Phase 8: Data Management & Deployment

Overview

After completing **integration and external access in Phase 7**, the next step was to ensure the **PlayStation CRM data is reliable, consistent, and secure**, while also preparing for **safe deployments** of all the customizations and logic built in earlier phases.

This phase had two major objectives:

1. **Data Management** – make sure gamer data, subscription information, repair records, and related objects are **accurate**, **deduplicated**, **backed up**, **and portable**.

2. Deployment

By completing this phase, the PlayStation CRM became not just functional and integrated but also **enterprise-ready** — capable of scaling with reliable data and controlled deployments.

Activities Done

1. Data Import & Export

Managing gamer-related records at scale required bulk operations and backup strategies:

- Data Import Wizard was used for simple imports:
 - o Imported new Gamers (Contacts) along with their subscription data.
 - Ensured relationships (e.g., which subscription belongs to which gamer) were preserved using lookup fields.
- **Data Loader** was configured for larger datasets, such as bulk uploading **Repair_c** records and exporting large subscription history logs.
 - This tool was particularly useful for mass updates when subscription statuses changed during testing.
- Weekly Data Export Service was scheduled as a disaster recovery strategy, generating compressed export files of all CRM data (Contacts, Games, Subscriptions, Repairs, Cases).
- Result: All gamer and subscription data is backed up and can be restored or migrated if needed.

2. Data Quality & Duplicate Rules

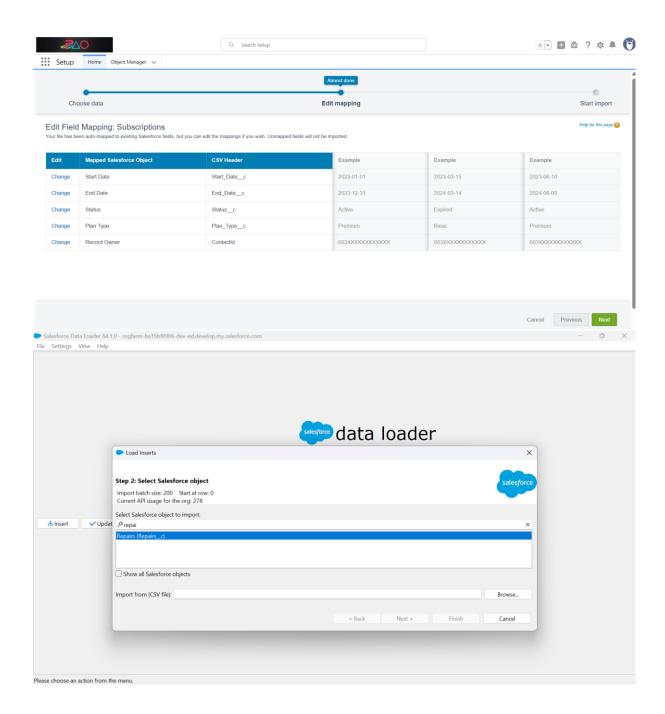
Clean data was critical for CRM usability:

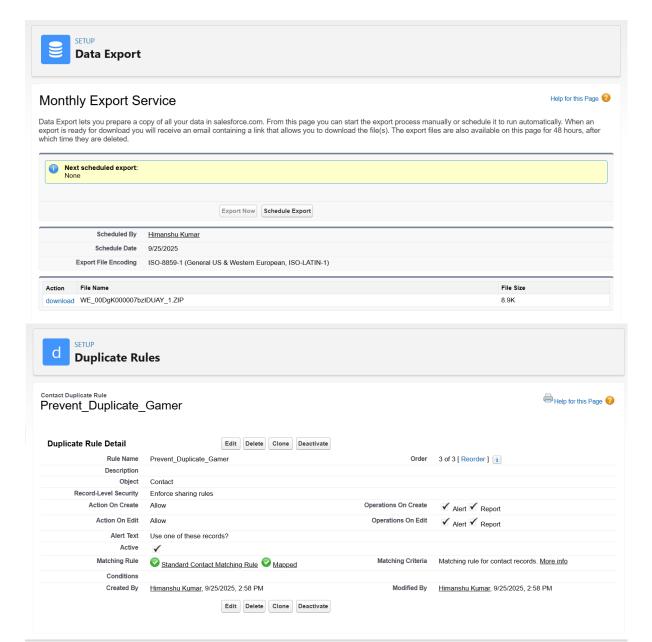
- **Duplicate Rules** were created to prevent multiple records of the same gamer being entered (e.g., matching on Email + Phone). This ensured each gamer had a single unified profile.
- Validation Rules were fine-tuned to enforce data integrity:
 - Subscriptions must always have a Start Date earlier than End Date.

- o Repair records cannot be marked as **Closed** without entering **Repair Cost**.
- Result: Subscriptions, repairs, and gamer records remain consistent and trustworthy.

3. Deployment Using Change Sets

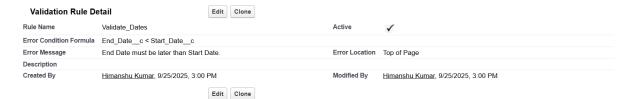
Since this project was built in a Developer Edition org without Sandbox support, all deployments were configured directly. In a production scenario, Outbound and Inbound Change Sets would be used.





Subscriptions Validation Rule

Back to Subscriptions



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