PHASE 8: DATA MANAGEMENT & DEPLOYMENT

Goal: Ensure that the Institute Management System app maintains high-quality data, supports smooth data migration, and enables deployment of customizations to Salesforce orgs and repositories.

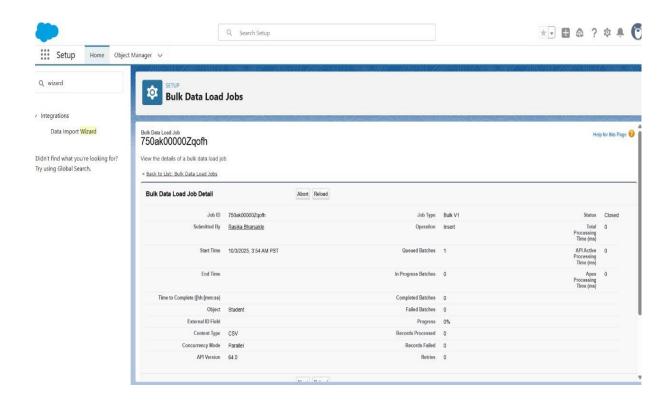
1. Data Loader (using existing CSVs)

- Used to bulk import large datasets like students, courses, and fee records.
- CSV files prepared and uploaded for initial data migration.
- Supports updates and exports for ongoing data management.
- These CSVs serve as the data source for importing records into Salesforce.

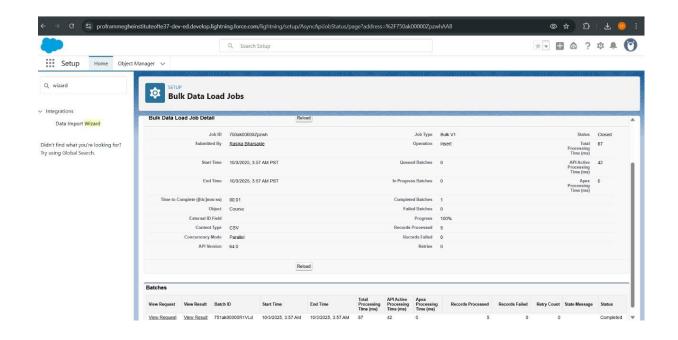
2. Data Import Wizard (Upload From Data Wizard)

- Data Import Wizard (Upload Form Data Wizard)
- Used for smaller or simpler imports (like uploading student inquiry forms).
- User-friendly interface for admins with step-by-step mapping.
- Best suited for limited records and quick data uploads.

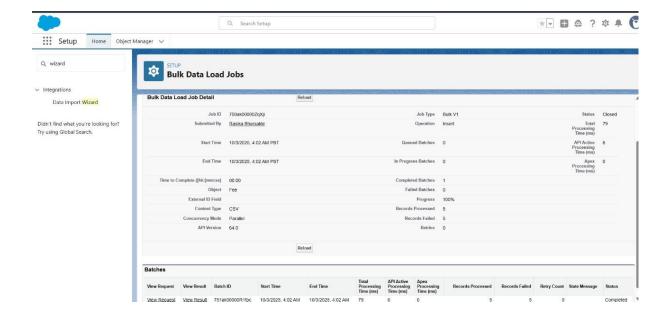
> For Object :Student



▶ For Object :Course



> For Object :Student



3. Duplicate Rules

- Configured to prevent duplicate records (e.g., based on Student Email, Course Code).
- Rules set to either alert users or block duplicate creation.
- Maintains clean, accurate, and consistent records for reliable reports.

For Student: *- • • • • • Q Search Setup Setup Home Object Manager V Q duplic d Duplicate Rules ∨ Data Duplicate Management Help for this Page Student Duplicate Rule Student Duplicate Rule Duplicate Error Logs Duplicate Rules Duplicate Rule Detail Edit Delete Clone Activate Rule Name Student Duplicate Rule Description Object Student Record Level Security Enforce sharing rules Action On Create Allow Matching Rules Order 1 of 1 [Reorder] Didn't find what you're looking for? Try using Global Search. Operations On Create ✓ Alert ✓ Report Operations On Edit Alert Report Action On Edit Allow Alert Text Use one of these records? Matching Ciferia (Student: Email EXACT MalchBlank = TRUE) AND (Student: Name EXACT MalchBlank = TRUE) Matching Rule Student Duplicate Rule matching rule Mapped Conditions Cne Student Duplicate Rule : Student Duplicate Rule -- Salesforce -- Developer Edition | Edit | Delete | Clone | Activate | Modified By Rasika Bharsakle, 10/3/2025, 4:05 AM

For Fee:

