

Phase 8: Data Management & Backup

This phase focused on managing data within the Salesforce Developer Org for the Insurance Claim & Policy Management System. The goal was to ensure accurate records for Customers, Policies, Claims, and Mentors/Agents while maintaining data integrity.

1. Data Import & Record Creation

Purpose:

Populate the system with sample data for testing and validation.

Implementation:

- Sample Customers, Policies, and Claims were created manually through the Salesforce UI.
- Ensured that records are linked correctly via lookup and master-detail relationships.

Procedure:

1. Navigate to **Object Manager** → **Select Object** (e.g., Customer, Policy, Claim).
2. Click **New** to create records.
3. Fill in all required fields ensuring consistency in relationships.
4. Save records and validate that relationships appear correctly in related lists.

The screenshot shows the Salesforce Object Manager interface for the 'Claim' object. The left sidebar lists various configuration options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Restriction Rules, Scoping Rules, Object Access, and Triggers. The main panel displays the 'Details' tab for the 'Claim' object. It includes fields for Description, API Name (Claim_c), Singular Label (Claim), and Plural Label (Claims). On the right, there are checkboxes for Enable Reports (checked), Track Activities, Track Field History (checked), Deployment Status (Deployed), and Help Settings (Standard salesforce.com Help Window). At the top right, there are 'Edit' and 'Delete' buttons.

SETUP > OBJECT MANAGER

Customer

Details
Details

Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Object Access

Description
API Name
Customer__c
Custom
✓
Singular Label
Customer
Plural Label
Customers

Enable Reports
✓
Track Activities
Track Field History
✓
Deployment Status
Deployed
Help Settings
Standard salesforce.com Help Window

SETUP > OBJECT MANAGER

Policy

Details
Details

Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Object Access
Triggers

Description
API Name
Policy__c
Custom
✓
Singular Label
Policy
Plural Label
Policies

Enable Reports
✓
Track Activities
Track Field History
✓
Deployment Status
Deployed
Help Settings
Standard salesforce.com Help Window

2. Duplicate Management

Purpose:

Prevent duplicate entries for Customers and Policies.

Implementation:

- Unique fields such as **Customer Email** and **Policy Number** ensured data uniqueness.

Procedure:

1. While creating new records, system enforced uniqueness of key fields.
2. Manual verification ensured no duplicates existed in test data.

3. Data Backup

Purpose:

Maintain a backup of sample data within the org.

Implementation:

- Exported records using **Reports** to Excel for reference.
- Backup allowed verification of test data before proceeding to automation or reporting phases.

Procedure:

- Create a report for the object (e.g., Customers, Policies, Claims).
- Include all relevant fields.
- Click **Export → Excel Format** to save a local copy.

The screenshot shows a Microsoft Excel window with the following details:

- Title Bar:** AutoSave (Off), report1758967692087 - Protected..., Saved to this PC, Search.
- Menu Bar:** File, Home, Insert, Draw, Page Layout, Formulas, Data, Review, View, Add-ins, Help.
- Alert Bar:** PROTECTED VIEW Be careful—files from the Internet can contain viruses. Unless you need to edit, it's safer to stay in Protected View. Enable Editing.
- Worksheet:** A1 selected. Column headers: Claim: Claim Name, Claim Number, Claim Date, Amount, Policy: Policy Name, Status, Policy Type.
- Data:**

	Claim: Claim Name	Claim Number	Claim Date	Amount	Policy: Policy Name	Status	Policy Type
1	CLM001	CLM-0001	09-10-2025	5000	Health Plus Plan		Health, Life, Vehicle
2	Accident Claim 2025	CLM-0002	9/18/2025	20000	Health Plus Plan	Pending, Approved,	Health, Life, Vehicle
3	Accident Claim 2025	CLM-0003	9/18/2025	20000	Health Plus Plan	Pending, Approved,	Health, Life, Vehicle
- Document Recovery:** Excel has recovered the following files. Save the ones you wish to keep. report1758967692087.xls [Or... Version created last time the user... 27-09-2025 15:38]
- Bottom Bar:** Which file do I want to save? Close, < >, report1758967692087, +, Ready, Weather (27°C, Mostly clear), Search, Task View, Start button, Language (ENG IN), Network (Wi-Fi), Battery (144%), Date and Time (01:38, 05-10-2025).