# **Data Management & Deployment**

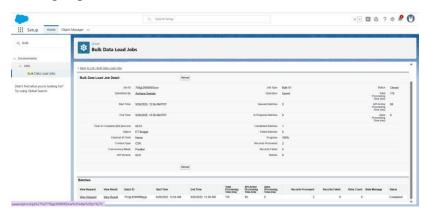
In this phase, I focused on preparing and managing data, preventing duplicates, performing backups, and setting up deployment for the **Expense Tracker** project. The steps followed are outlined below.

#### 1. Building Data Templates

- Prepared CSV files to organize and import data:
  - budgets.csv
  - o expenses.csv

### 2. Importing Data

- **Budgets:** Imported using **Data Import Wizard**, mapping fields accurately and loading budgets.csv.
- Expenses: Imported using **Data Import Wizard**, mapping fields correctly and loading expenses.csv.



## 3. Preventing Duplicates

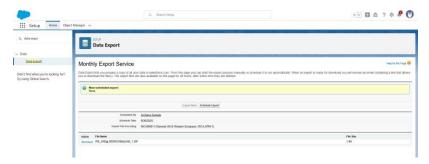
- Created a Matching Rule on ET Expense c using Name, Amount, and Date.
- Created a **Duplicate Rule** using the above Matching Rule, with action set to **Alert**.
- This setup warns users when attempting to enter duplicate expense records, maintaining data integrity.



#### 4. Data Backup

• Performed manual and scheduled backups:

- Used **Data Export** (Setup  $\rightarrow$  Data Export) to download a ZIP of all data.
- Scheduled monthly exports for both ET\_Budget\_\_c and ET\_Expense\_\_c to ensure data safety.



# 5. VS Code & Salesforce CLI (SFDX)

- VS Code: Used for Salesforce development, including Apex classes, triggers, Lightning Web Components, and metadata management.
- **SFDX CLI:** Command-line tool to retrieve, deploy, and manage metadata between the Salesforce org and the local project.

