

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
 - 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.


Setup

Bulk Data Load Jobs

[Back to List Bulk Data Load Jobs](#)

Bulk Data Load Job Detail

Job ID: 751g.0000002aw

Submitted by: Archana.Sethi

Start Time: 9/26/2025, 12:16:46 PM PST

End Time: 9/26/2025, 12:16:46 PM PST

Time to Complete (Min): 00:01

Client: ET Budget

Estimated Prod Name:

Content Type: CSV

Concurrency Mode: Parallel

API Version: 64.0

Job Type: Bulk V1

Operation: Uplink

Completed Databases: 0

In Progress Databases: 0

Completed Databases: 1

Failed Databases: 0

Progress: 100%

Records Processed: 2

Records Failed: 0

Retries: 0

Status: Closed

Total Processed Time (min): 115

API Active Processing Time (min): 59

API In Progress Time (min): 0

View Instance	View Result	Batch ID	Start Time	End Time	Total Processing Time (min)	API Active Processing Time (min)	API In Progress Time (min)	Records Processed	Records Failed	Retry Count	State Message	Status
View Instance	View Result	751g.00000002aw	9/26/2025, 12:16:46 PM	9/26/2025, 12:16:46 PM	115	59	0	2	0	0		Completed

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.

The screenshot shows the Palo Alto Networks Setup interface. On the left, there's a navigation menu with 'Setup', 'Home', and 'Object Manager'. The main content area is titled 'Duplicate Rules'. Below this, there's a sub-header 'ET Expense Duplicate Check'. A table lists duplicate rules, with one rule selected: 'ET Expense Matching by Name/Category/Amount'. The rule details are shown on the right, including its description, action, and matching criteria. The rule is marked as 'Allowed'.

4. Data Backup

- Performed **manual and scheduled backups**:

- [illegible]

- **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.

