

Phase 8 — Data Management & Deployment

Objective: Efficiently manage data in Salesforce, prevent duplicates, and deploy configurations from Sandbox to Production.

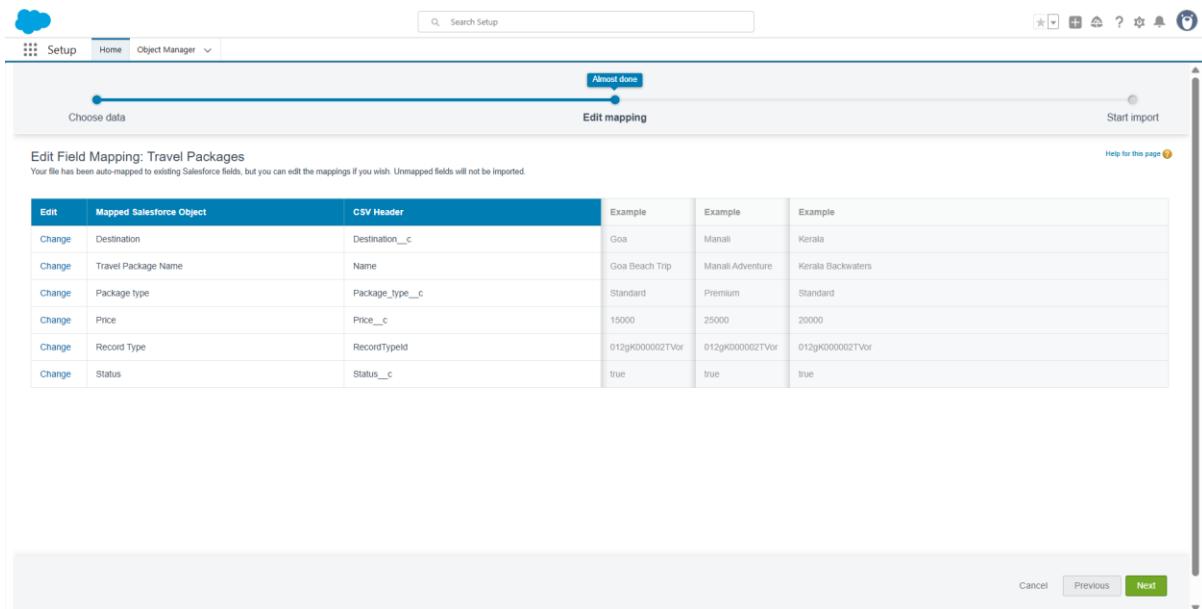
A. Data Import Wizard (Leads / Customers)

Purpose: Quickly import data in Salesforce using CSV files.

Steps (Click by Click):

1. Go to **Setup** → **Data** → **Data Import Wizard**.
2. Click **Launch Wizard**.
3. Select **Object** to import: e.g., Leads or Customers.
4. Click **Add New Records** (or Update Existing Records if needed).
5. Upload **CSV file** → Click **Next**.
6. Map CSV columns to Salesforce fields → Click **Next**.
7. Review → Click **Start Import**.
8. Monitor **Import Status** → Errors are highlighted for correction.

 Leads and Customers are now imported and available in Salesforce.



The screenshot shows the 'Edit Field Mapping' step of the Data Import Wizard for the 'Travel Packages' object. At the top, there's a progress bar with two steps: 'Choose data' and 'Almost done'. Below the progress bar, there's a note: 'Edit Field Mapping: Travel Packages' and 'Your file has been auto-mapped to existing Salesforce fields, but you can edit the mappings if you wish. Unmapped fields will not be imported.' A 'Help for this page' link is also present. The main area displays a table mapping CSV headers to Salesforce fields. The table has columns: 'Edit', 'Mapped Salesforce Object', 'CSV Header', 'Example', and 'Example'. The rows show the following mappings:

Edit	Mapped Salesforce Object	CSV Header	Example	Example
Change	Destination	Destination__c	Goa	Manali
Change	Travel Package Name	Name	Goa Beach Trip	Manali Adventure
Change	Package type	Package_type__c	Standard	Premium
Change	Price	Price__c	15000	25000
Change	Record Type	RecordTypeld	012gK000002TVor	012gK000002TVor
Change	Status	Status__c	true	true

At the bottom right of the table, there are 'Cancel', 'Previous', and 'Next' buttons.

