

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**

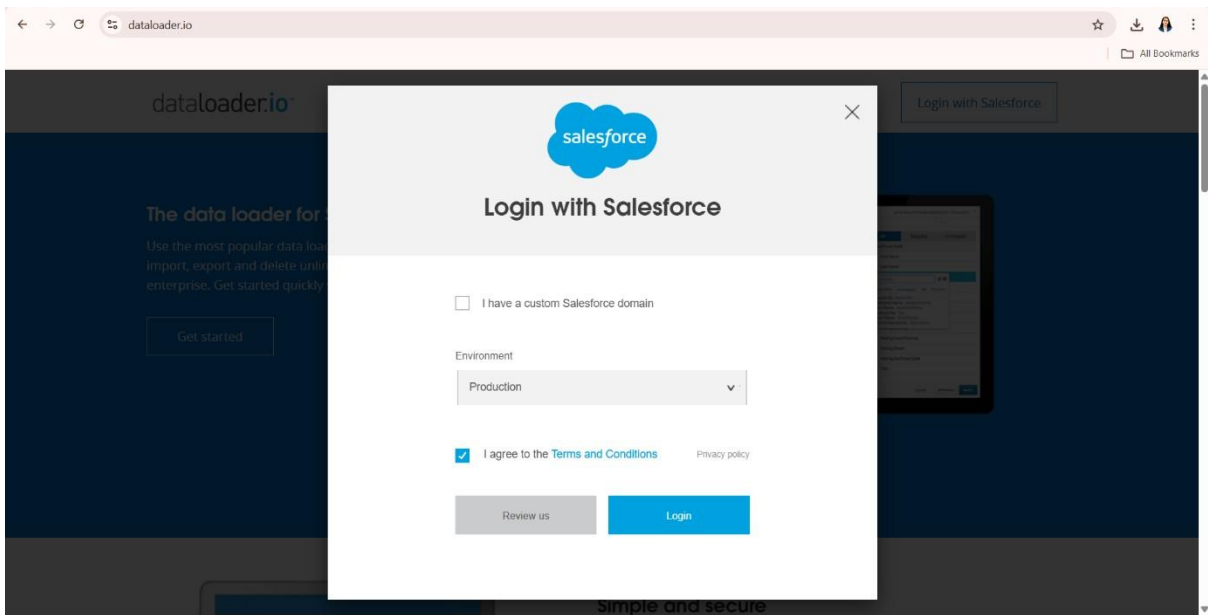


Fig.8.1.Login Page of Data Loader.io

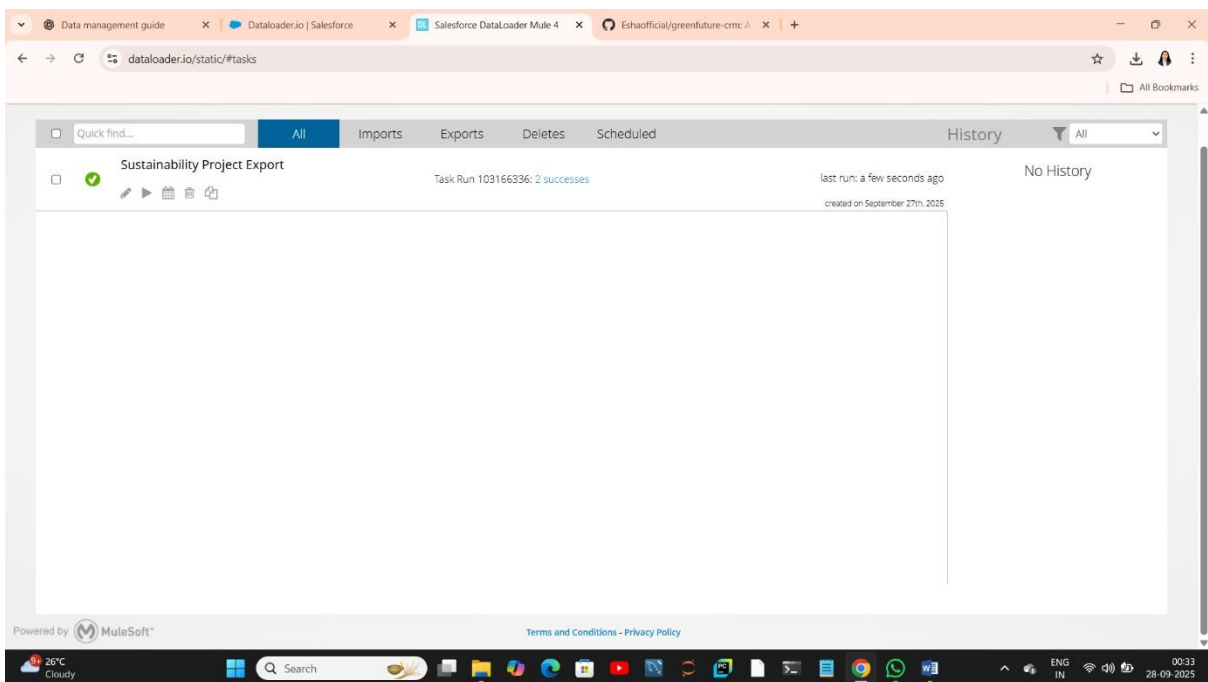


Fig.8.2. Export Operation Successes page

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

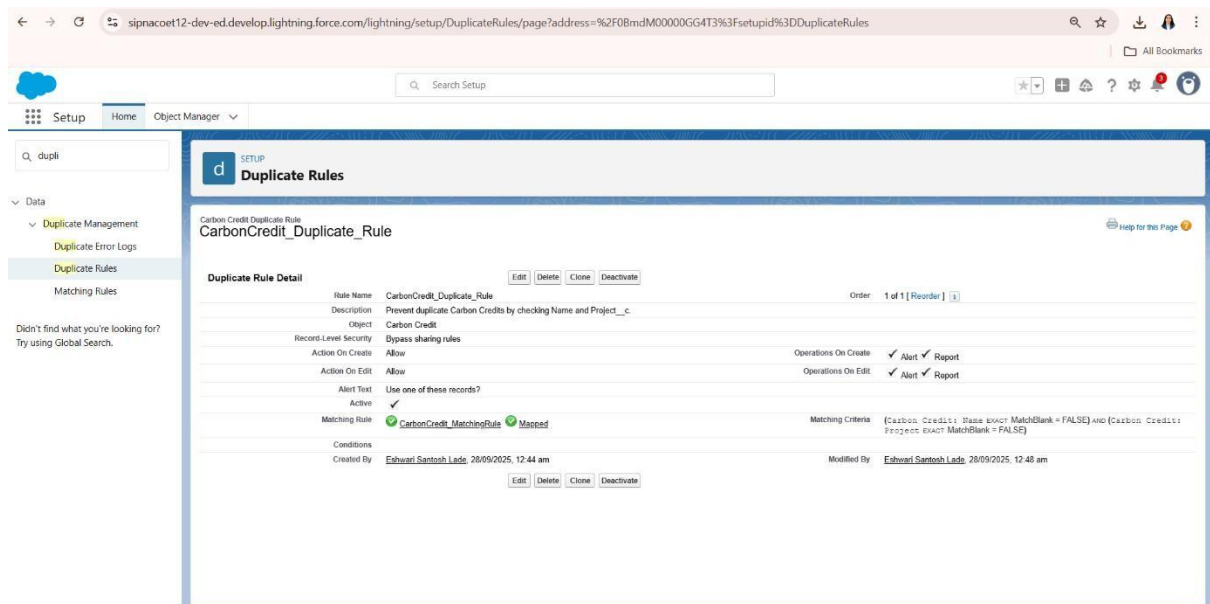


Fig.8.3. New Duplicate Rule – Setup Page

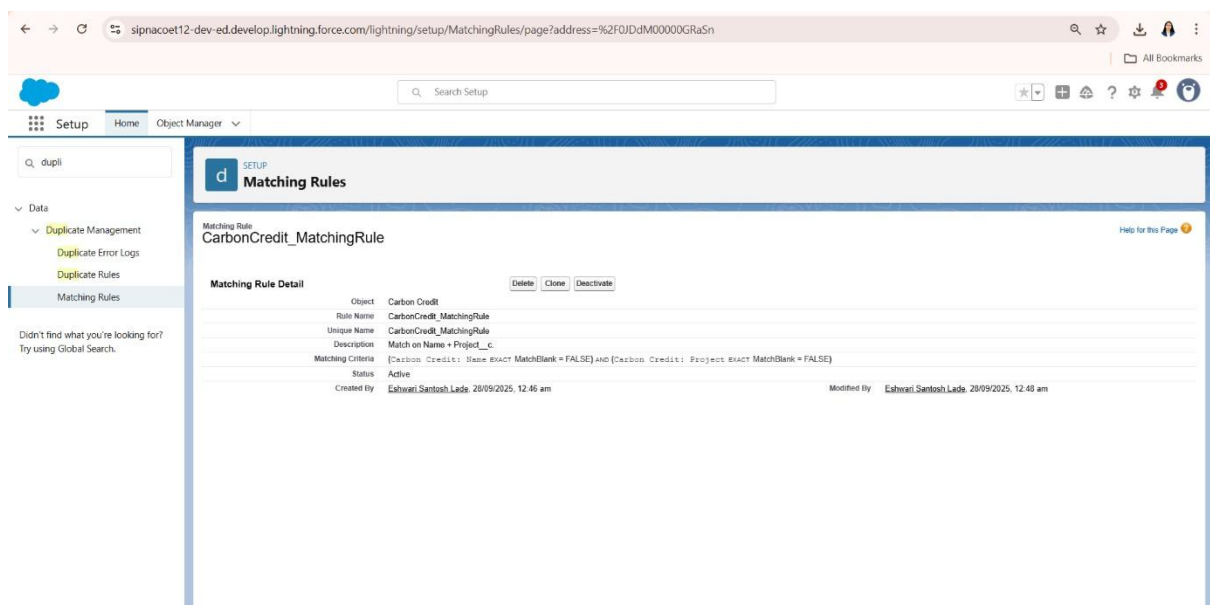


Fig.8.4. Activate Rule & Matching Rule Details

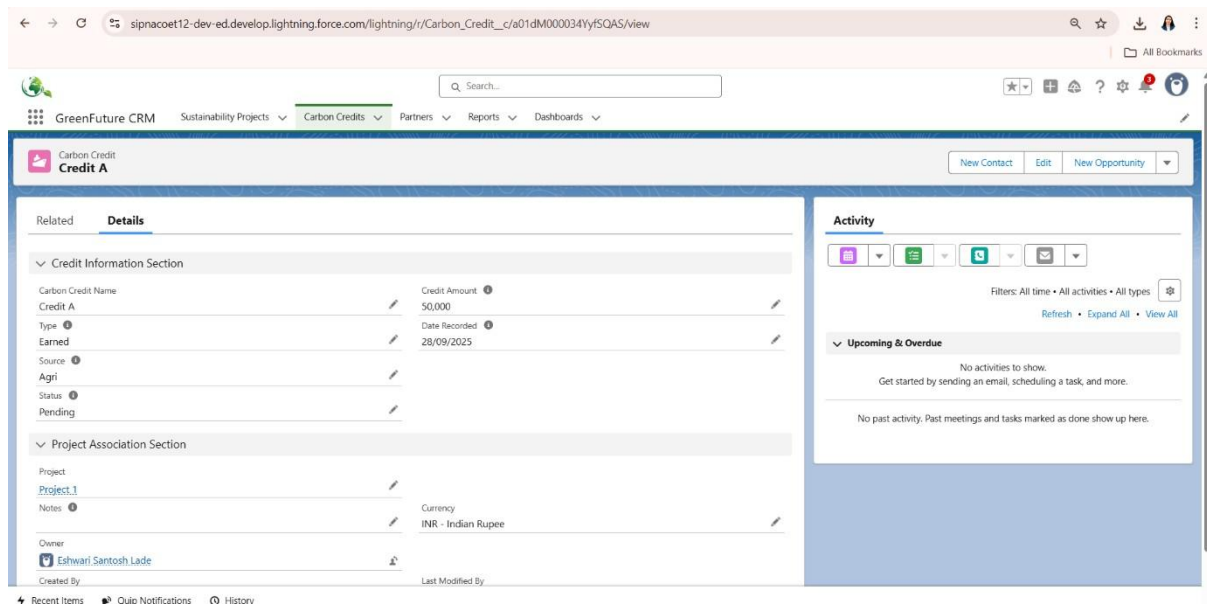


Fig.8.5. Validation of Duplicate Rule

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

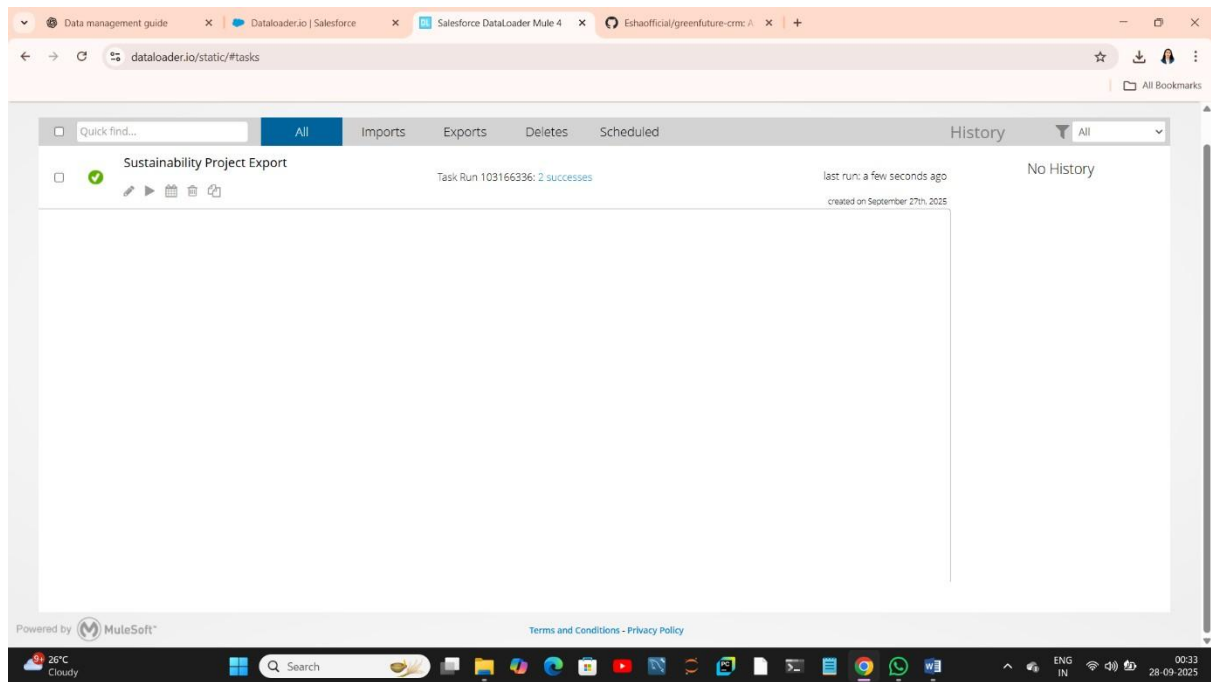


Fig.8.6. Export Progress Page

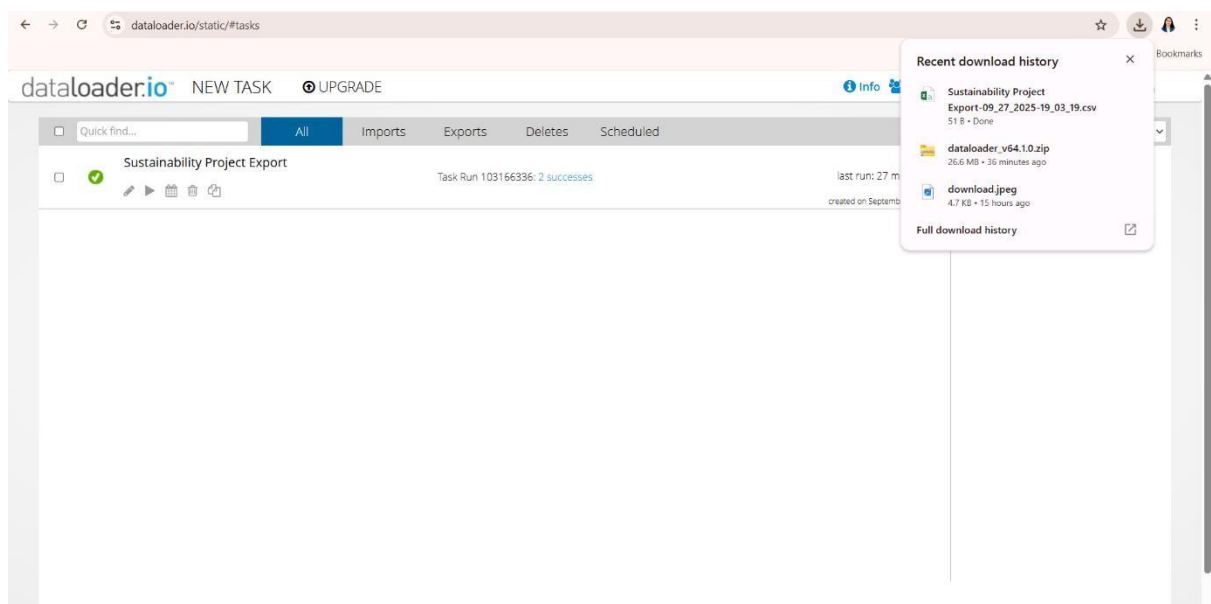


Fig 8.7. Export Download Page

