# **Guest360 CRM Project – Phase 8: Data Management & Deployment**

The Phase 8 (Data Management & Deployment) of the Guest 360 CRM Project. It provides step-by-step click instructions with screenshot placeholders.

## **Step 1: Data Import Wizard (for small data sets)**

### Path: **Setup** → **Data Import Wizard** → **Launch Wizard**

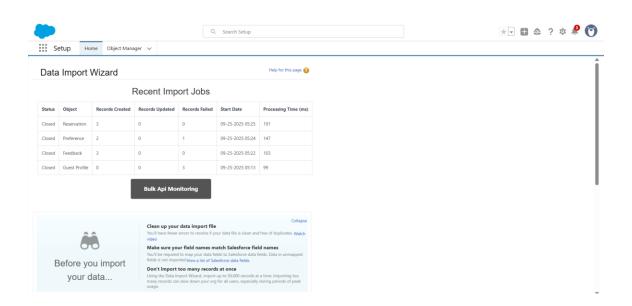
1. Select the object (e.g., Guest Profiles).

'Choose CSV File' → upload GuestProfile.csv.

Next  $\rightarrow$  map CSV columns to Salesforce fields.

 $Guest_ID \rightarrow Guest_ID\_c$ ,  $Email \rightarrow Email\_c$ .

'Start Import' → wait for confirmation email.

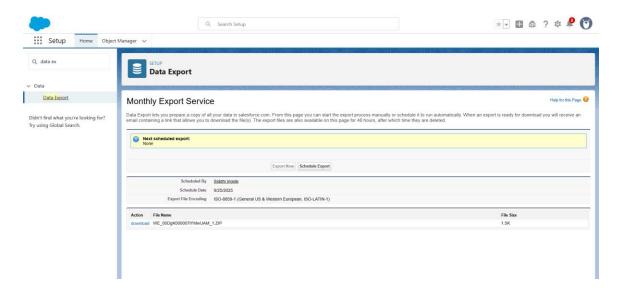


# **Step 2: Data Export (for large data sets)**

Path: Setup-data export

Choose the objects that were created

- -Guest Profile
- -Reservation
- -Feedback
- -Preference



# **Step 3: Backup & Duplicate Rules**

- A. Backup Data
- 1. Setup  $\rightarrow$  Data Export  $\rightarrow$  Export Now.
- 2. Select objects (Guest Profile, Reservation, etc.).
- 3. Click Start Export → Salesforce sends ZIP file backup.



# **B. Duplicate Rules**

Setup  $\rightarrow$  Duplicate Rules  $\rightarrow$  New Rule.

Select object (Guest Profile).

Name: GuestProfile\_DuplicateCheck.

Matching Rule: Guest\_ID\_c or Email\_c unique.

Action: Block (or Allow & Report).

#### Activate

