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
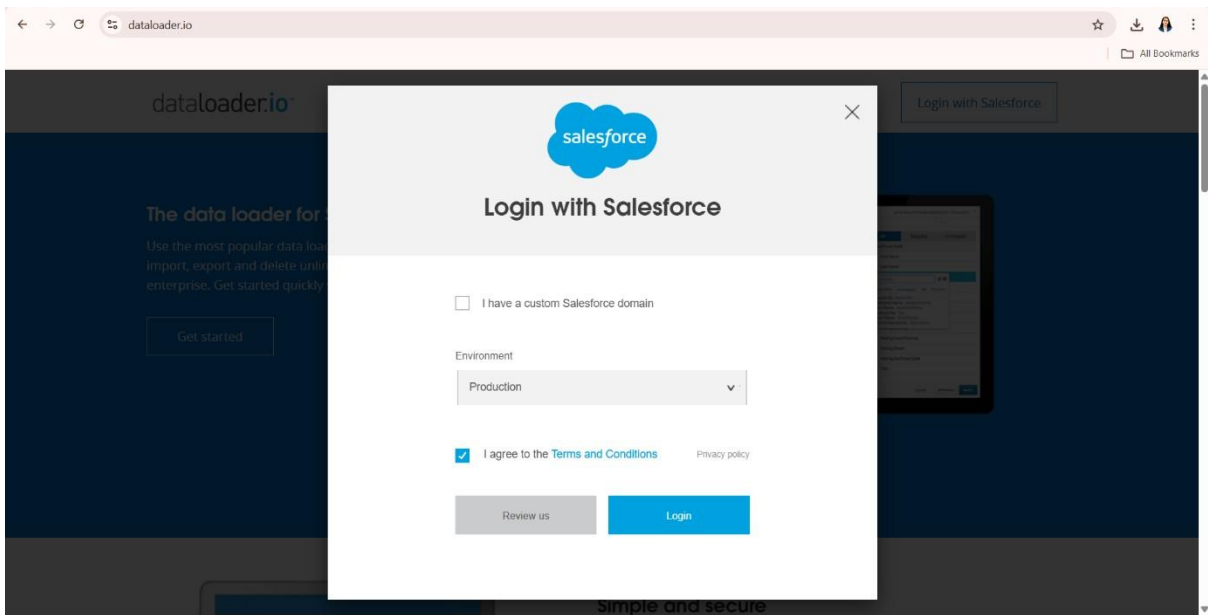5. Click **Next → Finish**
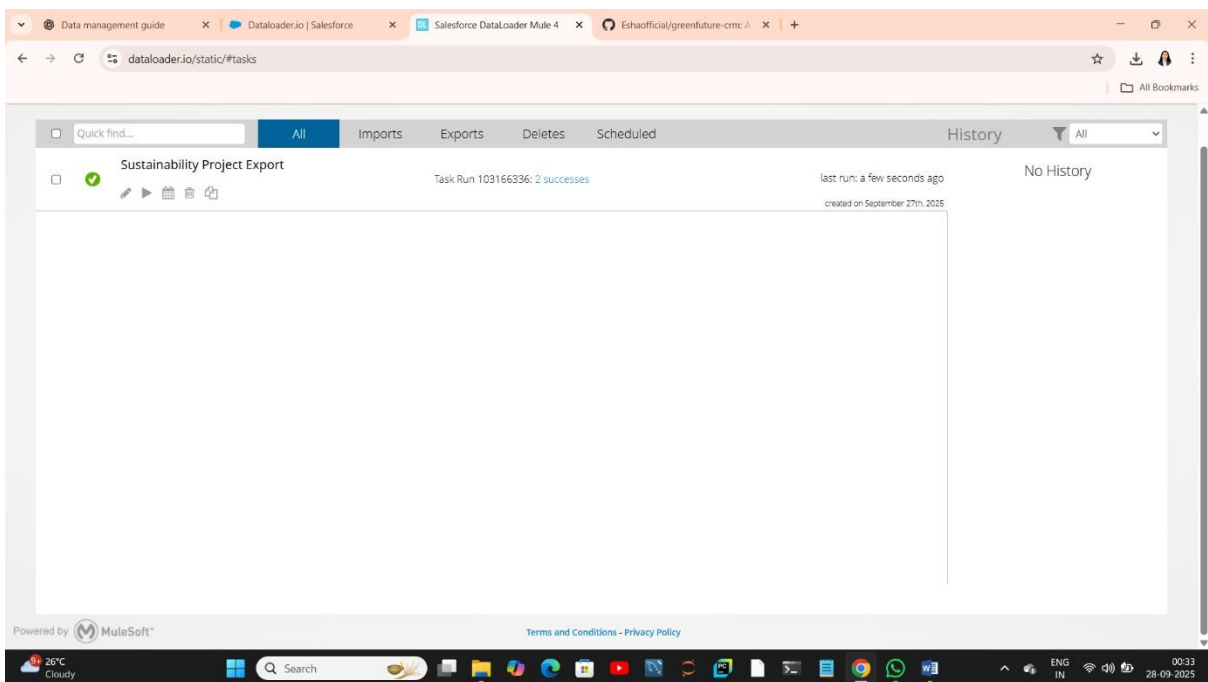6. Check **Success & Error files**

