

LegalAid Connect - Phase 8: Data Management & Deployment (Admin & Developer) Report

Project Title: LegalAid Connect
Phase: 8 - Data Management & Deployment
Date: 29 September 2025
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1. Introduction

Phase 8 was dedicated to establishing the operational foundation for LegalAid Connect, focusing on secure data integrity and a reliable methodology for deploying customizations. Given the sensitive nature of client and case data, objectives included defining a compliant data migration path, implementing robust data quality controls (especially for duplicate client records), and formalizing a modern, source-driven deployment process. This phase ensures the application is secure, maintainable, and ready for regulatory review and user acceptance testing (UAT).

2. Data Migration & Management

Purpose: To migrate legal case–related data, enforce data quality standards, and establish data backup strategies.

Component	Implementation Details
Data Import	<p>Initial data loads were performed using:</p> <ul style="list-style-type: none">• Data Import Wizard – for small-scale CSV imports of Client (Contact) and Lawyer (User) records.• Salesforce Data Loader – for larger, bulk Upsert operations on Legal_Case__c records and related Case Activities.
Data Quality	<p>To prevent duplicate case or client data:</p> <ul style="list-style-type: none">• A Matching Rule was created on the Client (Contact) object to identify records with identical Phone and Email values.• A Duplicate Rule was set to alert users and block saving duplicates during record creation.
Data Backup	<p>Configured Data Export Service to automatically generate a full backup of all organization data on a weekly basis. Backups are emailed to system administrators for disaster recovery and compliance purposes.</p>

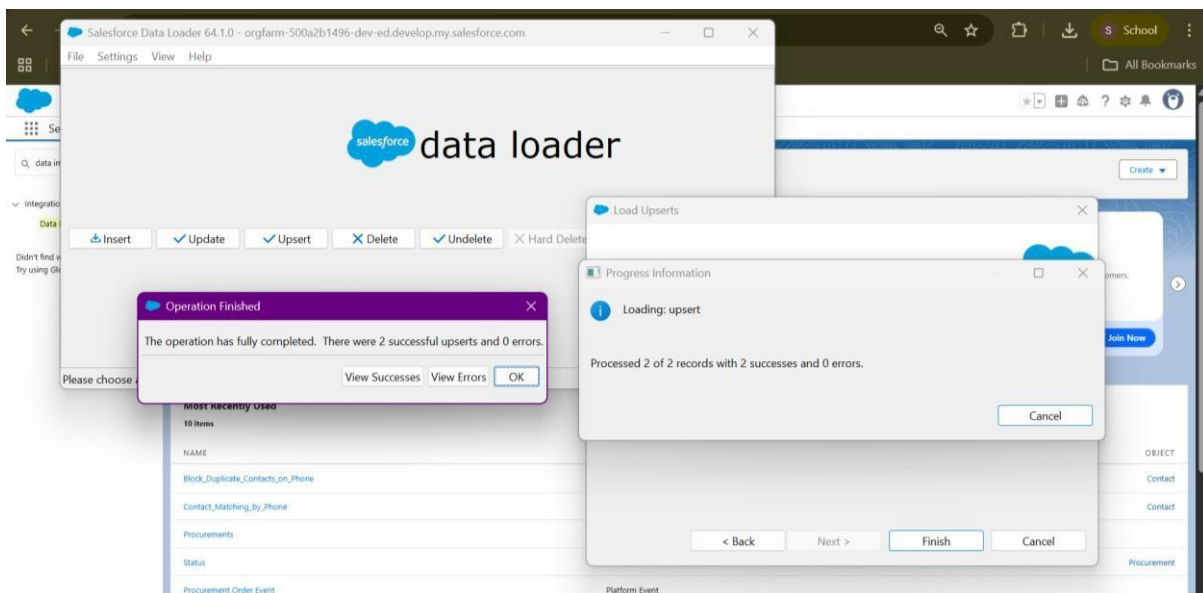
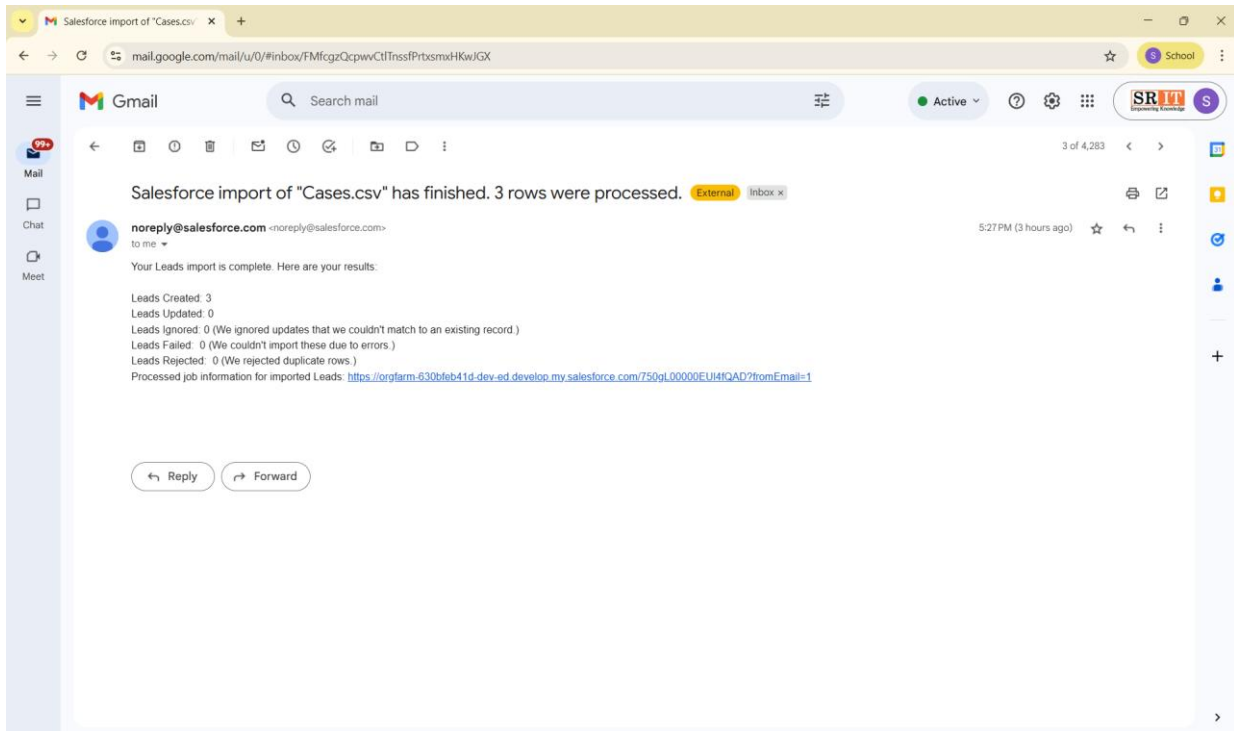
Data Import:

- Loaded Clients, Lawyers, and Case records to seed the system for UAT.

Data Quality:

1. Matching Rule: Configured for Contact (Client) records to match on Phone + Email.
2. Duplicate Rule: Blocks creation of duplicates and alerts users.

Data Import:



Data Quality:

1. Matching Rule:

SETUP

Matching Rules

Matching Rule

Email

Help for this Page

Matching Rule Detail

Delete

Clone

Deactivate

Object	Lawyer Profile
Rule Name	Email
Unique Name	Email
Description	
Matching Criteria	(Lawyer Profile: Lawyer_Name EXACT MatchBlank = FALSE) AND (Lawyer Profile: Contact_Info Fuzzy:PHONE MatchBlank = FALSE)
Status	Active
Created By	GOWNI SRJIITHA, 10/1/2025, 9:06 PM
Modified By	GOWNI SRJIITHA, 10/1/2025, 9:06 PM

2. Duplicate Rule:

SETUP

Duplicate Rules

Account Duplicate Rule

Prevent Duplicate Account Names

Help for this Page

Duplicate Rule Detail

Edit

Delete

Clone

Activate

Rule Name	Prevent Duplicate Account Names	Order	2 of 2 [Reorder]
Description			
Object	Account		
Record-Level Security	Enforce sharing rules		
Action On Create	Allow	Operations On Create	<input checked="" type="checkbox"/> Alert <input checked="" type="checkbox"/> Report
Action On Edit	Allow	Operations On Edit	<input checked="" type="checkbox"/> Alert <input checked="" type="checkbox"/> Report
Alert Text	Use one of these records?		
Active	<input type="checkbox"/>		
Matching Rule	<input checked="" type="checkbox"/> Standard Account Matching Rule <input checked="" type="checkbox"/> Mapped	Matching Criteria	Matching rule for account records. More info
Conditions			
Created By	GOWNI SRJIITHA, 10/1/2025, 5:50 PM	Modified By	GOWNI SRJIITHA, 10/1/2025, 5:50 PM

Edit

Delete

Clone

Activate


3. Deployment & Environment Strategy

Purpose: To define the process for moving metadata (code and configuration) between environments.

Component	Implementation Details
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Sandbox Strategy	A standard sandbox strategy was defined for the project lifecycle. A Developer Sandbox serves as the primary environment for all declarative configuration, coding, and unit testing activities before promotion to other environments.
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Deployment Method	The deployment pipeline was managed through VS Code and the Salesforce CLI (SFDX) . The sf project deploys start command was used to successfully deploy all custom metadata—including Apex classes, Triggers, and Lightning Web Components—from the local source repository to the Salesforce org.
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LegalAid Connect

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Overdue

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Upcoming

4

4

0

0

0

0

0

4 items • Filtered by Created Date, Me, Total Contacts

Send Email

Assign Label

	Name	Title	Account Name	Last Activity	Actions
1	SRUJITHA GOWNI		Client_Data		<div>Send</div> <div>Call</div> <div>More</div>
2	Deva Orsu		Client_Data		<div>Send</div> <div>Call</div> <div>More</div>
3	Balaji RVB				<div>Send</div> <div>Call</div> <div>More</div>
4	SRI VAISHNAVI BHASKARA				<div>Send</div> <div>Call</div> <div>More</div>

4. Phase 8 Outcome

- Successfully established and tested a complete data management lifecycle, including import, quality control, and export procedures.
- Implemented a modern, source-controlled deployment process using the Salesforce CLI, making application updates reliable and repeatable.
- The AgriTrust Connect application is now fully populated with sample data and is ready for the final phases of reporting and user acceptance testing.