

Phase 8: Data Management & Deployment

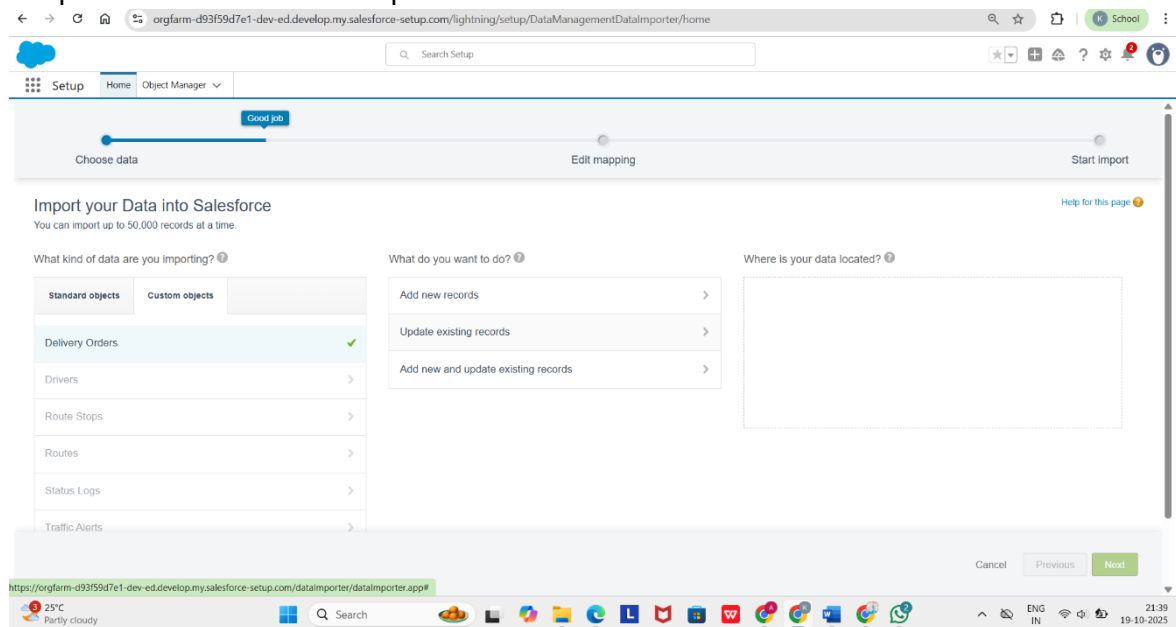
Objective: In this phase, we focus on managing data efficiently and deploying customizations from one Salesforce environment to another. This ensures smooth migration, data consistency, and secure backups, forming the foundation for stable and scalable CRM operations.

1. Data Import Wizard

Purpose: Simplifies importing data such as Accounts, Contacts, Leads, or Custom Object records directly through Salesforce UI.

- 1 Navigate to Setup → Data Import Wizard → Launch Wizard.
- 2 Choose the object (e.g., Account, Contact, or Custom Object).
- 3 Select the operation — Add new, Update existing, or Upsert.
- 4 Upload your CSV file and map fields correctly.
- 5 Run the import and review the success/error files.

Use Case: Ideal for smaller datasets under 50,000 records. Best used for quick imports where mapping and deduplication are simple. It is helpful when end-users or admins need to upload data without developer assistance.



