

Phase 8: Data Management & Deployment

Data Import Wizard

The Data Import Wizard in Salesforce allows importing records for standard and custom objects.

For this project, government scheme-related data such as **Schemes**, **Scheme Applications**, **Fund Transactions**, and **Grievances** can be imported into their respective custom objects with the defined fields:

- **Schemes:** Scheme Code, Scheme Name, Description, Eligibility Criteria, Start Date, End Date, Max Amount, Active
- **Scheme Applications:** Application Name, Citizen Email, Citizen User, Contact, Requested Amount, Approved Amount, Date, Stage, Scheme
- **Fund Transactions:** Fund Transaction Name, Amount, Payment Date, Payment Status, Scheme Application
- **Grievances:** Grievance Name, Category, Contact, Resolution Notes, Scheme Application

This helps in populating sample/test data during development.

The screenshot shows the Salesforce Data Import Wizard interface. At the top, there's a navigation bar with tabs for Home, Chatter, Libraries, Content, Subscriptions, Scheme Applications, Fund Transactions, Grievances, and Schemes. Below this is a search bar and a 'Switch to Lightning E' button. The main content area is titled 'Data Import Wizard' and features a 'Recent Import Jobs' table with columns: Status, Object, Records Created, Records Updated, Records Failed, Start Date, and Processing Time (ms). A 'Bulk Api Monitoring' button is visible below the table. On the left, there's a sidebar with 'Quick Find / Search...' and a list of administrative tasks under 'Administer', including Release Updates, Manage Users, Manage Apps, Manage Territories, Company Profile, Data Classification, Privacy Center, Security Controls, Domain Management, Communication Templates, Translation Workbench, Data Management, Mobile Administration, Desktop Administration, Outlook Integration and Sync, Gmail Integration and Sync, Email Administration, and Google Apps. A large blue box with binoculars icon says 'Before you import your data...'. To the right of this box, there are three sections: 'Clean up your data import file' (with a 'Watch video' link), 'Make sure your field names match Salesforce field names' (with a 'View a list of Salesforce data fields' link), and 'Don't import too many records at once' (with a warning about 50,000 records).

salesforce

Search...

Search

Switch to Lightning E

Home Chatter Libraries Content Subscriptions Scheme Applications Fund Transactions Grievances Schemes +

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Data Import Wizard

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Recent Import Jobs

Status	Object	Records Created	Records Updated	Records Failed	Start Date	Processing Time (ms)
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Bulk Api Monitoring

Before you import your data...

Collapse

Clean up your data import file
You'll have fewer errors to resolve if your data file is clean and free of duplicates. [Watch video](#)

Make sure your field names match Salesforce field names
You'll be required to map your data fields to Salesforce data fields. Data in unmapped fields is not imported. [View a list of Salesforce data fields.](#)

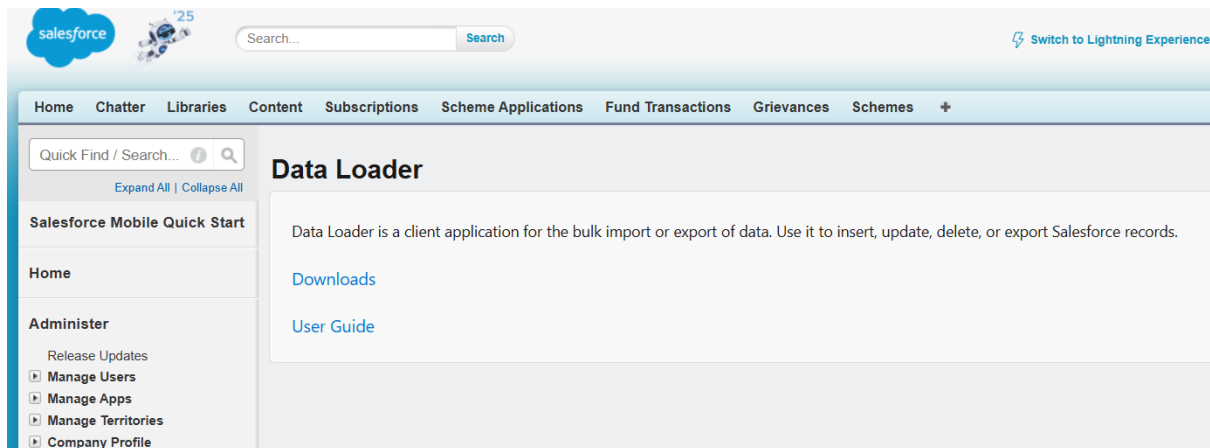
Don't import too many records at once
Using the Data Import Wizard, import up to 50,000 records at a time. Importing too many records can slow down your org for all users, especially during periods of peak usage.

