

Phase 8 – Data Management & Deployment

1. Data Import Wizard

- Used to upload initial lead records into Salesforce.
- Upload some leads by mapping fields like salutation, first name, last name, company, email, phone, lead source, lead score, etc.

Choose data

Almost done

Edit mapping

Start import

Edit Field Mapping: Leads

Your file has been auto-mapped to existing Salesforce fields, but you can edit the mappings if you wish. Unmapped fields will not be imported.

| Edit | Mapped Salesforce Object | CSV Header | Example | Example | Example |
|------------------------|--------------------------|-------------|------------------|------------------|-------------------------|
| Change | Salutation | Salutation | Mr. | Ms. | Mr. |
| Change | First Name | First Name | Rahul | Priya | Arjun |
| Change | Last Name | Last Name | Mehta | Sharma | Verma |
| Change | Company | Company | Mehta Builders P | Dream Homes R | Verma Constructions |
| Change | Email | Email | rahul.mehta@ex | priya.sharma@e | arjun.verma@example.com |
| Change | Phone | Phone | 9876543210 | 9876501234 | 9812345678 |
| Change | Lead Source | Lead Source | Web | Partner Referral | Phone Inquiry |

2. Data Loader (Optional)

- For bulk import/export (not required in this project since records were small).
- Future scope: Could be used for exporting engagement logs or importing 1000+ leads.

3. Duplicate Rule (Optional)

4. Data Export & Backup

- Used Salesforce **Data Export** tool for weekly backup of Leads & Engagements.

- Ensures recovery in case of accidental deletion.

Monthly Export Service

[Help for this Page](#)

Data Export lets you prepare a copy of all your data in salesforce.com. From this page you can start the export process manually or schedule it to run automatically. When an export is ready for download you will receive an email containing a link that allows you to download the file(s). The export files are also available on this page for 48 hours, after which time they are deleted.

Next scheduled export:
 A data export is currently in progress for your organization.

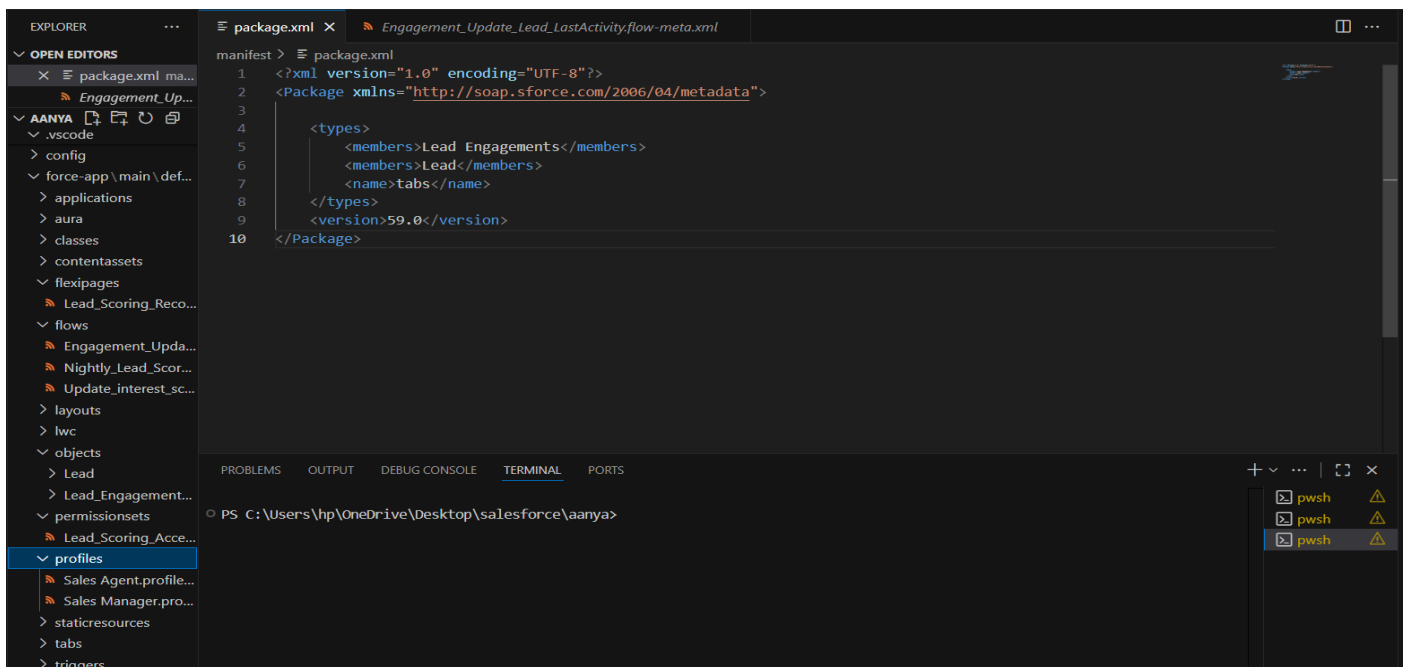
Export Now
 Schedule Export

Your export has been queued. You will receive an email notification when it is completed.

| | |
|----------------------|---|
| Scheduled By | Aanya_Badoniya |
| Schedule Date | 9/25/2025 |
| Export File Encoding | ISO-8859-1 (General US & Western European, ISO-LATIN-1) |

5. Deployment Basics

- Used **Salesforce CLI (SFDX)** with **VS Code** to deploy metadata.
- Steps followed:
 1. Created a **manifest folder** with **package.xml**.
 2. Added all flows, objects, and fields related to **Lead Scoring System**.
 3. Pushed changes into GitHub for version control.



6. Change Sets (Optional)

- Could also be used for deployment, but **SFDX was preferred** for flexibility and version control.