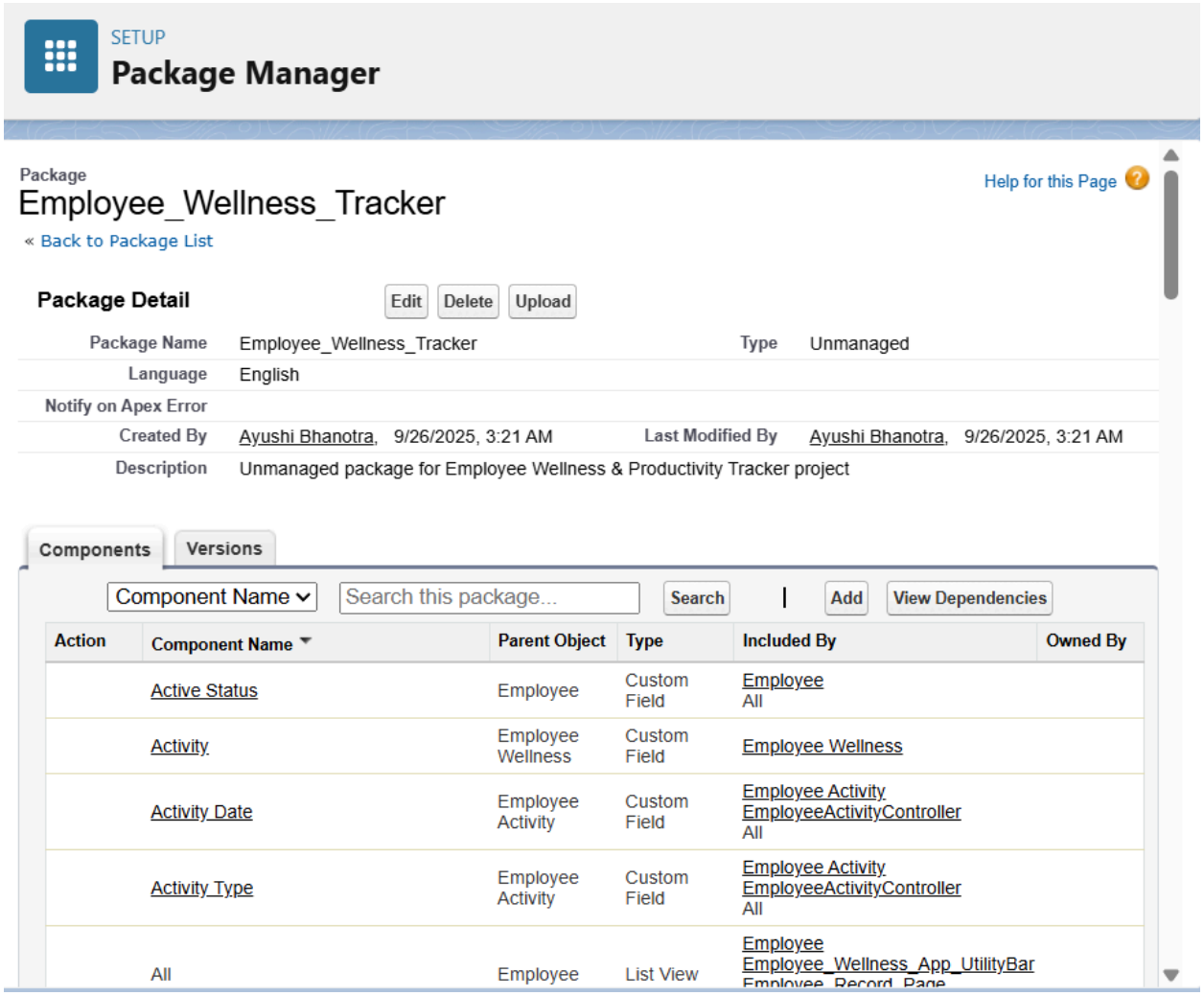
- **Unmanaged Package**:
  Used to group and share Salesforce components like objects, Apex classes, and Lightning components. These components can still be **edited in the target org**. Best for **projects, testing, and learning**.
- **Managed Package**:
  Locked package intended for **AppExchange apps** or controlled distribution. Components are **not editable** in the target org.

