

Phase 8: Data Management & Deployment

1. Data Import Wizard – Import Custom Object Data

Purpose: Quickly import small to medium datasets (up to 50,000 records) into Salesforce without coding.

Steps:

1. Go to **Setup** → **Data** → **Data Import Wizard** → **Launch Wizard**.
2. Scroll to **Custom Objects** → Select **SustainabilityProject__c**.
3. Click **Add New Records** → **Choose CSV file** (your prepared SustainabilityProject.csv).
4. Map fields:
 - Name → Sustainability Project Name
 - Start_Date__c → Start Date
 - End_Date__c → End Date
 - Status__c → Status
 - Approval_Status__c → Approval Status
 - Priority__c → Priority
 - Project_Budget__c → Project Budget
 - Number_of_Beneficiaries__c → Number of Beneficiaries
 - Location__c → Location
 - Project_Type__c → Project Type
 - Partner__c → Partner
 - OwnerId → Owner
5. Click **Start Import** → Monitor results.
6. Repeat for CarbonCredit__c CSV:
 - Map Project__c to **Project Lookup** (match project names exactly).
 - Map other fields: Name, Credit_Amount__c, Status__c, OwnerId, Date_Recorded__c, Type__c, Source__c, Notes__c.

2. Data Loader

Purpose: Bulk import, update, export, or delete Salesforce records.

Steps (Ready-to-Use)

1. Download & install **Salesforce Data Loader**
2. Open → Login using **Sandbox/Production credentials**
3. Choose operation **Export** → **Object: SustainabilityProject__c**
4. Map CSV columns → Salesforce fields
5. Click **Next** → **Finish**
6. Check **Success & Error files**

