

Phase 8: Data Management & Deployment

Goal: Manage financial transaction data efficiently and move project configurations between environments.

1. Data Import Wizard:

Purpose: Import small demo datasets into Salesforce for testing.

Steps Followed:

- Created a sample CSV with ~50 demo hotel management records (Room ID, Hotel ID, Guest Name, Booking ID, Housekeeping Task, Payment Status).
 - Used Data Import Wizard: Setup → Data Import Wizard → Custom Objects → Room/Booking/Guest.
 - Imported the records successfully (IDs auto-generated if using Auto Number).

Why Important:

Provides test data for flows, validations, and dashboards in the hotel management system.

Bulk Data Load Jobs		Help for this Page										
Bulk Data Load Job 750gK00000DoCeP		Help for this Page										
View the details of a bulk data load job.												
« Back to List: Bulk Data Load Jobs												
Bulk Data Load Job Detail		Reload										
Job ID: 750gK00000DoCeP Submitted By: Shaik Yasmin		Job Type: Bulk V1 Operation: Upsert										
Start Time: 9/26/2025, 2:12 AM IST		Queued Batches: 0										
End Time: 9/26/2025, 2:12 AM IST		In Progress Batches: 0										
Time to Complete ([hh:]mm:ss): 00:04		Completed Batches: 1										
Object: Room		Failed Batches: 0										
External ID Field: Name		Progress: 100%										
Content Type: CSV		Records Processed: 6										
Concurrency Mode: Parallel		Records Failed: 0										
API Version: 64.0		Retries: 0										
Reload												
Batches												
View Request	View Result	Batch ID	Start Time	End Time	Total Processing Time (ms)	API Active Processing Time (ms)	Apex Processing Time (ms)	Records Processed	Records Failed	Retry Count	State Message	Status

2. Data Loader (Bulk Data):

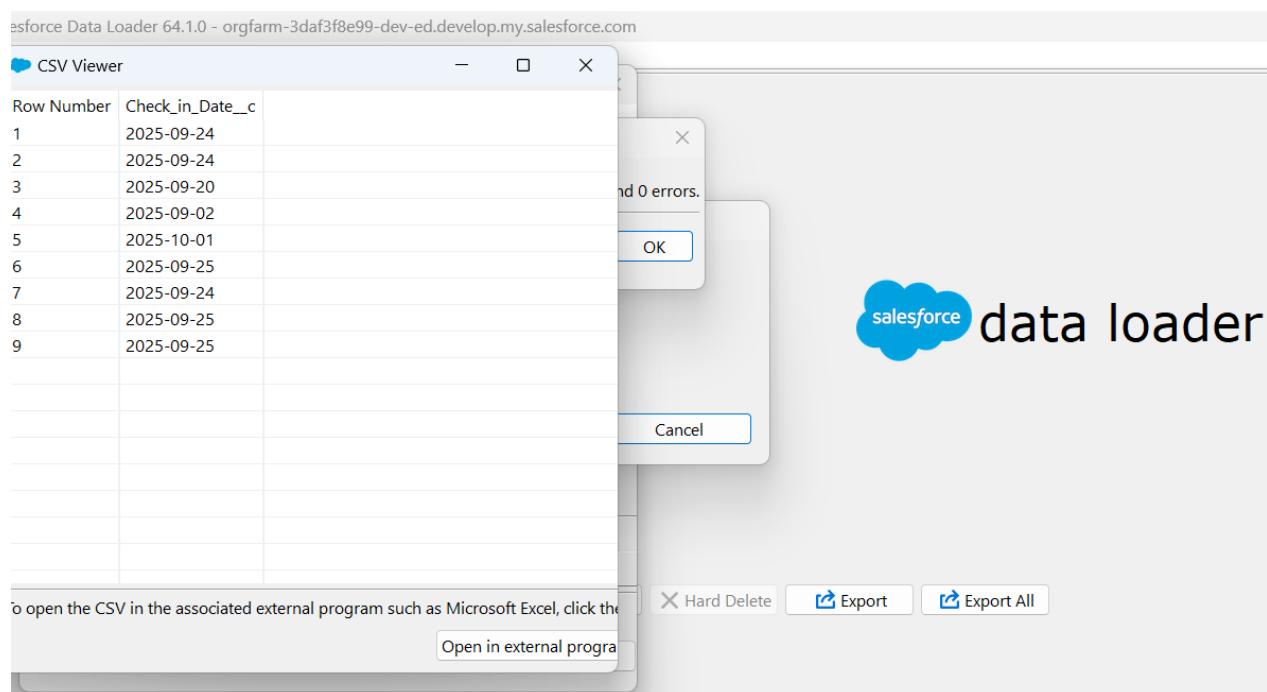
Purpose: Import or export large datasets (50k+ records).

Use Cases:

- Test system performance with bulk hotel bookings and guest records.
- Supports insert, update, upsert, delete operations.