Bulk Data Load Job Detail

Job ID	Submitted By	Job Type	Status
750gK00000DYL0v	Yash Dinhata	Bulk V1 Insert	Closed

Batches

View Request	View Result	Batch ID	Start Time	End Time	Total Processing Time (ms)	API Active Processing Time (ms)	Ajax Processing Time (ms)	Records Processed	Records Failed	Retry Count	State Message	Status
View Request	View Result	751gk000008apd7C	9/21/2025, 9:54 PM	9/21/2025, 9:54 PM	87	34	0	10	0	0	Completed	

Bulk Data Load Job Detail

Job ID	Submitted By	Job Type	Status
750gK00000DW8MN	Yash Dinhata	Bulk V1 Insert	Closed

Batches

View Request	View Result	Batch ID	Start Time	End Time	Total Processing Time (ms)	API Active Processing Time (ms)	Ajax Processing Time (ms)	Records Processed	Records Failed	Retry Count	State Message	Status
View Request	View Result	751gk000008apd7C	9/21/2025, 8:07 AM	9/21/2025, 8:07 AM	91	43	0	10	0	0	Completed	

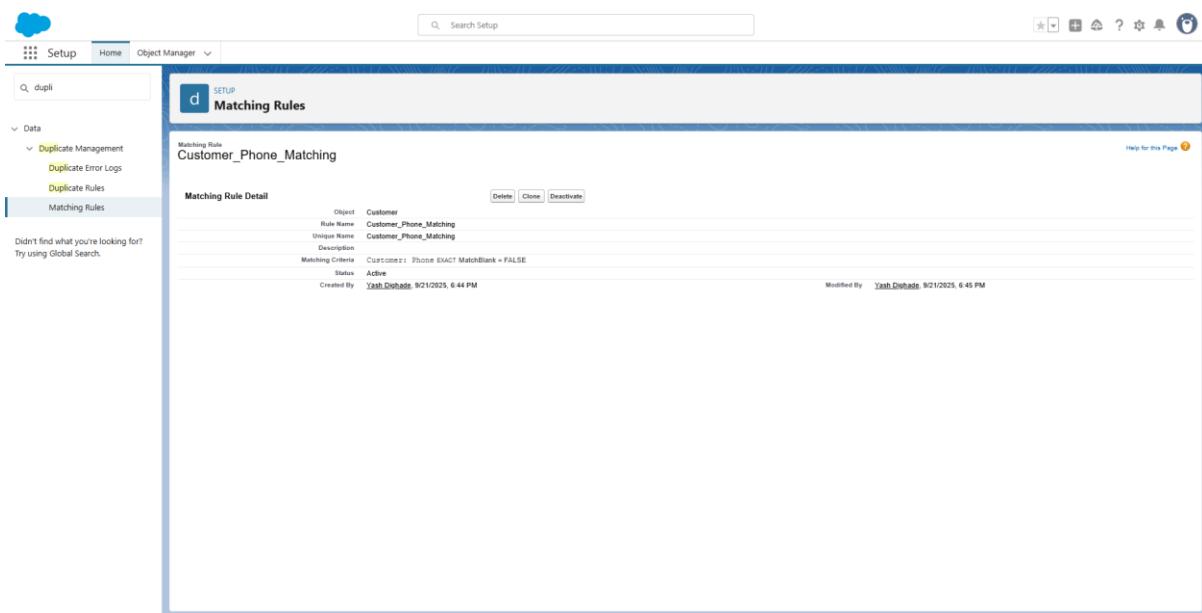
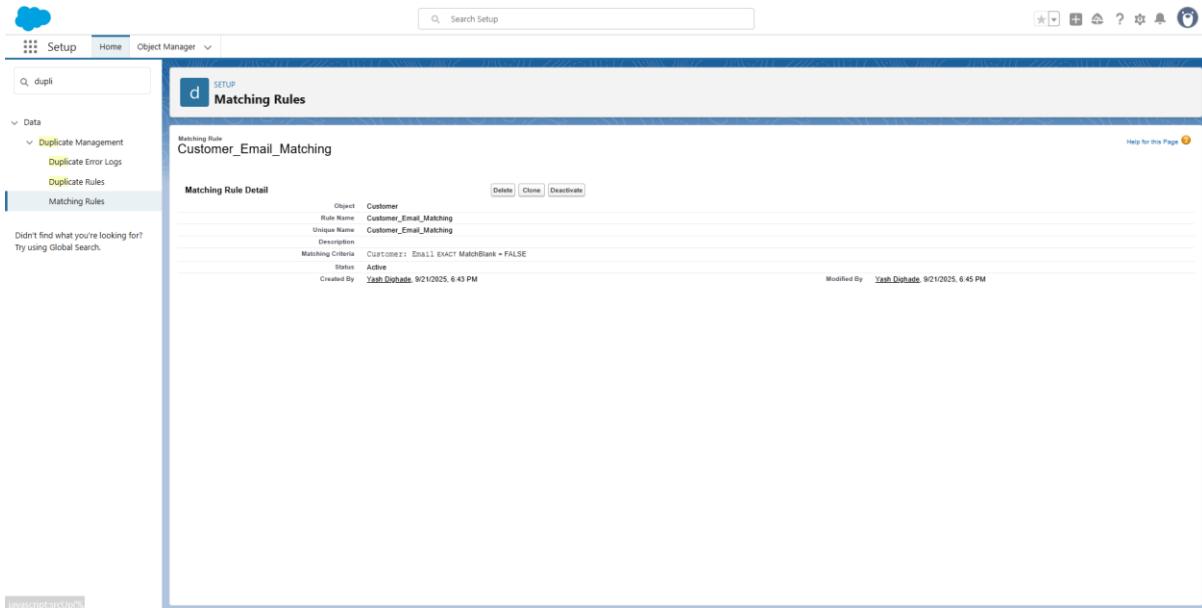
C. Duplicate Rules & Matching Rules

