

Project Title: Employee Wellness & Productivity Tracker

Phase 8 : Data Management & Deployment

DATA IMPORT WIZARD

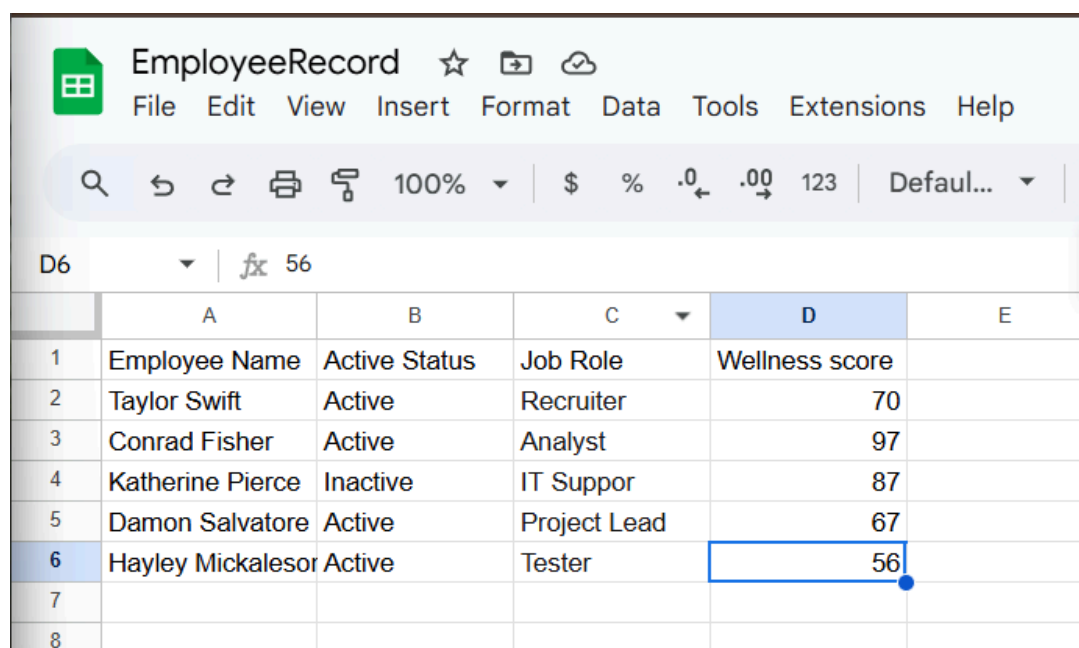
Purpose

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

The screenshot shows the 'Edit mapping' step of the Data Import Wizard. At the top, a progress bar indicates the current step is 'Almost done'. The main heading is 'Edit Field Mapping: Employee'. Below this, a message states: '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.' A table with 6 columns is displayed: 'Edit', 'Mapped Salesforce Object', 'CSV Header', and three 'Example' columns. The table contains four rows of mappings for Employee Name, Active Status, Job Role, and Wellness Score. At the bottom right, there are 'Cancel', 'Previous', and 'Next' buttons.

Edit	Mapped Salesforce Object	CSV Header	Example	Example	Example
Change	Employee Name	Employee Name	Taylor Swift	Conrad Fisher	Katherine Pierce
Change	Active Status	Active Status	Active	Active	Inactive
Change	Job Role	Job Role	Recruiter	Analyst	IT Support
Change	Wellness Score	Wellness score	70	97	87

Import Success Page

The screenshot shows the 'Review & Start Import' page. A progress bar at the top shows the 'Start import' step as 'Great job'. A modal dialog box is open in the center with the text: 'Congratulations, your import has started! Click OK to view your import status on the Bulk Data Load Job page.' The dialog has an 'OK' button. In the background, under 'Your selections:', there is a list with checkmarks: 'Employee', 'Add new records', and 'EmployeeRecord - Sheet1.csv'.

