

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**

Setup

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Q wizard

Integrations

Data Import Wizard

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Bulk Data Load Jobs

Bulk Data Load Job

750ak00000Zqofh

Help for this Page

View the details of a bulk data load job.

Back to List: Bulk Data Load Jobs

Bulk Data Load Job Detail

Abort

Reload

Job ID	750ak00000Zqofh	Job Type	Bulk V1	Status	Closed
Submitted By	Rasika Bharsable	Operation	Insert	Total Processing Time (ms)	0
Start Time	10/3/2025, 3:54 AM PST	Queued Batches	1	API Active Processing Time (ms)	0
End Time		In Progress Batches	0	Apex Processing Time (ms)	0
Time to Complete (hh:mm:ss)		Completed Batches	0		
Object	Student	Failed Batches	0		
External ID Field		Progress	0%		
Content Type	CSV	Records Processed	0		
Concurrency Mode	Parallel	Records Failed	0		
API Version	64.0	Retries	0		

➤ For Object :Course

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Bulk Data Load Jobs

Bulk Data Load Job

750ak00000Zpzwh

Help for this Page

View the details of a bulk data load job.

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Bulk Data Load Job Detail

Reload

Job ID	750ak00000Zpzwh	Job Type	Bulk V1	Status	Closed
Submitted By	Rasika Bharsable	Operation	Insert	Total Processing Time (ms)	67
Start Time	10/3/2025, 3:57 AM PST	Queued Batches	0	API Active Processing Time (ms)	42
End Time	10/3/2025, 3:57 AM PST	In Progress Batches	0	Apex Processing Time (ms)	0
Time to Complete (hh:mm:ss)	00:01	Completed Batches	1		
Object	Course	Failed Batches	0		
External ID Field		Progress	100%		
Content Type	CSV	Records Processed	5		
Concurrency Mode	Parallel	Records Failed	0		
API Version	64.0	Retries	0		

Batches

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	751ak00000R1VLd	10/3/2025, 3:57 AM	10/3/2025, 3:57 AM	67	42	0	5	0	0		Completed

➤ For Object :Student

Bulk Data Load Job Detail													
Job ID	750ak000002qXji				Job Type	Bulk V1		Status	Closed				
Submitted By	Ranika Bhansakle				Operation	Insert		Total Processing Time (ms)	79				
Start Time	10/3/2025, 4:02 AM PST				Queued Batches	0		API Active Processing Time (ms)	6				
End Time	10/3/2025, 4:02 AM PST				In Progress Batches	0		Apex Processing Time (ms)	0				
Time to Complete ((hh:mm:ss))	00:00				Completed Batches	1		Records Processed	5				
Object	Fee				Failed Batches	0		Records Failed	5				
External ID Field					Progress	100%		Retry Count	0				
Content Type	CSV							State Message	Completed				
Concurrency Mode	Parallel												
API Version	64.0				Retries	0							
Batches													
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	751ak00000R1bdc	10/3/2025, 4:02 AM	10/3/2025, 4:02 AM	79	6	0	5	5	0		Completed	

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 duplic

✓ Data

Duplicate Management

Duplicate Error Logs

Duplicate Rules

Matching Rules

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SETUP

Duplicate Rules

Student Duplicate Rule

Student Duplicate Rule

Help for this Page

Duplicate Rule Detail

Edit

Delete

Clone

Activate

Order 1 of 1 [Reorder]

Rule Name

Student Duplicate Rule

Description

Student

Record-Level Security

Enforce sharing rules

Action On Create

Allow

Operations On Create

☒ Alert

☒ Report

Action On Edit

Allow

Operations On Edit

☐ Alert

☐ Report

Alert Text

Use one of these records?

Active

☒

Matching Rule

☒ Student Duplicate Rule matching rule

☒ Mapped

Matching Criteria

{(student: Email EXACT MatchBlank = TRUE) AND (student: Name EXACT MatchBlank = TRUE)}

Conditions

Student Duplicate Rule : Student Duplicate Rule ~ Salesforce - Developer Edition

Modified By

Rasika Bharsakle

10/3/2025, 4:05 AM

Edit

Delete

Clone

Activate

For Fee:

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✓ Data

Duplicate Management

Duplicate Error Logs

Duplicate Rules

Matching Rules

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Duplicate Rules

Fee Duplicate Rule

fee duplicate rule

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Rule Name

fee duplicate rule

Description

Fee

Record-Level Security

Enforce sharing rules

Action On Create

Block

Operations On Create

☐ Alert

☐ Report

Action On Edit

Block

Operations On Edit

☐ Alert

☐ Report

Alert Text

Use one of these records?

Active

☐

Matching Rule

☒ fee duplicate rule matching rule

☒ Mapped

Matching Criteria

{(Fee: NAME EXACT MatchBlank = FALSE) AND (Fee: STUDENT EXACT MatchBlank = FALSE)}

Conditions

Created By

Rasika Bharsakle

10/3/2025, 4:08 AM

Modified By

Rasika Bharsakle

10/3/2025, 4:08 AM

Edit

Delete

Clone

Activate

