

PHASE 8 : Data Management & Deployment

Goal: The goal is to ensure accurate, secure, and efficient handling of data in system, while preparing the application for deployment. This includes importing existing data, managing duplicates, maintaining data integrity, and using tools like Data Import Wizard, Data Loader, Duplicate Rules, and Change Sets.

1. Data Import Wizard / Manual Import

The Data Import Wizard is a Salesforce tool that allows users to import data into standard and custom objects using a simple, guided interface. It supports CSV files and provides options to insert, update, or upsert records.

In the Booking & Family Portal project, the Data Import Wizard was used to bulk upload family records, plots, and existing booking data.

SETUP

Bulk Data Load Jobs

Monitor Bulk Data Load Jobs

Monitor the status of recent bulk data load jobs. These jobs are created by Data Loader and other Bulk API client applications.

Quota

Your organization has processed 0 batches in the last 24 hours. Your organization can process 15,000 batches in a 24-hour period.

Resource used in the last 24 hours:
CPU: 0 milliseconds
IO: 0 bytes
Disk: 0 bytes

In Progress

Job ID	Submitted By	Start Time	Status	Job Type	Operation	Object	Records Processed	Records Failed	Progress
No records to display.									

Completed last 7 days

Job ID	Submitted By	Start Time	End Time	Status	Job Type	Operation	Object	Records Processed	Records Failed	Time to Complete (hh:mm:ss)
750VVJ00000U2qZA	Awasthy_Vanshika	18/09/2025, 1:54 pm	18/09/2025, 1:54 pm	Closed	Bulk V1	Insert	Burial	3	3	00:02
750VVJ00000U2qxf	Awasthy_Vanshika	18/09/2025, 1:45 pm	18/09/2025, 1:45 pm	Closed	Bulk V1	Insert	Booking Request	3	1	00:05
750VVJ00000U2Nta	Awasthy_Vanshika	18/09/2025, 1:43 pm	18/09/2025, 1:43 pm	Closed	Bulk V1	Insert	Maintenance Task	3	1	00:02
750VVJ00000U2Pta	Awasthy_Vanshika	18/09/2025, 1:38 pm	18/09/2025, 1:38 pm	Closed	Bulk V1	Insert	Plot	3	0	00:01
750VVJ00000U2E0s	Awasthy_Vanshika	18/09/2025, 1:37 pm	18/09/2025, 1:37 pm	Closed	Bulk V1	Insert	Burial	3	3	00:00

Digital Cemetery

Families

Plots

Burials

Booking Requests

Maintenance Tasks

Documents

Sections

Payments

Visit Logs

Dashboards

More

Booking Requests

Recently Viewed

New

Import

Change Owner

Assign Label

21 items • Updated a few seconds ago

Search this list...

Filter

Sort

Refresh

Print

Export

	Booking Request Name	
1	<input type="checkbox"/> TestBookingReq06	
2	<input type="checkbox"/> BookingTestReq	
3	<input type="checkbox"/> TestBookingReq	
4	<input type="checkbox"/> TestBookingReq06	
5	<input type="checkbox"/> varBookingRequestName	
6	<input type="checkbox"/> TestRequestName2398	
7	<input type="checkbox"/> Request-002	
8	<input type="checkbox"/> a08dL00000MuEID	
9	<input type="checkbox"/> a08dL00000MuZlv	
10	<input type="checkbox"/> a08dL00000MqgEc	
11	<input type="checkbox"/> TestRequestName234	
12	<input type="checkbox"/> varBookingRequestName	
13	<input type="checkbox"/> a08dL00000MrkP	
14	<input type="checkbox"/> a08dL00000MrcPY	
15	<input type="checkbox"/> richa test	
16	<input type="checkbox"/> varBookingRequestName	


16	<input type="checkbox"/>	shilpa
17	<input type="checkbox"/>	shubham jain
18	<input type="checkbox"/>	Simmi Barman
19	<input type="checkbox"/>	test
20	<input type="checkbox"/>	vibhuti mishra
21	<input type="checkbox"/>	vibhuti mishra
22	<input type="checkbox"/>	Yashika Raikwar

2. Duplicate Rules

In the project, Duplicate Rules were implemented to avoid creating duplicate Family records or Booking Requests. For example:

Prevent multiple family records with the same email or contact number.