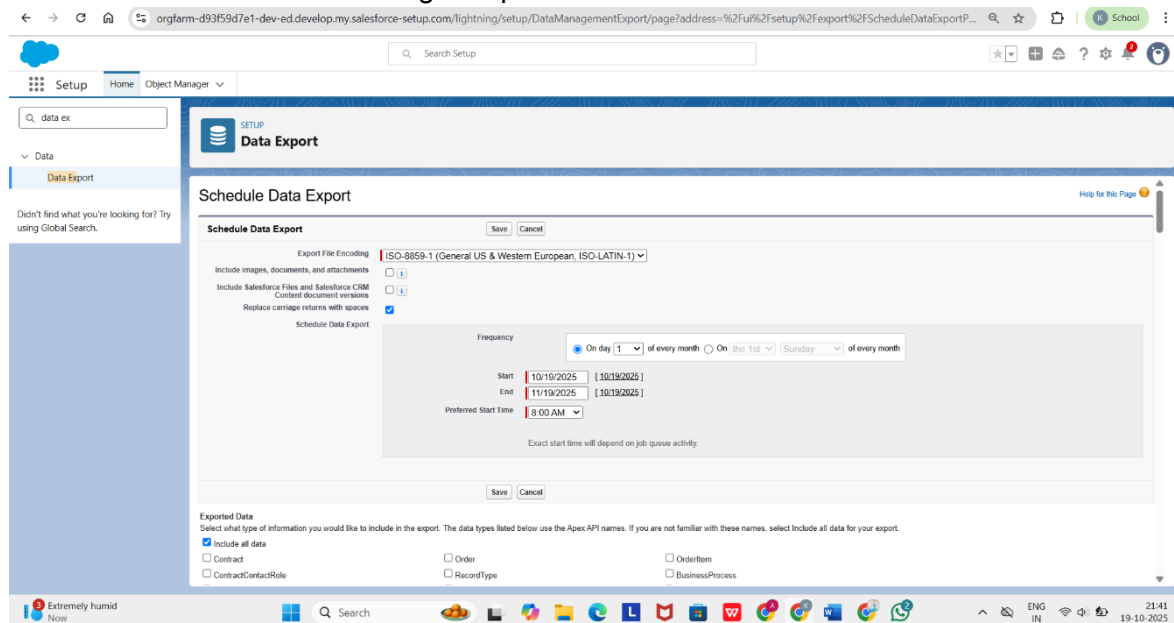
2. Data Loader

Purpose: A client application for bulk import, export, update, or delete operations.

- 1 Download and install Salesforce Data Loader.

- 2 Login using Salesforce credentials or OAuth.
- 3 Choose the operation (Insert, Update, Upsert, Delete, Export).
- 4 Select the CSV file and map fields.
- 5 Run the operation and review success/error logs.

Use Case: Used when large volumes of data need to be migrated, such as initial data loads, mass updates, or regular data synchronization. It allows automation and provides better control over error handling and performance.