DATA LOADER

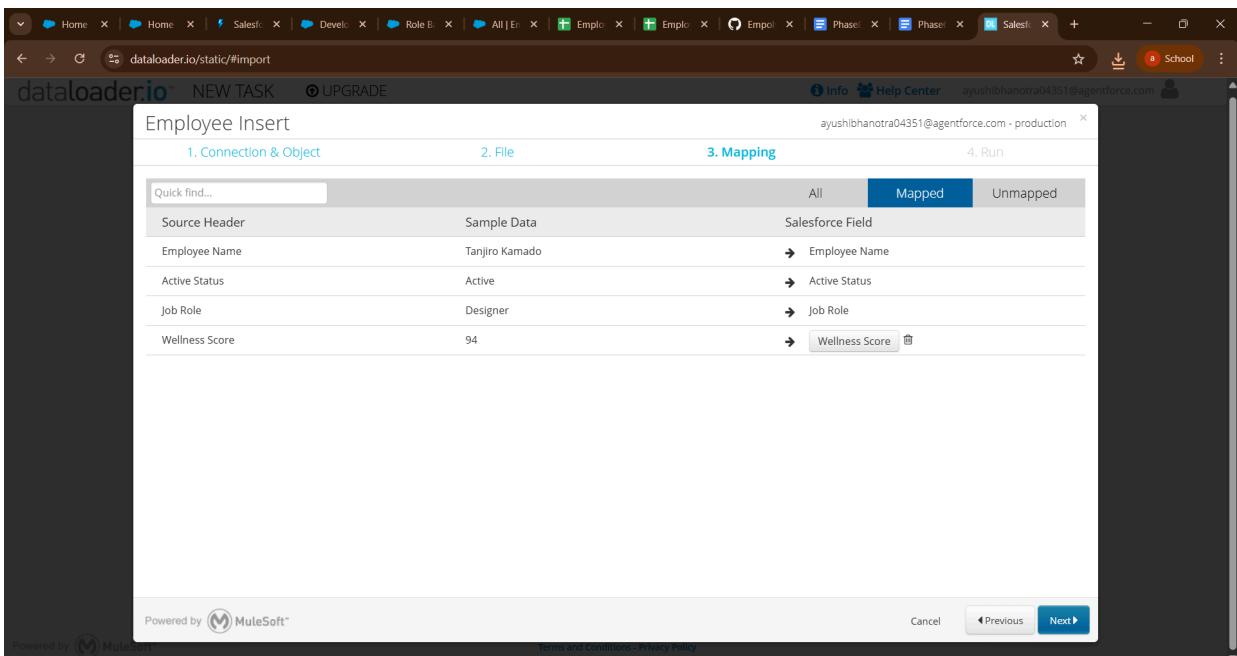
Purpose

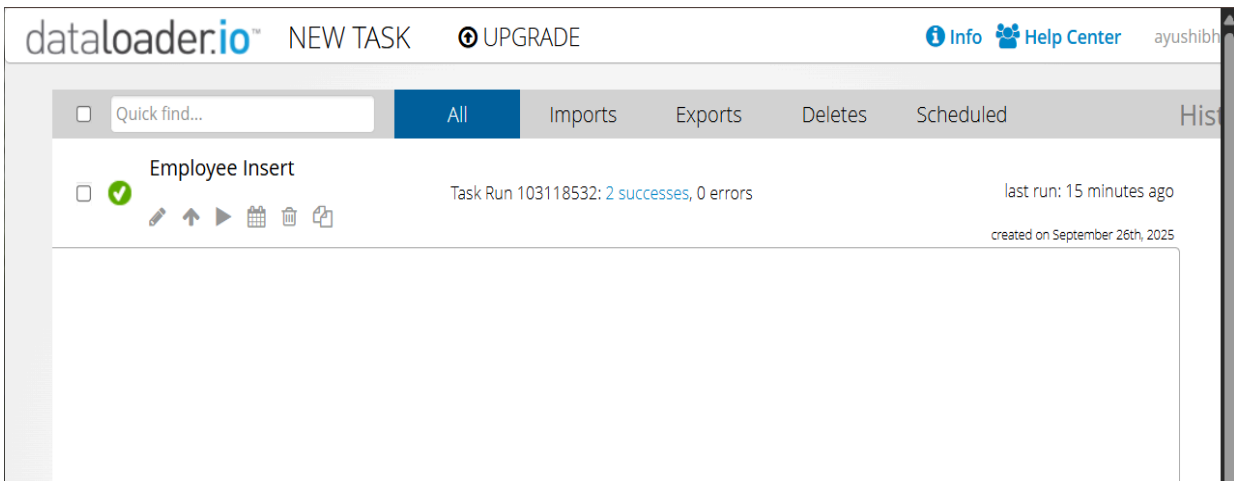
- Manage **large datasets** in Salesforce (more than 50,000 records).
- Supports **Insert, Update, Delete, and Export** operations.
- Ideal for **bulk importing employees, wellness activities, or productivity tasks**.

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.



SETUP

Duplicate Rules




Employee Duplicate Rule

Employee Email Duplicate Rule

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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	<input checked="" type="checkbox"/> Alert <input checked="" type="checkbox"/> Report	
Action On Edit	Allow		Operations On Edit	<input checked="" type="checkbox"/> Alert <input type="checkbox"/> Report	
Alert Text	Use one of these records?				
Active	<input checked="" type="checkbox"/>				
Matching Rule	 <u>Employee Email Exact Match</u>  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	
<div><div>Edit</div><div>Delete</div><div>Clone</div><div>Deactivate</div></div>					

Matching Rule

Employee Email Exact Match

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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.

Monthly Export Service

[Help for this Page](#) 

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:**
A data export is currently in progress for your organization.

[Export Now](#)

[Schedule Export](#)

Your export has been queued. You will receive an email notification when it is completed.

Scheduled By [Ayushi Bhanotra](#)

Schedule Date 9/26/2025

Export File Encoding ISO-8859-1 (General US & Western European, ISO-LATIN-1)

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.


Package Manager

Package

Employee_Wellness_Tracker

[« Back to Package List](#)

Package Detail

Edit Delete Upload

Package Name	Employee_Wellness_Tracker	Type	Unmanaged
Language	English		
Notify on Apex Error			
Created By	Ayushi Bhanotra, 9/26/2025, 3:21 AM	Last Modified By	Ayushi Bhanotra, 9/26/2025, 3:21 AM
Description	Unmanaged package for Employee Wellness & Productivity Tracker project		

Components Versions

Component Name

Search this package...

Search

Add

View Dependencies

Action	Component Name	Parent Object	Type	Included By	Owned By
	Active Status	Employee	Custom Field	Employee All	
	Activity	Employee Wellness	Custom Field	Employee Wellness	
	Activity Date	Employee Activity	Custom Field	Employee Activity EmployeeActivityController All	
	Activity Type	Employee Activity	Custom Field	Employee Activity EmployeeActivityController All	
	All	Employee	List View	Employee Employee_Wellness_App_UTILITYBar Employee_Record_Page	

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.

