


PHASE 8 : Data Management & Deployment

Goal: The goal is to ensure accurate, secure, and efficient handling of data in system, while preparing the application for deployment. This includes importing existing data, managing duplicates, maintaining data integrity, and using tools like Data Import Wizard, Data Loader, Duplicate Rules, and Change Sets.

1. Data Import Wizard / Manual Import

The Data Import Wizard is a Salesforce tool that allows users to import data into standard and custom objects using a simple, guided interface. It supports CSV files and provides options to insert, update, or upsert records.

In the Booking & Family Portal project, the Data Import Wizard was used to bulk upload family records, plots, and existing booking data.

 **Bulk Data Load Jobs**

Monitor Bulk Data Load Jobs

Monitor the status of recent bulk data load jobs. These jobs are created by Data Loader and other Bulk API client applications.

Quota

Your organization has processed 0 batches in the last 24 hours. Your organization can process 15,000 batches in a 24-hour period.


Resource used in the last 24 hours:
CPU: 0 milliseconds
IO: 0 bytes
Disk: 0 bytes

In Progress


Job ID	Submitted By	Start Time	Status	Job Type	Operation	Object	Records Processed	Records Failed	Progress
No records to display.									

Completed last 7 days

Job ID	Submitted By	Start Time	End Time	Status	Job Type	Operation	Object	Records Processed	Records Failed	Time to Complete (hh:mm:ss)
750WU00000U2gZA	Awasthy_Vanshika	18/09/2025, 1:54 pm	18/09/2025, 1:54 pm	Closed	Bulk V1	Insert	Burial	3	3	00:02
750WU00000U29xE	Awasthy_Vanshika	18/09/2025, 1:45 pm	18/09/2025, 1:45 pm	Closed	Bulk V1	Insert	Booking Request	3	1	00:05
750WU00000U2fNa	Awasthy_Vanshika	18/09/2025, 1:43 pm	18/09/2025, 1:43 pm	Closed	Bulk V1	Insert	Maintenance Task	3	1	00:02
750WU00000U2Pqj	Awasthy_Vanshika	18/09/2025, 1:38 pm	18/09/2025, 1:38 pm	Closed	Bulk V1	Insert	Plot	3	0	00:01
750WU00000U2EDs	Awasthy_Vanshika	18/09/2025, 1:37 pm	18/09/2025, 1:37 pm	Closed	Bulk V1	Insert	Burial	3	3	00:00



Digital Cemetery C...
Dashboards ▾
Accounts ▾
Plots ▾
Families ▾
Burials ▾
Booking Requests ▾
Docum



Booking Requests

All

22 items • Sorted by Booking Request Name • Updated a few seconds ago

	<input type="checkbox"/> Booking Request Name ↑
1	<input type="checkbox"/> Alia Bhatt
2	<input type="checkbox"/> Amrita Chaturvedi
3	<input type="checkbox"/> Bhuvan Kori
4	<input type="checkbox"/> Bhuvan Kori
5	<input type="checkbox"/> Dr. Gautam
6	<input type="checkbox"/> gg
7	<input type="checkbox"/> Gudiya Tripathi
8	<input type="checkbox"/> Krishna Kali
9	<input type="checkbox"/> Mohan Jain
10	<input type="checkbox"/> ninja
11	<input type="checkbox"/> Pari Tiwari
12	<input type="checkbox"/> Request-002
13	<input type="checkbox"/> Request-003
14	<input type="checkbox"/> seema
15	<input type="checkbox"/> shila
16	<input type="checkbox"/> shilpa
16	<input type="checkbox"/> shilpa
17	<input type="checkbox"/> shubham jain
18	<input type="checkbox"/> Simmi Barman
19	<input type="checkbox"/> test
20	<input type="checkbox"/> vibhuti mishra
21	<input type="checkbox"/> vibhuti mishra
22	<input type="checkbox"/> Yashika Raikwar

2. Duplicate Rules

In the project, Duplicate Rules were implemented to avoid creating duplicate Family records or Booking Requests. For example:

Prevent multiple family records with the same email or contact number.

Ensure that a booking reference or family booking is not accidentally submitted twice.

