

Title: Integrated Customer Sales and Support System

Phase 8: Data Management & Deployment

Objective

Phase 8 focuses on managing Salesforce data and deploying configurations. The goal is to ensure data integrity, prevent duplicates, and prepare the org for any future deployments if needed. Only features relevant to this project are implemented.

1. Data Import Wizard - Implemented for Accounts & Contacts

Purpose:

Used to import small to medium datasets into Salesforce objects without coding.

Steps for Project:

1. Navigate to **Setup → Data Import Wizard → Launch Wizard**.
2. Select the object to import (**Accounts or Contacts**).
3. Upload the **CSV file** containing project data.
4. Map each CSV column to the corresponding Salesforce field.
5. Click **Start Import** and wait for confirmation.

Note:

“Data Import Wizard was used to populate Accounts and Contacts. It ensures sample data is available for testing dashboards, reports, and LWCs.”

Setup Home Object Manager

Getting started

Choose data Edit mapping Start import Help for this page

Import your Data into Salesforce You can import up to 50,000 records at a time.

What kind of data are you importing? Standard objects Custom objects

Accounts and Contacts Leads Solutions

What do you want to do? Add new records Match Contact by: None Match Account by: None Trigger workflow rules and processes? None Update existing records Add new and update existing records

Where is your data located? Drag CSV file here to upload

CSV File General (1 row) Charset Encoding (1 row) Character Code (1 row) ISO-8859-1 (General US & Western European ISO-Latin1) Values Separated By Comma Outbox CSV ACT! CSV Gmail CSV

Choose data Edit mapping

Edit Field Mapping: Accounts and Contacts You file has been auto-mapped to existing Salesforce fields, but you can edit the mappings if you wish. Unmapped fields will not be imported.

Field	Mapped Salesforce Object	CSV Header	Example	Example	Example
Change	Account: Account Name	Account Name	ABC Corp	XYZ Ltd	
Change	Account: Phone, Contact: Phone	Phone	987654321	9123456789	
Change	Account: Billing City	Billing City	Hyderabad	Bangalore	
Change	Account: Industry	Industry	Technology	Finance	

Data Import Wizard

Recent Import Jobs

Status	Object	Records Created	Records Updated	Records Failed	Start Date	Processing Time (ms)
Closed	Contact	3	0	1	09-25-2025 04:49	540
Closed	Account	3	0	0	09-25-2025 04:49	345
Closed	Account	3	0	1	09-25-2025 04:45	627

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
Large imports can impact network performance. 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

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

Additional Resources

2. Data Loader Implemented for Cases

Purpose:

Used for bulk data import operations, especially when importing **related records**.

Reason for Use in Project:

- Cases were imported using **Data Loader** instead of Data Import Wizard because:
 - The dataset included related records (Cases linked to Accounts/Contacts)
 - Bulk import functionality was needed

Note:

“Cases were imported using Data Loader. This ensures all Case records are available in the org for testing dashboards, reports, and LWCs.”

The screenshot shows the 'Load Inserts' interface in Salesforce. At the top, it says 'Load Inserts' and has a close button. Below that is a 'Step 3: Mapping' section with a 'salesforce' logo. It displays system information: 'Import batch size: 200 Start at row: 0', 'Current API usage for the org: 4', and 'API Limit for the org: 15,000'. There are two buttons: 'Choose an Existing Map' and 'Create or Edit a Map'. The main area is a mapping grid:

CSV Column Header	Salesforce Object Field Name
Case Number	
Subject	Subject
Status	Status
Priority	Priority
Account Name	
Contact Email	
Description	Description

At the bottom of the mapping grid are buttons: '< Back', 'Next >', 'Finish', and 'Cancel'. A message bar at the bottom says 'Please choose an action from the menu.' The status bar at the bottom of the screen shows 'Prospectus Users' and 'Service'.

3. Duplicate Rules

Purpose:

Prevents duplicate records when importing or creating new data.