Why Important:

Useful for stress testing hotel management flows and data processing.



3. Duplicate Rules:

Purpose: Prevent duplicate transaction records or customer profiles.

Steps:

- Setup → Duplicate Rules → New Rule.
- For Guests: match on Email/Phone.
- For Bookings: match on Booking ID.

Why Important:

Ensures accurate data — prevents errors in booking or billing.

Duplicate Rules

Guest Duplicate Rule
Prevent_Duplicate_Guests

Duplicate Rule Detail

Rule Name	Prevent_Duplicate_Guests	Order	1 of 1 [Reorder]
Description	Prevents creating multiple guest records with the same Email or Phone Number in Hotel Booking CRM.	Operations On Create	<input checked="" type="checkbox"/> Alert <input type="checkbox"/> Report
Object	Guest	Operations On Edit	<input checked="" type="checkbox"/> Alert <input type="checkbox"/> Report
Record-Level Security	Enforce sharing rules		
Action On Create	Allow		
Action On Edit	Allow		
Alert Text	A guest with this Email or Phone Number already exists. Please check before creating a new record."		
Active	<input type="checkbox"/>		
Conditions	(Guest: Email NOTEQUALTO null) AND (Guest: ID NOTEQUALTO null) AND (Guest: Number of Bookings GREATER THAN 0)	Modified By	Shaik Yasmin, 9/26/2025, 9:10 AM
Created By	Shaik Yasmin, 9/26/2025, 9:10 AM		

Matching Rules

Guest_Email_Phone_Matching

Matching Rule Detail

Object	Guest	Delete	Clone	Deactivate
Rule Name	Guest_Email_Phone_Matching			
Unique Name	Guest_Email_Phone_Matching			
Description	Matches Guest records if Email or Phone Number are the same to prevent duplicate guests in the Hotel Booking CRM.			
Matching Criteria	(Guest: Email EXACT MatchBlank = FALSE) AND (Guest: Phone EXACT MatchBlank = FALSE)			
Status	Active	Modified By	Shaik Yasmin, 9/26/2025, 9:14 AM	
Created By	Shaik Yasmin, 9/26/2025, 9:13 AM			

Duplicate Rules

Booking Duplicate Rule
Prevent_Duplicate_Bookings

Duplicate Rule Detail

Rule Name	Prevent_Duplicate_Bookings	Order	1 of 1 [Reorder]
Description	Booking	Operations On Create	<input checked="" type="checkbox"/> Alert <input checked="" type="checkbox"/> Report
Object	Booking	Operations On Edit	<input type="checkbox"/> Alert <input type="checkbox"/> Report
Record-Level Security	Enforce sharing rules		
Action On Create	Allow		
Action On Edit	Allow		
Alert Text	Use one of these records?		
Active	<input type="checkbox"/>		
Conditions	(Booking: Guest_Name EQUALS null) AND (Booking: Check-in Date NOTEQUALTO null)	Modified By	Shaik Yasmin, 9/26/2025, 9:18 AM
Created By	Shaik Yasmin, 9/26/2025, 9:18 AM		

Matching Rules

Room_Number_Match_Rule

Matching Rule Detail

Object	Room	Delete	Clone	Deactivate
Rule Name	Room_Number_Match_Rule			
Unique Name	Room_Number_Match_Rule			
Description				
Matching Criteria	(Room: Name EXACT MatchBlank = FALSE) AND (Room: Room_Type EXACT MatchBlank = FALSE)			
Status	Active	Modified By	Shaik Yasmin, 9/26/2025, 9:21 AM	
Created By	Shaik Yasmin, 9/26/2025, 9:20 AM			

Duplicate Rule Detail

	Value	Action
Rule Name	Prevent_Duplicate_Rooms	Edit Delete Clone Deactivate
Description		Order 1 of 1 [Reorder] Edit
Object	Room	
Record-Level Security	Enforce sharing rules	
Action On Create	Block	Operations On Create <input type="checkbox"/> Alert <input type="checkbox"/> Report
Action On Edit	Allow	Operations On Edit <input checked="" type="checkbox"/> Alert <input type="checkbox"/> Report
Alert Text	Use one of these records?	
Active	<input checked="" type="checkbox"/>	
Matching Rule	Room_Number_Match_Rule Mapped	Matching Criteria (Room: Name EXACT MatchBlank = FALSE) AND (Room: Room_Type EXACT MatchBlank = FALSE)
Conditions	[Room: Room_Name EQUALS null] AND [Room: Room_Type EQUALS null]	
Created By	Shaik Yasmin 9/26/2025, 9:24 AM	Modified By Shaik Yasmin 9/26/2025, 9:24 AM

4. Data Export & Backup:

Purpose: Ensure regular backup of hotel management data.

Steps:

- Setup → Data Export → Schedule Weekly Export.
- Export all custom objects: Room, Hotel, Guest, Booking, Housekeeping Task, Payment.
- Store CSV backups securely.