SETUP

Duplicate Rules

All Duplicate Rules

What Are Duplicate Rules?

View: All Duplicate Rules

Rule Name	Description	Object	Matching Rule	Active	Last Modified By
Standard Account Duplicate Rule	Identify accounts that duplicate other accounts.	Account	Standard Account Matching Rule	✓	VAwas
Standard Contact Duplicate Rule	Identify contacts that duplicate other contacts and leads.	Contact	Standard Lead Matching Rule Standard Contact Matching Rule	✓	VAwas
Standard Lead Duplicate Rule	Identify leads that duplicate other leads and contacts.	Lead	Standard Lead Matching Rule Standard Contact Matching Rule	✓	VAwas

3. Deployment (VS Code & SFDX)

Primary method for moving customizations (metadata) throughout this project has been Visual Studio Code and the Salesforce CLI (SFDX). All custom Apex code, Lightning Web Components, and their related configurations have been deployed using the SFDX: Deploy Source to Org command.

PHASE 9 : Reporting, Dashboards & Security Review

Goal: The goal is to provide administrators and stakeholders with clear visibility and secure control over the Digital Cemetery system. This includes creating custom reports and dashboards to monitor booking requests, approvals, burials, and plot usage. Additionally, it focuses on ensuring data security and compliance by implementing sharing settings, field-level security, session restrictions, login IP ranges, and audit trails.

1. Reports

Reports are organized lists of records that allow users to analyze and summarize data based on specific criteria. They can be created in different formats such as Tabular, Summary, Matrix, and Joined to meet various reporting needs.

In the Digital Cemetery project, reports were used to:

Track Booking Requests by status (Pending, Approved, Rejected)

Monitor Burial records and their associated plots

Summarize family activity and booking history

Help administrators generate insights for planning, approvals, and resource allocation

Digital Cemetery C...

Search...

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Dashboards

Accounts

Plots

Families

Burials

Booking Requests

Documents

Sections

Maintenance Tasks

Reports

More

Reports

Created by Me

7 items

Search reports created by me...

New Report

New Folder

⚙

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Booking Requests Report		Public Reports	Vanshika Awasthy	19/9/2025, 11:52 am	<div></div>
Created by Me	Burial Report		Public Reports	Vanshika Awasthy	19/9/2025, 11:46 am	<div></div>
Private Reports	Deceased and Document Report		Public Reports	Vanshika Awasthy	19/9/2025, 1:08 pm	<div></div>
Public Reports	Documents Report		Public Reports	Vanshika Awasthy	19/9/2025, 2:26 pm	<div></div>
All Reports	Family Plot Report		Public Reports	Vanshika Awasthy	18/9/2025, 2:11 pm	<div></div>
FOLDERS	Plots Report		Public Reports	Vanshika Awasthy	19/9/2025, 2:21 pm	<div></div>
All Folders	Summary Report		Public Reports	Vanshika Awasthy	19/9/2025, 2:33 pm	<div></div>
Created by Me						
Shared with Me						
FAVORITES						
All Favorites						

- Booking Request Report

Report: Booking Requests

Booking Requests Report

Enabl

Total Records
22

<input type="checkbox"/> Booking Request: ID ↑	<input type="checkbox"/> Booking Request: Booking Request Name	<input type="checkbox"/> Family	<input type="checkbox"/> Desired Burial Date	<input type="checkbox"/> Status	<input type="checkbox"/> Priority
<input type="checkbox"/> a07WU00000cS19V (1)	seema	Sharma Family	17/09/2025	New	Standard
Subtotal					
<input type="checkbox"/> a07WU00000cS1CM (1)	test	Sharma Family	17/09/2025	New	Emergency
Subtotal					
<input type="checkbox"/> a07WU00000cSCf8 (1)	gg	Sharma Family	17/09/2025	Pending Approval	Emergency
Subtotal					
<input type="checkbox"/> a07WU00000cShh8 (1)	shila	Burman Family	18/09/2025	New	Emergency
Subtotal					
<input type="checkbox"/> a07WU00000cd28M (1)	Request-002	-	-	Pending Approval	-
Subtotal					
<input type="checkbox"/> a07WU00000cd28N (1)	Request-003	-	-	Approved	-
Subtotal					
<input type="checkbox"/> a07WU00000dGiby (1)	shilpa	-	25/09/2025	New	-
Subtotal					
<input type="checkbox"/> a07WU00000dGONO (1)	ninja	-	26/09/2025	New	-