Your Project Use Case

- In this project, an **Unmanaged Package** was created for the **Employee Wellness & Productivity Tracker**.
- Components you added:
  - **Apex Classes:** `EmployeeController`, `EmployeeActivityController`

- **Lightning Web Components (LWC Bundles):** `wellnessScoreCard`, `employeeActivityList`, `updateScoreButton`
- **Lightning App:** *Employee Wellness Tracker App*

This package allows all project components to be **shared with another org** and still be **editable** there.

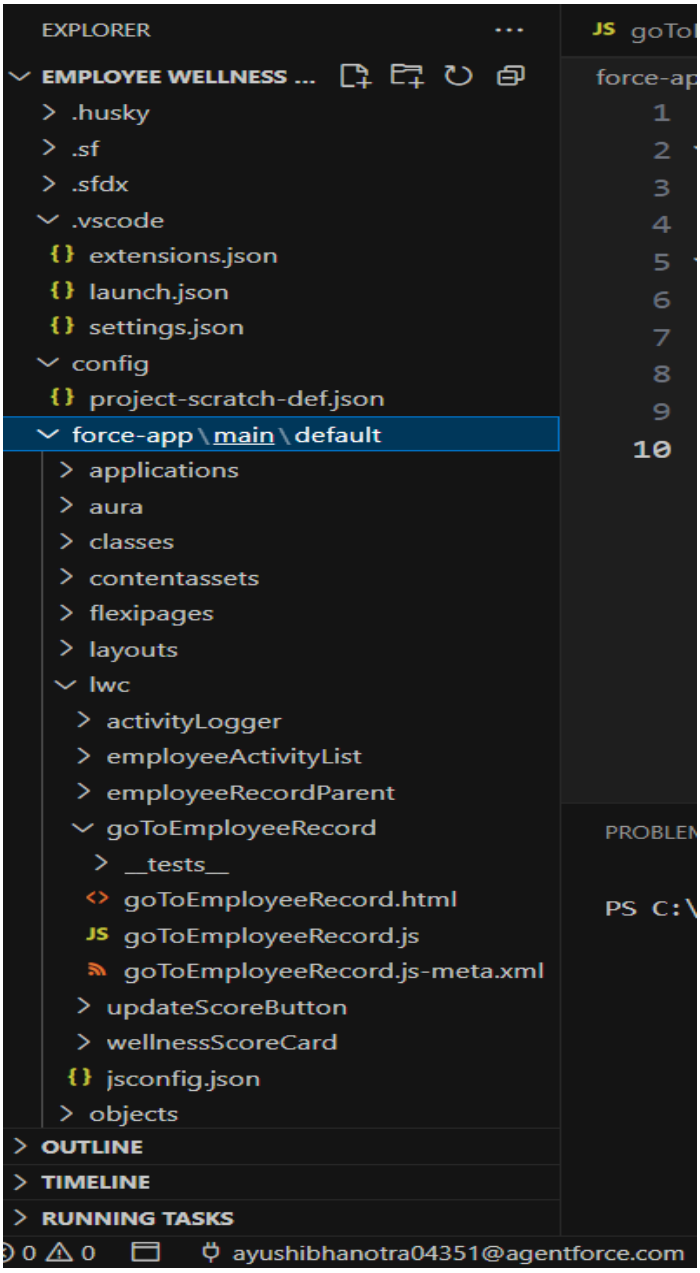


VS CODE & SFDX

Intro:

In this project, I am not using the **ANT Migration Tool** since it is a legacy option and less commonly used today. Instead, I am using **Visual Studio**

Code (VS Code) with Salesforce CLI (SFDX), which is the recommended modern approach for Salesforce development and deployment.

Purpose:

Provide a modern development environment for Salesforce. With VS Code and Salesforce CLI (SFDX), developers can create, edit, test, and deploy metadata (Apex Classes, LWCs, Objects) directly from their local machine.