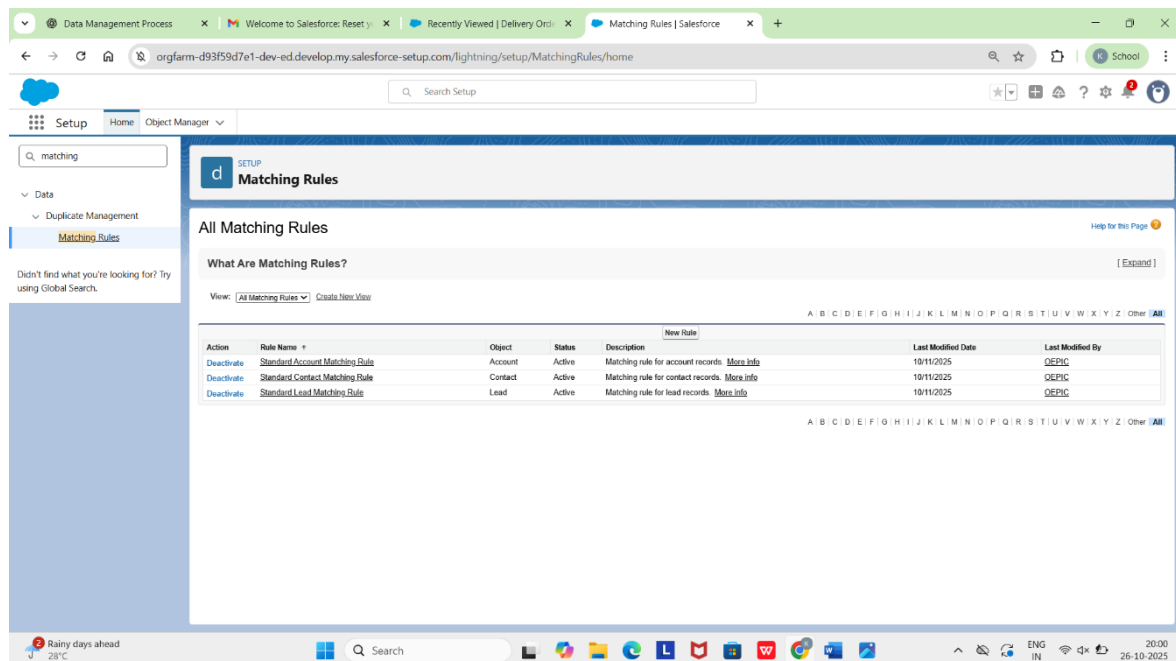
3. Duplicate & Matching Rules

Purpose: Prevent creation of duplicate records and maintain clean data.

- 1 Go to Setup → Matching Rules → New and define matching criteria (e.g., Email, Phone).
- 2 Create a Duplicate Rule using the matching rule and set behavior (Block, Alert, or Report).
- 3 Activate both rules.
- 4 Test by creating records to ensure duplicates are flagged.

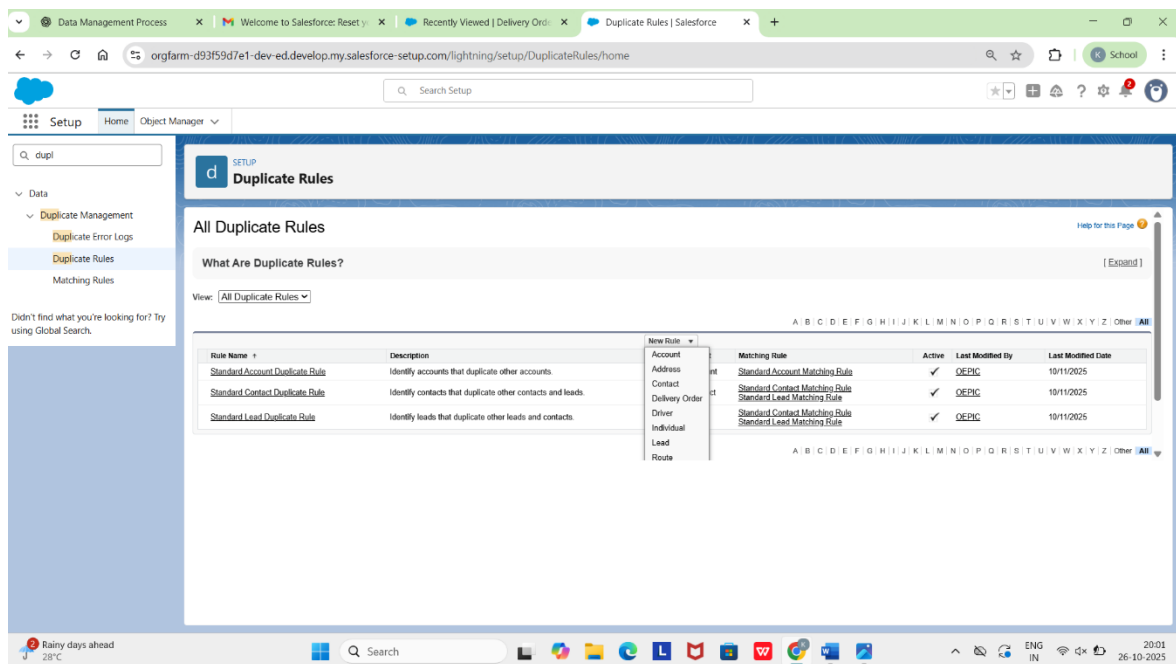
Use Case: Keeps CRM data clean by automatically identifying potential duplicates during record creation or update. This improves data integrity, reporting accuracy, and customer

satisfaction.



