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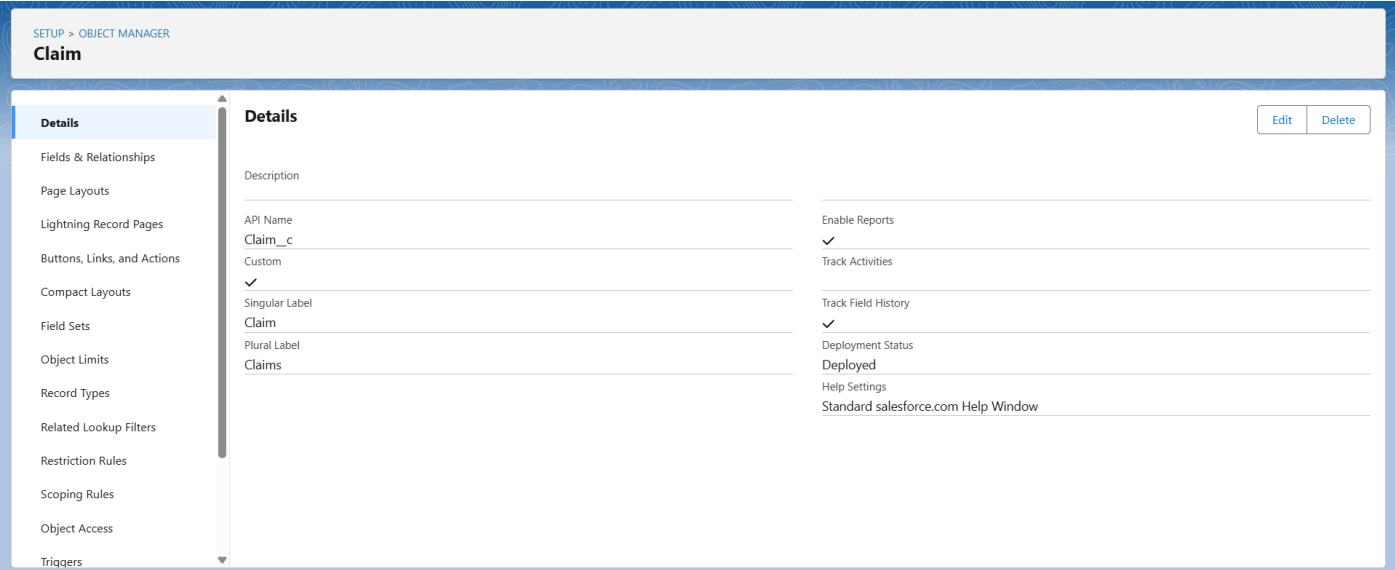
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- Details
- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Restriction Rules
- Scoping Rules
- Object Access

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

Details | **Details** | Edit | Delete

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- 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
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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:

1. Create a report for the object (e.g., Customers, Policies, Claims).

2. Include all relevant fields.

3. Click **Export → Excel Format** to save a local copy.