Ensure that a booking reference or family booking is not accidentally submitted twice.


SETUP

Duplicate Rules

All Duplicate Rules

What Are Duplicate Rules?

View: All Duplicate Rules

ABCDEFGHIJKLMNOPQRSTUV

Rule Name ↑	Description	Object	Matching Rule	Active	Last Modified By
Standard Account Duplicate Rule	Identify accounts that duplicate other accounts.	Account	Standard Account Matching Rule	✓	VAwas
Standard Contact Duplicate Rule	Identify contacts that duplicate other contacts and leads.	Contact	Standard Lead Matching Rule Standard Contact Matching Rule	✓	VAwas
Standard Lead Duplicate Rule	Identify leads that duplicate other leads and contacts.	Lead	Standard Lead Matching Rule Standard Contact Matching Rule	✓	VAwas

ABCDEFGHIJKLMNOPQRSTUV

3. Deployment (VS Code & SFDX)

Primary method for moving customizations (metadata) throughout this project has been Visual Studio Code and the Salesforce CLI (SFDX). All custom Apex code, Lightning Web Components, and their related configurations have been deployed using the SFDX: Deploy Source to Org command.

PHASE 9 : Reporting, Dashboards & Security Review

Goal: The goal is to provide administrators and stakeholders with clear visibility and secure control over the Digital Cemetery system. This includes creating custom reports and dashboards to monitor booking requests, approvals, burials, and plot usage. Additionally, it focuses on ensuring data security and compliance by implementing sharing settings, field-level security, session restrictions, login IP ranges, and audit trails.

1. Reports

Reports are organized lists of records that allow users to analyze and summarize data based on specific criteria. They can be created in different formats such as Tabular, Summary, Matrix, and Joined to meet various reporting needs.

In the Digital Cemetery project, reports were used to:

Track Booking Requests by status (Pending, Approved, Rejected)


Monitor Burial records and their associated plots

Summarize family activity and booking history

Help administrators generate insights for planning, approvals, and resource allocation

Report Name	Description	Folder	Created By
BookingRequestReport		Public Reports	RICHA KAROTIYA
New Burials Report		Public Reports	RICHA KAROTIYA
Customized Burial Report		Public Reports	RICHA KAROTIYA
Lead conversion rate	What percentage of leads have been converted?	Channel Sales	Automated Process
New Families Report		Public Reports	RICHA KAROTIYA
New Deceaseds Report		Public Reports	RICHA KAROTIYA
New Plots Report		Public Reports	RICHA KAROTIYA
SUMmaryReport		Public Reports	RICHA KAROTIYA
New Visit Logs Report		Public Reports	RICHA KAROTIYA

- Booking Request Report

<div>  <div> Report: Booking Requests <div> Booking Requests Report <div> Enabl </div> </div> </div> </div>						
<div> <div>Total Records</div> <div>22</div> </div>						
<input type="checkbox"/> Booking Request: ID ↑	<input type="checkbox"/> Booking Request: Booking Request Name	<input type="checkbox"/> Family	<input type="checkbox"/> Desired Burial Date	<input type="checkbox"/> Status	<input type="checkbox"/> Priority	
<input type="checkbox"/> a07WU00000cS19V (1)	seema	Sharma Family	17/09/2025	New	Standard	
Subtotal						
<input type="checkbox"/> a07WU00000cS1CM (1)	test	Sharma Family	17/09/2025	New	Emergency	
Subtotal						
<input type="checkbox"/> a07WU00000cSCf8 (1)	gg	Sharma Family	17/09/2025	Pending Approval	Emergency	
Subtotal						
<input type="checkbox"/> a07WU00000cSln8 (1)	shila	Burman Family	18/09/2025	New	Emergency	
Subtotal						
<input type="checkbox"/> a07WU00000cd28M (1)	Request-002	-	-	Pending Approval	-	
Subtotal						
<input type="checkbox"/> a07WU00000cd28N (1)	Request-003	-	-	Approved	-	
Subtotal						
<input type="checkbox"/> a07WU00000dGiby (1)	shilpa	-	25/09/2025	New	-	
Subtotal						
<input type="checkbox"/> a07WU00000dGONO (1)	ninja	-	26/09/2025	New	-	
Row Counts	<input checked="" type="checkbox"/> Detail Rows	<input checked="" type="checkbox"/> Subtotals	<input checked="" type="checkbox"/> Grand Total			

