


## Phase 8 Summary: Data Management & Deployment

**Project:** Residential Maintenance Request Portal

This phase focused on managing the application's data and understanding the process of moving customizations to a live environment.

### 1. Data Import Wizard

- **Purpose:** To easily upload many records at once from a spreadsheet (CSV file) instead of creating them one by one.
- **Key Actions:** A CSV file containing a list of new **Property Unit** records was prepared. The Data Import Wizard was used to upload this file, map the spreadsheet column to the correct Salesforce field, and successfully create multiple records in a single operation.

 <b>Bulk Data Load Jobs</b>					
Bulk Data Load Job <b>750gL00000E38PB</b>					
View the details of a bulk data load job.					
<a href="#">Back to List: Bulk Data Load Jobs</a>					
<b>Bulk Data Load Job Detail</b> <span>Reload</span>					
Job ID	750gL00000E38PB	Job Type	Bulk V1	Status	Closed
Submitted By	ALLA VIJAYA KRISHNA	Operation	Insert	Total Processing Time (ms)	175
Start Time	9/24/2025, 8:28 AM PST	Queued Batches	0	API Active Processing Time (ms)	84
End Time	9/24/2025, 8:28 AM PST	In Progress Batches	0	Apex Processing Time (ms)	0
Time to Complete (hh:mm:ss)	00:01	Completed Batches	1		
Object	Property Unit	Failed Batches	0		
External ID Field		Progress	100%		
Content Type	CSV	Records Processed	9		
Concurrency Mode	Parallel	Records Failed	0		
API Version	54.0	Records	0		

The screenshot shows a web-based setup interface. At the top, there is a navigation bar with a 'Setup' tab selected, and a search bar labeled 'Search Setup'. A progress bar at the top indicates three steps: 'Choose data', 'Edit mapping', and 'Start import', with the 'Start import' step being the current active step. Below the progress bar, the main heading is 'Review & Start Import' with a subtext 'Review your import information and click Start Import.' and a 'Help for this page' link. The content is divided into three columns: 'Your selections:', 'Your import will include:', and 'Your import will not include:'. The 'Your selections:' column lists 'Property Units' and 'Add new records', both with green checkmarks. The 'Your import will include:' column shows 'Mapped fields' with a large '1'. The 'Your import will not include:' column shows 'Unmapped fields' with a large '0'. At the bottom right, there are three buttons: 'Cancel', 'Previous', and 'Start Import'.

Property Units	Mapped fields	Unmapped fields
✓	1	0

## 2. Duplicate Rule:

### Unique Property Unit Number

- **Purpose:** To help keep data clean by warning users when they attempt to create a record that might be a duplicate of an existing one.
- **Key Actions:** A **Duplicate Rule** was created and activated on the **Property Unit** object. The rule is configured to check for an exact match on the

**Name** field ("Unit Number") and display a custom alert message to the user if a duplicate is found during record creation.

SETUP

Duplicate Rules

All Duplicate Rules

[Help for this Page](#)

What Are Duplicate Rules?

[ Expand ]

View: All Duplicate Rules

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other

All

New Rule

Rule Name ↑	Description	Object	Matching Rule	Active	Last Modified By	Last Modified Date
<a href="#">Standard Account Duplicate Rule</a>	Identify accounts that duplicate other accounts.	Account	<a href="#">Standard Account Matching Rule</a>	✓	QEPIK	8/4/2025
<a href="#">Standard Contact Duplicate Rule</a>	Identify contacts that duplicate other contacts and leads.	Contact	<a href="#">Standard Contact Matching Rule</a> <a href="#">Standard Lead Matching Rule</a>	✓	QEPIK	8/4/2025
<a href="#">Standard Lead Duplicate Rule</a>	Identify leads that duplicate other leads and contacts.	Lead	<a href="#">Standard Contact Matching Rule</a> <a href="#">Standard Lead Matching Rule</a>	✓	QEPIK	8/4/2025

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other

All

### 3. Deployment Concept: Change Sets

- Purpose:** To understand the standard, admin-friendly process for moving completed customizations (objects, fields, flows, etc.) from a development environment (like your Developer Org) to a live production environment.
- Key Learning:** A **Change Set** is the tool used to package up components for deployment between connected Salesforce orgs. Although no deployment was performed, the concept of building in a sandbox and moving into to production using this tool was covered.