

Phase 8 — Data Management & Deployment

1. Data Import Wizard

- Configuration
 - Use Data Import Wizard to seed Job_Position__c and Candidate__c with starter CSVs.
- Procedure
 - Setup → Data Import Wizard → Launch → Custom Objects → Job_Position__c then Candidate__c → Map fields → Start Import → Verify results.
- Screenshot
 - Data Import Wizard launch or mapping screen showing Job_Position__c mapping.

The screenshot shows the Salesforce Bulk Data Load interface. The left sidebar contains navigation links for Setup, Home, and Object Manager. The main content area displays the details for a Bulk Data Load job with ID 750gL00000DysPX. The job is in a 'Closed' status. The table below provides a detailed breakdown of the job's performance and configuration.

Bulk Data Load Job Detail			
Job ID	750gL00000DysPX	Job Type	Bulk V1
Submitted By	Poonam Rajak	Operation	Upsert
Start Time	9/23/2025, 9:28 AM PST	Queued Batches	0
End Time	9/23/2025, 9:28 AM PST	In Progress Batches	0
Time to Complete (hh:mm:ss)	00:00	Completed Batches	1
Object	Job Position	Failed Batches	0
External ID Field	Name	Progress	100%
Content Type	CSV	Records Processed	4
Concurrency Mode	Parallel	Records Failed	1
API Version	64.0	Retries	0

The screenshot displays the Salesforce Bulk Data Load interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar is present with the text 'Search Setup'. The left sidebar shows 'Integrations' and 'Data Import Wizard'. The main content area is titled 'Bulk Data Load' and shows 'Bulk Data Load Job Detail' for Job ID 750gL00000DzDv6, submitted by Poonam Rajak. The job is in 'Closed' status. The details table shows the following data:

Field	Value	Field	Value	Status	Closed
Job ID	750gL00000DzDv6	Job Type	Bulk V1	Total Processing Time (ms)	175
Submitted By	Poonam Rajak	Operation	Upsert	API Active Processing Time (ms)	101
Start Time	9/23/2025, 9:22 AM PST	Queued Batches	0	Apex Processing Time (ms)	3
End Time	9/23/2025, 9:22 AM PST	In Progress Batches	0	Completed Batches	1
Time to Complete (hh:mm:ss)	00:01	Failed Batches	0	Progress	100%
Object	Candidate	Records Processed	6	Records Failed	3
External ID Field	Name	Retries	0		
Content Type	CSV				
Concurrency Mode	Parallel				
API Version	64.0				

Below the job details is a 'Batches' table with the following data:

View Request	View Result	Batch ID	Start Time	End Time	Total Processing Time (ms)	API Active Processing Time (ms)	Apex Processing Time (ms)	Records Processed	Records Failed	Retry Count	State Message	Status
View Request	View Result	751gL00000BZ2aH	9/23/2025, 9:22 AM	9/23/2025, 9:22 AM	175	101	3	6	3	0		Completed

2.Data Loader

- Configuration: not required for initial seed.

3.Duplicate Rules

- Configuration

Duplicate Rule Name: Candidate_Email_Dupe on object Candidate__c using Matching Rule Candidate_Email_Exact; Actions set to Alert + Report on create and edit; rule is Active with alert text "Duplicate email found. Please review.

- Procedure

- Setup → Duplicate Rules → New Rule (Candidate__c) → Match on Email__c → Action: Alert/Block → Save and Activate.

- Screenshot
 - Duplicate Rules list showing an active rule for Candidate__c.

The screenshot shows the Salesforce Setup interface for Duplicate Rules. The left sidebar has a search bar with 'duplicate' and a list of options: Data, Duplicate Management, Duplicate Error Logs, Duplicate Rules (selected), and Matching Rules. The main content area is titled 'Duplicate Rules' and shows a table with one rule named 'Candidate_Email_Dupe'. The rule is active and has a matching rule 'Candidate_Email_Exact' mapped to it. The matching criteria is 'Candidate: Candidate_Email exact MatchBlank = FALSE'.

