

# Phase 8: Data Management & Deployment – Revaa Documentation

## Overview

Phase 8 focuses on how data is managed in Salesforce, including importing, exporting, backing up, maintaining data quality, and deploying Revaa's configurations between orgs. This ensures that Revaa remains functional, scalable, and secure.

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### 1. Data Import Wizard

The **Data Import Wizard** allows us to import records for standard and custom objects like Investor\_\_c, Property\_\_c, Transaction\_\_c, and Investment\_Lot\_\_c.

#### Steps:

1. Navigate to: **Setup → Data → Data Import Wizard**.
2. Click **Launch Wizard**.
3. Select **Standard or Custom Object** (e.g., Investor\_\_c).
4. Choose **Add New Records** or **Update Existing Records** depending on the use case.
5. Upload the CSV file.
  - Example: Investor\_\_c.csv for investors.
  - Map CSV columns to Salesforce fields:
    - Name → Name
    - Email → Email
    - Total\_Investment\_\_c → Total\_Investment\_\_c
6. Click **Next → Start Import**.

**Screenshot Step:** Take a screenshot after mapping CSV columns (Setup → Data Import Wizard → Map Fields).

7. Repeat the steps for **Property\_\_c, Transaction\_\_c, and Investment\_Lot\_\_c** in order.

#### Notes:

- Ensure all **lookup relationships** are mapped correctly (e.g., Transaction\_\_c → Investor\_\_c, Investment\_Lot\_\_c → Transaction\_\_c).
- Maintain **consistent naming conventions** as per Revaa schema.

Getting closer

Choose data      Edit mapping      Start import

Investment Lots >

Investors ✓

Portfolio Snapshots >

Profit Distributions >

Properties >

Transactions >

Update existing records >

Add new and update existing records ✓

Match by: ?

Name

Which User field in your file designates record owners? ?

--None--

Which Contact field in your file do you want to match against to set the Investor Contact lookup field? ?

--None--

Trigger workflow rules and processes? ?

☒ Trigger workflow rules and processes for new and updated records

CSV

File

Choose File | No file chosen

Character Code ?

ISO-8859-1 (General US & Western European, ISO-LATIN-1) ✓

Values Separated By

Comma

Cancel Previous Next

## 2. Data Loader

For large datasets or automated imports/exports, **Data Loader** is preferred.

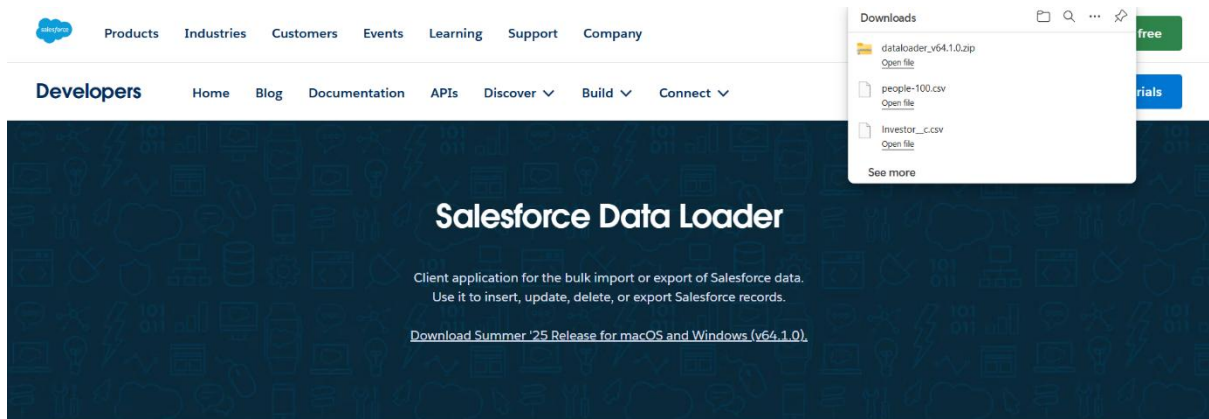
### Steps:

1. Download and install **Data Loader**.
2. Open Data Loader → Click **Insert/Update/Upsert/Delete/Export** depending on the task.
3. Log in using **Salesforce credentials**.
4. Select **object** (e.g., Transaction\_\_c).
5. Choose **CSV file** for import.
6. Map fields and perform the operation.

**Screenshot Step:** Take screenshot of the mapping screen after field mapping.

### Tips:

- Use **External IDs** for Upsert operations.
- Always back up data before performing Delete or Update operations.