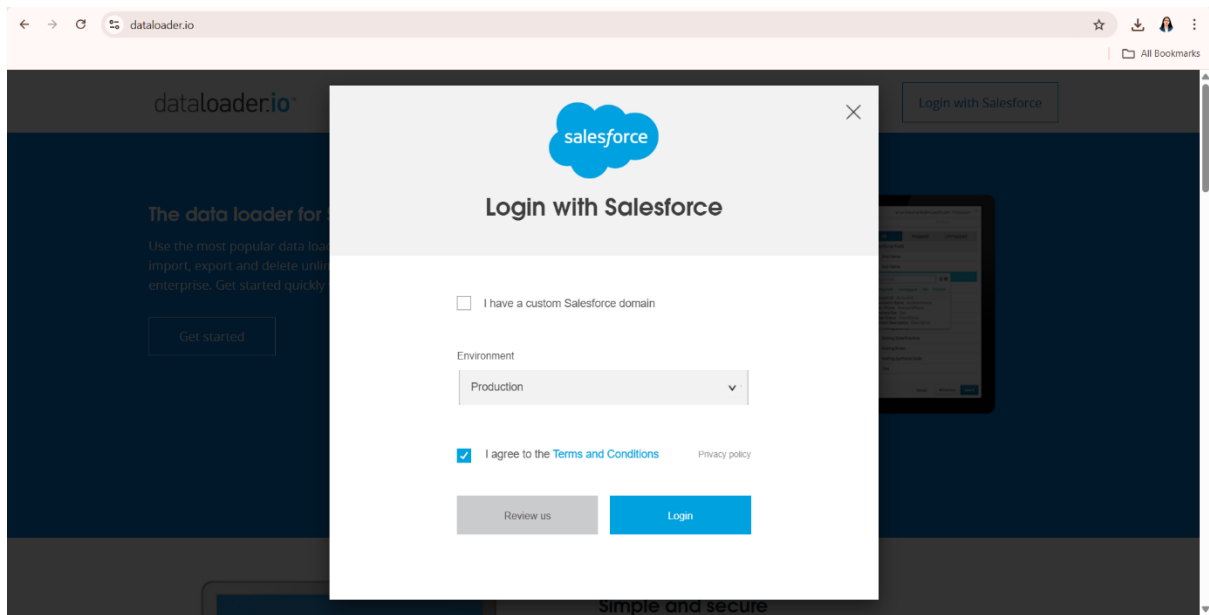


Fig.8.1.Login Page of Data Loader.io

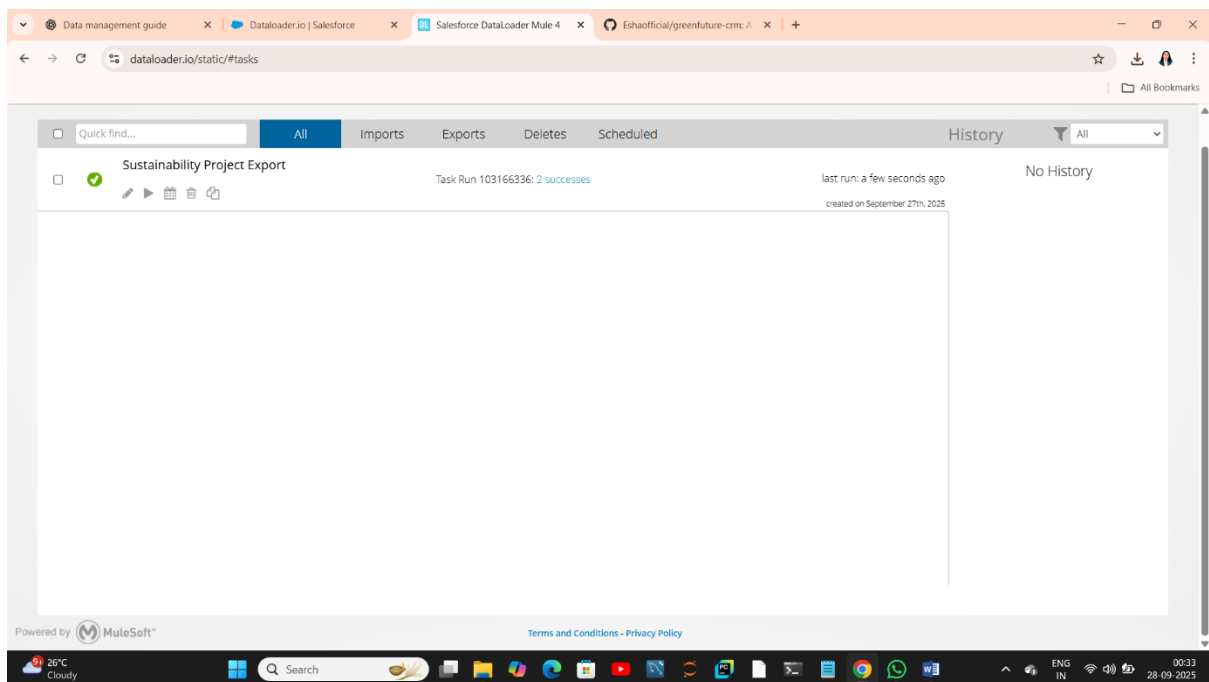


Fig.8.2. Export Operation Successes page

3.Duplicate Rules

Purpose: Prevent duplicate records (Contacts, Accounts, Custom Objects).

Steps

1. Go to **Setup** → **Duplicate Management** → **Duplicate Rules** → **New Rule**
2. Select object: **CarbonCredit__c**
3. Click **Next** → **Define Matching Rule**

4. Use fields: Name, Project__c
5. Action on Create/Edit: **Block** or **Alert**
6. Activate rule

Sample Matching Rule

- Name: CarbonCredit_Duplicate_Rule
- Fields: Name + Project__c
- Logic: Exact match