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
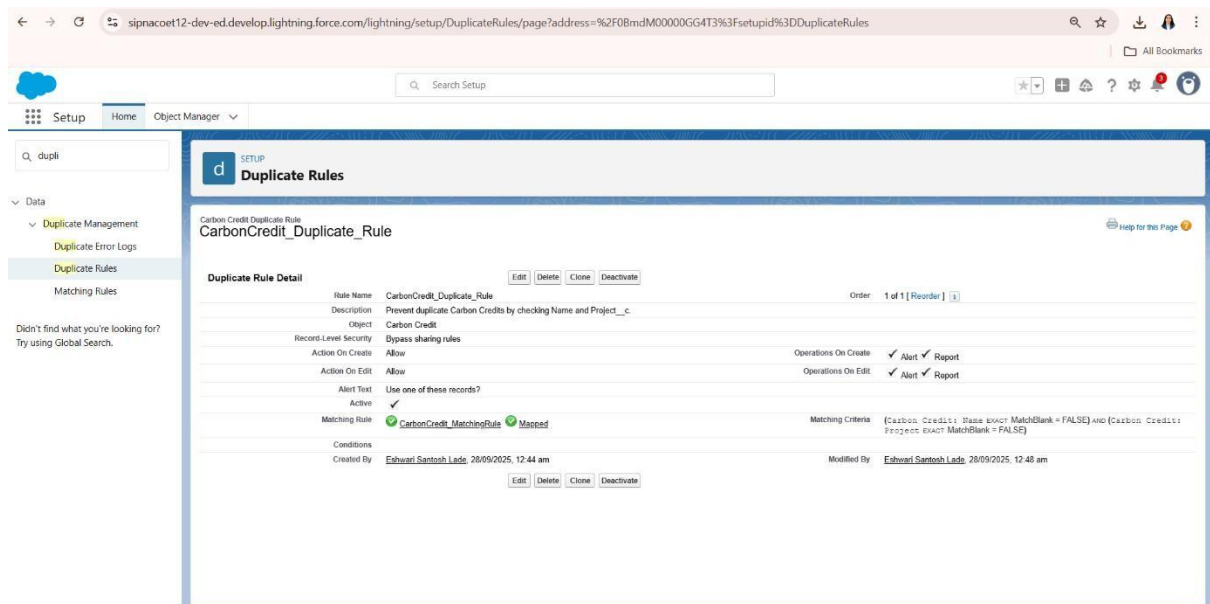
Fig.8.3. New Duplicate Rule – Setup Page
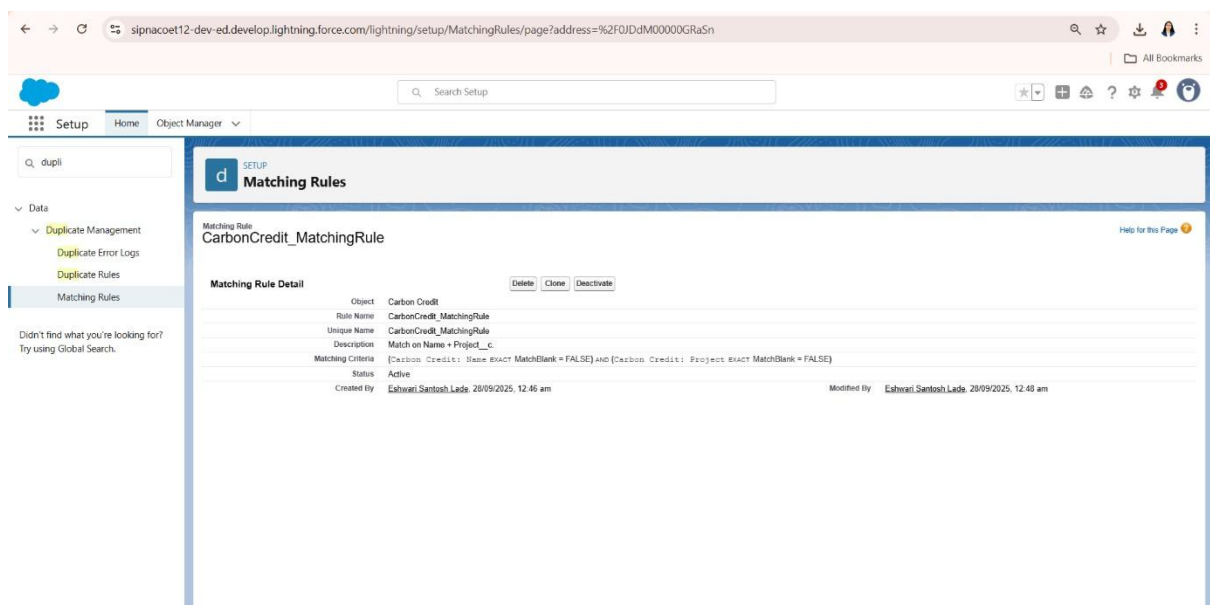