Purpose: Prevent duplicate customer or lead records.

Steps (Click by Click):

1. Go to **Setup → Duplicate Management → Matching Rules**.
2. Click **New Rule** → Choose Object (e.g., Customer__c).
3. Define **Matching Criteria** (Email, Phone, Full Name).
4. Save & Activate.
5. Go to **Duplicate Rules → New Rule** → Choose Object (Customer__c).

6. Define Action: Block or Alert → Select Matching Rule → Activate.



Salesforce now prevents creation of duplicate Customers or Leads.

D. Data Export & Backup

Purpose: Maintain weekly backups for critical records.

Steps (Click by Click):

1. Go to **Setup** → **Data** → **Data Export**.
2. Click **Export Now** or schedule weekly export.
3. Select objects: Customers, Bookings, Payments.

4. Choose **Include Attachments / Documents** if required.

5. Click **Start Export** → Download ZIP files once ready.

The screenshot shows the 'Data Export' setup page in Salesforce. The 'Monthly Export Service' tab is selected. Under 'Export File Encoding', 'ISO-8859-1 (General US & Western European, ISO-LATIN-1)' is chosen. Under 'Include Images, documents, and attachments', the checkbox is checked. Under 'Include Salesforce Files and Salesforce Content document versions', the checkbox is checked. Under 'Replace carriage returns with spaces', the checkbox is checked. In the 'Exported Data' section, the 'Include all data' checkbox is checked. A large list of objects is shown, each with a checkbox: Contact, Asset, Lead, BusinessProcess, Campaign, CaseContactRole, ContentDocumentLink, ContractContractRole, EmailRoutingAddress, Event, FeedHistory, FieldHistory, Individual, Note, OpportunityContactRole, OrgWideEmailAddress, ProcessInstance, RecordType, Task, VoiceCall, and VoiceCallRecording. Below this list are other objects: Order, Account, Partner, NotificationMember, CampaignMember, CaseHistory2, ContentVersion, EmailDisclaimer, EntryHistory, EventRelation, FeedPost, FiscalYearSettings, LinkReference, Opportunity, OpportunityHistory, Period, ProcessInstanceStep, Solution, VoiceCall, and SisUserBlacklist. At the bottom right of the page are 'Start Export' and 'Cancel' buttons. The URL at the bottom is <https://orgfarm-ccf334e19-dev-ed.develop.lightning.force.com/lightning/setup/DataManagementExport/home>.

✓ Weekly backups ensure data safety and recovery options.

E. Deployment (Sandbox → Production)

Purpose: Move tested configurations and customizations from Sandbox to Production.

Steps (Click by Click):

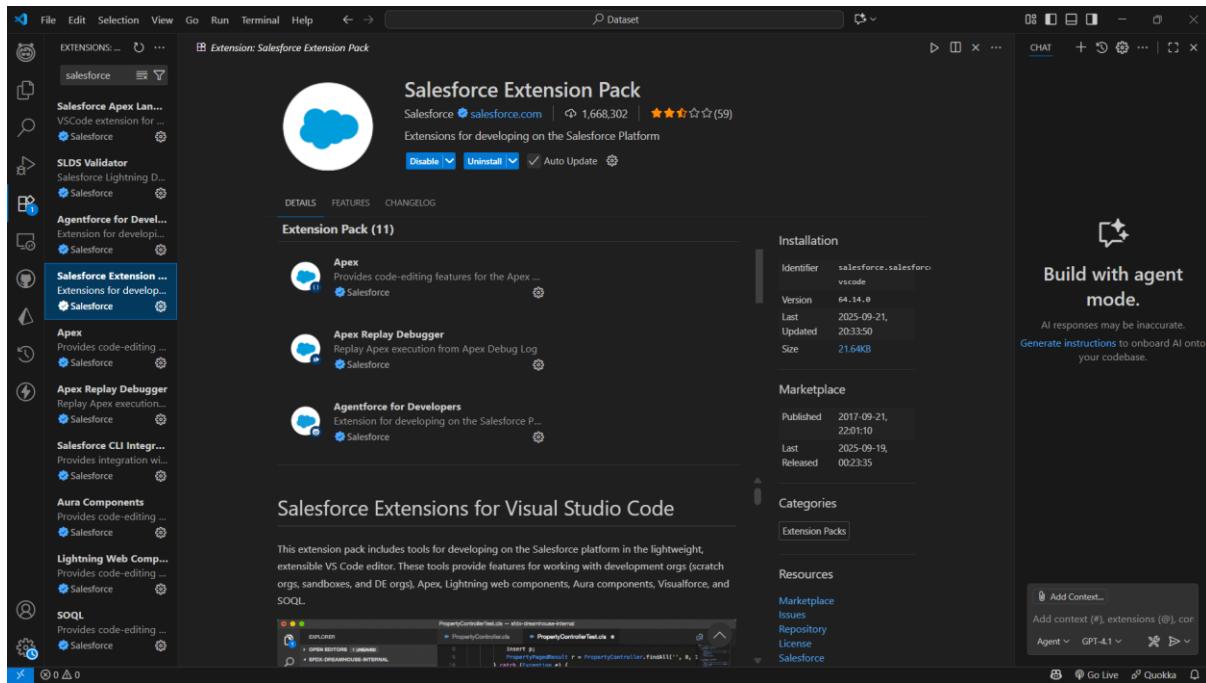
1. In **Sandbox** → **Setup** → **Outbound Change Sets** → Click **New**.
 2. Name: SmartTravel_Deployment → Save.
 3. Add Components:
 - Flows
 - Apex Classes & Triggers
 - Lightning Web Components
 - Reports & Dashboards
 4. Upload **Change Set** → Select target org (Production) → Upload.
 5. In **Production** → **Inbound Change Sets** → Validate & Deploy.
-  All customizations and components are now deployed safely to Production.
-

F. VS Code + SFDX Deployment (Optional for Developers)

Purpose: Use Salesforce DX for advanced deployment and version control.