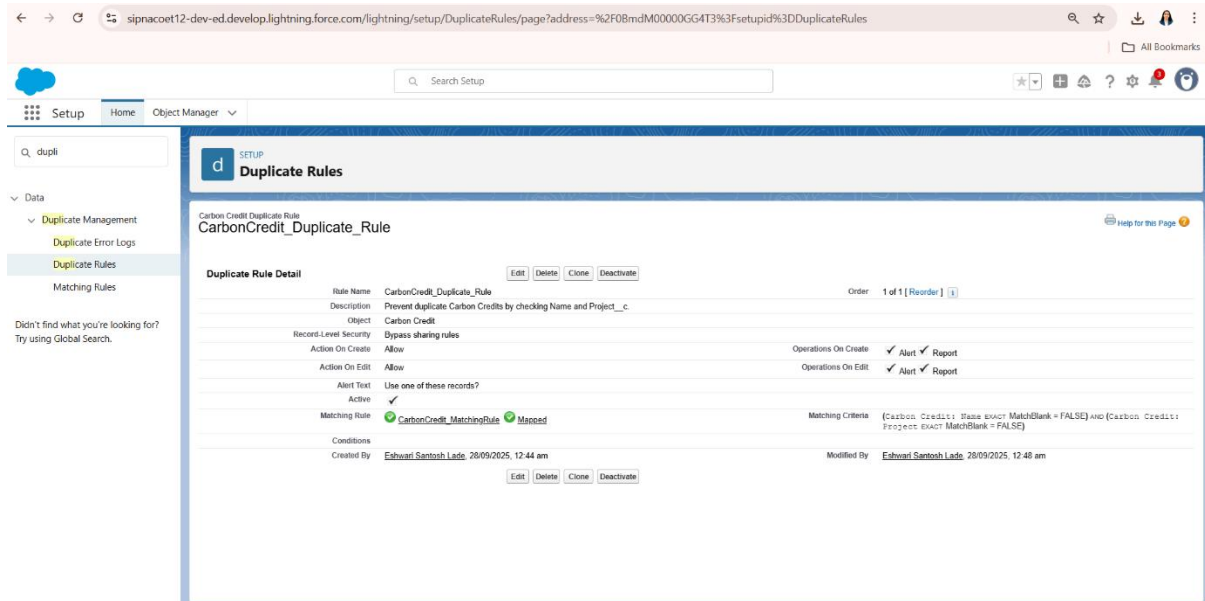


Fig.8.3. New Duplicate Rule – Setup Page

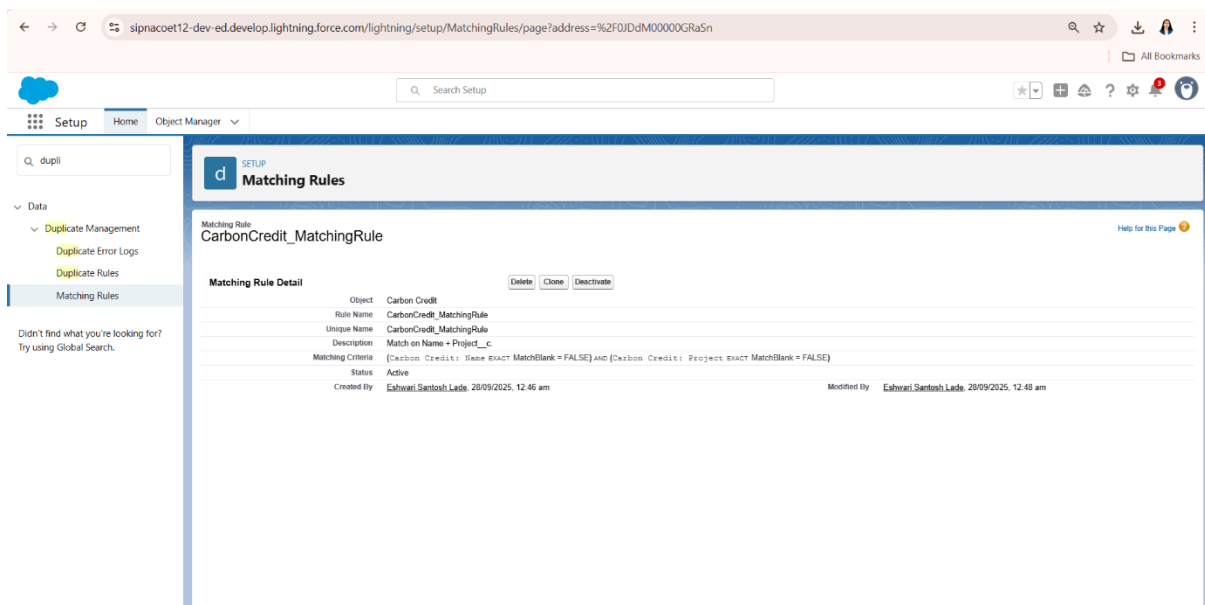


Fig.8.4. Activate Rule & Matching Rule Details

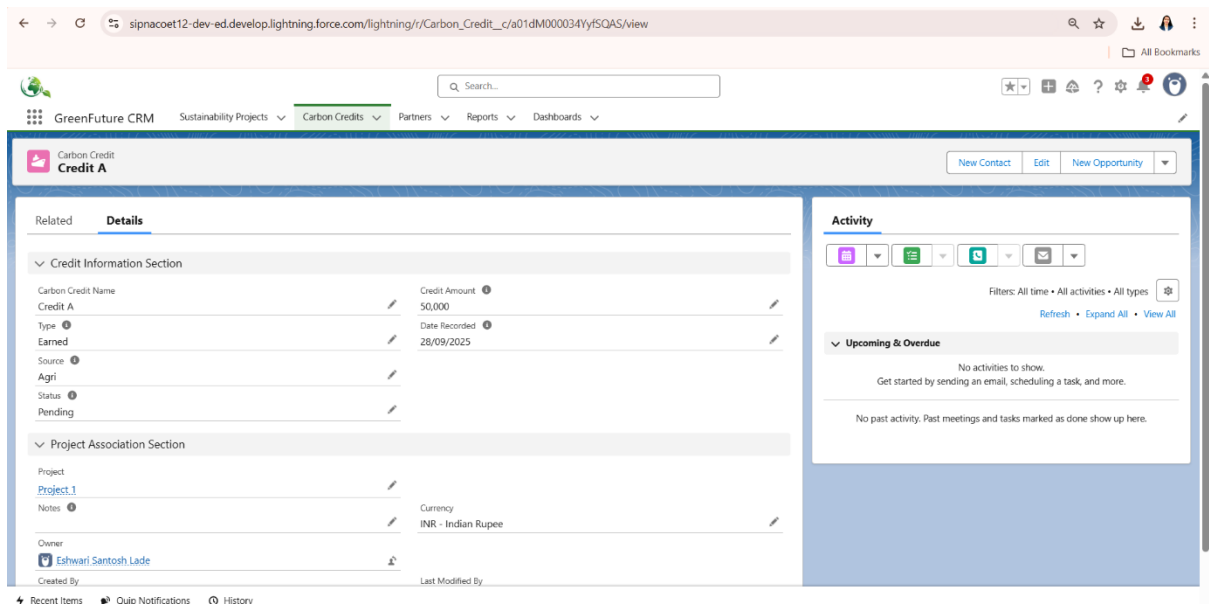


Fig.8.5. Validation of Duplicate Rule

4.Data Export & Backup

Purpose: Backup Salesforce data.

Steps

1. Go to **Setup** → **Data** → **Data Export** → **Export Now**
2. Select **Objects:** SustainabilityProject__c, CarbonCredit__c
3. Include **Attachments, Images** if needed
4. Click **Start Export**
5. Download ZIP containing CSV files