Rule Name	Description	Object	Record Level Security	Action On Create	Action On Edit	Alert Text	Active	Matching Rule	Matching Criteria	Conditions	Created By	Modified By
Candidate_Email_Dupe		Candidate	Enforce sharing rules	Allow	Allow	Duplicate email found. Please review	✓	Candidate_Email_Exact	Candidate: Candidate_Email exact MatchBlank = FALSE		Poonam Rajak	Poonam Rajak

4. Data Export & Backup

- Configuration
 - Weekly Export enabled for backup.
- Procedure
 - Setup → Data Export → Schedule Export → Weekly → Select key objects → Save.
- Screenshot

The screenshot shows the Salesforce Setup interface for Data Export. The left sidebar has a search bar with 'data export' and a list of options: Data, Data Export (selected). The main content area is titled 'Data Export' and shows the 'Monthly Export Service' section. It displays the next scheduled export as 'None'. Below this, there are buttons for 'Export Now' and 'Schedule Export'. The 'Schedule Export' button is highlighted. The page also shows the scheduled by user 'Poonam Rajak', the schedule date '9/23/2025', and the export file encoding 'ISO-8859-1 (General US & Western European, ISO-LATIN-1)'. At the bottom, there is a table showing the action 'download' and the file name 'WE_00Dgl.00000B0HbHUAH_1.ZIP' with a file size of '6.0K'.

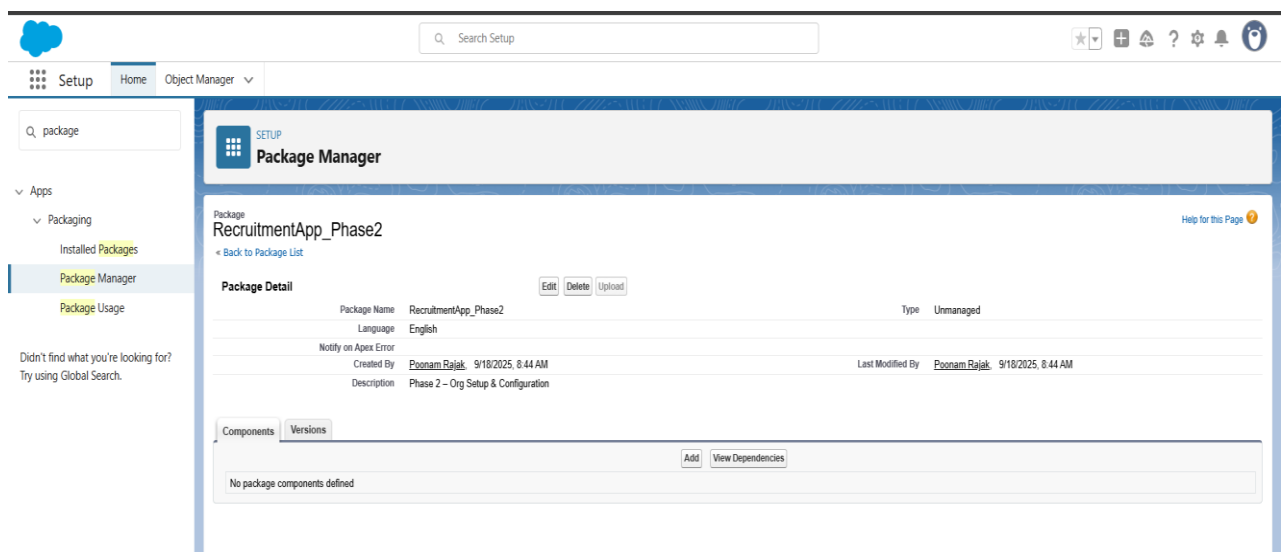
Action	File Name	File Size
download	WE_00Dgl.00000B0HbHUAH_1.ZIP	6.0K

5. Change Sets

- Configuration : not configured

6. Unmanaged vs Managed Packages

- Configuration
 - Unmanaged package for capstone handoff (source-visible, editable); managed package not required.
- Procedure
 - Setup → Package Manager → New Unmanaged Package → Add components → Upload
- Screenshot
 - Package detail page



7. ANT Migration Tool

- Configuration : not configured

8. VS Code & SFDX

- Configuration
 - SFDX project initialized; source-format under force-app/main/default; scripts for auth, pull, deploy.

- Procedure
 - `sfdx auth:web:login` → `sfdx force:source:push` (scratch) or `force:source:deploy` (sandbox) → `sfdx force:apex:test:run` for validation.
- Screenshot
 - VS Code Explorer showing the SFDX project tree with classes, lwc, triggers;

