

EXPENSE TRACKER APP

Phase 8: Data Management & Deployment

Goal: Manage and migrate data efficiently, and prepare your Expense Tracker for deployment to production.

Step 1 — Data Import Wizard

Purpose

To quickly import small datasets such as demo Expense records or test users into Salesforce directly through the UI.

Navigation Path

Setup → Data → Data Import Wizard


Detailed Steps

1. Go to Setup → Data Import Wizard.
2. Select the object type:
 - Custom Objects → Expense
3. Click Launch Wizard.
4. Choose Add New Records (for new imports) or Update Existing Records (to modify existing data).
5. Upload a CSV file with the following sample columns:
 - Expense_Number__c
 - Amount__c
 - Expense_Date__c
 - Category__c
 - Employee__c
 - Approval_Status__c
6. Map fields → Match CSV columns with Salesforce fields.

7. Click Start Import → wait for completion.
8. Review results → check success and error logs.

Why This Step Matters

- Easily imports test/demo data for validation and reports.
- Simple and intuitive — no need for external tools.



SetupHomeObject Manager


Data Import Wizard

Help for this page

Recent Import Jobs

Status	Object	Records Created	Records Updated	Records Failed	Start Date	Processing Time (ms)
--------	--------	-----------------	-----------------	----------------	------------	----------------------

Bulk Api Monitoring



Before you import your data...

Collapse


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.

Import your data in 3 easy steps!


Launch the Data Import Wizard to import your data.




Pre-step: Prepare your data for import



Choose data to import



Edit field mapping




Review and start import

Launch Wizard!

FAQ

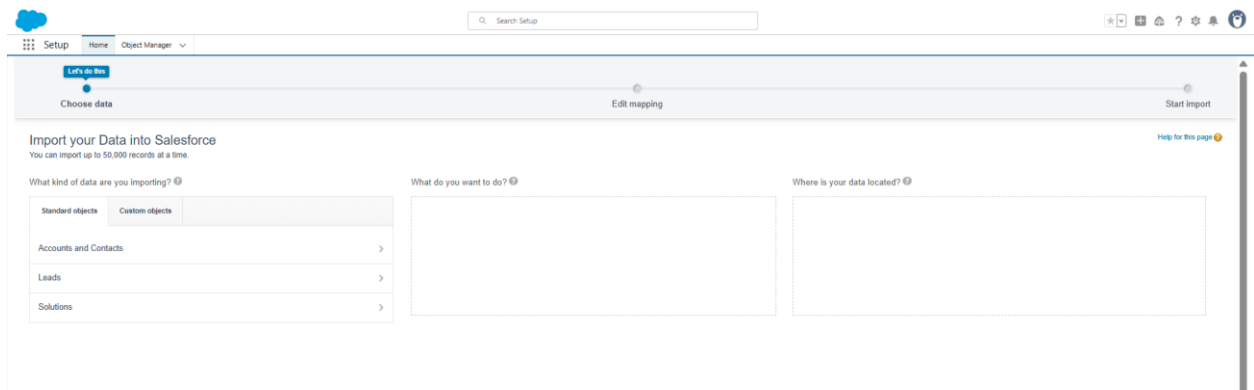
How do I prepare my data for import?
How many records can I import?
What kind of objects can I import?
Can I do simultaneous imports?
How long does it take to complete an import?

Data Import video series



Additional Resources

Find import templates and other helpful tools
Learn how to use the Data Import Wizard



Step 2 — Data Loader

Purpose

To import or export large datasets (hundreds or thousands of records) for Expenses or Users.

Navigation Path

Install Salesforce Data Loader → Open → Log in with Salesforce credentials

Detailed Steps

1. Download and install Salesforce Data Loader (if not already installed).
2. Open it → Click Login.
3. Choose an operation:
 - Insert (for new records)
 - Update (for existing records)
 - Export (to download data)
4. Select Expense__c as the object.
5. Browse and upload your CSV file.
6. Map the CSV fields to Salesforce fields.
7. Run the operation → review the success and error logs.

Why This Step Matters

- Supports bulk operations that can't be done in the UI.
- Allows exporting data for backup or migration



SETUP

Data Loader

Data Loader

[Help for this page](#)

Data Loader is a client application for the bulk import or export of data. Use it to insert, update, delete, or export Salesforce records.

[Downloads](#)

[User Guide](#)

Step 3 — Duplicate Rules

Purpose

Prevent duplicate expense records for the same employee or date.

Navigation Path


Setup → Duplicate Management → Duplicate Rules → New Rule

Detailed Steps

1. Click New Rule → Select Object = Expense__c.
2. Name the rule: Expense Duplicate Check.
3. Under Matching Criteria, add:
 - Amount__c = Exact Match
 - Expense_Date__c = Exact Match
 - Employee__c = Exact Match
4. Choose Action on Create: Block or Allow with Alert.
5. Optionally, add Alert Message: “Duplicate expense detected for this employee and date.”
6. Click Activate.

Why This Step Matters


- Prevents duplicate entries in reports or approvals.
- Keeps data clean and reliable.

 **SETUP**

Duplicate Rules

Expense Duplicate Rule

Expense_Duplicate_Check

 [Help for this Page](#)




Duplicate Rule Detail

Edit

Delete

Clone

Activate

Rule Name	Expense_Duplicate_Check	Order	1 of 1 [Reorder] 
Description	Prevents duplicate Expense entries for same employee, amount, and date.		
Object	Expense		
Record-Level Security	Enforce sharing rules		
Action On Create	Allow	Operations On Create	<input checked="" type="checkbox"/> Alert <input checked="" type="checkbox"/> Report
Action On Edit	Allow	Operations On Edit	<input type="checkbox"/> Alert <input type="checkbox"/> Report
Alert Text	Use one of these records?		
Active	<input type="checkbox"/>		
Matching Rule	 Standard Account Matching Rule  Not Mapped	Matching Criteria	Matching rule for account records. More info
Conditions			
Created By	John Manager , 10/9/2025, 7:32 PM	Modified By	John Manager , 10/9/2025, 7:32 PM

Edit

Delete

Clone

Activate

Step 4 — Data Export & Backup

Purpose

Back up your Expense Tracker data weekly or on-demand.

Navigation Path

Setup → Data → Data Export

Detailed Steps

1. Go to Setup → Data Export.
2. Choose Export Now or Schedule Export (weekly).
3. Select objects:
 - Expense__c
 - User
 - Approval History (optional)
4. Choose .CSV as file format.
5. Click Start Export or Save Schedule.
6. Download the .zip file from the email link when ready.

7. Store it securely in company storage or backup system.

Why This Step Matters

- Protects against data loss or accidental deletions.

Required for audit compliance and data recovery

Monthly Export Service

Export File Encoding: **ISO-8859-1 (General US & Western European, ISO-LATIN-1)**

☐ Include images, documents, and attachments

☐ Include Salesforce Files and Salesforce CRM Content document versions

☒ Replace carriage returns with spaces

Exported Data

Select what type of information you would like to include in the export. The data types listed below use the Apex API names. If you are not familiar with these names, select Include all data for your export.

