Project Title – "Smart Subscription Tracker"

Phase 8: Data Management & Deployment

Data Import Wizard-

In Salesforce (Lightning): click Setup (().

Quick Find \rightarrow type Data Import Wizard \rightarrow click it.

Click Launch Wizard (or Open Data Import Wizard).

Scroll to the relevant object area: choose Standard Objects or Custom Objects \rightarrow Subscription__c.

Choose the action: Add new records, Update existing records, or Add new and update existing.

Upload your CSV file for the object you selected.

Field mapping & lookups

After upload the wizard auto-maps columns to fields. Verify each mapping.

For Account lookup on subscriptions, map your CSV column Account_External_ID__c to Account → External_ID__c (or to Account Id if you used Salesforce Ids).

Double-check date, picklist and number mappings.

When ready, click Start Import (or Next \rightarrow Start Import).



Data loader-

> Data export

- In Data Loader choose **Export**.
- Select object **Account**.
- Click **Browse...** to choose a CSV output path.
- Use SOQL query or select fields: Id, Name (or Id, Name, BillingCity if helpful).
- \bullet Click **Next** \rightarrow **Finish**. Open the CSV and match names to Ids for use in the Subscriptions file.

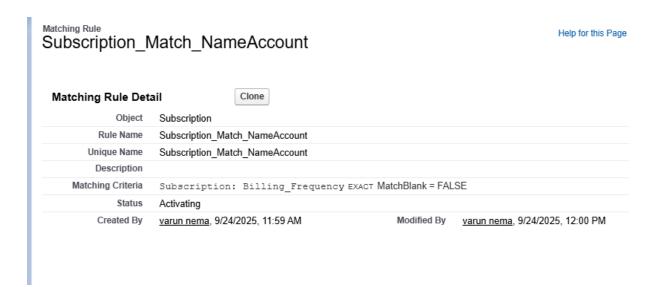


Record ID	Account	Discountc	End Date	Price	Start Date	Status
a01gK00000L4cal	J 001gK00000L4caTQAR		09/19/2025		09-10-2025	Expired
a01gK00000L4ca\	/ 001gK00000L4caTQAR		09/30/2025		09/20/2025	Draft
a01gK00000L4ca\	∧001gK00000L4caTQAR				09/20/2025	Draft
a01gK00000L4lh1	001gK00000L4lh0QAB		09/19/2025		09-10-2025	Expired
a01gK00000L4lh2	001gK00000L4lh0QAB		09/30/2025		09/20/2025	Draft
a01gK00000L4lh3	001gK00000L4lh0QAB				09/20/2025	Draft
a01gK00000L4xS4	001gK00000L4xS3QAJ		09/19/2025		09-10-2025	Expired
a01gK00000L4xS5	001gK00000L4xS3QAJ		09/19/2025		09/15/2025	Expired
a01gK00000L4ziO	001gK00000L4ziNQAR		09/19/2025		09-10-2025	Expired
a01gK00000L4ziP	C 001gK00000L4ziNQAR		09/30/2025		09/20/2025	Active
a01gK00000L52e	001gK00000L52edQAB		09/19/2025		09-10-2025	Expired
a01gK00000L52ef	f(001gK00000L52edQAB		09/19/2025		09/15/2025	Expired
a01gK00000LMod	001gK00000LMoq6QAD		10/17/2025		09/22/2025	Active
a01gK00000LMuX	(I 001gK00000LMuXKQA1		10/17/2025		09/22/2025	Active

Duplicate Rules

Matching rule

- Setup → Quick Find → Duplicate Management → Matching Rules.
- Click New Rule.
- Select Object = subscription_c.
- Give it a Label: subscription_Match_NamePhone. Add a short description.
- Add matching criteria:
- Field: Account: Name → Matching Method: Fuzzy (or "Approximate/Name" if shown).
- Add another criterion: Account: Phone → Matching Method: Exact.
- Save → then Activate the matching rule (must be active before it's used by a Duplicate Rule).

