

# Employee Onboarding & Asset Management CRM Project

## Phase 8: Data Management & Deployment

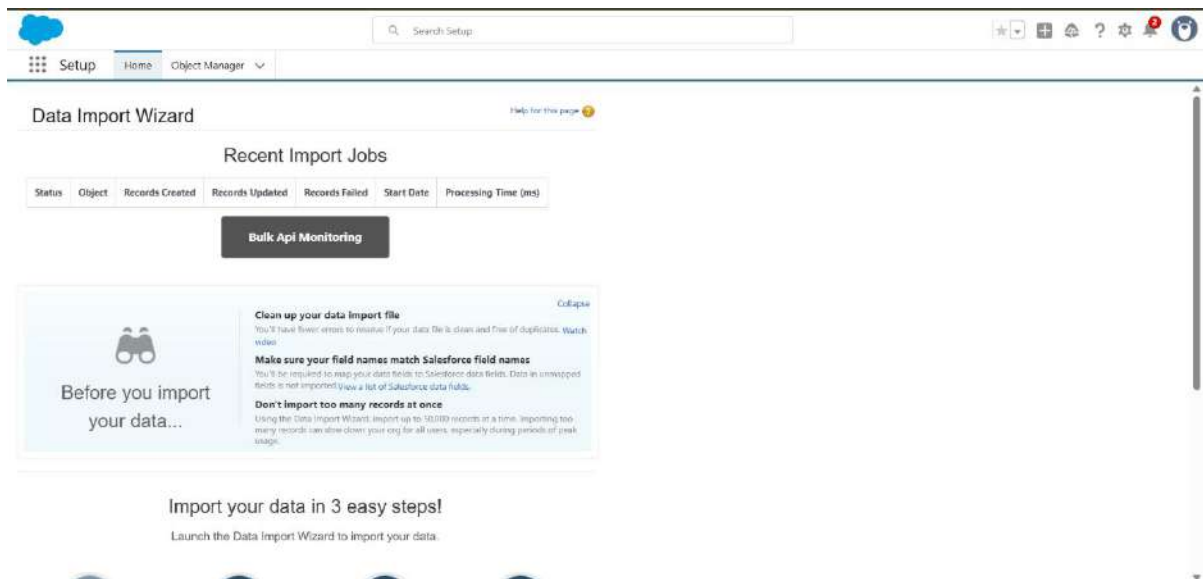
### Phase 8: Data Management & Deployment (Simplified)

#### ◆ Objective

Ensure employee and asset data is **accurate, secure, and properly deployed** to Production.

