

Phase 8 — Data Management & Deployment

A — Data Import Wizard

1. Setup → Quick Find → **Data Import Wizard** → Launch Wizard.
2. Select **Custom Objects** → Request (or Volunteers/Resources).
3. Upload your CSV file (prepare columns matching API names: e.g., Requester_Name__c, Priority__c, Request_Type__c, Requested_On__c).

The screenshot shows the 'Edit mapping' step of the Salesforce Data Import Wizard. A progress bar at the top indicates the current step is 'Edit mapping', with 'Choose data' and 'Start import' as previous and next steps respectively. The main content area is titled 'Edit Field Mapping: Requests' and includes a note: '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.' Below this is a table for mapping CSV headers to Salesforce fields.

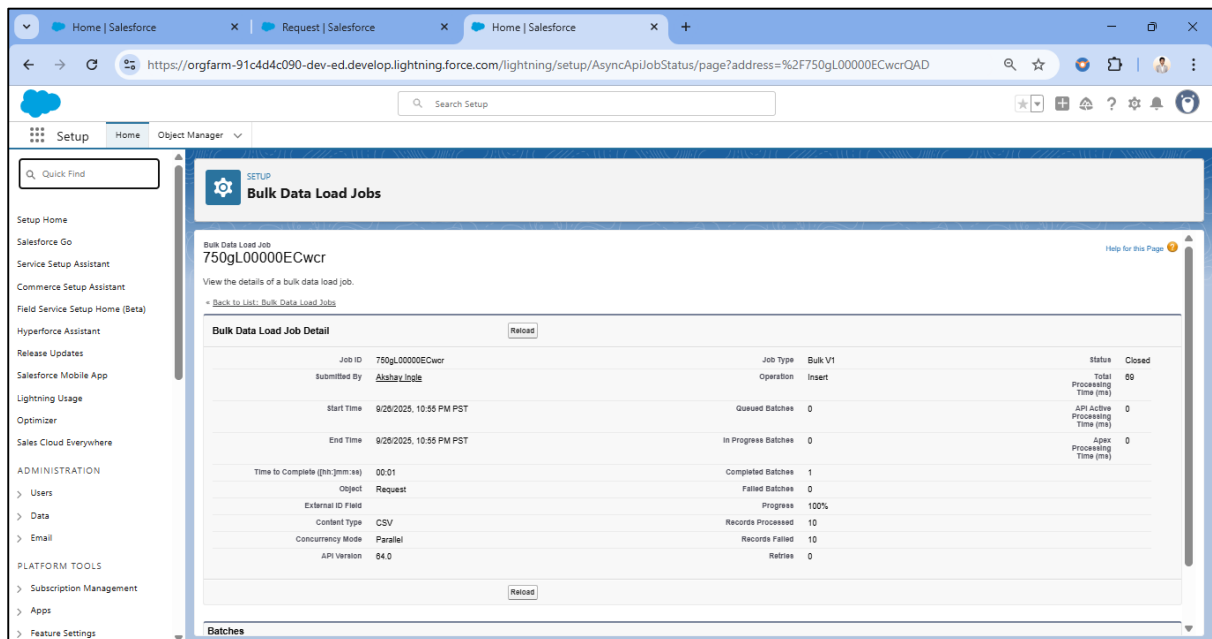
Edit	Mapped Salesforce Object	CSV Header	Example	Example	Example
Change	Requester Name	Requester_Name__c	Aarav Sharma	Ananya Patel	Rohan Verma
Change	Priority	Priority__c	High	Medium	Low
Change	Request Type	Request_Type__c	Medical	Supply	Medical
Change	Requested On	Requested_On__c	20-09-2025	21-09-2025	22-09-2025

At the bottom right, there are buttons for 'Cancel', 'Previous', and 'Next'.

Map fields (Data Import Wizard shows mapping) → Start Import

The screenshot shows the 'Review & Start Import' step of the Salesforce Data Import Wizard. A progress bar at the top indicates the current step is 'Start import', with 'Choose data' and 'Edit mapping' as previous steps. The main content area is titled 'Review & Start Import' and includes a note: 'Review your import information and click Start Import.' Below this, there are three sections: 'Your selections:', 'Your import will include:', and 'Your import will not include:'. The 'Your selections:' section shows 'Requests' with a green checkmark, 'Add new records' with a green checkmark, and 'Requested_Records.csv' with a green checkmark. The 'Your import will include:' section shows 'Mapped fields' with the number '4'. The 'Your import will not include:' section shows 'Unmapped fields' with the number '0'. At the bottom right, there are buttons for 'Cancel', 'Previous', and 'Start Import'.

