

Phase 8: Data Management & Deployment

Objective

To manage, migrate, and deploy project data and metadata efficiently using Salesforce tools such as **Data Import Wizard**, **Duplicate Rules**, and **VS Code + Salesforce CLI** for deployment between environments.

This phase ensures that my *Customer Success & Support Management CRM* project is fully data-ready and easily deployable.

Step 1: Data Import Wizard

Purpose

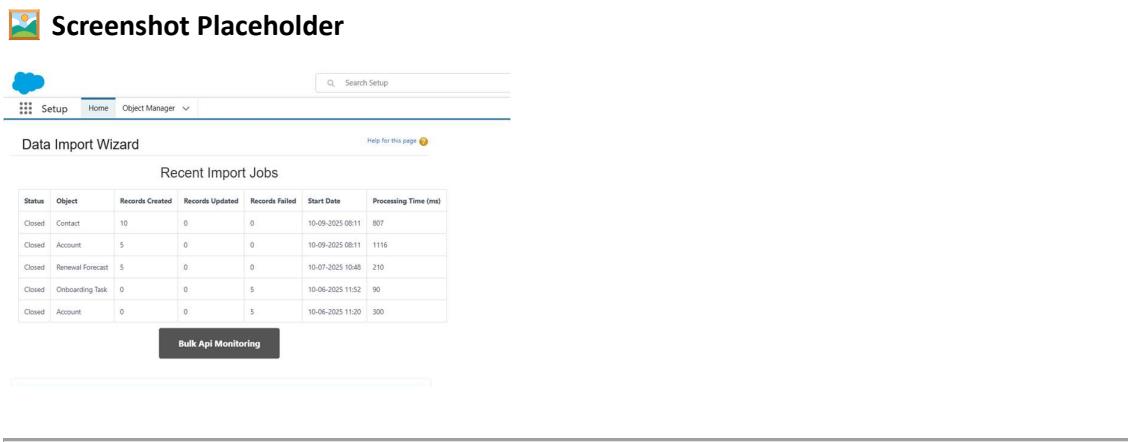
Used for importing small-volume data (up to 50,000 records) into Salesforce directly via the browser.

Helps populate test data for objects such as **Account**, **Contact**, **Onboarding Task**, and **Support Case**.

Steps Performed

1. **Navigated** to → Setup → *Data Import Wizard*
(or via App Launcher → Search “Data Import Wizard” → Launch Wizard)
2. **Selected Object**
 - Accounts
 - Contacts
 - Onboarding Tasks (Custom Object)
 - Renewalforecast (Custom Object)
3. **Selected Operation** → “Add New Records”
4. **Uploaded CSV files:**
 - AccountData.csv
 - ContactData.csv
 - OnboardingTaskData.csv
 - Renewalforecast.csv
5. **Mapped fields** such as:
 - *Account Name, Industry, Customer Since (Date)*

- *Contact Name, Email, Phone*
 - *Task Name, Status, Due Date*
6. Clicked **Start Import** → received import summary email.
7. Verified imported records in the respective object tabs.

 A screenshot placeholder showing a portion of the Salesforce Data Import Wizard interface. The top navigation bar includes 'Setup', 'Home', 'Object Manager', and a search bar. Below the navigation is a section titled 'Recent Import Jobs' with a table showing five completed imports. The table columns are: Status, Object, Records Created, Records Updated, Records Failed, Start Date, and Processing Time (ms). The data is as follows:

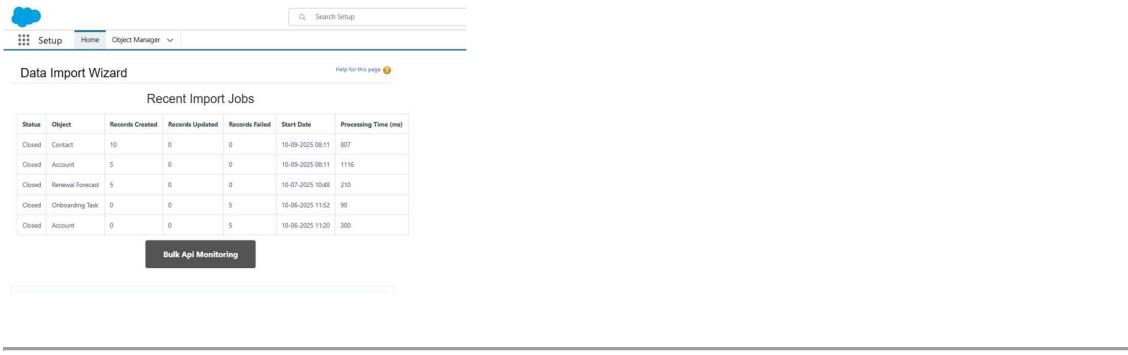
Status	Object	Records Created	Records Updated	Records Failed	Start Date	Processing Time (ms)
Closed	Contact	10	0	0	10-09-2025 08:11	807
Closed	Account	5	0	0	10-09-2025 08:11	1116
Closed	Renewal Forecast	5	0	0	10-07-2025 10:48	210
Closed	Onboarding Task	0	0	5	10-06-2025 11:52	90
Closed	Account	0	0	5	10-06-2025 11:20	300

A dark button labeled 'Bulk API Monitoring' is visible at the bottom of the table.

Step 2: Data Loader

Purpose

For bulk data operations (50,000 + records) — insert, update, upsert, delete, and export using CSV files.

 A screenshot placeholder showing a portion of the Salesforce Data Import Wizard interface, identical to the one above. It shows the 'Recent Import Jobs' table with the same five entries and processing times.

Step 3: Duplicate Rules

Purpose

To prevent duplicate data creation for Accounts and Contacts.

Steps Performed

1. Went to Setup → *Duplicate Rules*.
2. Clicked **New Rule** → Selected Object = *Account*.

3. **Label:** Duplicate Account Rule
4. **Matching Rule:** Standard Account Matching Rule
5. **Actions:**

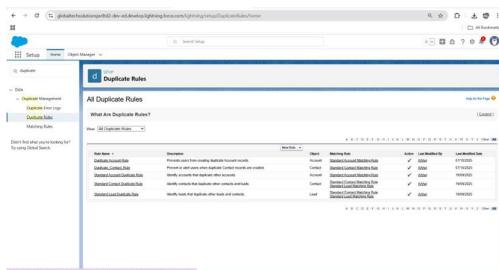
- On Create → Allow but Alert
- On Edit → Allow but Alert

6. **Alert Text:**
“A duplicate Account record already exists. Please check before saving.”
7. **Activated Rule.**

 **Repeated for Contact Object:**

- **Label:** Duplicate Contact Rule
- **Matching Rule:** Standard Contact Matching Rule
- **Action:** Allow but Alert

 **Screenshot Placeholder**



 **Step 4: Unmanaged vs Managed Packages**

 **Purpose**

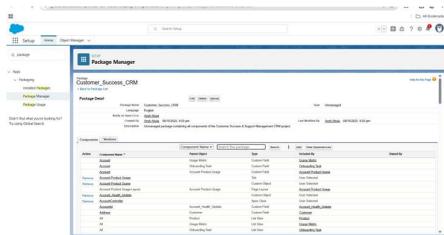
To understand packaging options for deployment and sharing.

 **Explanation**

- **Unmanaged Package:**
Used for this project — metadata remains editable after installation, ideal for learning and portfolio projects.
- **Managed Package:**
Used for commercial AppExchange apps — code is locked and version-controlled.

 **my project uses Unmanaged Packaging for flexibility.**

Screenshot Placeholder



Step 5: Deployment via VS Code + Salesforce CLI

Purpose

To move metadata between your **VS Code** workspace and **Salesforce Developer Edition org**.