The screenshot shows the Salesforce Matching Rules page. The left sidebar contains a search bar with 'matching' and a navigation menu with 'Data' and 'Duplicate Management'. The main content area is titled 'Matching Rules' and includes a 'What Are Matching Rules?' section. Below this is a table with columns: Action, Rule Name, Object, Status, Description, Last Modified Date, and Last Modified By. The table lists three rules: Standard Account Matching Rule, Standard Contact Matching Rule, and Standard Lead Matching Rule, all with a status of 'Active' and a last modified date of 10/11/2025.

Action	Rule Name	Object	Status	Description	Last Modified Date	Last Modified By
Deactivate	Standard Account Matching Rule	Account	Active	Matching rule for account records. More info	10/11/2025	OEPIC
Deactivate	Standard Contact Matching Rule	Contact	Active	Matching rule for contact records. More info	10/11/2025	OEPIC
Deactivate	Standard Lead Matching Rule	Lead	Active	Matching rule for lead records. More info	10/11/2025	OEPIC



The screenshot shows the Salesforce Duplicate Rules page. The left sidebar contains a search bar with 'dupl' and a navigation menu with 'Data' and 'Duplicate Management'. The main content area is titled 'Duplicate Rules' and includes a 'What Are Duplicate Rules?' section. Below this is a table with columns: Rule Name, Description, Matching Rule, Active, Last Modified By, and Last Modified Date. The table lists three rules: Standard Account Duplicate Rule, Standard Contact Duplicate Rule, and Standard Lead Duplicate Rule, all with a status of 'Active' and a last modified date of 10/11/2025.

Rule Name	Description	Matching Rule	Active	Last Modified By	Last Modified Date
Standard Account Duplicate Rule	Identify accounts that duplicate other accounts.	Standard Account Matching Rule	✓	OEPIC	10/11/2025
Standard Contact Duplicate Rule	Identify contacts that duplicate other contacts and leads.	Standard Contact Matching Rule	✓	OEPIC	10/11/2025
Standard Lead Duplicate Rule	Identify leads that duplicate other leads and contacts.	Standard Lead Matching Rule	✓	OEPIC	10/11/2025

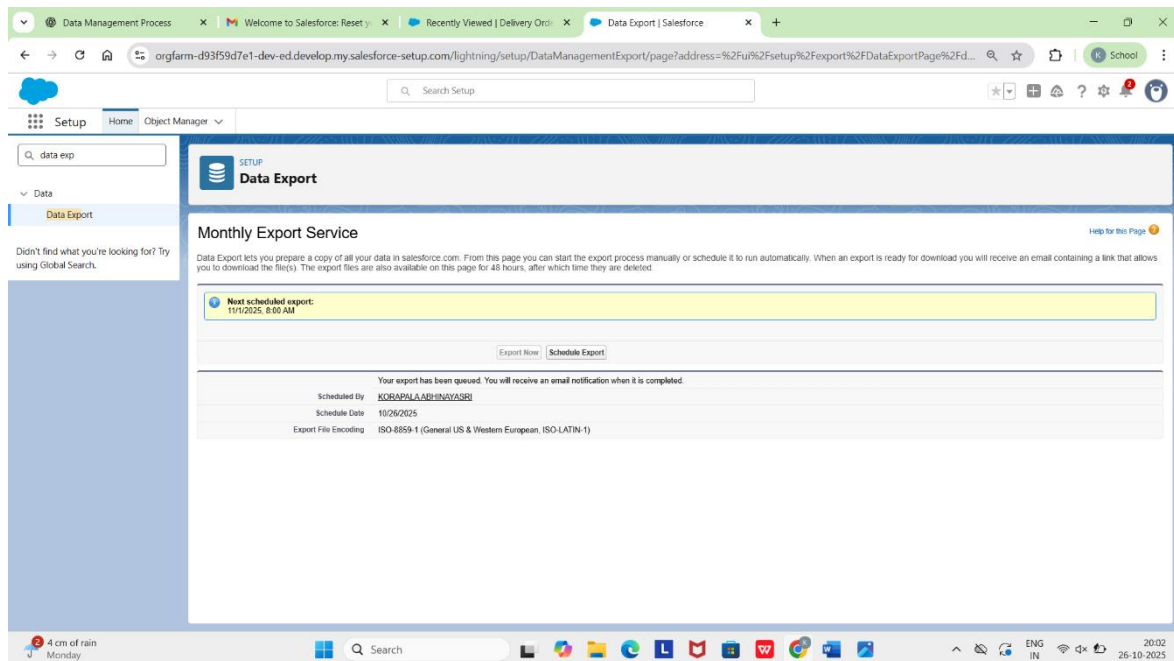
4. Data Export & Backup

Purpose: To ensure data safety and compliance by creating regular backups.