☒ Include all data

<input type="checkbox"/> Contract	<input type="checkbox"/> Order	<input type="checkbox"/> OrderItem
<input type="checkbox"/> Asset	<input type="checkbox"/> Account	<input type="checkbox"/> Contact
<input type="checkbox"/> Lead	<input type="checkbox"/> Partner	<input type="checkbox"/> Product2
<input type="checkbox"/> BusinessProcess	<input type="checkbox"/> NotificationMember	<input type="checkbox"/> UserRole
<input type="checkbox"/> Campaign	<input type="checkbox"/> CampaignMember	<input type="checkbox"/> Case
<input type="checkbox"/> CaseContactRole	<input type="checkbox"/> CaseHistory2	<input type="checkbox"/> CaseSolution
<input type="checkbox"/> ContentDocumentLink	<input type="checkbox"/> ContentVersion	<input type="checkbox"/> ContentVersionMap
<input type="checkbox"/> ContractContactRole	<input type="checkbox"/> EmailDisclaimer	<input type="checkbox"/> EmailMessage
<input type="checkbox"/> EmailRoutingAddress	<input type="checkbox"/> EntityHistory	<input type="checkbox"/> EntitySubscription
<input type="checkbox"/> Event	<input type="checkbox"/> EventRelation	<input type="checkbox"/> FeedComment
<input type="checkbox"/> FeedFieldHistory	<input type="checkbox"/> FeedPost	<input type="checkbox"/> FeedTrackedChange
<input type="checkbox"/> FieldHistory	<input type="checkbox"/> FiscalYearSettings	<input type="checkbox"/> GroupSubscription
<input type="checkbox"/> Individual	<input type="checkbox"/> LinkReference	<input type="checkbox"/> NewsFeed
<input type="checkbox"/> Note	<input type="checkbox"/> Opportunity	<input type="checkbox"/> OpportunityCompetitor
<input type="checkbox"/> OpportunityContactRole	<input type="checkbox"/> OpportunityHistory	<input type="checkbox"/> OpportunityLineItem
<input type="checkbox"/> OrgWideEmailAddress	<input type="checkbox"/> Period	<input type="checkbox"/> PricebookEntry
<input type="checkbox"/> ProcessInstance	<input type="checkbox"/> ProcessInstanceStep	<input type="checkbox"/> ProcessInstanceWorkitem
<input type="checkbox"/> RecordType	<input type="checkbox"/> Solution	<input type="checkbox"/> Task
<input type="checkbox"/> TaskRelation	<input type="checkbox"/> VoiceCall	<input type="checkbox"/> User
<input type="checkbox"/> VoiceCallRecording	<input type="checkbox"/> SiqUserBlacklist	<input type="checkbox"/> StreamActivityAccess
<input type="checkbox"/> RequestsForAccessSIQ	<input type="checkbox"/> SalesforceIqSyncFailure	<input type="checkbox"/> AccountContactRole
<input type="checkbox"/> WorkOrder	<input type="checkbox"/> WorkOrderLineItem	<input type="checkbox"/> ServiceAppointment
<input type="checkbox"/> WorkType	<input type="checkbox"/> ServiceResource	<input type="checkbox"/> ServiceTerritory
<input type="checkbox"/> ServiceTerritoryMember	<input type="checkbox"/> ServiceResourceSkill	<input type="checkbox"/> SkillRequirement
<input type="checkbox"/> AssignedResource	<input type="checkbox"/> OperatingHours	<input type="checkbox"/> ResourceAbsence
<input type="checkbox"/> TimeSlot	<input type="checkbox"/> ResourcePreference	<input type="checkbox"/> ActionLinkTemplateBinding

Step 5 — Change Sets (Deployment to Production)

Purpose

Deploy all configurations, objects, and automations from Sandbox to Production.