Import your data in 3 easy steps!

Data Loader

Data Loader is used for bulk data import, export, update, and deletion.

In this project, **bulk Scheme Applications, Fund Transactions, and Grievances** can be uploaded through Data Loader using CSV files mapped to the above fields.



Duplicate Rules

Duplicate rules prevent the creation of duplicate records in the system. Duplicate Rules were created for each custom object to ensure no duplicate entries are allowed.

1. Scheme Duplicate Rule

- Prevent duplicate scheme records based on Scheme Code.
- **Action on Create:** Alert
- **Action on Edit:** Alert
- **Matching Criteria:** Scheme Code__c field checked to prevent duplication

2. Scheme Application Duplicate Rule

- Prevent duplicate applications for the same citizen and scheme.
- **Action on Create:** Alert
- **Action on Edit:** Alert
- **Matching Criteria:** Citizen Email__c + Scheme__c fields checked to prevent duplication

3. Fund Transaction Duplicate Rule

- Prevent duplicate fund transactions for the same application on the same date and amount.
- **Action on Create:** Alert

- **Action on Edit:** Alert
- **Matching Criteria:** Payment Date__c + Amount__c + Scheme Application__c fields checked to prevent duplication

4. Grievance Duplicate Rule

- Prevent duplicate grievances for the same citizen, scheme application, and category.
- **Action on Create:** Alert
- **Action on Edit:** Alert
- **Matching Criteria:** Citizen__c + Scheme Application__c + Category__c fields checked to prevent duplication

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Scheme Duplicate Rule

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Rule Name	Scheme Duplicate Rule	Order	1 of 1 [Reorder]
Description	Prevent duplicate scheme records based on Scheme Code.		
Object	Scheme		
Record-Level Security	Enforce sharing rules		
Action On Create	Allow	Operations On Create	<input checked="" type="checkbox"/> Alert <input type="checkbox"/> Report
Action On Edit	Allow	Operations On Edit	<input checked="" type="checkbox"/> Alert <input type="checkbox"/> Report
Alert Text	Use one of these records?		
Active	<input type="checkbox"/>		
Matching Rule	<input checked="" type="checkbox"/> Scheme Duplicate Rule matching rule <input checked="" type="checkbox"/> Mapped	Matching Criteria	Scheme : Scheme_Code EXACT MatchBlank = FALSE
Conditions			
Created By	KAPPAACHCHITHA	26/09/2025, 9:03 pm	Modified By KAPPAACHCHITHA 26/09/2025, 9:03 pm

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Scheme Application Duplicate Rule

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Rule Name	Scheme Application Duplicate Rule	Order	1 of 1 [Reorder]
Description	Prevent duplicate applications based on Application Name.		
Object	Scheme Application		
Record-Level Security	Enforce sharing rules		
Action On Create	Allow	Operations On Create	<input checked="" type="checkbox"/> Alert <input type="checkbox"/> Report
Action On Edit	Allow	Operations On Edit	<input checked="" type="checkbox"/> Alert <input type="checkbox"/> Report
Alert Text	Duplicate application found. Use existing record.		
Active	<input type="checkbox"/>		
Matching Rule	<input checked="" type="checkbox"/> Scheme Application Duplicate Rule matching rule <input checked="" type="checkbox"/> Mapped	Matching Criteria	Scheme Application: Name EXACT MatchBlank = FALSE
Conditions			
Created By	KAPPAACHCHITHA	26/09/2025, 9:06 pm	Modified By KAPPAACHCHITHA 26/09/2025, 9:06 pm