- 1 Navigate to Setup → Data Export.
- 2 Choose objects to include and decide whether to include attachments/files.
- 3 Click Export Now or Schedule Export for weekly/monthly backups.

4 Download the ZIP file once available.

Use Case: Ensures business continuity by maintaining secure backups of all Salesforce data. This process helps restore accidentally deleted records, recover from corruption, and meet data retention or compliance requirements.

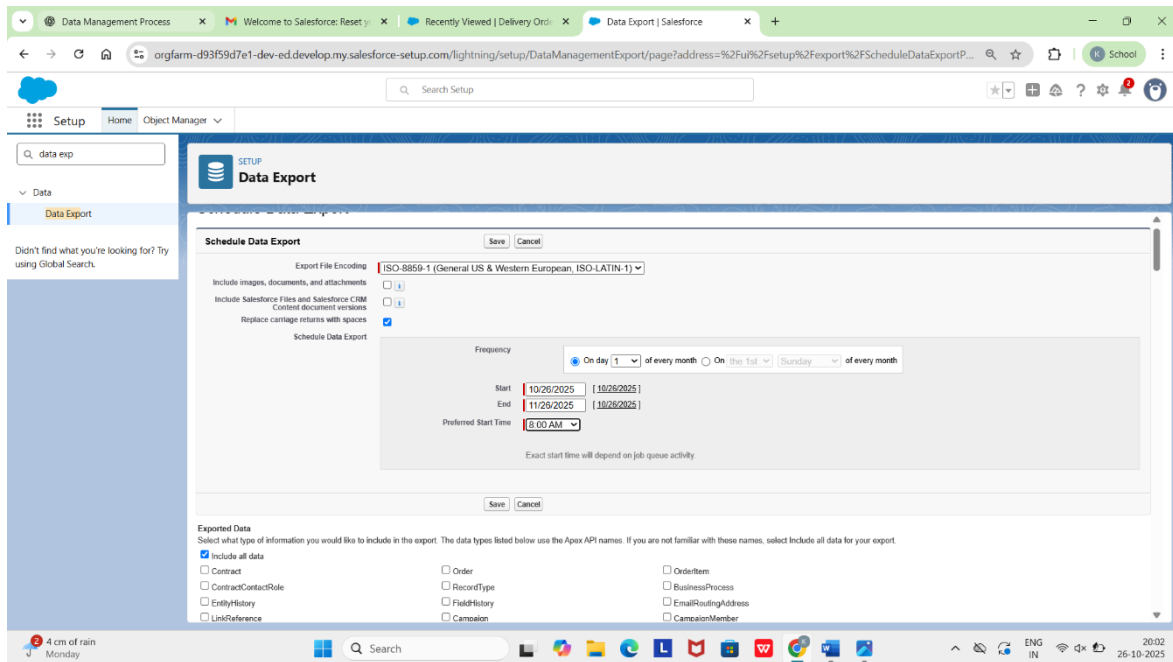


5. Change Sets

Purpose: To deploy metadata (custom objects, triggers, layouts, etc.) between connected Salesforce orgs (e.g., Sandbox → Production).

- 1 In Sandbox, go to Setup → Outbound Change Sets → New.
- 2 Add components (Apex Classes, Page Layouts, etc.).
- 3 Upload to target org.
- 4 In Production, go to Inbound Change Sets, validate, and deploy.

Use Case: Simplifies deployment between environments while maintaining control and traceability. It is ideal for admins and smaller teams who prefer a point-and-click migration method for tested configurations.



6. Managed vs Unmanaged Packages

Purpose: Packaging enables distribution and reusability of Salesforce components.