Rule Documented:

- **Rule Name:** Standard Account Duplicate Rule
- **Object:** Account
- **Actions:**
 - On Create: Allow, Alert , Report
 - On Edit: Allow, Alert , Report
- **Alert Text:** “Use one of these records?”
- **Matching Rule:** Standard Account Matching Rule
- **Field Mapping:** Confirmation Mapping Selected
- **Conditions:** None

Reason for Partial Implementation:

- Dataset is small and controlled; risk of duplicates is low
- Rule is active and available for future use if needed

The screenshot shows the Salesforce Setup interface with the following details:

- Setup** tab is selected.
- Object Manager** dropdown is open.
- Duplicate Rules** is selected under the **Data** category.
- All Duplicate Rules** view is selected.
- What Are Duplicate Rules?** section is visible.
- View:** All Duplicate Rules dropdown is set to "All Duplicate Rules".
- Table View:** A grid displays three rows of duplicate rules:
 - Standard Account Duplicate Rule**: Object is Account, Matching Rule is Standard Account Matching Rule.
 - Standard Contact Duplicate Rule**: Object is Contact, Matching Rule is Standard Contact Matching Rule.
 - Standard Lead Duplicate Rule**: Object is Lead, Matching Rule is Standard Lead Matching Rule.

4. Optional Features – Not Required for Project Scope

1. Data Export & Backup

Purpose:

- Salesforce Data Export allows administrators to create backups of org data for disaster recovery or migration purposes.
- Regular exports are recommended for production orgs with large or critical datasets.
- Backup can be scheduled (weekly/monthly) and includes all standard and custom objects.

Reason Not Implemented:

- The project dataset is **small** and purely for testing/demo purposes.
- No sensitive or critical data exists that requires a backup.
- All data is easily reproducible through CSV files or Data Import Wizard/Data Loader.

Note:

“In a real-world scenario, periodic backups would be necessary, especially when handling live organizational data, to prevent accidental loss or corruption.”

2. Change Sets

Purpose:

- Change Sets are used to deploy metadata changes (like objects, fields, workflows, and page layouts) from **sandbox to production** or between connected orgs.
- They allow structured deployment with version tracking.

Reason Not Implemented:

- The project was **developed directly in the org** (no separate sandbox).
- No production deployment or multi-org migration was required.
- Using Change Sets would have been redundant.

Note:

“Change Sets are essential in enterprise projects with multiple orgs and staged environments. For small single-org projects, direct implementation is faster and sufficient.”

3. Unmanaged / Managed Packages

Purpose:

- Packages are used to distribute Salesforce apps and components across orgs.
- **Managed Packages:** Used for apps with licensing and upgrade capabilities (e.g., AppExchange apps).
- **Unmanaged Packages:** Used to share code and configurations without licensing, often for educational/demo purposes.

Reason Not Implemented:

- No external apps or apps for distribution were required for this project.
- The project is **org-specific**; no need to share components with other orgs.

Note:

“In real-world projects, packages allow developers to reuse or sell components, and managed packages handle upgrades automatically. For internal projects, packages are optional.”

4. ANT Migration Tool

Purpose:

- ANT is a **command-line tool** for deploying Salesforce metadata between orgs.
- Supports bulk deployments, CI/CD pipelines, and version-controlled development.

Reason Not Implemented:

- The project scope is **single-org based**.
- No CI/CD setup or external org deployment was needed.
- All metadata (objects, fields, record types, LWCs) was created directly in Salesforce UI.

Note:

“ANT is commonly used in enterprise projects to automate deployments and manage metadata versioning. For small-scale, sandbox-free projects, it is not necessary.”

5. VS Code & Salesforce DX

Purpose:

- VS Code with Salesforce DX (SFDCX) enables **source-driven development**, version control integration, and command-line deployment.

- Ideal for team projects, automated testing, and CI/CD pipelines.

Reason Not Implemented:

- Project was **developed entirely in Salesforce UI**.
- No team collaboration or version control was required.
- SFDX is powerful but adds complexity for small, org-based projects.

Note:

“VS Code & SFDX are essential for professional development environments, especially with multiple developers and automated deployment pipelines. For single-developer, small-scale projects, Salesforce UI is sufficient and faster.”