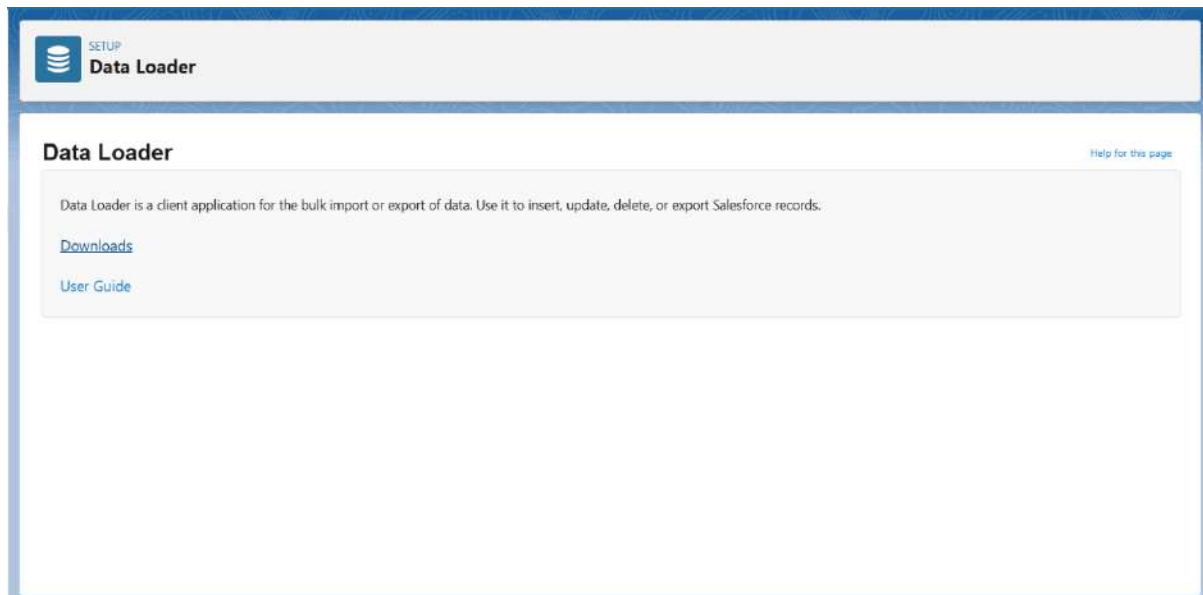
#### 1. Data Import Wizard

- **Purpose:** Import small to medium records like new employees or assets.
- **Steps:**
  1. Setup → Data → Data Import Wizard.
  2. Select object → Map CSV fields → Import.
- **Example:** Import 50 new employees with onboarding tasks.



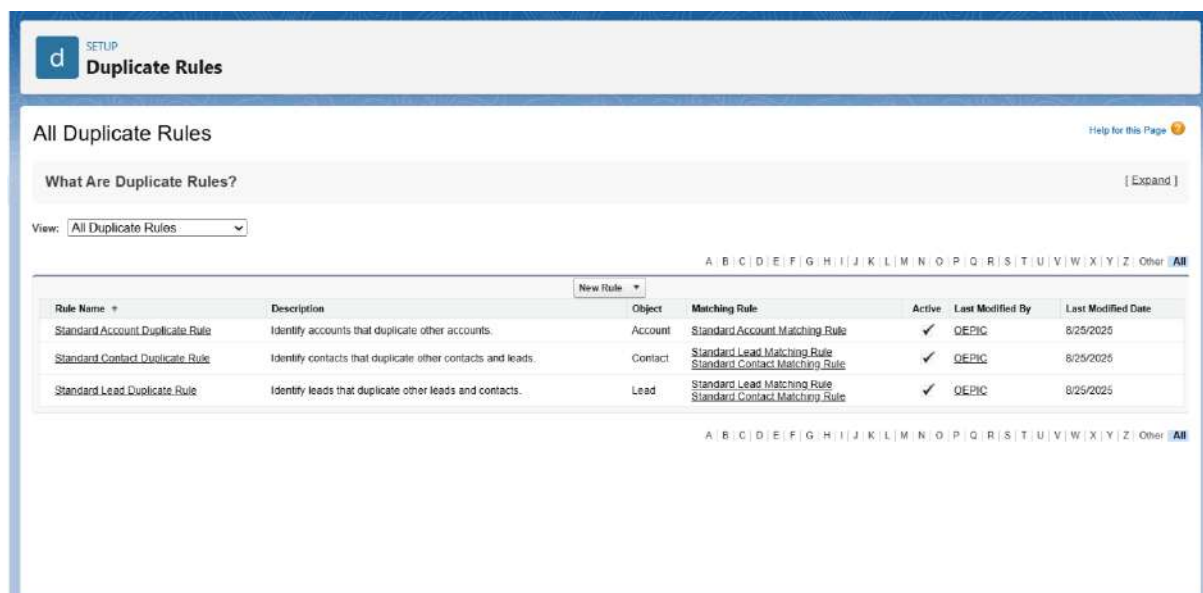
#### 2. Data Loader

- **Purpose:** Import large volumes of records (>10,000), like historical asset data.
- **Steps:**
  1. Download Salesforce Data Loader → Login.
  2. Insert/Update/Upsert → Map fields → Execute → Check success/error files.



### 3. Duplicate Rules

- **Purpose:** Prevent duplicate employee or asset records.
- **Steps:**
  1. Setup → Duplicate Management → Duplicate Rules.
  2. Object: Employee\_\_c → Match on Email & Employee ID → Block/Alert.



### 4. Change Sets

- **Purpose:** Deploy **configuration changes** (fields, flows, validation rules) from Sandbox → Production.
- **Steps:**

1. Setup → Deploy → Outbound Change Sets → Add Components.
  2. Upload → Production Admin approves → Deploy.
- **Example:** Deploy “Return Asset” flow and custom onboarding fields.
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## 5. VS Code & Salesforce DX (Optional for CI/CD)

- **Purpose:** For version-controlled deployment (only if your team uses source control).
  - **Steps:**
    1. VS Code + Salesforce Extensions → Create SFDX project.
    2. Pull metadata from Sandbox → Test → Deploy to Production.
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### **Outcome**

- Data imported accurately.
- Duplicate records prevented.
- Sandbox → Production deployment completed securely.
- Deployment process is reliable.