

Phase 8: Data Management & Deployment - Deepfake CRM

1. Data Import Wizard

Purpose: Import new records into Salesforce using UI-based wizard.

Steps:

1. Setup → Data Import Wizard → Launch Wizard.
2. Select object (Clients, Videos, Alerts, Detection_System).
3. Choose operation: Add New Records / Update / Upsert.
4. Upload CSV (headers = Salesforce API Names).
5. Map fields manually if required.
6. Start import → Monitor progress → Check success/error report.

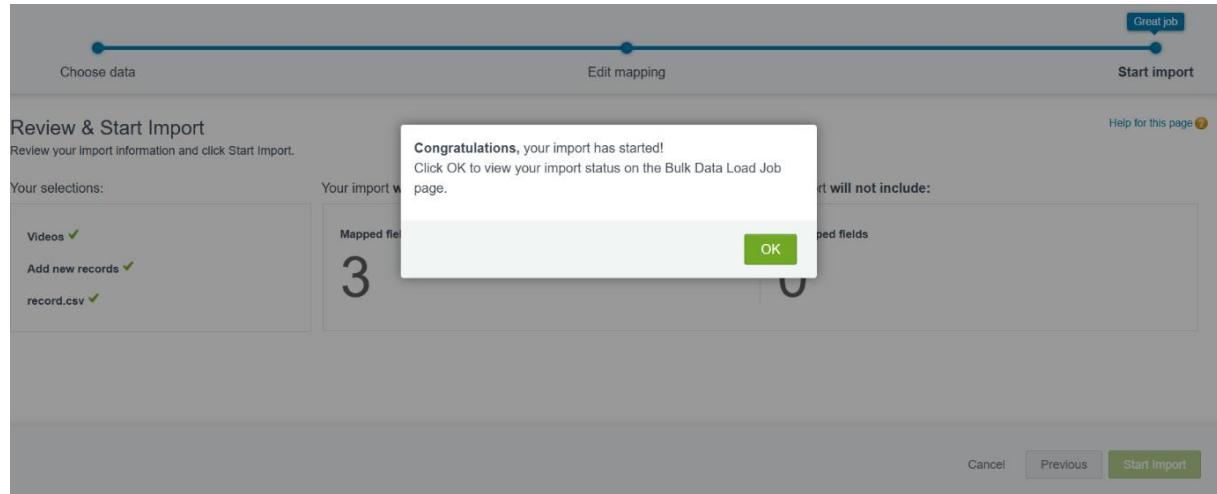
The screenshot shows the 'Choose data' step of the Data Import Wizard. At the top, there's a progress bar with three segments: 'Choose data' (blue), 'Edit mapping' (grey), and 'Start import' (grey). A tooltip 'Getting closer.' is above the progress bar. Below the bar, there's a message: 'Import your Data into Salesforce' and 'You can import up to 50,000 records at a time.' On the right, there's a 'Help for this page' link. The main area has three sections: 'What kind of data are you importing?' (with tabs for Standard objects and Custom objects, showing 'Videos' selected), 'What do you want to do?' (with 'Add new records' selected), and 'Where is your data located?' (with a 'Drag CSV file here to upload' field, a 'CSV' file icon, a 'Choose file' button with 'record.csv' selected, 'Character Code' set to 'ISO-8859-1 (General US & Western European, ISO-LATIN-1)', 'Values Separated By' set to 'Comma', and a checked 'Trigger workflow rules and processes?' checkbox). At the bottom are 'Cancel', 'Previous', and 'Next' buttons.

Edit Field Mapping: Videos

Your file has been auto-mapped to existing Salesforce fields, but you can edit the mappings if you wish. Unmapped fields will not be imported.

Help for this page 

Edit	Mapped Salesforce Object	CSV Header	Example	Example	Example
Change	Video Name	Video	Title	ID	Fake News
Change	Record Owner	Uploaded_bUpload_	Source_URL	y	Rajesh
Change	Source URL	Column-3	Status	Date	2025-09-



Tips:

- Unique identifiers (Email, Video_ID) must match.
- Required fields must be filled.
- Check lookup fields for related objects.

2. Data Loader

Purpose: Bulk import/update/delete/export records.

Steps:

1. Install C open Data Loader.
2. Login → choose environment (Sandbox/Production).
3. Select operation: Insert / Update / Upsert / Delete / Export.
4. Select object → Select CSV file.

5. Map fields → Save mapping.
6. Run operation → Download success C error files.
7. Verify data in Salesforce.

Name	Type	Compressed size	Password p...	Size	Ratio	Date modified
META-INF	File folder					27-08-2025 23:27
util	File folder					27-08-2025 23:27
dataloader-64.1.0.jar	JAR File	27,218 KB	No	28,591 KB	5%	27-08-2025 23:27
install	Windows Batch File	1 KB	No	1 KB	33%	27-08-2025 23:27
install.command	COMMAND File	1 KB	No	1 KB	33%	27-08-2025 23:27

Tips:

- Video_ID_c as external ID for Upsert.
 - Always backup data before bulk operations.
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3. Duplicate Rules

Purpose: Maintain data quality by preventing duplicates.

Steps:

1. Create Matching Rule: Setup → Matching Rules → New.
 - Define fields to match (e.g., Email for Clients).
2. Create Duplicate Rule: Setup → Duplicate Rules → New.
 - Select Matching Rule.
 - Action on Create/Edit: Block / Alert.
 - Activate rule.
3. Test rule by inserting duplicate record.