### What is it?

Data Loader is a client application for the bulk import or export of data. Use it to insert, update, delete, or export Salesforce records.

When importing data, Data Loader reads, extracts, and loads data from comma-separated values (CSV) files or from a database

## 3. Duplicate Rules

To maintain clean data, we create **Duplicate Rules** for key objects.

### Steps:

1. Navigate to: **Setup** → **Duplicate Management** → **Duplicate Rules**.
2. Click **New Rule** → Select object (e.g., `Investor__c`).
3. Define **Matching Rule**:
  - Example: Match **Email** or **Name**.
4. Specify **Action on Create/Update**:
  - Block
  - Allow with Alert
5. Activate the rule.

### Screenshot:

SETUP

Duplicate Rules

Investor Duplicate Rule

Investor Duplicate Management

Help for this Page

Duplicate Rule Detail

Edit

Delete

Clone

Activate

Rule Name

Investor Duplicate Management

Order

1 of 1

Reorder

Description

Investor

Record-Level Security

Enforce sharing rules

Action On Create

Allow

Operations On Create

Alert

Report

Action On Edit

Allow

Operations On Edit

Alert

Report

Alert Text

Use one of these records?

Active

☐

Matching Rule

Investor Duplicate Management matching rule

Mapped

Matching Criteria

(Investor: Email EXACT MatchBlank = FALSE) AND (Investor: Contact\_Number EXACT MatchBlank = FALSE)

Conditions

Created By

ANIKET KAKADE, 9/28/2025, 6:26 PM

Modified By

ANIKET KAKADE, 9/28/2025, 6:26 PM

Edit

Delete

Clone

Activate

## 4. Data Export & Backup

Regular backups are crucial for Revaa.

### Steps:

1. Navigate to: **Setup** → **Data** → **Data Export**.
2. Click **Export Now** or **Schedule Export**.
3. Select objects to export: **Investor\_\_c**, **Property\_\_c**, **Transaction\_\_c**, **Investment\_Lot\_\_c**.
4. Choose **include attachments and documents** if required.
5. Start export. Download ZIP file with CSVs.

## 5. Change Sets

Change sets allow deploying **metadata** between orgs (Sandbox → Production).

**Steps:**

1. Navigate to: **Setup** → **Deployment** → **Outbound Change Sets**.
2. Click **New** → Name the change set (e.g., RevaaPhase8\_ChangeSet).
3. Add **components**: Objects, Fields, Validation Rules, Flows, Apex Classes, Triggers.
4. Upload change set to **target org**.

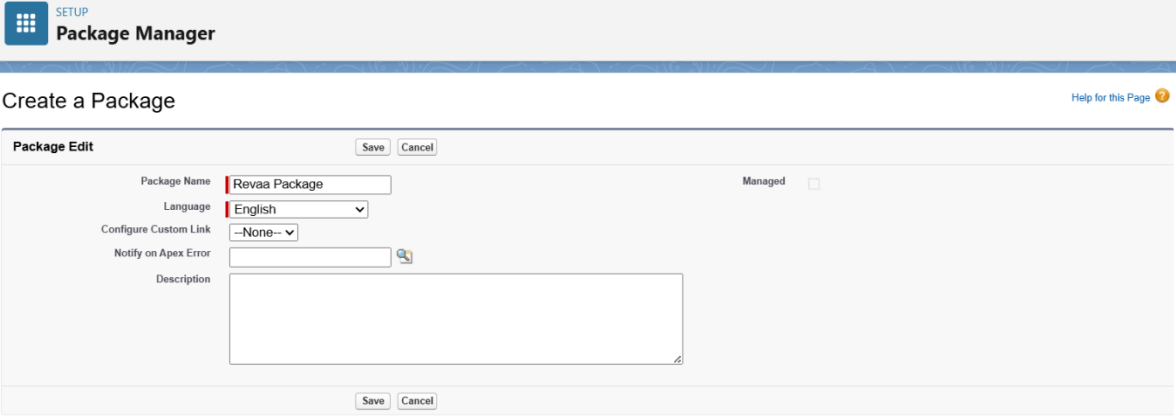
## 6. Unmanaged vs Managed Packages

- **Unmanaged Package:**
  - For distributing customizations for demonstration or learning.
  - Changes in the package do not sync after installation.
- **Managed Package:**
  - For production-grade apps.

