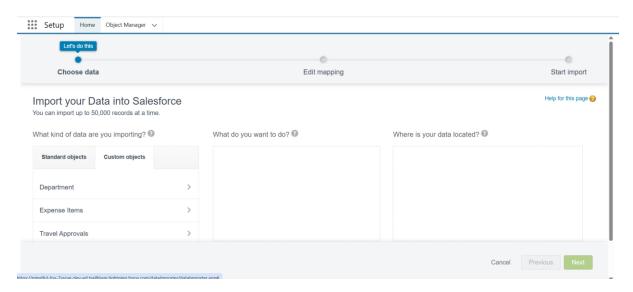
Phase 8: Data Management & Deployment

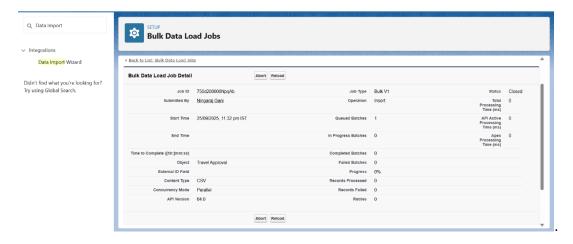
1. Data Import Wizard

- Used to upload sample data like Departments, Travel Approvals, and Expense Items.
- Example: Import a CSV with 10 department records (HR, IT, Finance, etc.) and 20 travel requests.
- Provides a simple UI for small-scale imports.



2. Data Loader

- Used for bulk data import/export when records are large in number.
- Example: Import 1000+ travel expense records for testing scalability.
- Supports scheduling and handling large CSV files

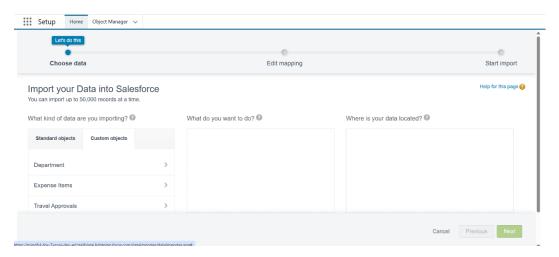


3. Duplicate Rules

- Prevents users from creating duplicate records.
- Example: Avoids creating two departments with the same name or two travel requests with the same ID.
- Ensures data integrity in the system.

4. Data Export & Backup

- Exports Salesforce data regularly to create backups.
- Example: Weekly export of Travel Approval and Expense Item records for recovery.
- Ensures business continuity and protects against accidental deletions.



5. Change Sets

- Used to move custom objects, fields, validation rules, and flows from Sandbox to Production.
- Example: Move Travel Approval object with its fields and approval process from test environment to live system.

6. Unmanaged vs Managed Packages

- Unmanaged Packages: Used to share project configuration for development/testing.
- Managed Packages: Used for distribution (like apps on AppExchange).
- Example: The Travel Approval App could be shared with other orgs via an Unmanaged Package.