Navigation Path

Setup → Outbound Change Sets

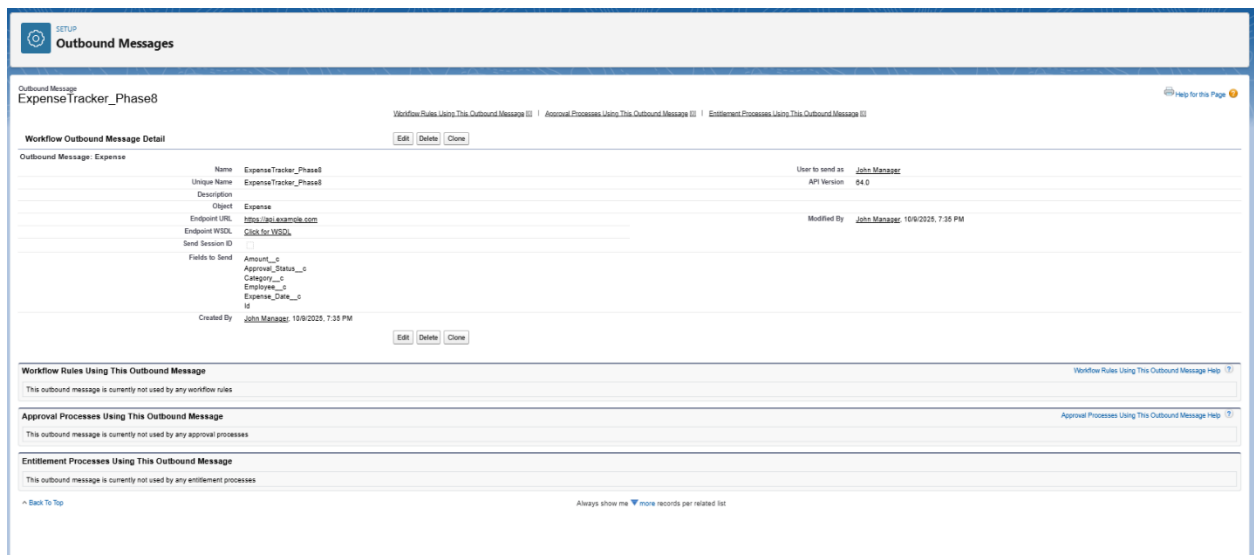
Detailed Steps

1. In Sandbox, go to Setup → Outbound Change Sets → New.
2. Enter:
 - Name: Expense_Tracker_Deployment

- Description: Deploy Expense Tracker setup to production.
3. Click Save.
 4. Click Add → select components to include:
 - Custom Object: Expense__c
 - Fields, Validation Rules, Flows, Approval Processes
 - Apex Classes, Triggers, Lightning Pages
 5. Upload the change set to the production org.
 6. In Production, go to Inbound Change Sets.
 7. Validate and Deploy the change set.

Why This Step Matters

- Moves your work safely between orgs.
- Ensures consistent configurations in testing and production.



Step 6 — Package Deployment (Optional)

Purpose

Use Managed or Unmanaged Packages for sharing or reuse.

Navigation Path

Setup → Package Manager → New Package

Detailed Steps

1. Click New Package.
2. Enter Name: Expense Tracker Package.
3. Add all related components (Expense object, triggers, classes, flows).
4. Choose Managed (for publishing) or Unmanaged (for personal migration).
5. Click Upload.

Why This Step Matters

- Packages are reusable and ideal for version control or sharing your app.

Installed Packages

On AppExchange you can browse, test drive, download, and install pre-built apps and components right into your salesforce.com environment. [Learn More about Installing Packages](#)

Apps and components are installed in packages. Any custom apps, tabs, and custom objects are initially marked as "In Development" and are not deployed to your users. This allows you to test and customize before deploying. You can deploy the components individually using the other features in setup or as a group by clicking Deploy. Depending on the links next to an installed package, you can take different actions from this page. To remove a package, click Uninstall. To manage your package licenses, click Manage Licenses.

Action	Package Name	Publisher	Version Number	Namespace Prefix	Install Date	Limits	Apps	Tabs	Objects	AppExchange Ready
Uninstall	Developer Edition	Salesforce Developers	0.0	devcapp	10/3/2025, 7:41 PM	✓	1	5	0	Not Passed
Description: Package for the Developer Edition app										

Uninstalled Packages

No uninstalled package data archives

Step 7 — SFDX / VS Code Deployment (Developer Optional)

Purpose

Enable developers to manage deployments using CLI tools.

Steps

1. Install Salesforce CLI (SFDX) and VS Code.
2. Connect your org using:

```
sfdx auth:web:login -a DevHub
```

3. Retrieve metadata:

```
sfdx force:source:retrieve -m CustomObject:Expense__c
```

4. Deploy changes to another org:

```
sfdx force:source:deploy -u Production
```