

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:
 - 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**.

- 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.

The screenshot displays the Salesforce Data Loader application. The top section shows the 'Edit Field Mapping: Subscriptions' window, which includes a progress bar with steps: 'Choose data', 'Edit mapping' (current), and 'Start import'. Below the progress bar, a table lists the mappings for the 'Subscriptions' object.

Edit	Mapped Salesforce Object	CSV Header	Example	Example	Example
Change	Start Date	Start_Date__c	2023-01-01	2023-03-15	2023-06-10
Change	End Date	End_Date__c	2023-12-31	2024-03-14	2024-06-09
Change	Status	Status__c	Active	Expired	Active
Change	Plan Type	Plan_Type__c	Premium	Basic	Premium
Change	Record Owner	ContactId	003XXXXXXXXXXXX	003XXXXXXXXXXXX	003XXXXXXXXXXXX

Below the mapping table, the 'Load Inserts' dialog box is open, showing 'Step 2: Select Salesforce object'. It indicates an import batch size of 200 and current API usage of 278. The 'Select Salesforce object to import:' field is set to 'Repairs (Repairs__c)'. The dialog also includes options for 'Show all Salesforce objects' and 'Import from (CSV file):' with a 'Browse...' button. Navigation buttons at the bottom include '< Back', 'Next >', 'Finish', and 'Cancel'.



SETUP

Data Export

Monthly Export Service

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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:

None

[Export Now](#)[Schedule Export](#)

Scheduled By	Himanshu Kumar	
Schedule Date	9/25/2025	
Export File Encoding	ISO-8859-1 (General US & Western European, ISO-LATIN-1)	

Action	File Name	File Size
download	WE_00DgK000007bzIDUAY_1.ZIP	8.9K



SETUP

Duplicate Rules


Contact Duplicate Rule

Prevent_Duplicate_Gamer

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Duplicate Rule Detail

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Rule Name	Prevent_Duplicate_Gamer		Order	3 of 3 [Reorder] 	
Description					
Object	Contact				
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 checked="" type="checkbox"/> Report
Alert Text	Use one of these records?				
Active	<input checked="" type="checkbox"/>				
Matching Rule	<input checked="" type="checkbox"/> Standard Contact Matching Rule <input checked="" type="checkbox"/> Mapped		Matching Criteria	Matching rule for contact records. More info	
Conditions					
Created By	Himanshu Kumar, 9/25/2025, 2:58 PM		Modified By	Himanshu Kumar, 9/25/2025, 2:58 PM	
<div><div>Edit</div><div>Delete</div><div>Clone</div><div>Deactivate</div></div>					

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Subscriptions Validation Rule

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Validation Rule Detail

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Rule Name	Validate_Dates	Active	<input checked="" type="checkbox"/>
Error Condition Formula	End_Date__c < Start_Date__c		
Error Message	End Date must be later than Start Date.	Error Location	Top of Page
Description			
Created By	Himanshu Kumar, 9/25/2025, 3:00 PM	Modified By	Himanshu Kumar, 9/25/2025, 3:00 PM

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