Report: Booking Requests

Booking Requests Report

Enable F

<input type="checkbox"/> Booking Request: ID ↑	Booking Request: Booking Request Name	Family	Desired Burial Date	Status	Priority
<input type="checkbox"/> a07WU00000cd28N (1)	Request-003	-	-	Approved	-
Subtotal					
<input type="checkbox"/> a07WU00000dGilby (1)	shilpa	-	25/09/2025	New	-
Subtotal					
<input type="checkbox"/> a07WU00000dGONO (1)	ninja	-	26/09/2025	New	-
Subtotal					
<input type="checkbox"/> a07WU00000dMwzw (1)	shubham jain	-	25/09/2025	-	-
Subtotal					
<input type="checkbox"/> a07WU00000dMzMX (1)	vibhuti mishra	-	26/09/2025	-	-
Subtotal					
<input type="checkbox"/> a07WU00000dMzO9 (1)	vibhuti mishra	-	26/09/2025	-	-
Subtotal					
<input type="checkbox"/> a07WU00000dNJ7U (1)	Simmi Barman	Burman Family	25/09/2025	New	Emergency
Subtotal					
<input type="checkbox"/> a07WU00000dNPO1 (1)	Gudiya Tripathi	Tripathi Family	25/09/2025	New	-
Subtotal					
<input type="checkbox"/> a07WU00000dNQY (1)	Dr. Gautam	-	26/09/2025	New	-
Row Counts	Detail Rows	Subtotals	Grand Total		

- Burial Record

Report: Burials

Burial Report

Enable Field Editing

Total Records
7

<input type="checkbox"/> Burial Date ↑	Burial: Burial Name	Deceased Name	Date of Death	Burial Type	Family	Plot	Status
<input type="checkbox"/> 04/09/2025 (1)	Shri	ShriKumari Karotiya	04/09/2025	Standard	Karotiya Family	PLT-0010	-
Subtotal							
<input type="checkbox"/> 12/09/2025 (1)	Jai	Jai Krishna	12/09/2025	Customize	Thakur Family	PLT-0005	Completed
Subtotal							
<input type="checkbox"/> 16/09/2025 (1)	test	test name	01/09/2025	Standard	Sharma Family	PLT-0001	Completed
Subtotal							
<input type="checkbox"/> 18/09/2025 (2)	Avanti	Avanti DUBey	17/09/2025	Cremation	Dubey Family	PLT-0001	Scheduled,
	arzu	arzu deceased	10/09/2008	Customize	Sharma Family	PLT-0003	Completed
Subtotal							
<input type="checkbox"/> 19/09/2025 (1)	wooden	wooden deceased	09/09/2010	Cremation	Sharma Family	PLT-0001	Completed
Subtotal							
<input type="checkbox"/> 20/09/2025 (1)	shreedeivi	shreedeivi deceased	02/09/2007	Customize	Burman Family	PLT-0003	Scheduled,
Subtotal							
Total (7)							