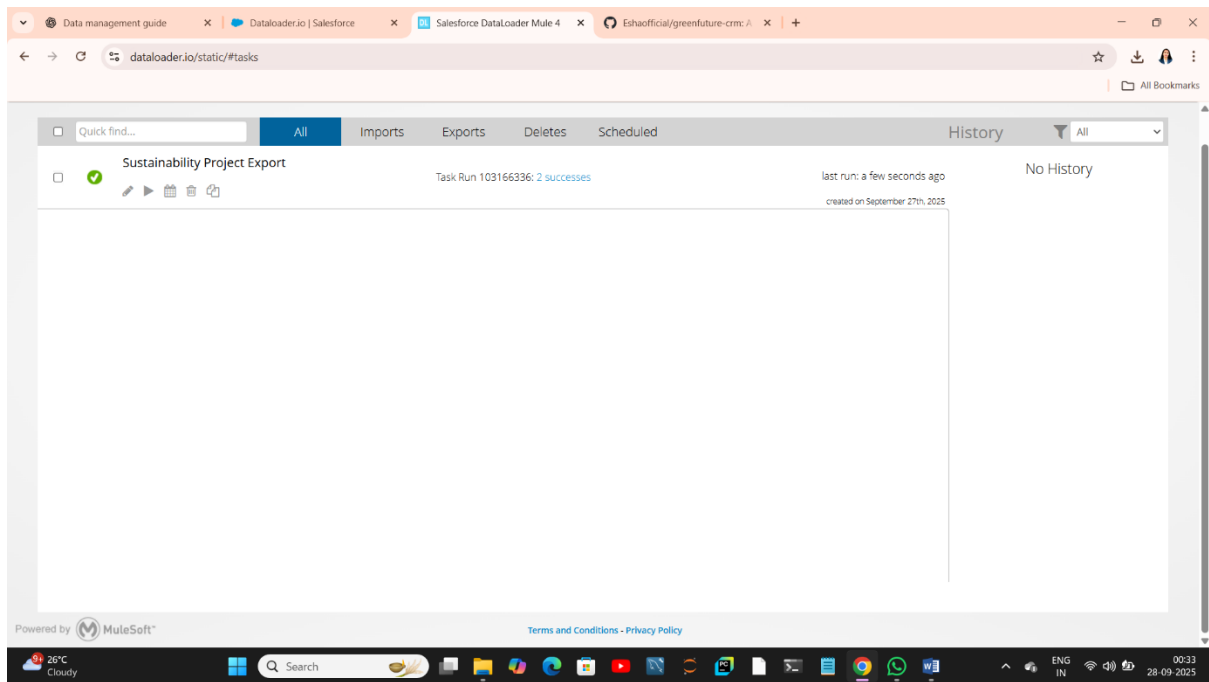


Fig.8.6. Export Progress Page

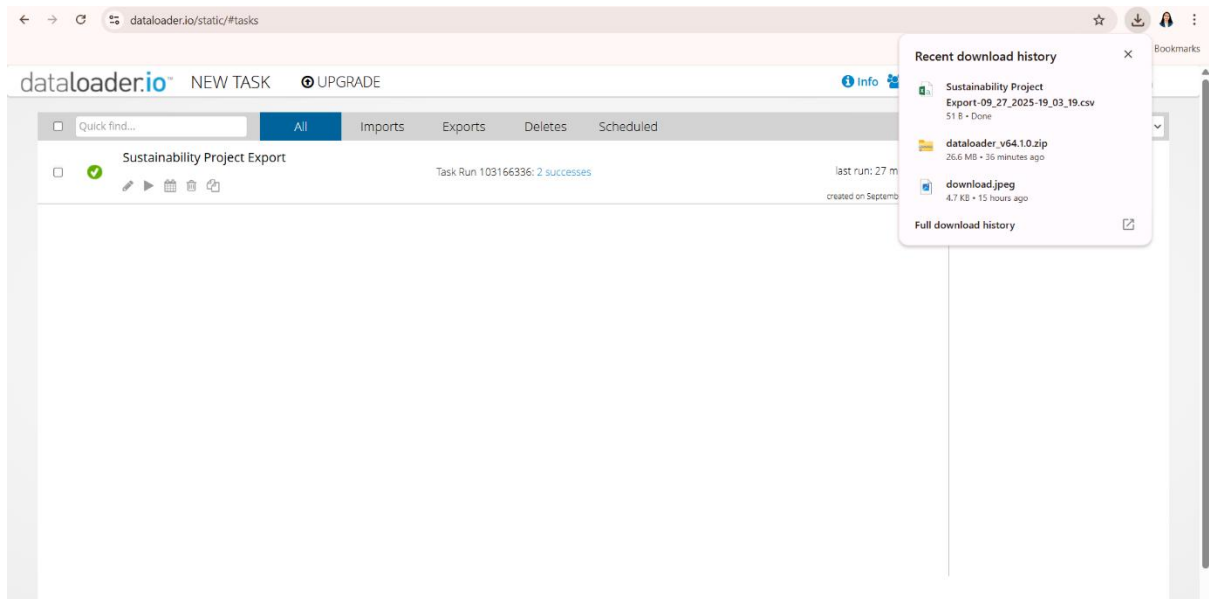


Fig 8.7. Export Download Page