B- Data Loader

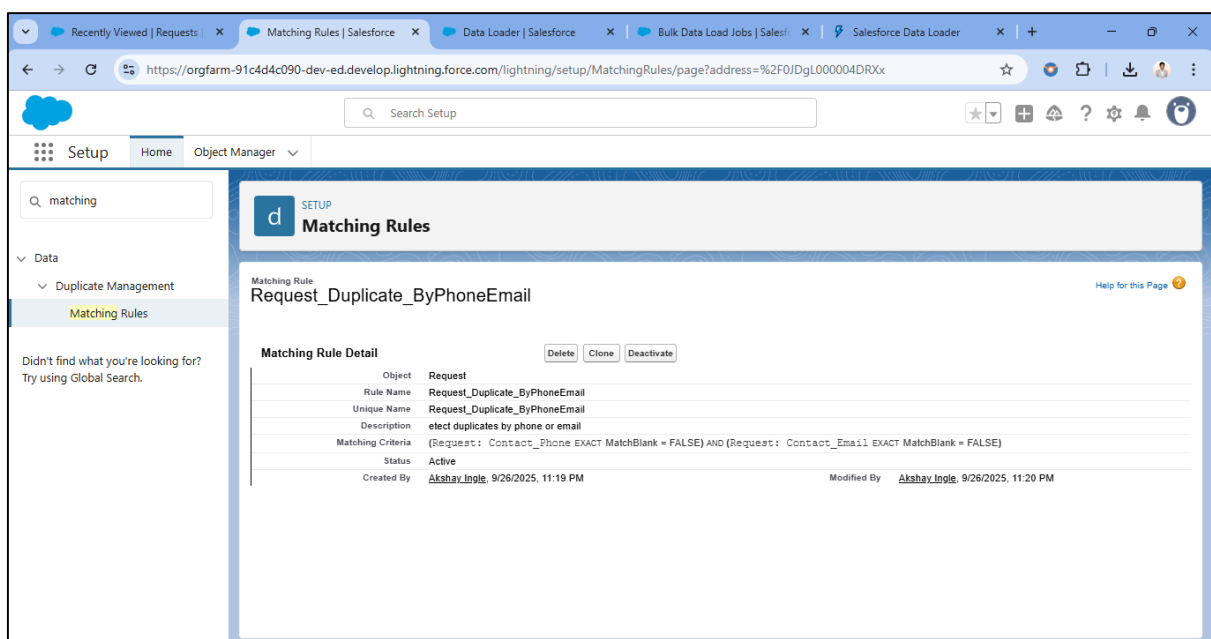


The screenshot shows the Salesforce Bulk Data Load Jobs page. The left sidebar contains navigation links for Setup, Home, Object Manager, and a Quick Find search bar. The main content area displays the details for a Bulk Data Load Job with ID 750gL00000ECwcr. The job is submitted by Akshay Ingle and is currently in progress. The job details table shows the following information:

Job ID	Submitted By	Job Type	Bulk V1	Status	Closed
750gL00000ECwcr	Akshay Ingle	Operation	Insert	Total Processing Time (ms)	59
Start Time	9/26/2025, 10:55 PM PST	Queued Batches	0	API Active Processing Time (ms)	0
End Time	9/26/2025, 10:55 PM PST	In Progress Batches	0	API Processing Time (ms)	0
Time to Complete (hh:mm:ss)	00:01	Completed Batches	1		
Object	Request	Failed Batches	0		
External ID Field		Progress	100%		
Content Type	CSV	Records Processed	10		
Concurrency Mode	Parallel	Records Failed	10		
API Version	64.0	Retries	0		

C — Duplicate Rules & Matching Rules

1. Setup → Quick Find → **Matching Rules** → **New** (create matching rule for Request by phone/email).
2. Setup → Quick Find → **Duplicate Rules** → **New** → choose object Request__c → link to matching Rule → Action: Block or Alert (Alert recommended for demo). Activate.
3. Test: try inserting duplicate Request with same phone → system shows duplicate alert.



The screenshot shows the Salesforce Matching Rules page. The left sidebar contains navigation links for Setup, Home, Object Manager, and a Quick Find search bar. The main content area displays the details for a Matching Rule named Request_Duplicate_ByPhoneEmail. The rule is created by Akshay Ingle and is currently active. The rule details table shows the following information:

Object	Rule Name	Unique Name	Description	Matching Criteria	Status	Created By	Modified By
Request	Request_Duplicate_ByPhoneEmail	Request_Duplicate_ByPhoneEmail	etect duplicates by phone or email	(Request: Contact_Phone EXACT MatchBlank = FALSE) AND (Request: Contact_Email EXACT MatchBlank = FALSE)	Active	Akshay Ingle, 9/26/2025, 11:19 PM	Akshay Ingle, 9/26/2025, 11:20 PM

D — Data Export & Backup

1. Setup → Quick Find → **Data Export** → **Export Now** or Schedule Export → choose objects (Requests, Volunteers, Resources) → Start Export.

The screenshot shows the Salesforce Setup page for Data Export. The browser address bar displays a URL from a Salesforce developer instance. The left sidebar shows the navigation menu with 'Data Export' selected under the 'Data' category. The main content area is titled 'Data Export' and 'Monthly Export Service'. It includes a description of the service and a status box indicating the next scheduled export is in progress. Below this, there are buttons for 'Export Now' and 'Schedule Export'. A table at the bottom shows the export details: Scheduled By (Akshay Ingle), Schedule Date (9/26/2025), and Export File Encoding (ISO-8859-1).

Setup

Search Setup

data

Data

Big Objects

Conversation Transcript Export

Data Export

Data Integration Metrics

Data Integration Rules

Duplicate Management

Duplicate Error Logs

Duplicate Rules

Matching Rules

Mass Delete Records

Mass Transfer Approval Requests

Mass Transfer Records

Mass Update Addresses

SETUP Data Export

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 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	Akshay Ingle
Schedule Date	9/26/2025
Export File Encoding	ISO-8859-1 (General US & Western European, ISO-LATIN-1)