

Phase 8: Data Management & Deployment

****Goal:****

Manage hotel data efficiently and ensure a smooth deployment process across Salesforce environments.

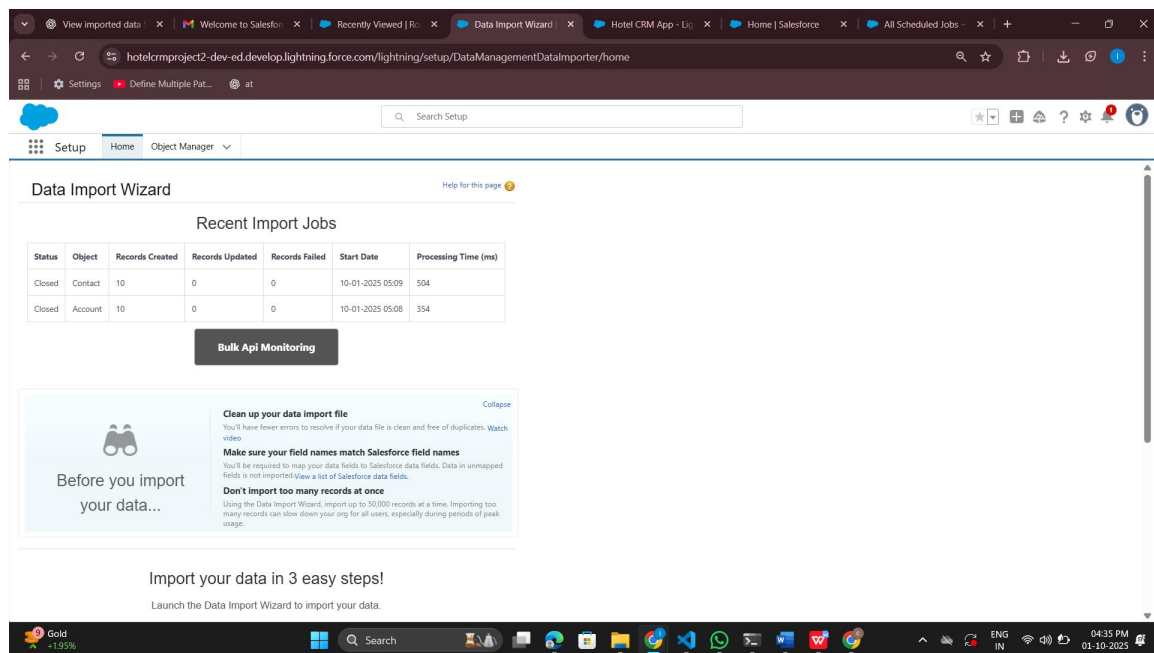
1. Data Import Wizard

****Purpose:****

Used to load standard data such as guest and room records.

****Key Features:****

- Accessible via Setup → Data Import Wizard
- Supports standard and custom objects
- Simple UI with field mapping



Upload multiple reservations in one operation.

The screenshot shows the Salesforce Lightning interface for monitoring bulk data load jobs. The top navigation bar includes links for Setup, Home, Object Manager, and Search Setup. A left sidebar lists various job types: Apex Flex Queue, Apex Jobs, Background Jobs, Bulk Data Load Jobs (highlighted), and Scheduled Jobs. Below the sidebar, there's a section titled "Monitor Bulk Data Load Jobs" with a subtitle explaining that it shows the status of recent bulk data load jobs created by Data Loader or other Bulk API client applications.

Quota

Your organization has processed 0 batches in the last 24 hours. Your organization can process 15,000 batches in a 24-hour period.
 Resource used in the last 24 hours:
 CPU: 0 milliseconds
 IO: 0 bytes
 Disk: 0 bytes

In Progress

Job ID	Submitted By	Start Time	Status	Job Type	Operation	Object	Records Processed	Records Failed	Progress
No records to display.									

Completed last 7 days

Job ID	Submitted By	Start Time	End Time	Status	Job Type	Operation	Object	Records Processed	Records Failed	Time to Complete @Hz-jm:ss.ss
75WVUJ000000LQda	ditya_lakshmi	01/10/2025, 10:39 am	01/10/2025, 10:39 am	Closed	Bulk V1	Insert	Contact	10	0	00:03
75WVUJ000000LQWj	ditya_lakshmi	01/10/2025, 10:38 am	01/10/2025, 10:38 am	Closed	Bulk V1	Insert	Account	10	0	00:00

3. Duplicate Rules

Purpose:

To prevent and manage duplicate guest records in the system.

Key Features:

- Customizable matching rules (e.g., email, phone number)
- Alerts or blocks users from creating duplicates
- Duplicate reports available

Use Case:

Ensure each guest has only one unique profile in the database.

The screenshot shows the Salesforce 'Duplicate Rules' setup page. The browser address bar indicates the URL is `hotelcrmproject2-dev-ed.develop.lightning.force.com/lightning/setup/DuplicateRules/home`. The page title is 'Duplicate Rules'. The left sidebar shows the navigation menu with 'Duplicate Rules' selected. The main content area is titled 'All Duplicate Rules' and includes a 'What Are Duplicate Rules?' section. Below this, there is a table listing the duplicate rules.

Rule Name	Description	Object	Matching Rule	Active	Last Modified By	Last Modified Date
Prevent_Duplicate_Guests		Contact	Standard Contact Matching Rule		ldivy	01/10/2025
Standard Account Duplicate Rule	Identify accounts that duplicate other accounts.	Account	Standard Account Matching Rule	✓	ldivy	25/09/2025
Standard Contact Duplicate Rule	Identify contacts that duplicate other contacts and leads.	Contact	Standard Contact Matching Rule Standard Lead Matching Rule	✓	ldivy	25/09/2025
Standard Lead Duplicate Rule	Identify leads that duplicate other leads and contacts.	Lead	Standard Contact Matching Rule Standard Lead Matching Rule	✓	ldivy	25/09/2025

4. Backup Strategy

****Purpose:****

To safeguard data through regular backups.

****Strategy:****

- Use Data Export (Setup → Data Export)
- Schedule weekly exports of all key data: guests, rooms, reservations
- Store backups securely (e.g., encrypted cloud storage)

5. Deployment Strategy

****Options:****

- Change Sets:

Best for declarative (point-and-click) changes. Use when moving customizations between related orgs (e.g., Sandbox → Production).

- SFDX (Salesforce DX):

Ideal for CI/CD pipelines and version control. Supports scratch orgs and source-driven development.

****Use Case:****

Deploy metadata such as objects, flows, and validation rules from Sandbox to Production.

6. Unmanaged vs Managed Packages

Feature	Unmanaged Package	Managed Package
-----	-----	-----
Editable Components	Yes	No (mostly read-only)
Use Case	Internal development	Distribution via AppExchange
Namespace	No	Yes

****Recommendation:****

Use Managed Packages if the solution will be shared or sold on the Salesforce AppExchange.