Row Counts
Detail Rows
Subtotals
Grand Total

- Family Plot Report

Joined Report

Family Plot Report

Families Families block 1							Plots Plots block 1
	Family: Family Name	Family: ID	Contact Person	Alternate Phone	Relationship to Deceased	Address	Plot: Plot Name
1	Sharma Family	a05WU00000wuG1Z	Ravi Sharma	-	Son	123, Green Park, Delhi	PLT-0001
2	Burman Family	a05WU00000wuGBx	Raja Burman	-	Sibling	1234.purwa jabalpur	PLT-0002
3	Tiwari Family	a05WU00000xKQna	Rajesh Tiwari	-	Sibling	-	PLT-0003
4	Jain Family	a05WU00000xKR2z	-	-	-	-	PLT-0005
5	Rajput Family	a05WU00000xKRDN	Seema Rajput	-	Parent	-	PLT-0006
6	Mishra Family	a05WU00000xKRWj	Shivarth Mishra	-	Other	-	PLT-0007
7	Dubey Family	a05WU00000xKRgP	Anil Dubey	-	Son	-	PLT-0008
8	Awasthy Family	a05WU00000xKRjd	Manoj Awasthy	-	Son	-	PLT-0009
9	Birothia Family	a05WU00000xKRIF	Mukesh Birothia	-	Spouse	-	PLT-0010
10	Karotiya Family	a05WU00000xKRmr	Rakesh Karotiya	-	Son	-	PLT-0014
11	Thakur Family	a05WU00000xKRtT	Manav Thakur	-	Sibling	-	PLT-0015
12	Bhatt Family	a05WU00000xKTgb	-	-	-	-	PLT-0016
13	Tripathi Family	a05WU00000xKUPm	-	-	-	-	PLT-0017
14	korı family	a05WU00000xKUcf	-	-	-	-	
15	Chaturvedi Family	a05WU00000xKVC9	-	-	-	-	
16	Rakiwar Family	a05WU00000xKVLp	-	-	-	-	

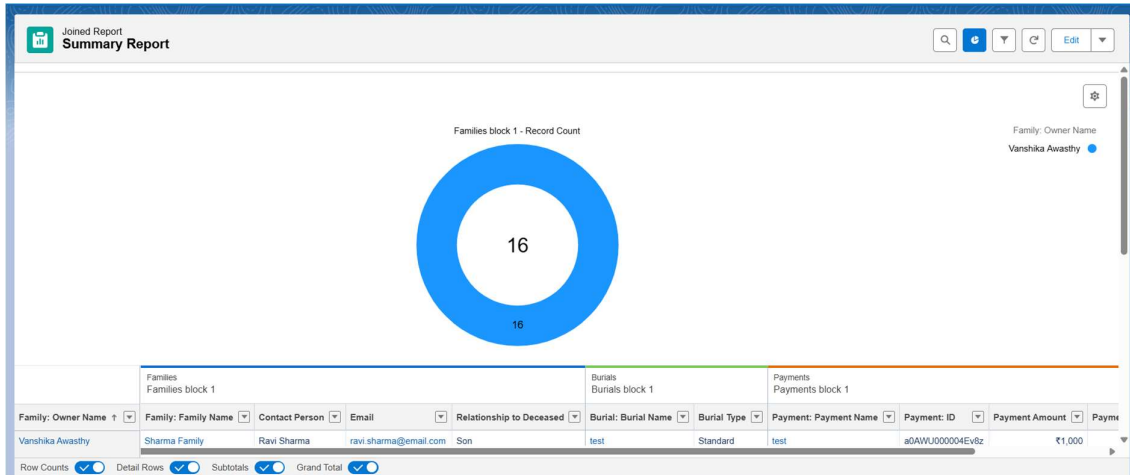
• Plot Report

Report: Plots

Plots Report

Total Records		Total Capacity					
13		23					
<input type="checkbox"/> Plot: Plot Name	Plot Number	Plot: ID	Capacity	Row	Status		
<input type="checkbox"/> PLT-0001 (1)	A- 101	a04WU00000Bk4bl	1	-	Available		
Subtotal			1				
<input type="checkbox"/> PLT-0002 (1)	B- 302	a04WU00000Bk4ez	1	-	Available		
Subtotal			1				
<input type="checkbox"/> PLT-0003 (1)	C- 145	a04WU00000Bk4gb	2	-	Available		
Subtotal			2				
<input type="checkbox"/> PLT-0005 (1)	Y659	a04WU00000BkkzB	1	-	Under Maintenance		
Subtotal			1				
<input type="checkbox"/> PLT-0006 (1)	P-101	a04WU00000Bkyin	4	A	Available		
Subtotal			4				
<input type="checkbox"/> PLT-0007 (1)	P-102	a04WU00000Bkyio	6	B	Occupied		
Subtotal			6				
<input type="checkbox"/> PLT-0008 (1)	P-103	a04WU00000Bkyip	2	A	Available		
Subtotal			2				
<input type="checkbox"/> PLT-0009 (1)	G-234	a04WU00000Blh3B	1	3	Occupied		
Row Counts		Detail Rows		Subtotals		Grand Total	
<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	

