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

Project Title: AgriTrust Connect - Sustainable Agriculture CRM
Phase: 8 - Data Management & Deployment
Date: 25 September 2025
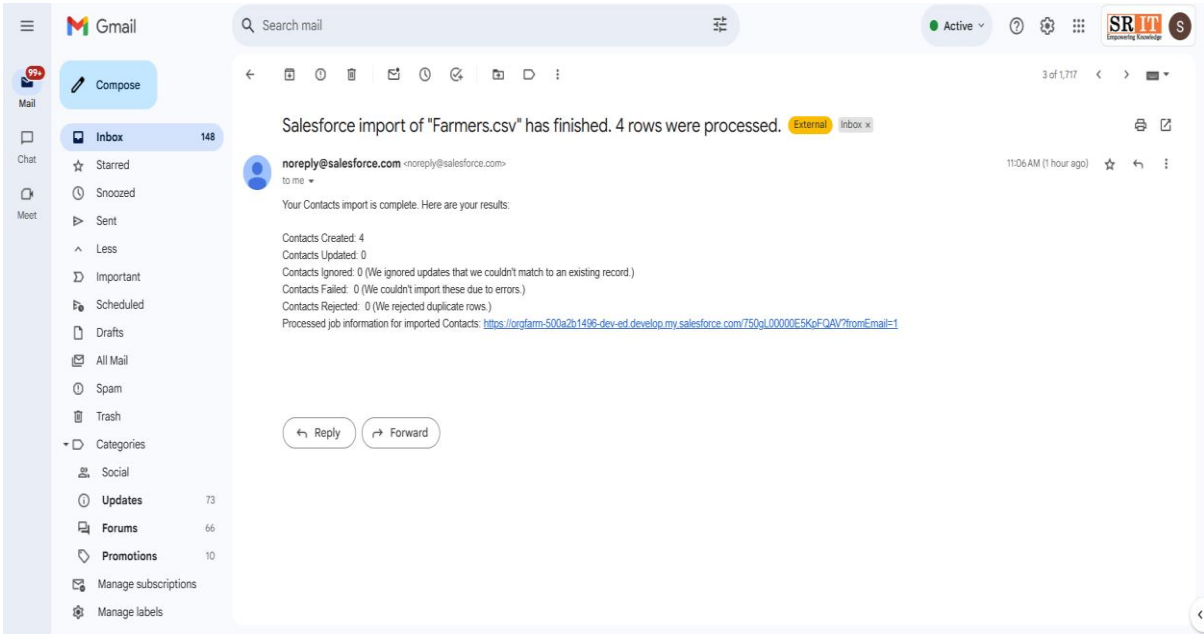**Prepared By:** SRI VAISHNAVI B

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1. Introduction

Phase 8 focused on the critical operational aspects of the project: managing the application's data and deploying customizations from the development environment. The objective was to establish a complete lifecycle for data migration, ensure long-term data integrity through automated rules, and implement a modern, source-driven deployment process. This phase ensures the AgriTrust Connect application is maintainable, scalable, and ready for user testing and production environments.
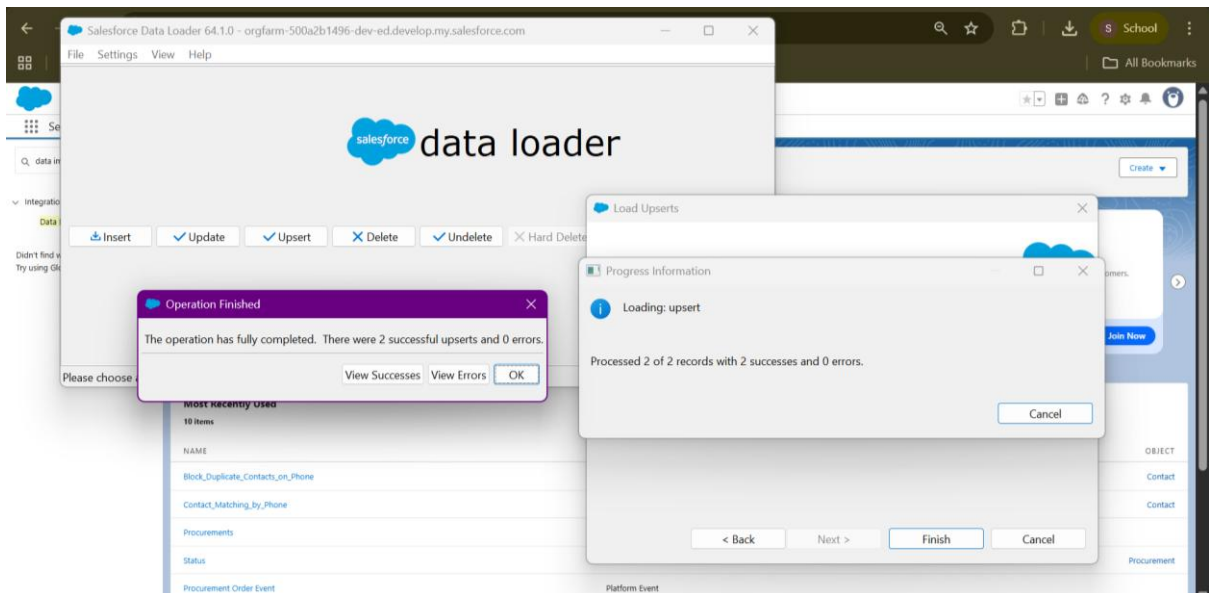
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2. Data Migration & Management

Purpose: To load initial data, establish data quality controls, and implement a backup strategy.

