

# Title: Leave Tracker Project

## Phase 8: Data Management & Deployment

### 1. Data Import Wizard

- Purpose: Bulk import records like Employees, Leave Policies, or Leave Requests.
- Steps:
  1. Go to Salesforce Setup → Data → Data Import Wizard.
  2. Select the object (e.g., Employee, Leave Policy).
  3. Upload the CSV file containing records.
  4. Map the CSV columns to Salesforce fields.
  5. Start the import and verify imported data.

Setup

Home

Object Manager


Data Import Wizard

Help for this page

Recent Import Jobs

Status	Object	Records Created	Records Updated	Records Failed	Start Date	Processing Time (ms)
Closed	Leave Requests	4	0	1	09-27-2025 05:01	223

Bulk Api Monitoring



Before you import your data...

**Clean up your data import file**

You'll have fewer errors to resolve if your data file is clean and free of duplicates. [Watch video](#)

**Make sure your field names match Salesforce field names**

You'll be required to map your data fields to Salesforce data fields. Data in unmapped fields is not imported. [View a list of Salesforce data fields](#).


**Don't import too many records at once**


Using the Data Import Wizard, import up to 50,000 records at a time. Importing too many records can slow down your org for all users, especially during periods of peak usage.


Collapse


Import your data in 3 easy steps!

Launch the Data Import Wizard to import your data.



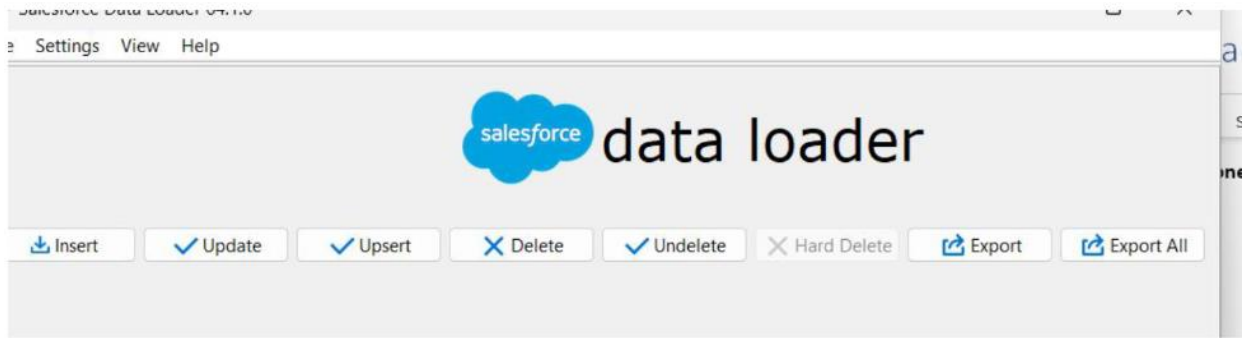






### 2. Data Loader

- Purpose: Handle large volumes of data for insert, update, delete, or export.
- Steps:

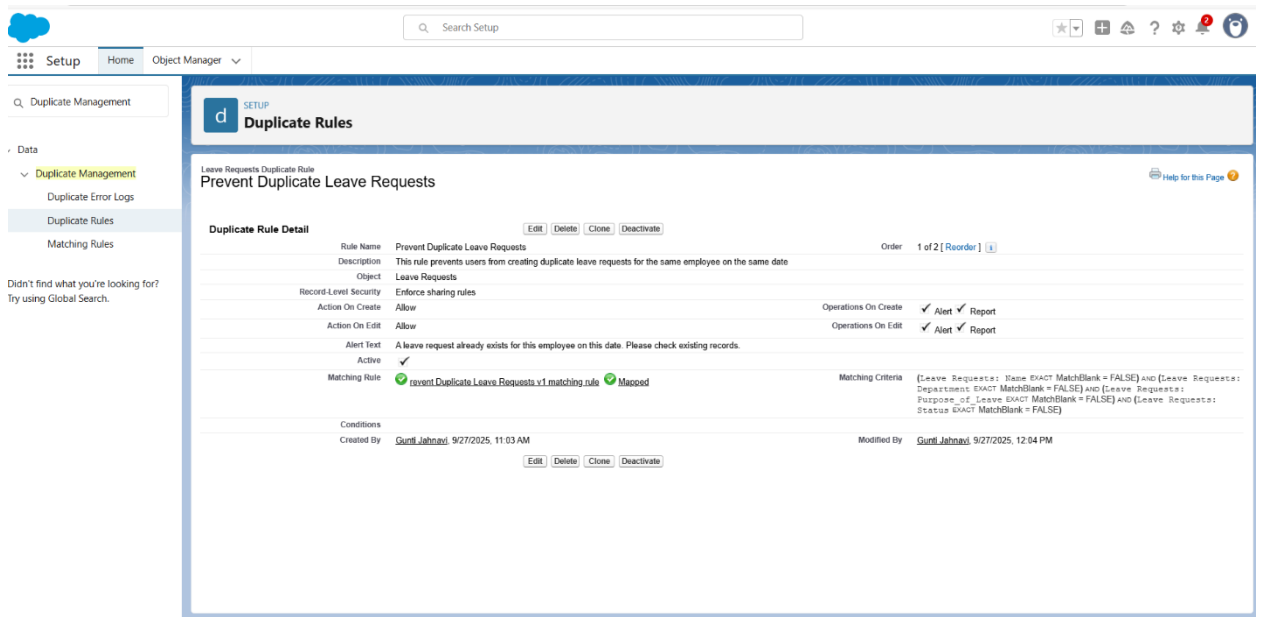


○

1. Install and open Data Loader.
2. Log in with your Salesforce credentials.
3. Choose the operation (Insert, Update, Delete, Export).
4. Select the object (e.g., Leave Requests).
5. Upload CSV file and map fields.
6. Execute operation and verify records.