Steps Performed

1. Authenticated org:

2. `sfdx auth:web:login -a DevHub`

3. Created Manifest file (manifest/package.xml):

```
4. 1. <?xml version="1.0" encoding="UTF-8"?>
5. 2. <Package xmlns="http://soap.sforce.com/2006/04/metadata">
6. 3.   <types><members>****
```

13. Retrieved metadata from org:

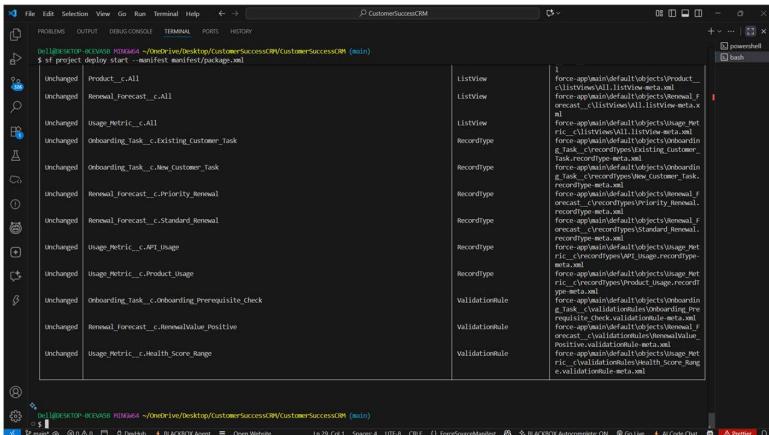
14. `sf project retrieve start --manifest manifest/package.xml`

15. Deployed metadata back to org (after changes):

16. `sf project deploy start --manifest manifest/package.xml`

17. Verified successful deployment in VS Code terminal ("Deployed Source Successfully").

Screenshot Placeholder



```
$ sf project deploy start -manifest manifest/package.xml
```

The terminal output shows the deployment process for the 'CustomerSuccessCRM' project. It lists various objects being deployed, including Product_c, Renewal_Forecast_c, Usage_Metric_c, Onboarding_Task_c, Renewal_forecast_c, Renewal_forecast_c_Alias, Renewal_forecast_c_Standard, Usage_Metric_c_API_Usage, Usage_Metric_c_Product_Usage, Onboarding_Task_c_Boarding_Prerequisite_Check, Renewal_forecast_c_RenewalValue_Positive, and Usage_Metric_c_Health_Score_Range. The status for most objects is 'Unchanged', while some like Renewal_Forecast_c are 'Untracked'. The deployment is successful, indicated by the green checkmark icon.

Step 6: Data Export & Backup (Optional)

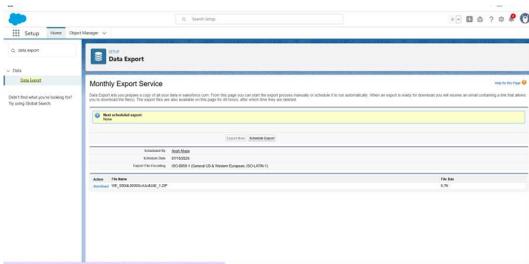
Purpose

To back up project data for recovery or migration.

Steps Performed

1. Went to Setup → *Data Export*.
2. Selected all key objects (Accounts, Contacts, Onboarding Tasks).
3. Clicked **Start Export** → Downloaded ZIP file containing CSV backups.

Screenshot Placeholder



Phase 8 Summary

Tool / Feature	Purpose	Used For
Data Import Wizard	Import data	Accounts, Contacts, Onboarding Tasks
Duplicate Rules	Avoid duplicates	Accounts & Contacts

Tool / Feature	Purpose	Used For
Unmanaged Package Share	editable app	Final submission
VS Code + CLI	Source control & deployment	Push/pull metadata
Data Export	Backup data	CSV archives

🏁 Outcome

At the end of Phase 8:

- All project data was imported and verified.
 - Duplicate prevention was configured.
 - Source and metadata were deployed using VS Code & CLI.
 - Project is now deployment-ready and backed up for future enhancements.
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