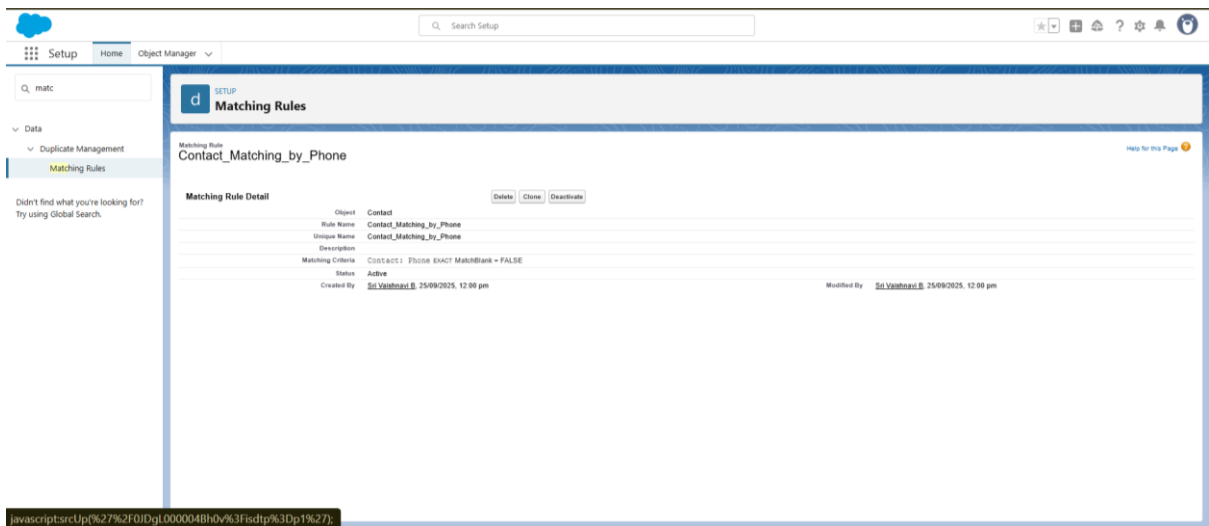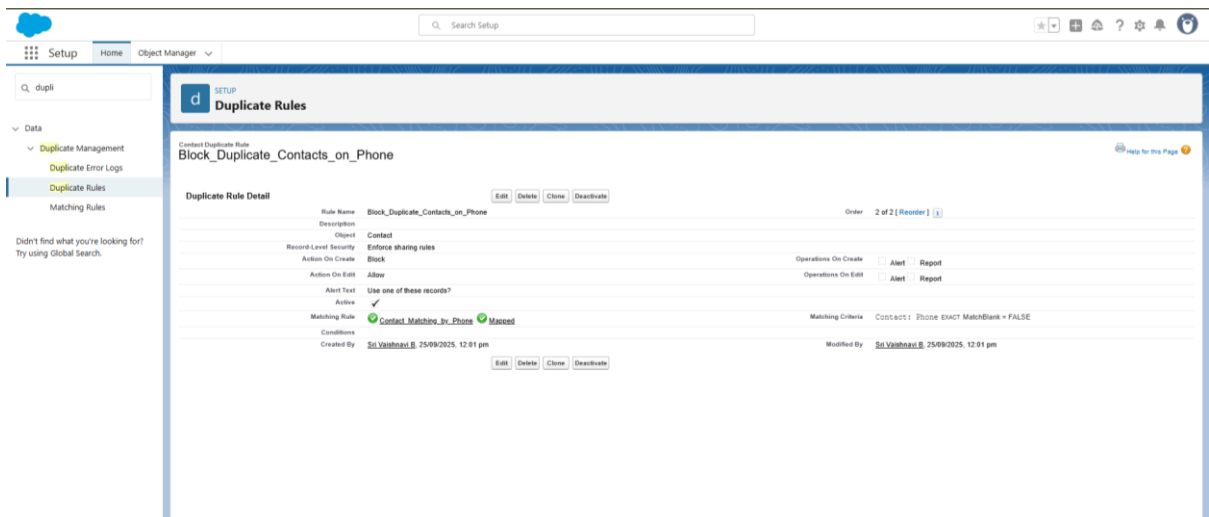| Component	Implementation Details
Data Import	Initial data loads were performed using two tools: the **Data Import Wizard** for user-friendly, small-scale CSV imports of Farmer (Contact) records, and the **Salesforce Data Loader** for larger, more complex bulk Upsert operations on Procurement records.
Data Quality	To maintain data integrity, a **Duplicate Rule** was configured on the Contact object. This rule uses a custom **Matching Rule** to identify records with an identical Phone field and blocks the creation of new duplicate records.
Data Backup	A disaster recovery and audit plan was initiated by configuring the **Data Export Service**. This service is now scheduled to perform an automated, full back up of all organization data on a weekly basis, with results sent via email.

Data Import:

Data Quality:

1. **Matching Rule:**

2. **Duplicate Rule:**

3. Deployment & Environment Strategy

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

Component	Implementation Details
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.
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.

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.