Steps (Click by Click):

1. Install **VS Code + Salesforce Extension Pack**.
2. Connect to Sandbox using **SFDX: Authorize an Org**.
3. Pull metadata → Make changes locally.
4. Push to Sandbox using **SFDX: Deploy Source to Org**.
5. For Production, create **Unlocked Package** or use **SFDX: Deploy Source to Org (Production)**.



```

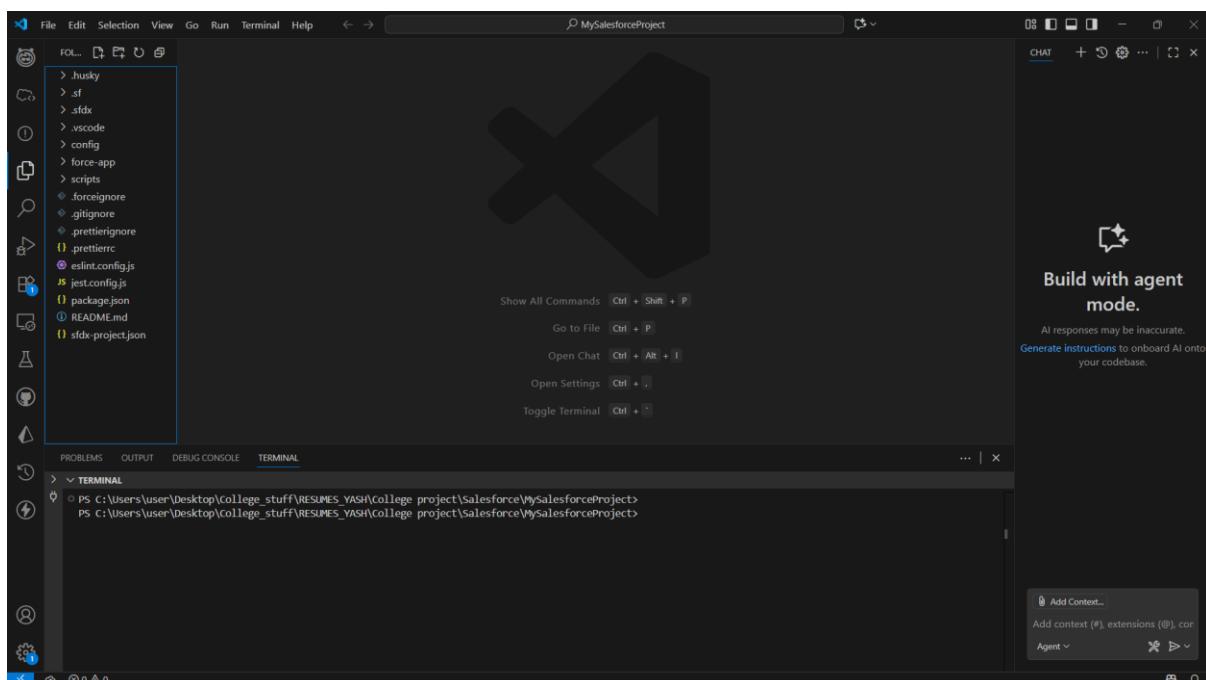
Microsoft Windows [Version 10.0.26100.6584]
(c) Microsoft Corporation. All rights reserved.

C:\Users\user>svr --version
'svr' is not recognized as an internal or external command,
operable program or batch file.

C:\Users\user>sf dx --version
@salesforce/cli/2.105.6 win32-x64 node-v20.16.0

C:\Users\user>

```



- ✓ Enables efficient source control and automated deployments.