Row Counts

Detail Rows

Subtotals

Grand Total

Report: Booking Requests

Booking Requests Report

Enable F

<input type="checkbox"/> Booking Request: ID ↑	Booking Request: Booking Request Name	Family	Desired Burial Date	Status	Priority
<input type="checkbox"/> a07WU00000cd28N (1)	Request-003	-	-	Approved	-
Subtotal					
<input type="checkbox"/> a07WU00000dGibY (1)	shilpa	-	25/09/2025	New	-
Subtotal					
<input type="checkbox"/> a07WU00000dGONO (1)	ninja	-	26/09/2025	New	-
Subtotal					
<input type="checkbox"/> a07WU00000dMwzw (1)	shubham jain	-	25/09/2025	-	-
Subtotal					
<input type="checkbox"/> a07WU00000dMzMX (1)	vibhuti mishra	-	26/09/2025	-	-
Subtotal					
<input type="checkbox"/> a07WU00000dMzO9 (1)	vibhuti mishra	-	26/09/2025	-	-
Subtotal					
<input type="checkbox"/> a07WU00000dNJ7U (1)	Simmi Barman	Burman Family	25/09/2025	New	Emergency
Subtotal					
<input type="checkbox"/> a07WU00000dNPO1 (1)	Gudiya Tripathi	Tripathi Family	25/09/2025	New	-
Subtotal					
<input type="checkbox"/> a07WU00000dNQnY (1)	Dr. Gautam	-	26/09/2025	New	-
Row Counts	Detail Rows	Subtotals	Grand Total		

Burial Record

Report: Burials

Burial Report

Enable Field Editing

Total Records
7

<input type="checkbox"/> Burial Date ↑	Burial: Burial Name	Deceased Name	Date of Death	Burial Type	Family	Plot	Status
<input type="checkbox"/> 04/09/2025 (1)	Shri	ShriKumari Karotiya	04/09/2025	Standard	Karotiya Family	PLT-0010	-
Subtotal							
<input type="checkbox"/> 12/09/2025 (1)	Jai	Jai Krishna	12/09/2025	Customize	Thakur Family	PLT-0005	Completed
Subtotal							
<input type="checkbox"/> 16/09/2025 (1)	test	test name	01/09/2025	Standard	Sharma Family	PLT-0001	Completed
Subtotal							
<input type="checkbox"/> 18/09/2025 (2)	Avanti	Avanti DÜbey	17/09/2025	Cremation	Dubey Family	PLT-0001	Scheduled,
	arzu	arzu deceased	10/09/2008	Customize	Sharma Family	PLT-0003	Completed
Subtotal							
<input type="checkbox"/> 19/09/2025 (1)	wooden	wooden deceased	09/09/2010	Cremation	Sharma Family	PLT-0001	Completed
Subtotal							
<input type="checkbox"/> 20/09/2025 (1)	shreedevi	shreedevi deceased	02/09/2007	Customize	Burman Family	PLT-0003	Scheduled,
Subtotal							
Total (7)							