• Summary Report



Joined Report

Summary Report

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Edit

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Families Families block 1					Burials Burials block 1		Payments Payments block 1			
Family: Owner Name ⌵	Family: Family Name ⌵	Contact Person ⌵	Email ⌵	Relationship to Deceased ⌵	Burial: Burial Name ⌵	Burial Type ⌵	Payment: Payment Name ⌵	Payment: ID ⌵	Payment Amount ⌵	Payme ⌵
Varshika Awasthy	Sharma Family	Ravi Sharma	ravi.sharma@email.com	Son	test	Standard	test	a0AWU000004Ev8z	₹1,000	
	Burman Family	Raja Burman	raja.burman@gmail.com	Sibling	wooden	Cremation				
	Tiwari Family	Rajesh Tiwari	-	Sibling	shreedevi	Customize				
	Jain Family	-	-	-	arzu	Customize				
	Rajput Family	Seema Rajput	-	Parent	Avanti	Cremation				
	Mishra Family	Shivarth Mishra	-	Other	Shri	Standard				
	Dubey Family	Anil Dubey	-	Son	Jai	Customize				
	Awasthy Family	Manoj Awasthy	-	Son						
	Birothia Family	Mukesh Birothia	-	Spouse						
	Karotiya Family	Rakesh Karotiya	-	Son						
	Thakur Family	Manav Thakur	-	Sibling						
	Bhatt Family	-	-	-						
	Tripathi Family	-	-	-						
	kori family	-	-	-						

Row Counts

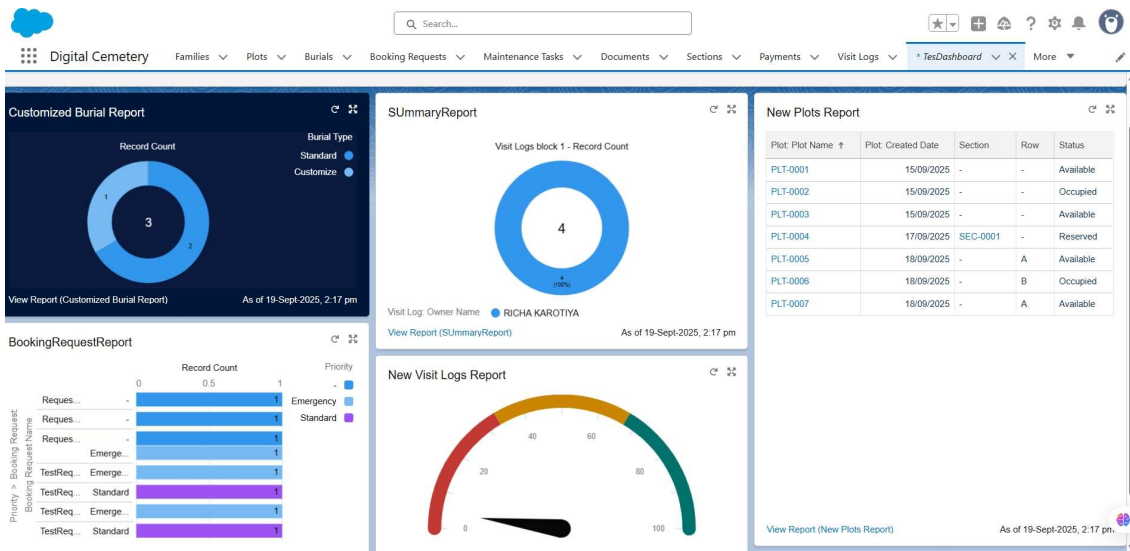
Detail Rows

Subtotals

Grand Total

2. Dashboard

Dashboards are visual representations of data from reports, allowing users to quickly analyze and monitor key metrics.



3. Sharing Settings

Sharing Settings define how records are shared and who can access them. They allow administrators to control access at the organization, object, and record level, ensuring sensitive data is only visible to authorized users.

THANKYOU