- Supports upgrades and licensing.

### Steps to Create:

1. Setup → Packages → New → Select Managed or Unmanaged.
2. Add components → Upload.



The screenshot shows the 'Create a Package' interface in the Salesforce Package Manager. The header includes the 'SETUP Package Manager' logo. The main section is titled 'Create a Package' with a 'Help for this Page' link. Below this is a 'Package Edit' form with fields for 'Package Name' (set to 'Revaa Package'), 'Language' (set to 'English'), 'Configure Custom Link' (set to '-None-'), 'Notify on Apex Error' (with a checkbox), and a 'Description' text area. There are 'Save' and 'Cancel' buttons at the top and bottom of the form. A 'Managed' checkbox is also present on the right side of the form.

## 7. ANT Migration Tool

The **ANT Migration Tool** allows deployment via XML metadata files.

### Steps:

1. Download **Force.com Migration Tool (ANT)**.
2. Configure **build.xml** and **package.xml** with required components.
3. Use commands:
4. ant retrieve
5. ant deploy
6. Validate deployment before pushing to production.

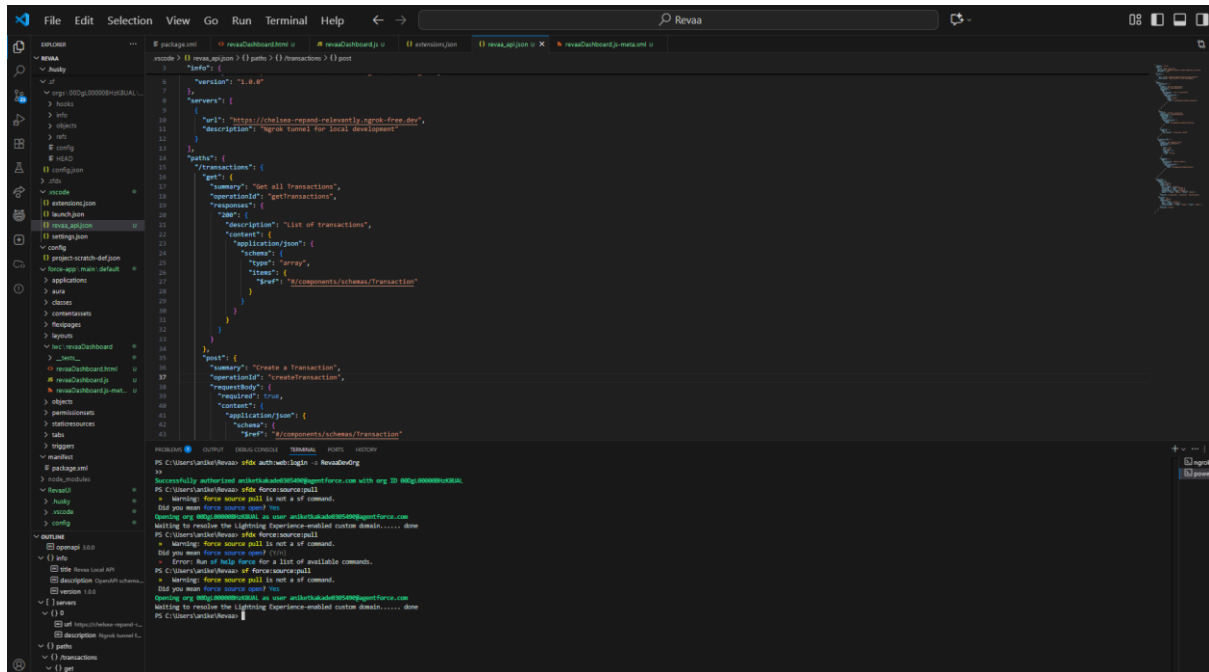
## 8. VS Code & SFDX

**VS Code with Salesforce Extensions** helps in development, deployment, and version control.

### Steps:

1. Open VS Code → Install **Salesforce Extension Pack**.
2. Authenticate with org:

3. `sfdx force:auth:web:login -a RevaaSandbox`
4. Retrieve or deploy metadata using SFDX commands.
5. Create new objects, Apex classes, and LWC from VS Code.



## Best Practices for Revaa Data Management

- Always maintain **data integrity** by using duplicate rules.
- Schedule **regular backups**.
- Use **Change Sets** or **SFDX** for consistent deployments.
- Validate all **lookup relationships** during import.
- Keep **test data** separate from production data.