

## 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.

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### 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.

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#### 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.

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Almost done

Choose data

Edit mapping

Start import

Edit Field Mapping: Subscriptions

Help for this page

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.

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

Cancel

Previous

Next

Salesforce Data Loader 64.1.0 - orgfarm-ba15bf8906-dev-ed.develop.my.salesforce.com

File Settings View Help

salesforce data loader

Load Inserts

Step 2: Select Salesforce object

Import batch size: 200 Start at row: 0  
Current API usage for the org: 278

Select Salesforce object to import:

Repair

Repairs (Repairs\_\_c)

☐ Show all Salesforce objects

Import from (CSV file): 

Browse...

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Finish

Cancel

Please choose an action from the menu.



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 &amp; Western European, ISO-LATIN-1)

Action	File Name	File Size
<a href="#">download</a>	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](#)] [i](#)

Description

Object Contact

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 ☒ Standard Contact Matching Rule ☒ 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[Edit](#)[Delete](#)[Clone](#)[Deactivate](#)

## Subscriptions Validation Rule

[Help for this Page](#)[Back to Subscriptions](#)

## Validation Rule Detail

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Rule Name Validate\_Dates

Active

☒

Error Condition Formula End\_Date\_\_c &lt; 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[Edit](#)[Clone](#)