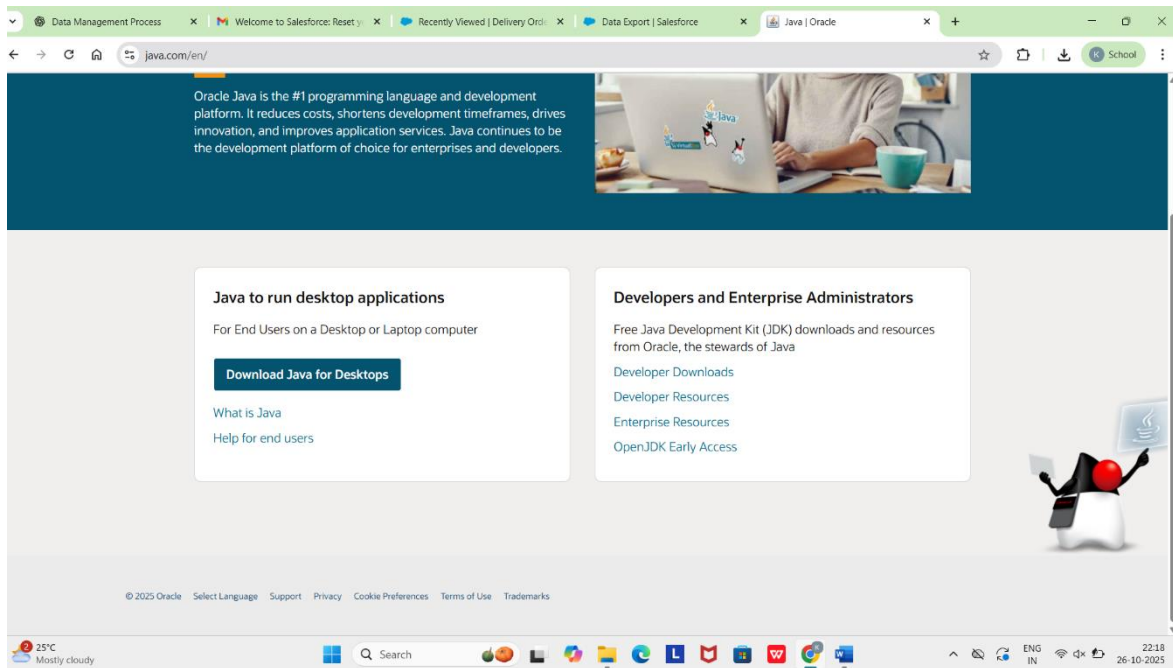
Use Case: Managed packages are used by developers and ISVs to distribute upgradable solutions through AppExchange. Unmanaged packages are used when sharing source code or configurations for learning, customization, or client-specific implementations.

7. ANT Migration Tool

Purpose: A Java-based command-line tool for retrieving and deploying metadata via XML manifests.

- 1 Install Java and Apache Ant.
- 2 Download the Salesforce ANT Migration Tool.
- 3 Configure build.properties with org credentials.
- 4 Edit package.xml to define components.
- 5 Run commands: ant retrieve / ant deploy.

Use Case: Suitable for automated deployments where consistency and repeatability are required. It enables version control integration and bulk metadata transfers across multiple Salesforce environments.

