

Phase 8 – Data Management and Deployment

To ensure that all contact and training-related data in the tracker is accurate, secure, up-to-date, and ready for analysis and reporting.

The screenshot shows the Salesforce App Manager interface. The left sidebar contains a navigation menu with the following items: App, esforce Mobile App, Data, Mass Transfer Approval Requests, Apps, App Manager (highlighted), AppExchange Marketplace, Connected Apps, Connected Apps OAuth Usage, Manage Connected Apps, External Client Apps, External Client App Manager, OAuth Usage, Settings, Lightning Bolt, Flow Category, Lightning Bolt Solutions, Mobile Apps, Salesforce, Mobile Builder for the Seller-Focused Experience, Salesforce Branding, and Salesforce Navigation. The main content area is titled 'Home' and features two cards: 'Get Started with Einstein Bots' and 'Mobile Publisher'. Below these cards is a 'Most Recently Used' section with a table of 10 items.

NAME	TYPE	OBJECT
Contact Record Page	Lightning Page	
Vinh Hua	User	
SFDC_DevConsole	Debug Level	
Trainings	Custom Tab Definition	Training
Status	Custom Field Definition	Training
Course Name	Custom Field Definition	Training

The screenshot shows the 'Details' page for a record in Salesforce. The page has two tabs: 'Related' and 'Details'. The 'Details' tab is selected. The page displays the following fields:

- Name: TN-0008
- Contact: Vaishnavi Wasade
- Course Date: 9/26/2025
- Course Name: Learning Salesforce
- Status: In Progress
- Created By: Vaishnavi Wasade, 9/26/2025, 2:59 AM
- Owner: Vaishnavi Wasade
- Last Modified By: Vaishnavi Wasade, 9/26/2025, 2:59 AM

Data Standards

- **Validation Rules:**
 - Use dropdowns for fixed options (e.g., “Completed”, “In Progress”)
 - Use date fields for training dates
 - Ensure unique identifiers (e.g., Employee ID, Training ID)
- **Consistency Guidelines:**
 - Consistent name formats (e.g., First Last)
 - Standardized course names
 - Unified status categories

TCS_LM_SF Home Accounts Contacts Students Trainings

Trainings Recently Viewed

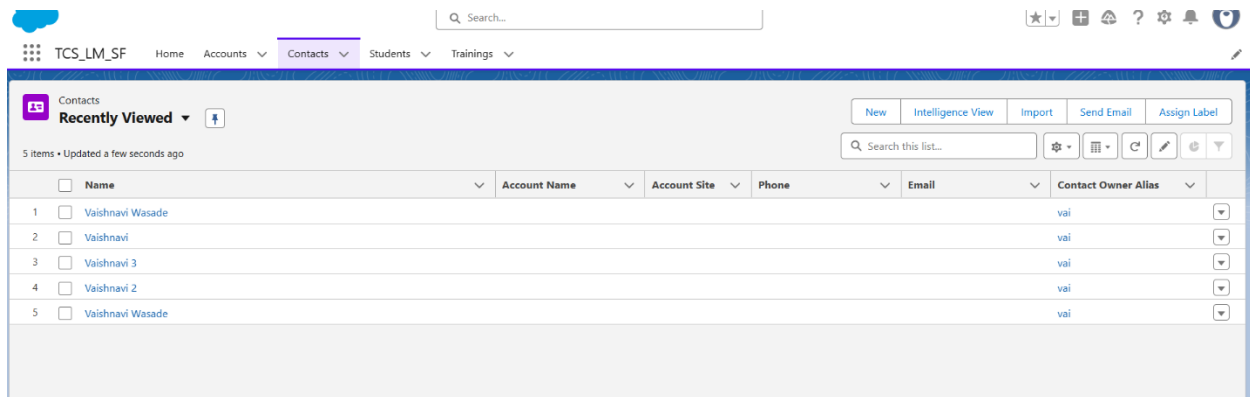
5 Items • Updated a few seconds ago

New Import Change Owner Assign Label

	<input type="checkbox"/>	Name	
1	<input type="checkbox"/>	TN-0008	
2	<input type="checkbox"/>	TN-0007	
3	<input type="checkbox"/>	TN-0006	
4	<input type="checkbox"/>	TN-0005	
5	<input type="checkbox"/>	TN-0004	

Data Quality Assurance

- **Scheduled Audits:** Regular reviews to:
 - Identify duplicates
 - Remove outdated entries
 - Fill in missing data
- **Use of Conditional Formatting:**
 - Highlight expired or overdue trainings
 - Mark incomplete records



The screenshot shows a CRM interface with a top navigation bar containing 'TCS_LM_SF', 'Home', 'Accounts', 'Contacts', 'Students', and 'Trainings'. A search bar is located on the right. Below the navigation bar, the 'Contacts' section is active, displaying 'Recently Viewed' contacts. A table lists 5 items, each with a checkbox, a name, and a 'Contact Owner Alias' column. The table is titled '5 items • Updated a few seconds ago'.

	<input type="checkbox"/>	Name	Account Name	Account Site	Phone	Email	Contact Owner Alias
1	<input type="checkbox"/>	Vaishnavi Wasade					vai
2	<input type="checkbox"/>	Vaishnavi					vai
3	<input type="checkbox"/>	Vaishnavi 3					vai
4	<input type="checkbox"/>	Vaishnavi 2					vai
5	<input type="checkbox"/>	Vaishnavi Wasade					vai