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Fund Transaction Duplicate Rule

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Duplicate Rule Detail

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Rule Name	Fund Transaction Duplicate Rule	Order	1 of 1 [Reorder]	
Description	Prevent duplicate fund transactions based on Fund Transaction Name.			
Object	Fund Transaction			
Record-Level Security	Enforce sharing rules			
Action On Create	Allow	Operations On Create	<input checked="" type="checkbox"/> Alert	<input type="checkbox"/> Report
Action On Edit	Allow	Operations On Edit	<input checked="" type="checkbox"/> Alert	<input type="checkbox"/> Report
Alert Text	Duplicate fund transaction detected.			
Active	<input type="checkbox"/>			
Matching Rule	<input checked="" type="checkbox"/> Fund Transaction Duplicate Rule matching rule	<input checked="" type="checkbox"/> Mapped	Matching Criteria	Fund Transaction: Payment_Status EXACT MatchBlank = FALSE
Conditions				
Created By	KAPPAACHCHITHA	26/09/2025, 9:07 pm	Modified By	KAPPAACHCHITHA
				26/09/2025, 9:09 pm

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Grievance Duplicate Rule

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Duplicate Rule Detail

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Rule Name	Grievance Duplicate Rule	Order	1 of 1 [Reorder]	
Description	Prevent duplicate grievances based on Grievance Name.			
Object	Grievance			
Record-Level Security	Enforce sharing rules			
Action On Create	Allow	Operations On Create	<input checked="" type="checkbox"/> Alert	<input type="checkbox"/> Report
Action On Edit	Allow	Operations On Edit	<input checked="" type="checkbox"/> Alert	<input type="checkbox"/> Report
Alert Text	Duplicate grievance already exists.			
Active	<input type="checkbox"/>			
Matching Rule	<input checked="" type="checkbox"/> Grievance Duplicate Rule matching rule	<input checked="" type="checkbox"/> Mapped	Matching Criteria	Grievance: Status EXACT MatchBlank = FALSE
Conditions				
Created By	KAPPAACHCHITHA	26/09/2025, 9:09 pm	Modified By	KAPPAACHCHITHA
				26/09/2025, 9:09 pm

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Data Export & Backup

Regular data exports are required for backup.

For this project, **Schemes, Scheme Applications, Fund Transactions, and Grievances** data can be exported periodically to maintain historical records and ensure data safety.

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Monthly Export Service

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 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:

None

Export NowSchedule Export

Scheduled By	KAPPAACHCHITHA
Schedule Date	26/09/2025
Export File Encoding	ISO-8859-1 (General US & Western European, ISO-LATIN-1)

Action	File Name	File Size
download	WE_00DdM00000d7GxdUAE_1.ZIP	1.8K

Your Organization Data Export has completed - Govt Schemes Management System – Dev

Inbox x



Do not reply <noreply@salesforce.com>

8:43 PM (33 minutes ago)



to me ▾

The export of your organization's data has been completed. Please click on the following link within the next 48 hours to receive the export.

<https://rvrjccollegeofengineering72-dev-ed.develop.my.salesforce.com/ui/setup/export/DataExportPage/d>

Thank you,
Salesforce

Change Sets

Change Sets are used to migrate metadata between orgs (Sandbox → Production).

For this project, Change Sets can be used to deploy:

- Custom objects (**Schemes, Scheme Applications, Fund Transactions, Grievances**)
- Custom fields defined in each object
- Flows, email alerts, and other automation

Unmanaged vs Managed Packages

- **Managed Packages:** Pre-built solutions from Salesforce AppExchange with limited customization.
- **Unmanaged Packages:** Provide full access to configuration and code.

For this project, no external packages were used. All objects, fields, and automation were custom-built.

ANT Migration Tool

The ANT Migration Tool is a command-line utility for metadata deployment.

For this project, it was **not required**, as all development was done in a single Salesforce org.

VS Code & SFDX

VS Code with Salesforce DX allows advanced development and deployment.

In this project, **all development was done directly in Salesforce UI**, so VS Code and SFDX were not used.