Why Important:

Prevents data loss during errors or deployment, ensures audit history for hotel operations.

Monthly Export Service

Help for this Page [Edit](#)

Next scheduled export: 10/5/2025, 2:00 AM

[Export Now](#) [Schedule Export](#)

Your export has been queued. You will receive an email notification when it is completed.

Scheduled By [Shaik Yasmin](#)
 Schedule Date 9/26/2025
 Export File Encoding ISO-8859-1 (General US & Western European, ISO-LATIN-1)

5. Change Sets:

Purpose: Move custom objects, fields, Apex classes, flows, and Lightning pages from Sandbox to Production without re-building.

Steps (real-world process):

1. In Sandbox Org → Setup → Outbound Change Sets → New Change Set.
2. Add components: Custom Objects, Apex Classes, Flows, Validation Rules, Approval Processes, Lightning Pages.
3. Upload Change Set to Target Org.
4. In Production Org → Inbound Change Sets → Deploy.

Note for Our Project:

- Working in a Developer Edition Org → Change Sets not available.
- Used VS Code & SFDX to manage deployments instead.

Note for Our Project:

Since we are working in a Developer Edition Org, Change Sets are not available. Instead, we documented the process for completeness but used VS Code & SFDX to manage deployments in our project.

6. Unmanaged vs Managed Packages (Optional)

Unmanaged: Share project with classmates → editable.

Managed: Locked → AppExchange style.

Our Case: Use Unmanaged Package if sharing project. No AppExchange publishing needed.

7. ANT Migration Tool:

Purpose: Command-line deployment tool used in enterprise teams with CI/CD pipelines.

Note: Not required for this project.

8. VS Code & SFDX:

Purpose: Developer-friendly way to manage Salesforce metadata, automate deployments, and maintain version control with Git. Works in Developer Orgs and preferred for real projects.

Steps Followed:

Install Salesforce CLI (SFDX):

1. Download from Salesforce CLI website and install.

Install VS Code & Salesforce Extension Pack:

2. Open VS Code → Extensions Marketplace → Search **Salesforce Extension Pack** → Install.

Authorize Dev Org in VS Code:

3. Open Command Palette (Ctrl + Shift + P) → SFDX: Authorize an Org.
4. Choose “Dev Hub” or “Sandbox/Developer Org” → Log in via browser → Allow access.

Create/Connect Project:

5. VS Code → Command Palette → SFDX: Create Project with Manifest.
6. Select a folder for your project → Generates manifest/package.xml.

Pull Metadata from Org:

7. In terminal (inside VS Code project folder):
`sf project retrieve start --manifest manifest/package.xml`
8. Fetches all metadata defined in package.xml (e.g., Room, Hotel, Guest, Booking, Housekeeping Task, Payment, Apex classes, Lightning pages).

9.

File Edit Selection View Go Run ...

TERMINAL

```
PS C:\Users\HP\Desktop\TCS\skill> sf project retrieve start --manifest manifest\package.xml
>>
    Retrieving Metadata
    Retrieving v58.0 metadata from shaikyasmin057143@agentforce.com using the v64.0 SOAP API
    ✓ Preparing retrieve request 16ms
    ✓ Sending request to org 587ms
    ✓ Waiting for the org to respond 5.24s
    ✓ Done 0ms

Status: Succeeded
Elapsed Time: 5.70s

Retrieved Source
```

State	Name	Type	Path
Created	Booking__c.Booking_Compact_Layout	CompactLayout	force-app\main\default\objects\Booking__c\compactLayouts\Booking_Compact_Layout.compactlayout-meta.xml
Created	Booking__c.Booking_Highlights	CompactLayout	force-app\main\default\objects\Booking__c\compactLayouts\Booking_Highlights.compactlayout-meta.xml
Created	Guest__c.Guest_Compact_Layout	CompactLayout	force-app\main\default\objects\Guest__c\compactLayouts\Guest_Compact_Layout.compactlayout-meta.xml
Created	Booking__c.Capacity__c	CustomField	force-app\main\default\objects\Booking__c\fields\Capacity__c.field-meta.xml
Created	Booking__c.Check_in_Date__c	CustomField	force-app\main\default\objects\Booking__c\fields\Check_in_Date__c.field-meta.xml
Created	Booking__c.Check_out_Date__c	CustomField	force-app\main\default\objects\Booking__c\fields\Check_out_Date__c.field-meta.xml
Created	Booking__c.Guest_Name__c	CustomField	force-app\main\default\objects\Booking__c\fields\Guest_Name__c.field-meta.xml
Created	Booking__c.Guest__c	CustomField	force-app\main\default\objects\Booking__c\fields\Guest__c.field-meta.xml
Created	Booking__c.Hotel__c	CustomField	force-app\main\default\objects\Booking__c\fields\Hotel__c.field-meta.xml

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