

## Phase 8: Data Management & Deployment (NGO Management System)

**Goal:** Efficiently manage donor and campaign data, prevent duplicates, maintain backups, and deploy configurations from Sandbox to Production.

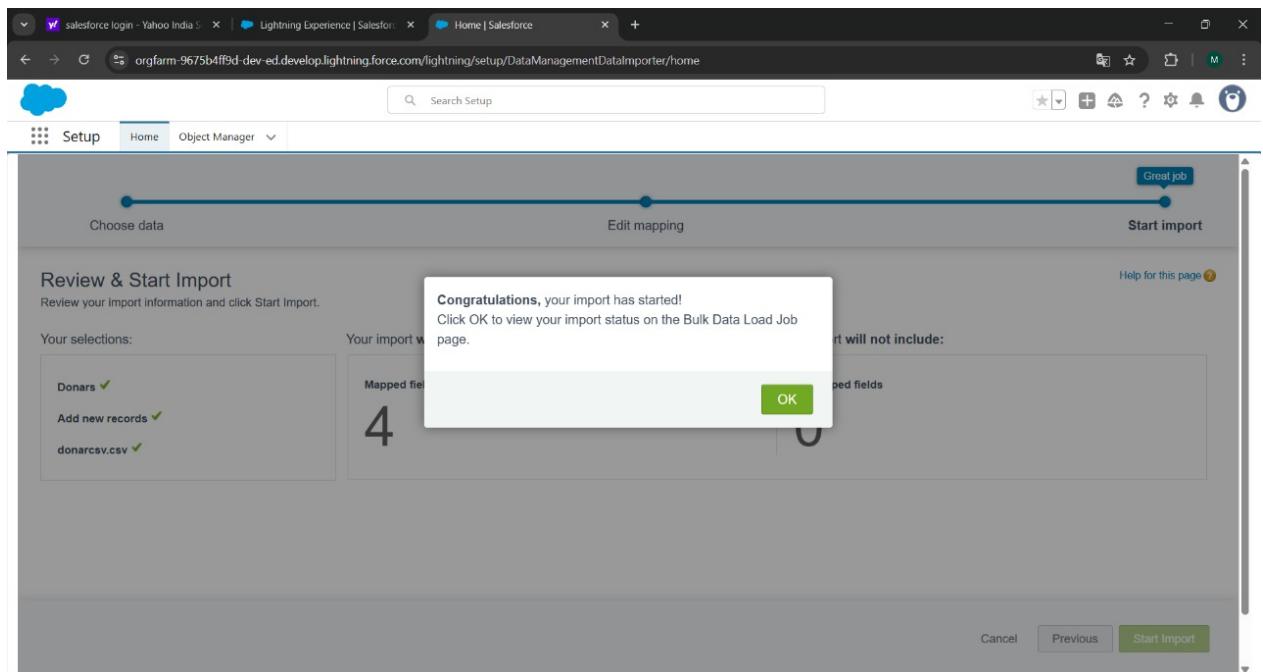
### A. Data Import Wizard (Donors / Campaigns / Volunteers)

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 the object to import: Donor\_c, Campaignc, or Volunteer\_c.
4. Choose Add New Records (or Update Existing Records if updating).
5. Upload your CSV file → Click Next.
6. Map CSV columns to Salesforce fields → Click Next.
7. Review the mapping → Click Start Import.
8. Monitor import status → Correct any errors highlighted.

 Donors, campaigns, and volunteers are now imported into Salesforce.



