**Phase 8: Data Management**

**Objectives**

Ensure **data accuracy, deduplication, backup, and compliance** while handling sensitive refund/payment details.

**Activities**

1. **Data Migration**
   * Imported **Order history** and **Customer data** using Data Loader.
   * Migrated ~50,000 records into Salesforce.
2. **Data Quality**
   * Validation rules prevent incorrect refund entry.
   * Duplicate Management Rules → prevent duplicate cases for same Order ID.
3. **Backup & Recovery**
   * Weekly data export via Salesforce Data Export Service.
   * Integrated with AWS S3 for offsite backup storage.
4. **Archiving Strategy**
   * Cases older than 2 years moved to archive object.
   * Archival policy ensures performance optimization.
5. **Data Security**
   * Role-based access (Agent, Finance, Warehouse).
   * Field-level security (refund amount visible only to Finance).
   * Encryption at rest for sensitive payment data.
6. **GDPR & Compliance**
   * Customer request for “Right to be Forgotten” implemented with **Data Deletion Process**.
   * Masking PII fields in reports for non-admins.
7. **ETL Processes**
   * MuleSoft ETL jobs to clean order data from legacy systems.
   * Standardized refund modes into a consistent picklist.

**Deliverables**

* **Data Migration Logs**
* **Backup & Archival Policy Document**
* **Data Governance Report**