

Phase 8: Data Management & Deployment

1. Import Blood Donor & Related Data

Option A: Data Import Wizard (for small data loads, <50k records)

- Go to Setup → Data Import Wizard
- Choose the object (e.g., Blood_Donor__c, Blood_Request__c, Hospital_Request__c)
- Upload CSV files (donor names, emails, blood types, request details, etc.)
- Map CSV columns to Salesforce fields
- Run import and check results for errors or duplicates

The screenshot displays the Salesforce Bulk Data Load Jobs interface. The left sidebar shows the navigation menu with 'Setup' selected. The main content area is titled 'Bulk Data Load Jobs' and includes a 'Quota' section, an 'In Progress' section, and a 'Completed last 7 days' section. The 'Completed last 7 days' section contains a table with job details.

Job ID	Submitted By	Start Time	End Time	Status	Job Type	Operation	Object	Records Processed	Records Failed	Time to Complete (hh:mm:ss)
750pL00000EAD0E	Sakinala_Jyotsna	9/26/2025, 11:38 AM	9/26/2025, 11:38 AM	Closed	Bulk V1	Insert	Transaction	50	50	00:01
750pL00000EB0EM	Sakinala_Jyotsna	9/26/2025, 11:36 AM	9/26/2025, 11:36 AM	Closed	Bulk V1	Insert	Hospital Request	50	50	00:01
750pL00000EB79S	Sakinala_Jyotsna	9/26/2025, 11:34 AM	9/26/2025, 11:34 AM	Closed	Bulk V1	Insert	Blood Request	51	51	00:01
750pL00000EAK0o	Sakinala_Jyotsna	9/26/2025, 11:26 AM	9/26/2025, 11:26 AM	Closed	Bulk V1	Insert	Blood Inventory	8	8	00:02
750pL00000EB3ot	Sakinala_Jyotsna	9/26/2025, 11:18 AM	9/26/2025, 11:18 AM	Closed	Bulk V1	Insert	Blood Donor	100	100	00:01

Option B: Data Loader (for large or bulk loads, >50k records)

- Download Data Loader from Setup
- Login with Salesforce credentials
- Choose operation: Insert / Update / Upsert / Delete
- Use CSVs with record IDs or External IDs for reference
- Run import and review success/error reports

2. Configure Duplicate Rules

- Go to Setup → Duplicate Rules
- Create new rules for important objects like Blood_Donor__c
- Use matching criteria such as Email, Phone Number to prevent duplicates
- Set action to Block or Alert on duplicates
- Activate the rules

The screenshot shows the Salesforce Setup interface for configuring a duplicate rule. The browser address bar indicates the URL: `orgfarm-1dad82a5f1-dev-ed.develop.lightning.force.com/lightning/setup/DuplicateRules/page?address=%2F0BmgL000048nPR%3Fsetupid%3DDuplica...`. The left sidebar shows the navigation menu with 'Duplicate Rules' selected under 'Data' > 'Duplicate Management'. The main content area displays the 'duplicate donor' rule details.