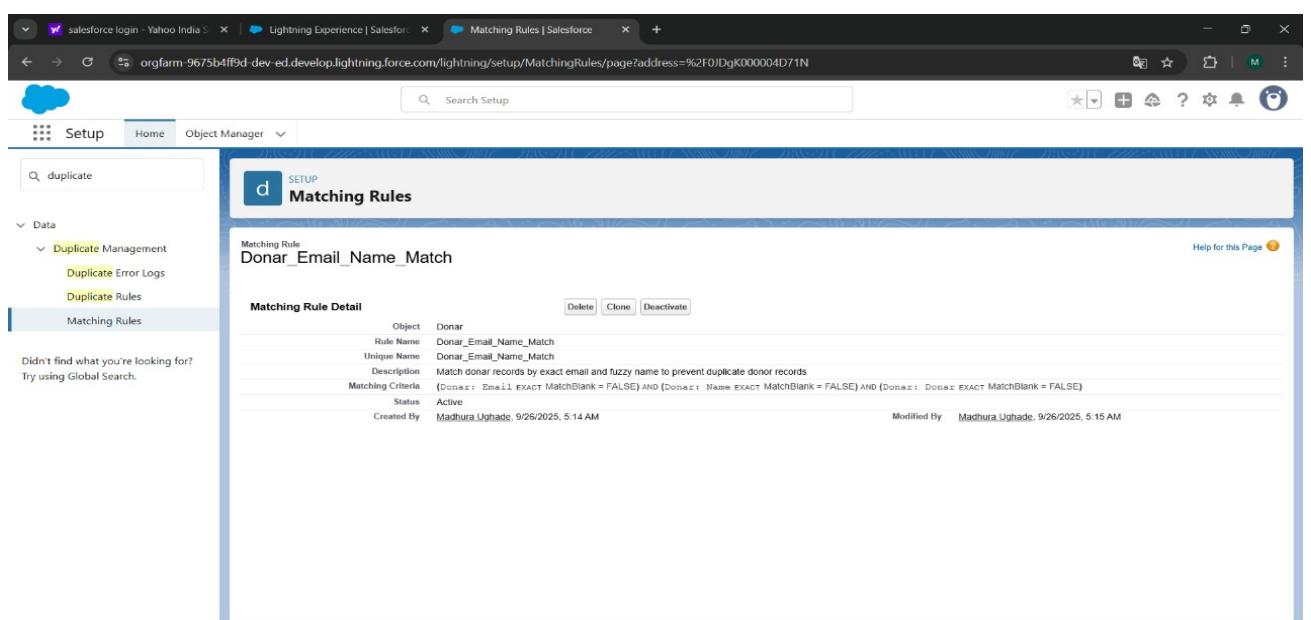
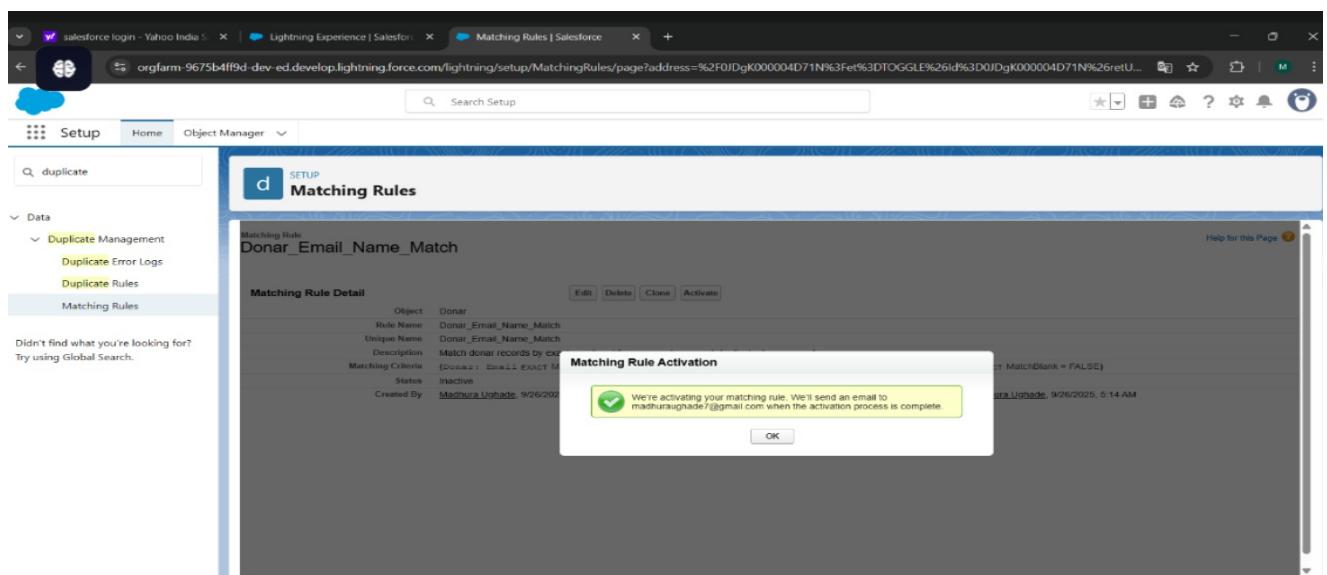
## B. Duplicate Rules & Matching Rules

Purpose: Prevent duplicate donor or volunteer records.

Steps (Click by Click):

1. Go to Setup → Duplicate Management → Matching Rules.
2. Click New Rule → Select object: Donor\_\_c.
3. Define matching criteria: Email, Phone, Full Name.
4. Save & Activate.
5. Go to Duplicate Rules → New Rule → Select object: Donor\_\_c.
6. Define Action: Block or Alert → Select the matching rule → Activate.

 Salesforce now prevents duplicate donors, volunteers, or campaigns.



## C. Data Export & Backup

Purpose: Maintain weekly backups for donors, campaigns, and donations.

Steps (Click by Click):

1. Go to Setup → Data → Data Export.
2. Click Export Now or Schedule Weekly Export.
3. Select objects: Donor\_c, Campaignc, Donationc, Volunteer\_c.
4. Choose Include Attachments / Documents if required.
5. Click Start Export → Download ZIP files once ready.

Weekly backups ensure data safety and recovery options

The screenshot shows the Salesforce Data Export page within the Lightning Experience interface. The left sidebar is titled 'Setup' and includes sections for Data, Big Objects, Conversation Transcript Export, Data Export (which is selected), 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, Mass Update Addresses, Picklist Settings, Schema Settings, and State and Country/Territory. The main content area is titled 'Data Export' and 'Monthly Export Service'. It displays a message: 'Data Export lets you prepare a copy of all your data in salesforce.com. From this page you can start the export process manually or schedule it to run automatically. When an export is ready for download you will receive an email containing a link that allows you to download the file(s). The export files are also available on this page for 48 hours, after which time they are deleted.' A yellow box highlights the message: 'Next scheduled export: A data export is currently in progress for your organization.' Below this, there are buttons for 'Export Now' and 'Schedule Export'. A summary table shows the queued export: 'Your export has been queued. You will receive an email notification when it is completed.' with details: 'Scheduled By' Madhura Ughade, 'Schedule Date' 9/26/2025, and 'Export File Encoding' ISO-8859-1 (General US & Western European, ISO-LATIN-1).