Row Counts
Detail Rows
Subtotals
Grand Total

Family Plot Report

Joined Report Family Plot Report							
Families Families block 1						Plots Plots block 1	
	Family: Family Name	Family: ID	Contact Person	Alternate Phone	Relationship to Deceased	Address	Plot: Plot Name
1	Sharma Family	a05WU00000wuG1Z	Ravi Sharma	-	Son	123, Green Park, Delhi	PLT-0001
2	Burman Family	a05WU00000wuGBx	Raja Burman	-	Sibling	1234.purwa jabalpur	PLT-0002
3	Tiwari Family	a05WU00000xKQna	Rajesh Tiwari	-	Sibling	-	PLT-0003
4	Jain Family	a05WU00000xKR2z	-	-	-	-	PLT-0005
5	Rajput Family	a05WU00000xKRDN	Seema Rajput	-	Parent	-	PLT-0006
6	Mishra Family	a05WU00000xKRWj	Shivarth Mishra	-	Other	-	PLT-0007
7	Dubey Family	a05WU00000xKRgP	Anil Dubey	-	Son	-	PLT-0008
8	Awasthy Family	a05WU00000xKRjd	Manoj Awasthy	-	Son	-	PLT-0009
9	Birothia Family	a05WU00000xKRIF	Mukesh Birothia	-	Spouse	-	PLT-0010
10	Karotiya Family	a05WU00000xKRmr	Rakesh Karotiya	-	Son	-	PLT-0014
11	Thakur Family	a05WU00000xKRtT	Manav Thakur	-	Sibling	-	PLT-0015
12	Bhatt Family	a05WU00000xKTgb	-	-	-	-	PLT-0016
13	Tripathi Family	a05WU00000xKUPm	-	-	-	-	PLT-0017
14	korl family	a05WU00000xKUcf	-	-	-	-	
15	Chaturvedi Family	a05WU00000xKVC9	-	-	-	-	
16	Rakiwar Family	a05WU00000xKVLp	-	-	-	-	

• Plot Report

Report: Plots

Plots Report

Total Records13

Total Capacity23

<input type="checkbox"/> Plot: Plot Name ↑ ▾	Plot Number ▾	Plot: ID ▾	Capacity ▾	Row ▾	Status ▾
<input type="checkbox"/> PLT-0001 (1)	A- 101	a04WU00000Bk4bl	1	-	Available
Subtotal			1		
<input type="checkbox"/> PLT-0002 (1)	B- 302	a04WU00000Bk4ez	1	-	Available
Subtotal			1		
<input type="checkbox"/> PLT-0003 (1)	C- 145	a04WU00000Bk4gb	2	-	Available
Subtotal			2		
<input type="checkbox"/> PLT-0005 (1)	Y659	a04WU00000BkkzB	1	-	Under Maintenance
Subtotal			1		
<input type="checkbox"/> PLT-0006 (1)	P-101	a04WU00000Bkyin	4	A	Available
Subtotal			4		
<input type="checkbox"/> PLT-0007 (1)	P-102	a04WU00000Bkyio	6	B	Occupied
Subtotal			6		
<input type="checkbox"/> PLT-0008 (1)	P-103	a04WU00000Bkyip	2	A	Available
Subtotal			2		
<input type="checkbox"/> PLT-0009 (1)	G-234	a04WU00000Bih3B	1	3	Occupied

Row Counts

☒

Detail Rows

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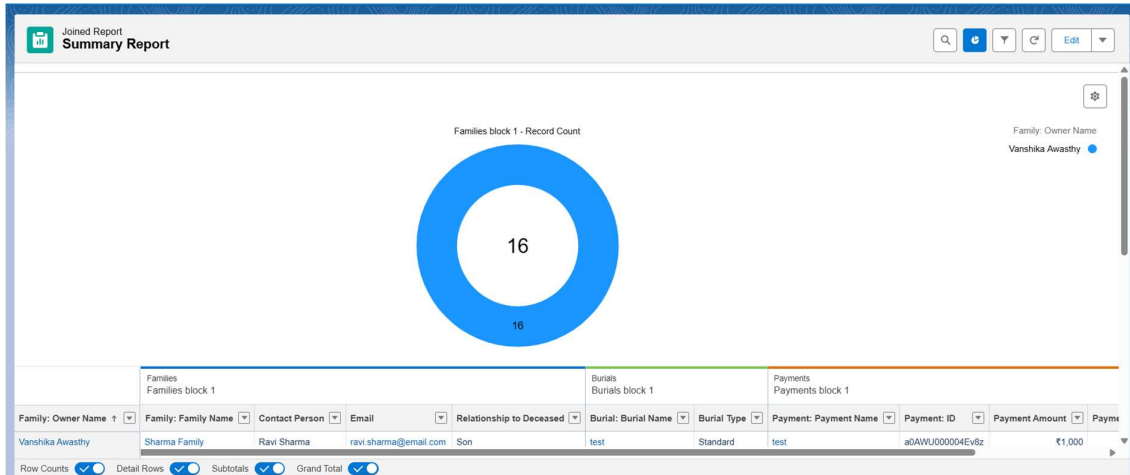
Subtotals

