

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

The Phase 8 (Data Management & Deployment) of the Guest360 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 → map CSV columns to Salesforce fields.

Guest\_ID → Guest\_ID\_\_c, Email → Email\_\_c.

'Start Import' → wait for confirmation email.

The screenshot shows the Salesforce 'Data Import Wizard' page. At the top, there's a navigation bar with 'Setup', 'Home', and 'Object Manager'. Below this, the page title is 'Data Import Wizard' with a 'Help for this page' link. The main section is titled 'Recent Import Jobs' and contains a table with the following data:

Status	Object	Records Created	Records Updated	Records Failed	Start Date	Processing Time (ms)
Closed	Reservation	3	0	0	09-25-2025 05:25	191
Closed	Preference	2	0	1	09-25-2025 05:24	147
Closed	Feedback	3	0	0	09-25-2025 05:22	103
Closed	Guest Profile	0	0	3	09-25-2025 05:13	99

Below the table is a 'Bulk Api Monitoring' button. At the bottom, there's a section titled 'Before you import your data...' with three tips:

- Clean up your data import file**: You'll have fewer errors to resolve if your data file is clean and free of duplicates. [Watch video](#)
- Make sure your field names match Salesforce field names**: You'll be required to map your data fields to Salesforce data fields. Data in unmapped fields is not imported. [View a list of Salesforce data fields.](#)
- Don't import too many records at once**: Using the Data Import Wizard, import up to 30,000 records at a time. Importing too many records can slow down your org for all users, especially during periods of peak usage.

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

Path: Setup-data export

Choose the objects that were created

-Guest Profile

-Reservation

-Feedback

-Preference

Search Setup

Setup Home Object Manager

data ex

Data

Data Export

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### SETUP Data Export

#### Monthly Export Service

Help for this Page

Data Export lets you prepare a copy of all your data in Salesforce.com. From this page you can start the export process manually or schedule it to run automatically. When an export is ready for download you will receive an email containing a link that allows you to download the file(s). The export files are also available on this page for 48 hours, after which time they are deleted.

Next scheduled export: None

Export Now Schedule Export

Scheduled By Siddhi Ingole  
Schedule Date 9/25/2025  
Export File Encoding ISO-8859-1 (General US & Western European, ISO-LATIN-1)

Action	File Name	File Size
<a href="#">download</a>	WE_00DgK000007YmWUAM_1.ZIP	1.5K

## Step 3: Backup & Duplicate Rules

A. Backup Data

1. Setup → Data Export → Export Now.

2. Select objects (Guest Profile, Reservation, etc.).

3. Click Start Export → Salesforce sends ZIP file backup.

Action	File Name	File Size
<a href="#">download</a>	WE_00DgK000007YmWUAM_1.ZIP	1.5K

## B. Duplicate Rules

Setup → Duplicate Rules → New Rule.

Select object (Guest Profile).

Name: GuestProfile\_DuplicateCheck.

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

Action: Block (or Allow & Report).

Activate

The screenshot displays the Salesforce Setup interface. The left sidebar shows the navigation menu with 'Setup' selected. The main content area is titled 'Duplicate Rules' and shows the configuration for a rule named 'GuestProfile\_DuplicateCheck'. The rule is currently inactive, as indicated by the 'Activate' button. The configuration details are as follows:

Duplicate Rule Detail	
Rule Name	GuestProfile_DuplicateCheck
Description	
Object	Guest Profile
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"/>
Matching Rule	<input checked="" type="checkbox"/> GuestProfile_DuplicateCheck matching rule <input checked="" type="checkbox"/> Mapped
Matching Criteria	{Guest Profile: Email EXACT MatchBlank = TRUE} AND {Guest Profile: Guest_ID EXACT MatchBlank = TRUE}
Operations On Create	<input checked="" type="checkbox"/> Alert <input checked="" type="checkbox"/> Report
Operations On Edit	<input type="checkbox"/> Alert <input type="checkbox"/> Report
Created By	Siddhi Ingole: 9/25/2025, 10:54 AM
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