SETUP

Matching Rules

Matching Rule

Help for this Page

Alert rule matching rule

Matching Rule Detail

[Delete](#) [Clone](#) [Deactivate](#)

Object	Alert
Rule Name	Alert rule matching rule
Unique Name	Alert_rule_matching_rule
Description	
Matching Criteria	Alert: Alert_Type EXACT MatchBlank = FALSE
Status	Active
Created By	Modified By
9/24/2025, 10:21 PM	9/24/2025, 10:21 PM

SETUP

Duplicate Rules

Alert Duplicate Rule

Alert rule

Help for this Page

Duplicate Rule Detail

			Edit	Delete	Clone	Deactivate
Rule Name	Alert rule	Order	1 of 1 [Reorder]	i		
Description						
Object	Alert					
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 checked="" type="checkbox"/> Alert	<input type="checkbox"/> Report		
Alert Text	Use one of these records?					
Active	<input checked="" type="checkbox"/>					
Matching Rule	<input checked="" type="checkbox"/> Alert rule matching_rule	<input checked="" type="checkbox"/> Mapped	Matching Criteria	Alert: Alert_Type EXACT MatchBlank = FALSE		
Conditions						
Created By	9/24/2025, 10:20 PM	Modified By	10:22 PM	, 9/24/2025,		

Your Salesforce matching rule is now activated

Inbox x

Salesforce Duplicate Management (... 10:51AM (1 minute ago)

to me ▾

Hello

Your matching rule Alert rule matching rule for identifying duplicate records has been activated and is now ready to use.

Salesforce Duplicate Management

You're registered as @gmail.com in Deepfake Incident Management System.. Need help? Contact Salesforce Customer Support.

Tips:

- Clients → Email unique.
- Videos → Video_ID_c unique.
- Alerts C Detection_System → ID fields unique.

4. Data Export & Backup

Purpose: Backup Salesforce data.

Steps (UI):

1. Setup → Data Export → Export Now / Schedule Export.
2. Select objects → Clients, Videos, Alerts, Detection_System.
3. Include attachments/files if needed.
4. Click Start Export → Download .zip files.

The screenshot shows the 'Schedule Data Export' page in the Salesforce Setup. At the top, there are checkboxes for 'Include images, documents, and attachments', 'Include Salesforce Files and Salesforce CRM Content document versions', and 'Replace carriage returns with spaces'. Below these are fields for 'Frequency' (set to 'On day 1 of every month'), 'Start' date ('9/24/2025'), 'End' date ('10/24/2025'), and 'Preferred Start Time' ('10:00 AM'). The page includes 'Save' and 'Cancel' buttons.

Your Organization Data Export has completed - Deepfake Incident Management System. [Inbox](#)



Do not reply <noreply@salesforce.com>
to me ▾

The export of your organization's data has been completed. Please click on the following link within the next 48 hours to receive the export.

<https://orgfarm-dcdf0dd826-dev-ed.my.salesforce.com/ui/setup/export/DataExportPage/d>

Thank you,
Salesforce

Tips:

- Maintain versioned backups.
- Store securely.

5. Change Sets

Purpose: Deploy metadata from Sandbox → Production.

Steps:

1. Create Outbound Change Set → Name C Description.
2. Add Components: Objects, Fields, Validation Rules, Flows, Apex, Dashboards.
3. Add Profiles (optional).

4. Upload to target org.
5. Target org → Inbound Change Set → Deploy.

Tips:

- Deploy dependencies in correct order.
 - Test flows C validation rules after deployment.
-

6. Unmanaged vs Managed Packages

Unmanaged Package: Editable in target org, cannot upgrade.

Managed Package: Mostly protected, upgradeable, used for AppExchange.

Use Cases:

- Deepfake CRM sandbox sharing → Unmanaged.
 - Client distribution / production → Managed.
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7. ANT Migration Tool

Purpose: Command-line metadata deployment.

Steps:

1. Install Java CANT.
2. Download Salesforce ANT Migration Tool.
3. Configure build.properties (org credentials).
4. Create package.xml (metadata to deploy).
5. Retrieve: ant retrieveUnpackaged.
6. Deploy: ant deployCode.
7. Check console output → Fix errors.

Tips:

- Include all dependencies.
 - Test in Sandbox first.
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8. VS Code s SFDX

Purpose: Source-driven development C deployment.

Steps:

1. Install VS Code C Salesforce Extension Pack.
2. Install Salesforce CLI (SFDX).
3. Create SFDX project → SFDX: Create Project.
4. Authorize org: `sfdx auth:web:login -r <url> -a <alias>`.
5. Retrieve metadata: `sfdx force:source:retrieve -m CustomObject:Videos__c`.
6. Make local changes → Objects, Flows, Validation Rules, LWC.
7. Deploy changes: `sfdx force:source:deploy -p force-app -u <alias>`.
8. Verify in Salesforce → test functionality.

The screenshot shows the VS Code interface with the 'TERMINAL' tab selected. The terminal window displays a command-line session for managing Salesforce orgs. The output shows the creation of a new org named 'DeepfakeProduction' and the retrieval of metadata for the 'Videos__c' custom object. A list of orgs is shown in the status bar, indicating they are connected. The file path '\Desktop\TCS Lastmile\Deepfake CRM\.vscode\Deepfake' is visible in the status bar.

```
s\          \Desktop\TCS Lastmile\Deepfake CRM\.vscode\Deepfake
scode
d and deleted scratch orgs
PS C:\Users\          \Desktop\TCS Lastmile\Deepfake CRM\.vscode\Deepfake
Deepfake CRMs>
```

Tips:

- Always retrieve before deploy.
- Track with Git for version control.
- Test Sandbox changes before Production deployment.