Fig.8.4. Activate Rule & Matching Rule Details
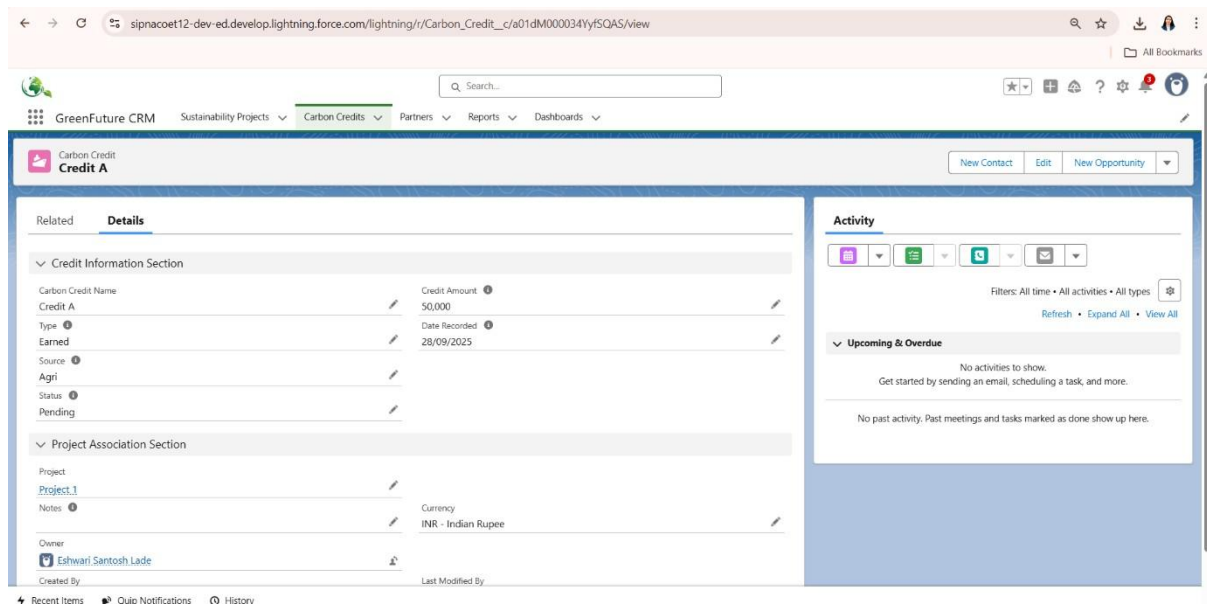
Fig.8.5. Validation of Duplicate Rule

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
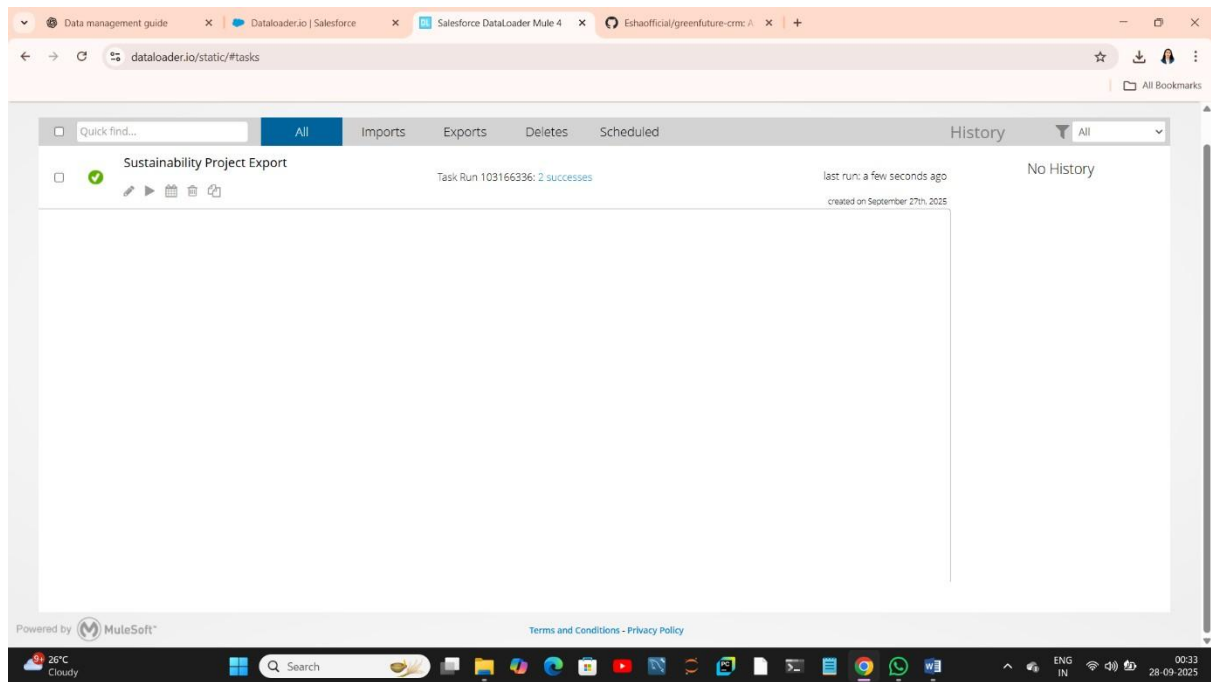
