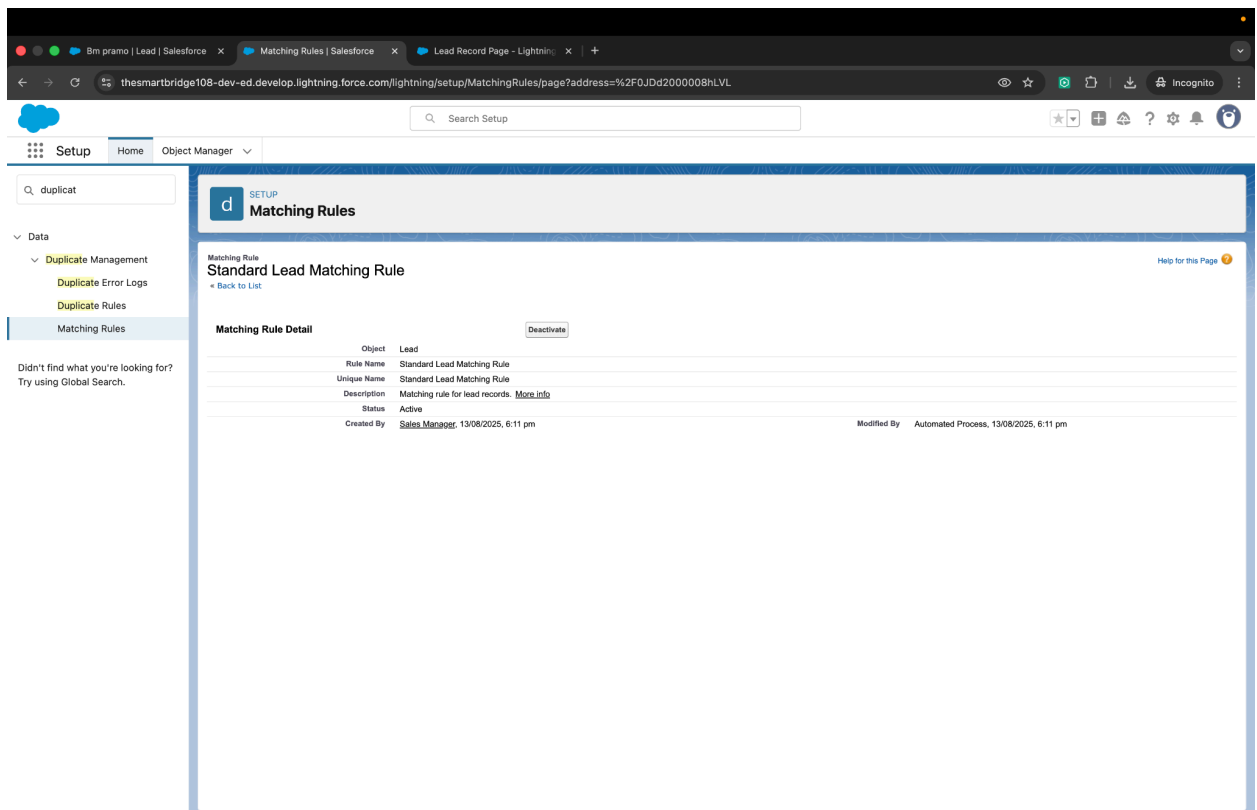# Phase 8 Report

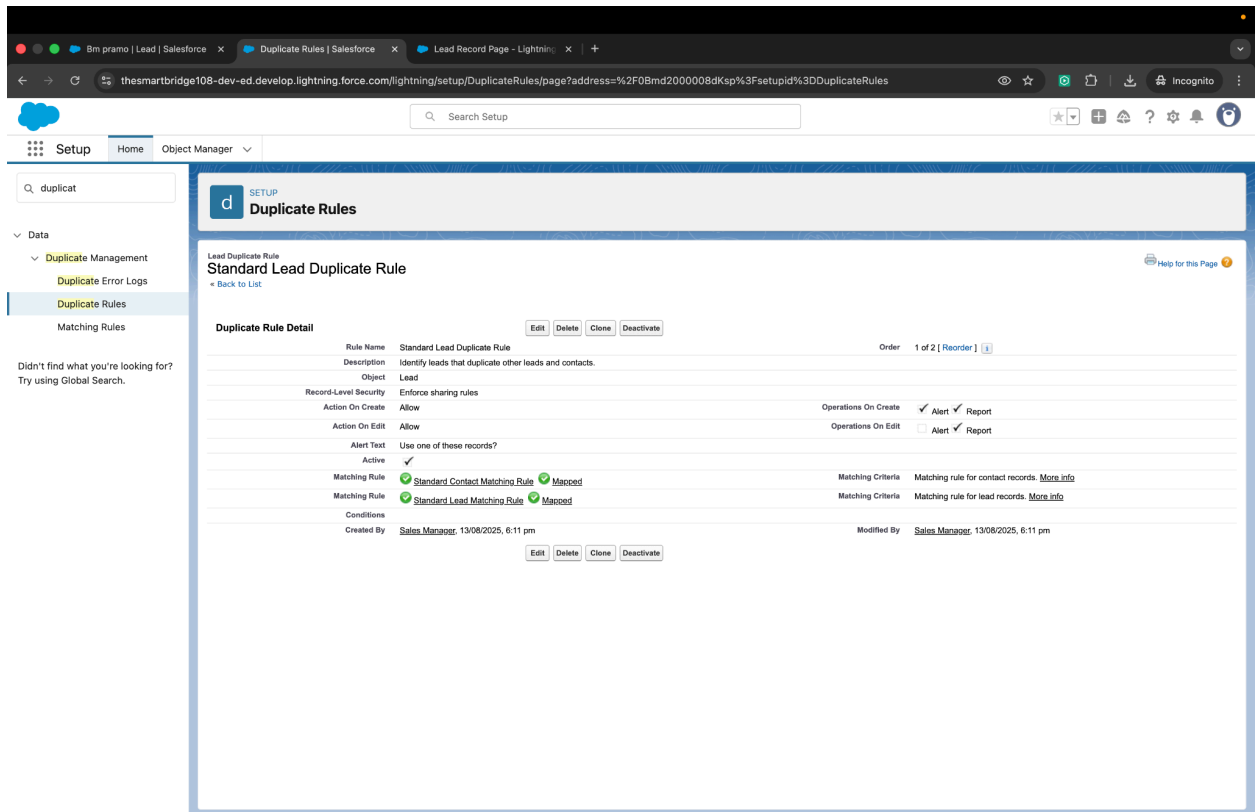# Data Management & Deployment Report

Duplicate Rules

Duplicate Rules are configured in the Salesforce org to maintain data integrity by preventing the creation of duplicate Lead records. These rules are set up to detect duplicates based on matching criteria such as email addresses and phone numbers. Alerts are configured to notify users when they attempt to create or edit a Lead that may already exist in the system.

- The rules ensure clean, reliable lead data, which is crucial for accurate sales tracking and reporting.
- Users experience prompt notifications to avoid redundant lead creation, improving sales efficiency.

Data Import Wizard

This tool, which facilitates importing lead and sales data from CSV files via UI, was not implemented as the project relies on real-time data entry and external integrations for lead data population.

Data Loader

The bulk data management tool was deemed unnecessary due to the project's focus on live data and integrations, and therefore was not utilized.

Data Export & Backup
Periodic data exports and backups have not been explicitly set up within the project scope but are recommended for production environments to ensure data safety and compliance.

Change Sets
Metadata deployment via Change Sets was not part of the current project delivery, though it is advisable for moving configurations safely between Salesforce orgs during production deployment.

Unmanaged vs Managed Packages
Packaging of components was not performed; the project was maintained within single org development without distribution needs.

ANT Migration Tool
The command-line deployment tool was not employed given the project's scope and the absence of continuous integration requirements.

VS Code & SFDX
Though powerful for source-driven development, these tools were not used since development and deployment were managed directly within Salesforce UI and Developer Console.

Conclusion

The focus on Duplicate Rules has helped maintain high data integrity within your Lead Management and Sales Tracking project. While other Phase 8 tools offer important capabilities for data import/export, metadata deployment, and development automation, they were outside the current project requirements and can be explored in future enhancements.