



## Phase 8: Data Management & Deployment

Phase 8: Data Management & Deployment. In this phase, you'll handle the initial data for your new system and learn about the deployment process.

The first task is to import sample Leads and Courses. Before using the import tool, you need to prepare your data in a spreadsheet.

### Step 1: Prepare Your Import Files

#### a) Create a Leads CSV File

1. Open a spreadsheet program (like Excel or Google Sheets).
2. In the first row, create these exact column headers: FirstName, LastName, Company, Email, LeadSource.
3. In the rows below, add 5-10 sample leads.
4. Save this file on your computer in CSV (Comma Separated Values) format. Name it leads\_import.csv.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
1	FirstName	LastName	Company	Email	LeadSource												
2	Priya	Sharma	Innovate Corp	priya.sharma@innovate.com	Web												
3	Arjun	Mehta	Global Tech	arjun.m@globaltech.net	Webinar												
4	Anika	Desai	Sunshine Digital	anika.d@sunshinedigital.org	Referral												
5	Rohan	Verma	Data Systems	rohan.verma@datasys.co	Phone Inquiry												
6	Saanvi	Gupta	Cloud Movers	saanvi.g@cloudmovers.io	Web												

#### b) Create a Courses CSV File

1. In a new spreadsheet, create these headers: Name, Price\_c, Category\_c, Duration\_c.
2. Add a few sample courses below the headers.
3. Save this file as courses\_import.csv.

The screenshot shows a Microsoft Excel window with the following details:

- File Bar:** AutoSave Off, courses\_import - ..., Saved to this PC, Search.
- Home Tab:** Font (Apotos Narrow, Size 11), Alignment, Number, Styles, Cells, Editing, Add-ins.
- Message Bar:** POSSIBLE DATA LOSS: Some features might be lost if you save this workbook in the comma-delimited (.csv) format. To preserve these features, save it in an Excel file format. Buttons: Don't show again, Save As...>.
- Worksheet:** A1 selected, data in columns A through D:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
1	Name	Price_c	Category_c	Duration_c														
2	Salesforce Admin Prep	45000	Cloud	30														
3	Introduction to AI	60000	AI	45														
4	Machine Learning Basics	75000	ML	60														
5	Apex for Beginners	55000	Cloud	40														
- Taskbar:** Power & Battery icon, Energy saver is on.
- System Tray:** Date (28-09-2025), Time (11:41), ENG IN, battery level (100%).

Now that you have your CSV files, let's use the **Data Import Wizard** to upload them. We'll do the **Leads** first, then the **Courses**.

## Import Your Leads

1. Go to **Setup** → search for **Data Import Wizard** and click it.
2. Click the large green button: **Launch Wizard!**
3. Under "What kind of data are you importing?", click on **Leads**.
4. Under "What do you want to do?", select **Add new records**.
5. Drag your **leads\_import.csv** file onto the upload area.
6. Click **Next**.
7. On the mapping screen, Salesforce should have automatically matched your columns to the correct fields. Click **Next**.
8. On the final screen, click **Start Import**.

You'll receive an email when the lead import is complete

## Import Your Courses

Repeat the process for your custom Course object.

1. Launch the **Data Import Wizard** again.
2. Click on **Custom Objects**, then select **Courses**.

3. Select **Add new records** and upload your `courses_import.csv` file.
4. Click **Next**, confirm the field mapping is correct, and click **Next** again.
5. Click **Start Import**.

The screenshot shows the Salesforce Data Import Wizard interface. At the top, there's a navigation bar with a cloud icon, a search bar, and various setup tools. Below that, a menu bar has 'Setup' selected. The main content area is titled 'Data Import Wizard' and shows 'Recent Import Jobs' with two entries:

Status	Object	Records Created	Records Updated	Records Failed	Start Date	Processing Time (ms)
Closed	Lead	5	0	0	09-28-2025 06:21	602
Closed	Course	4	0	0	09-28-2025 06:18	121

A dark button labeled 'Bulk API Monitoring' is visible below the table. To the left, a sidebar says 'Before you import your data...' with a binoculars icon. On the right, there are three collapsed tips:

- 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.

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**It's critical for any administrator to know how to back up an organization's data. Salesforce has a built-in tool for this.**

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## How to Back Up Your Data

1. Go to Setup → search for Data Export and click on it.
2. Click the Schedule Export button.
3. On the configuration page:
  - Frequency: You can schedule the backup to run weekly or monthly. Select Weekly.
  - Start / End Date: Set the start and end dates for your schedule.
  - Exported Data: Check the box for "Include all data" to get a complete backup of all your objects.
4. Click Save.

The screenshot shows the Salesforce Setup interface. The top navigation bar includes a cloud icon, a search bar labeled "Search Setup", and various global buttons. The main menu on the left has "Setup" selected, followed by "Home" and "Object Manager". A sidebar on the left is titled "Data" and lists several categories: Big Objects, Conversation Transcript Export, Data Export (which is selected and highlighted in yellow), Data Integration Metrics, Data Integration Rules, Duplicate Management, Duplicate Error Logs, Duplicate Rules, Matching Rules, Mass Delete Records, Mass Transfer Approval Requests, Mass Transfer Records, and Mass Update Addresses.

The central content area is titled "SETUP Data Export" and "Monthly Export Service". It explains that Data Export lets you prepare a copy of all your data in salesforce.com. It shows a scheduled export for "10/1/2025, 5:00 AM". There are "Export Now" and "Schedule Export" buttons at the bottom.

## Understanding Deployment

Deployment is the process of moving the customizations you've built (your objects, fields, flows, Apex code, etc.) from your current development org to another Salesforce org, like a testing environment or the final, live production environment for users.

Your project plan mentions two common tools for this:

- **Change Sets**
  - This is a point-and-click tool built into Salesforce Setup. You use it to package your components and send them between connected orgs (like from a sandbox to production). It's very common for administrative deployments.
- **SFDX (Salesforce Developer Experience)**
  - This is a powerful command-line toolset for developers. It allows them to manage their project as files on their computer, use version control systems like Git, and perform more complex, automated deployments.