Fig.8.6. Export Progress Page
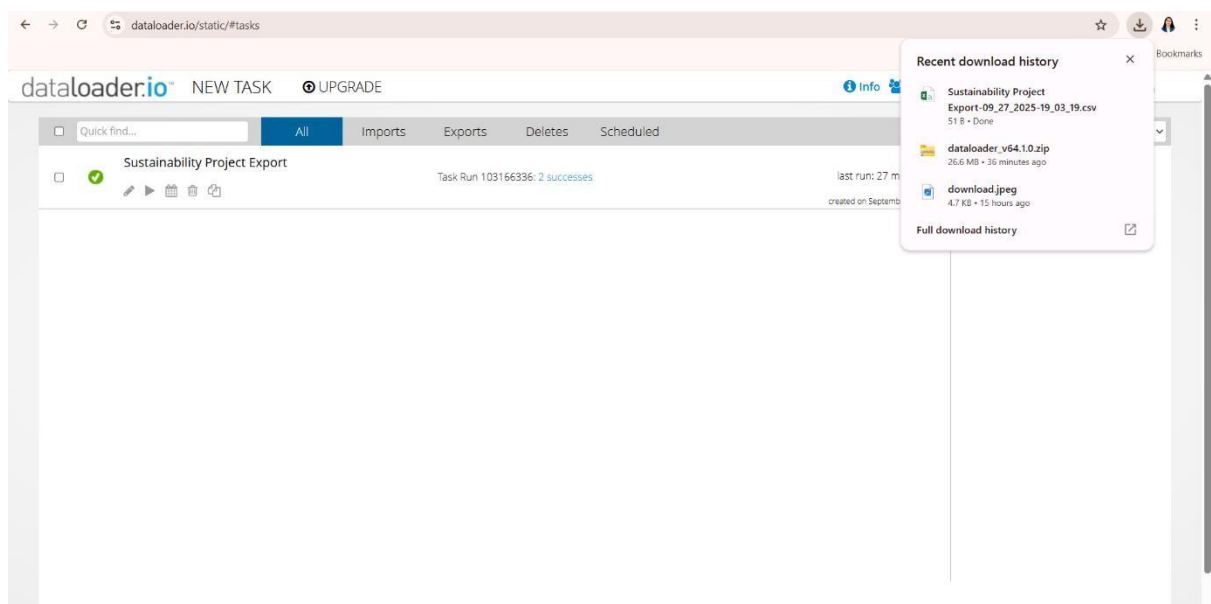
Fig 8.7. Export Download Page

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

Fig.8.8.Retrieved Data