

## Phase 8: Data Management & Deployment (Smart Property Portal CRM)

This phase ensures data (Properties, Leads, Visits) is imported, cleaned, and safely deployed to Salesforce environments (Sandbox → UAT → Production) along with your Apex & LWC code from the repo.

### Step 1: Data Import Wizard (Small Data Loads)

Use for uploading sample data like:

Property Listings (from CSV: Name, Location, Price, Assigned Agent).

A few test Leads and Accounts.

Navigate: Setup → Data Import Wizard → Select Object → Upload CSV → Map fields → Import.

Best for <50k records.

### Step 2: Data Loader (Bulk Data)

Use for larger datasets (e.g., thousands of Leads from campaigns).

Supports Insert, Update, Upsert, Delete, Export.

Example: Load 10,000+ Property\_\_c records for testing scalability.

### Step 3: Duplicate Rules

Prevents data duplication in Properties and Leads.

Example Rules:

Block duplicate Leads with same email/phone.

Block duplicate Property records with same Address + Price.

Navigate: Setup → Duplicate Rules → Create Rule → Test & Activate.

#### Step 4: Data Export & Backup

Navigate: Setup → Data Export.

Export weekly or monthly backups of Properties, Leads, Visits, Accounts.

Ensures recovery in case of failure or rollback after deployment.

#### Step 5: Change Sets (Metadata Deployment)

Move tested customizations from Sandbox → Production.

Include metadata from your