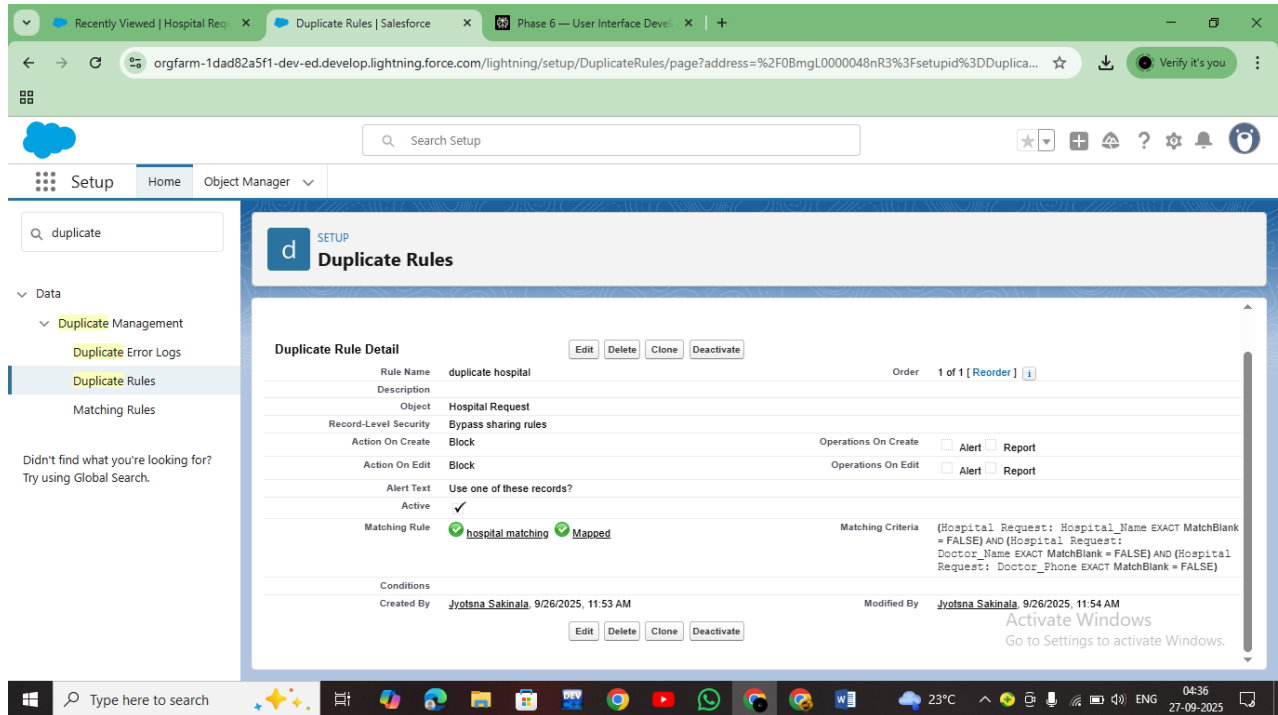
duplicate donor

Duplicate Rule Detail [Edit] [Delete] [Clone] [Deactivate]

Rule Name	duplicate donor	Order	1 of 1 [Reorder] [1]
Description			
Object	Blood Donor		
Record-Level Security	Bypass sharing rules		
Action On Create	Allow	Operations On Create	✓ Alert ✓ Report
Action On Edit	Allow	Operations On Edit	✓ Alert ✓ Report
Alert Text	Use one of these records?		
Active	✓		
Matching Rule	✓ donor_matching ✓ Mapped	Matching Criteria	(Blood Donor: Phone_Number EXACT MatchBlank = FALSE) AND (Blood Donor: Email EXACT MatchBlank = FALSE)
Conditions	Blood Donor: Date of Birth LESS OR EQUAL 1/1/2018		
Created By	Jyotsna Sakinla	Modified By	Jyotsna Sakinla
	9/26/2025, 11:53 AM		9/26/2025, 11:54 AM

[Edit] [Delete] [Clone] [Deactivate]

Go to Settings to activate Windows.



Example duplicate prevention:

- Prevent duplicate donors with the same email
- Prevent duplicate blood requests for the same donor and date

3. Data Export & Backup

- Go to Setup → Data Export
- Select critical objects: Blood_Donor__c, Blood_Request__c, Hospital_Request__c
- Export data as CSV for backup and reporting
- Schedule weekly or monthly exports for continuous data backup

4. Deploy Metadata (Layouts, Objects, Flows, etc.)

Option A: Change Sets (Declarative)

- Go to Setup → Outbound Change Sets
- Create a new Change Set
- Add components (Objects, Fields, Page Layouts, Validation Rules, Flows)

- Upload to target org (sandbox or production)
- Deploy from target org's Inbound Change Sets

Option B: ANT Migration Tool (Scripted)

- Install ANT on local machine
- Configure build.xml with source and target org credentials
- Use ant retrieve and ant deploy commands for automation

Option C: VS Code + SFDX (Modern Development)

- Install VS Code + Salesforce Extensions
- Authenticate org: `sfdx auth:web:login -d -a DevOrg`
- Retrieve source: `sfdx force:source:pull`
- Use Git for version control
- Deploy source: `sfdx force:source:deploy -p force-app`
- Ideal for teamwork and CI/CD pipelines

5. Testing After Deployment

- Login as different user profiles (Staff, Donor)
- Verify correct record and permission visibility
- Test duplicate prevention by re-importing existing records
- Test workflows and validations function as expected