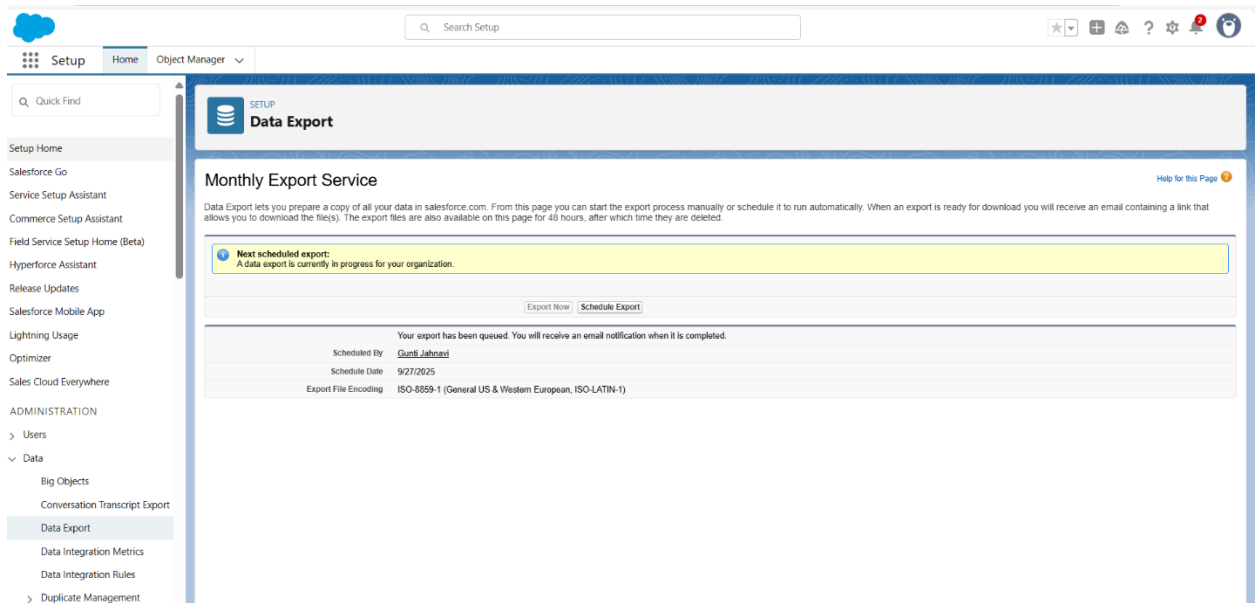
### 3. Duplicate Rules

- Purpose: Prevent duplicate entries for Employees or Leave Requests.
- Steps:
  1. Go to Setup → Duplicate Management → Duplicate Rules.
  2. Click New Rule and select the object.
  3. Define matching criteria (e.g., Employee Email).
  4. Activate the rule.
  5. Test by creating duplicate records to ensure prevention.

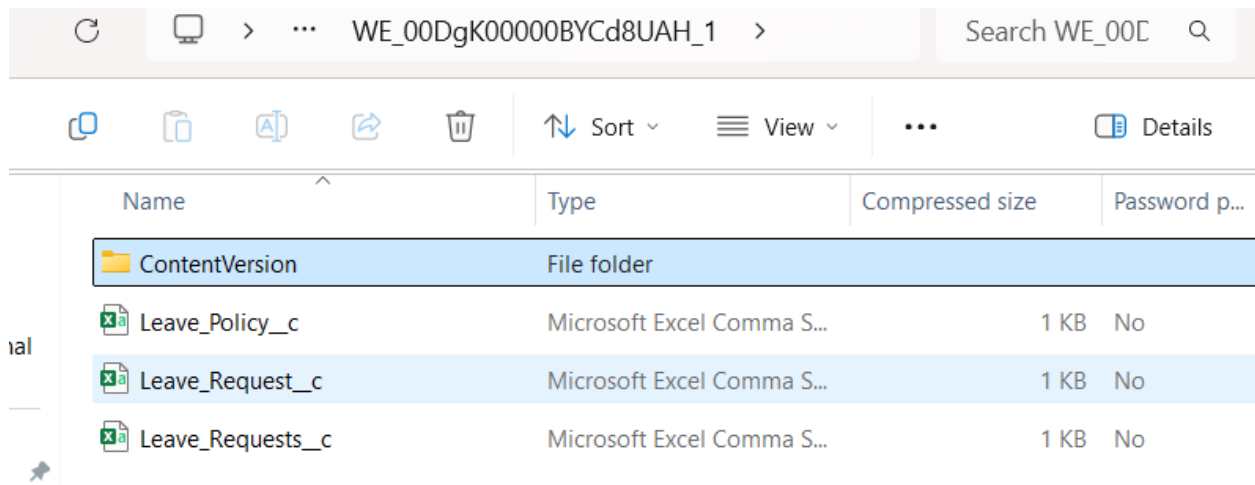


#### 4. Data Export & Backup

- Purpose: Regularly export and backup Salesforce data.
- Steps:
  1. Go to Setup → Data → Data Export.
  2. Select the objects to export (Employee, Leave Requests, Leave Policy).
  3. Choose schedule or export now.



4>Download exported ZIP files containing CSV data.



## 5. Change Sets

- Purpose: Deploy configuration from sandbox to production safely.
- Steps:
  1. Go to Setup → Deploy → Outbound Change Sets.
  2. Create a new Change Set and add components (objects, fields, workflows).
  3. Upload the Change Set to target org (Production).
  4. Log in to target org and deploy the Change Set.

Leave Tracker

Leave Requests ▾

Leave Policies ▾

Dashboards ▾

Search...

Leave Requests Name

Tala nopi

Department

Finance

Start Date ⓘ

9/27/2025

End Date ⓘ

9/28/2025

Purpose of Leave

Other

Comments / Reason ⓘ

Status

Approved

Number of Days

2.00

Leave Request Number

LR-0019

Created By

Gunti Jahnvi, 9/27/2025, 10:11 PM

Owner

Gunti Jahnvi

Last Modified By

Gunti Jahnvi, 9/27/2025, 10:11 PM

Notes & Attachments (0)

Upload Files

Or drop files

Leave Policies (0)

Approved Requests (0)