

# 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:**

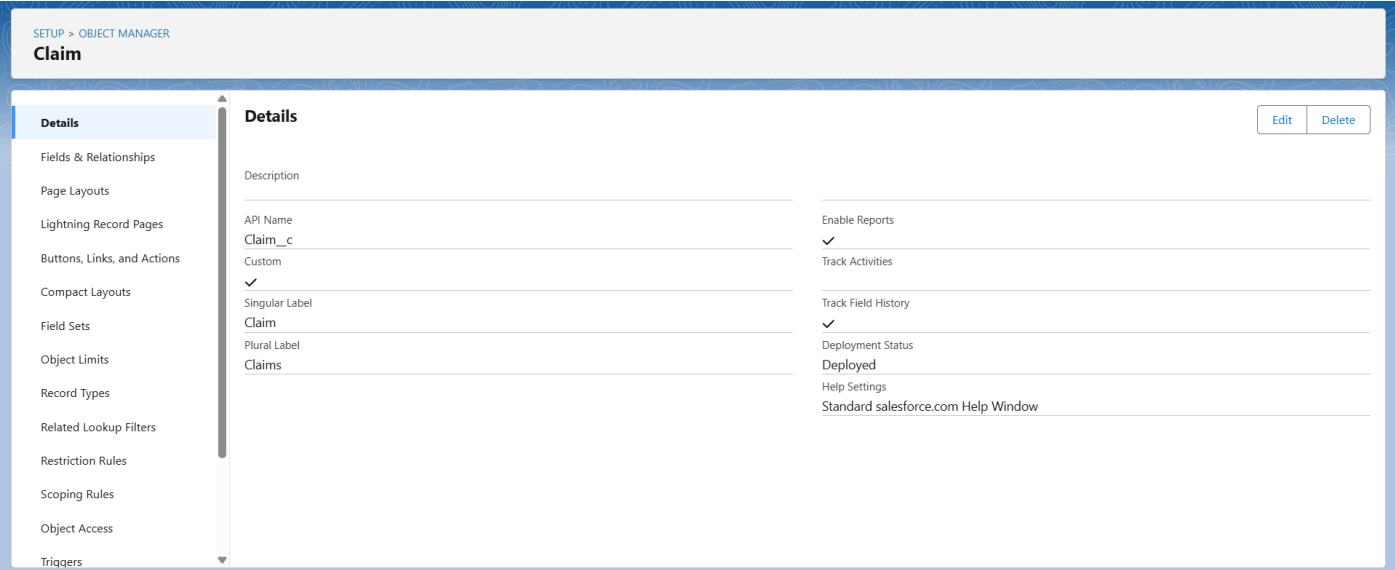
Populate the system with sample data for testing and validation.

**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.



SETUP > OBJECT MANAGER

Customer

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

Details

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

EditDelete

SETUP > OBJECT MANAGER

Policy

Details

Fields & Relationships

Page Layouts

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Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Object Access

Triggers

Details

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

EditDelete

## 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.

The screenshot displays a Microsoft Excel window titled "report1758967692087 - Protected View". The ribbon at the top includes File, Home, Insert, Draw, Page Layout, Formulas, Data, Review, View, Add-ins, and Help. A yellow warning bar at the top states: "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".

The worksheet shows a table with the following data:

Claim: Claim Name	Claim Number	Claim Date	Amount	Policy: Policy Name	Status	Policy Type
CLM001	CLM-0001	09-10-2025	5000	Health Plus Plan		Health, Life, Vehicle
Accident Claim 2025	CLM-0002	9/18/2025	20000	Health Plus Plan	Pending, Approved,	Health, Life, Vehicle
Accident Claim 2025	CLM-0003	9/18/2025	20000	Health Plus Plan	Pending, Approved,	Health, Life, Vehicle

The left sidebar shows "Document Recovery" with a message: "Excel has recovered the following files. Save the ones you wish to keep." Below this, a file named "report1758967692087.xls (Or...)" is listed with the note "Version created last time the user... 27-09-2025 15:38".

The bottom status bar shows "Ready", a temperature of "27°C", "Mostly clear", and the system clock "01:38 05-10-2025".