5.VS Code & Salesforce CLI (SFDX)

Purpose: Modern Salesforce development and deployment.

Steps:

1. Install **VS Code Salesforce Extensions**.
2. Authenticate orgs:
3. Retrieve metadata from org

4. Deploy metadata to target org
5. Use **Scratch Orgs** for development/testing

The screenshot shows a VS Code terminal window with the following commands and output:

```
PS C:\Users\Acer\Salesforce\GreenFutureCRM_PhaseB> touch manifest/package.xml
PS C:\Users\Acer\Salesforce\GreenFutureCRM_PhaseB> sf project retrieve start --manifest manifest/package.xml --target-org myDevOrg
```

The output shows the retrieval of metadata from the target org. The status is "Succeeded" and the elapsed time is 11.36s.

State	Name	Type	Path
Created	Admin	Profile	force-app\main\default\profiles\Admin.profile-meta.xml
Created	Analytics Cloud Integration User	Profile	force-app\main\default\profiles\Analytics Cloud Integration User.profile-meta.xml
Created	Analytics Cloud Security User	Profile	force-app\main\default\profiles\Analytics Cloud Security User.profile-meta.xml
Created	Authenticated Website	Profile	force-app\main\default\profiles\Authenticated Website.profile-meta.xml
Created	B2B Reordering Portal Buyer Profile	Profile	force-app\main\default\profiles\B2B Reordering Portal Buyer Profile.profile-meta.xml
Created	Chatter External User	Profile	force-app\main\default\profiles\Chatter External User.profile-meta.xml
Created	Chatter Free User	Profile	force-app\main\default\profiles\Chatter Free User.profile-meta.xml