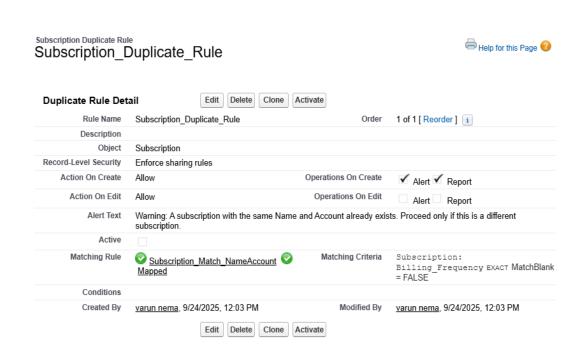


Duplicate Rule (example: subscription)

Setup → Duplicate Management → Duplicate Rules → New Rule

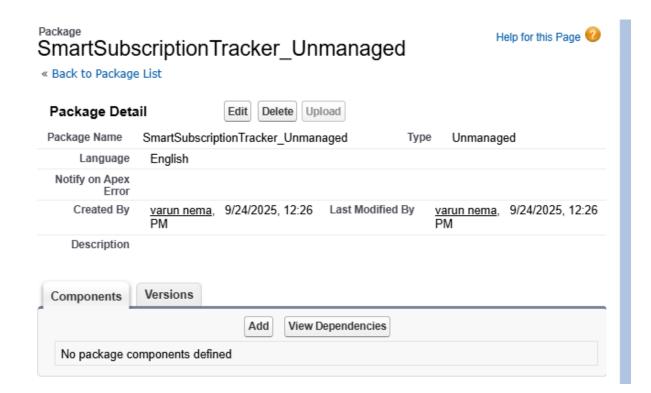
- 1. Object: Subscription__c.
- 2. Rule Name: Subscription_Duplicate_Rule (or similar).
- 3. Matching Rule: add the Subscription_Match_NameAccount matching rule you just created.

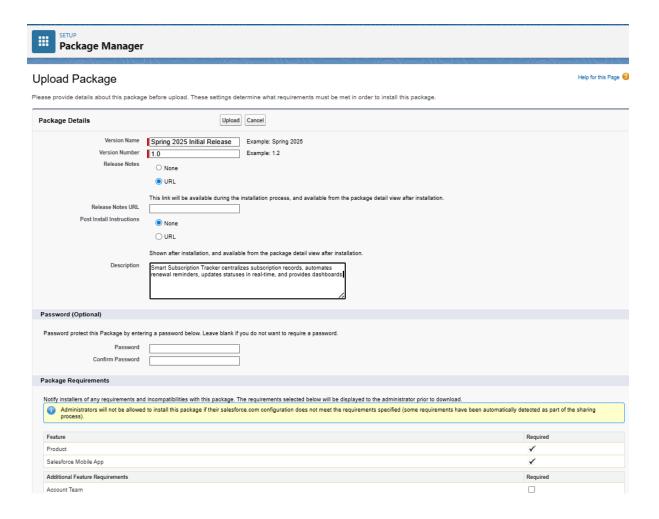
- 4. Action on Create: Allow (this lets bulk imports proceed; keeps record creation from being blocked).
 - Optionally Action on Edit: set to Allow (or Block if you want stricter editing controls).
- 5. Create Duplicate Record Sets (or "Report duplicates" / enable the option that records duplicates): enable this so Salesforce will create *Duplicate Record Set* entries you can review later.
- 6. Alert Text (optional) enter a short message to show users during UI creation, for example:
 - "Warning: A subscription with the same Name and Account already exists. Proceed only if this is a different subscription."
 - This will display when a user tries to create a possible duplicate in the Lightning UI while still allowing the save (because Action on Create = Allow).
- 7. Save → Activate the duplicate rule.



Unmanaged vs Managed Packages

- Go to Setup → Quick Find: "Packages" (or "App Manager / Packaging").
- Click New → give the package a name (e.g.,
 SmartSubscriptionTracker_Unmanaged) → Save.
- 3. Open the package and click Add → add components: Custom Object Subscription_c, fields, Apex classes, flows, permission sets, matching & duplicate rules, reports, dashboards, etc. Add everything your app needs.
- Click Upload → choose Unmanaged (if UI asks) → Upload.
 Wait until upload completes.
- 5. Once uploaded, get the Install URL from the package detail page and share with target orgs. Test install in a clean Dev org.
- 6. After install, run post-install checklist: assign permission sets, check duplicate rule behavior, run automation.





Change Sets

Change Sets are primarily utilized for migrating customizations and configurations between interconnected Salesforce environments, such as from a Sandbox to a Production instance. Since this project was developed entirely within a single Developer Org, environment-to-environment deployment was not required, and therefore Change Sets were not applied.

ANT Migration Tool

The ANT Migration Tool is a command-line—based deployment framework intended for use in large-scale projects, particularly where continuous integration and automated deployments are required. As this project was undertaken as an individual academic build within a single environment, the need for such advanced deployment automation did not arise, and the ANT Migration Tool was not employed.