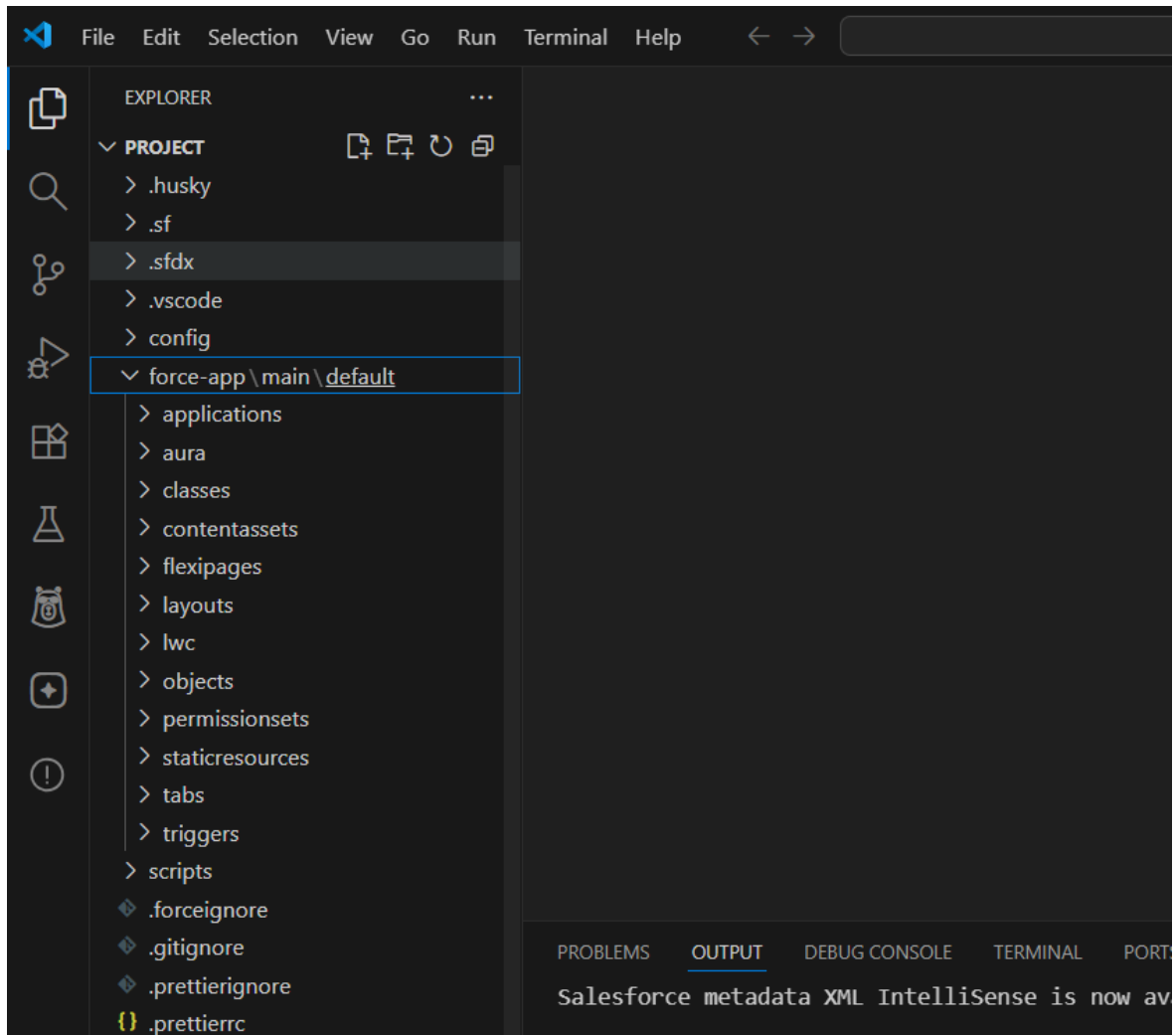


8. Visual Studio Code (VS Code) & Salesforce CLI (SFDX)

Purpose: The modern development and deployment environment for Salesforce developers.

- 1 Install VS Code and Salesforce CLI (SFDX).
- 2 Create a new project using: `sfdx force:project:create -n MyProject`.
- 3 Authorize your org using: `sfdx auth:web:login -a DevHubAlias`.
- 4 Retrieve or deploy metadata using CLI commands.
- 5 Use Git for version control and CI/CD integrations.

Use Case: Provides a unified development platform supporting source tracking, testing, and deployment. Ideal for continuous integration (CI) and continuous delivery (CD) pipelines, improving collaboration among development teams.



Conclusion: Data Management & Deployment are vital for ensuring Salesforce environments remain synchronized, reliable, and secure. By leveraging tools like Data Loader, Change Sets, and SFDX, organizations can automate deployment, prevent errors, and maintain data integrity across all environments.