Created	Chatter Moderator User	Profile	force-app\main\default\profiles\Chatter Moderator User.profile-meta.xml
Created	Contract Manager	Profile	force-app\main\default\profiles\Contract Manager.profile-meta.xml
Created	Cross Org Data Proxy User	Profile	force-app\main\default\profiles\Cross Org Data Proxy User.profile-meta.xml
Created	CustomM3A Marketing Profile	Profile	force-app\main\default\profiles\CustomM3A Marketing Profile.profile-meta.xml
Created	CustomM3A Sales Profile	Profile	force-app\main\default\profiles\CustomM3A Sales Profile.profile-meta.xml
Created	CustomM3A Support Profile	Profile	force-app\main\default\profiles\CustomM3A Support Profile.profile-meta.xml
Created	Customer Community Login User	Profile	force-app\main\default\profiles\Customer Community Login User.profile-meta.xml
Created	Customer Community Plus Login User	Profile	force-app\main\default\profiles\Customer Community Plus Login User.profile-meta.xml
Created	Customer Community Plus User	Profile	force-app\main\default\profiles\Customer Community Plus User.profile-meta.xml
Created	Customer Community User	Profile	force-app\main\default\profiles\Customer Community User.profile-meta.xml
Created	Customer Portal Manager Custom	Profile	force-app\main\default\profiles\Customer Portal Manager Custom.profile-meta.xml
Created	Customer Portal Manager Standard	Profile	force-app\main\default\profiles\Customer Portal Manager Standard.profile-meta.xml

Fig.8.8.Retrieved Data