☒

Grand Total

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• Summary Report



Joined Report

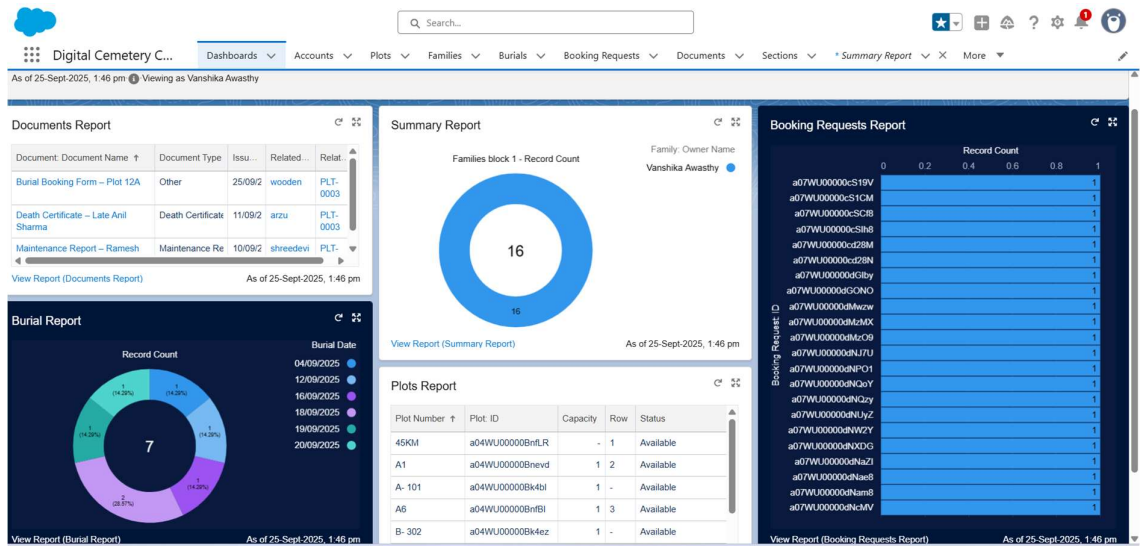
Summary Report

Families					Burials		Payments			
Families block 1					Burials block 1		Payments block 1			
Family: Owner Name	Family: Family Name	Contact Person	Email	Relationship to Deceased	Burial: Burial Name	Burial Type	Payment: Payment Name	Payment: ID	Payment Amount	Payment
Vanshika Awasthy	Sharma Family	Ravi Sharma	ravi.sharma@email.com	Son	test	Standard	test	a0AWUJ000004Ev8z	₹1,000	
	Buman Family	Raja Buman	raja.buman@gmail.com	Sibling	wooden	Cremation				
	Tiwari Family	Rajesh Tiwari	-	Sibling	shreedevi	Customize				
	Jain Family	-	-	-	arzu	Customize				
	Rajput Family	Seema Rajput	-	Parent	Avanti	Cremation				
	Mishra Family	Shivarth Mishra	-	Other	Shri	Standard				
	Dubey Family	Anil Dubey	-	Son	Jai	Customize				
	Awasthy Family	Manoj Awasthy	-	Son						
	Birothia Family	Mukesh Birothia	-	Spouse						
	Karotiya Family	Rakesh Karotiya	-	Son						
	Thakur Family	Manav Thakur	-	Sibling						
	Bhatt Family	-	-	-						
	Tripathi Family	-	-	-						
	kori family	-	-	-						

Row CountsDetail RowsSubtotalsGrand Total

2. Dashboard

Dashboards are visual representations of data from reports, allowing users to quickly analyze and monitor key metrics.



3. Sharing Settings

Sharing Settings define how records are shared and who can access them. They allow administrators to control access at the organization, object, and record level, ensuring sensitive data is only visible to authorized users.

THANKYOU