

Phase 8: Data Management & Deployment

Goal: Ensure clean property, lead, and customer data while moving Salesforce configurations smoothly from Sandbox to Production.

1. Data Import Wizard

- Use for small-scale data loads (up to 50,000 records).
- Import initial demo data for testing: 50 property records (status = Available, Sold, Rented), 30 lead records (buyers, sellers, renters), 20 contact records (existing customers).
- Helps business users (non-technical) quickly populate Salesforce.

2. Data Loader

- Use for bulk imports/updates (up to 5 million records).
- Import historical data: Past property listings (with pricing history), old leads and their status (Converted, Lost, Inactive), customer communication logs.
- Supports CSV uploads with mapping to Salesforce fields.

3. Duplicate Rules & Matching Rules

- Prevent multiple entries of the same property or lead.
- If a property already exists with the same Property ID or Address, block duplicate.
- If a lead with the same email + phone number exists, alert the user before saving.
- Set fuzzy matching for customer names (avoid 'John Smith' vs 'Jon Smith').

4. Data Export & Backup

- Weekly backup of all properties, leads, and customer data using Salesforce's Data Export Service.
- Store backups securely (Google Drive, SharePoint, AWS).
- Helps recover in case of accidental data loss.

5. Change Sets (Admin Deployments)

- Use Salesforce Change Sets to move configurations from Sandbox → Production.
- Examples: Custom Objects (Property, Inquiry, Appointment), Validation Rules, Flows, Reports & Dashboards.

6. Managed vs Unmanaged Packages

- Unmanaged Package: For internal deployment (training/demo).

- Managed Package: If you want to publish the Smart Property Portal as a reusable solution on Salesforce AppExchange.

7. Salesforce CLI (SFDX) & VS Code

- Developers can use Salesforce DX + Git for version control.

- Benefits: Track configuration changes, rollback if something breaks, team collaboration.

8. ANT Migration Tool (Advanced Deployment)

- Useful for automated deployments in enterprise projects.

- Example: Automatically deploy new fields for Properties (e.g., '3D Virtual Tour Link') from sandbox → production using command line.

End Result of Phase 8

- Clean, de-duplicated property & customer database.
- Automated data migration processes.
- Reliable deployment pipeline (Sandbox → Production).
- Secure backups for recovery.