

Phase 8: Data Management & Deployment – Minimal Must-Have

Goal: Manage data and deploy project changes effectively with only the essential steps.

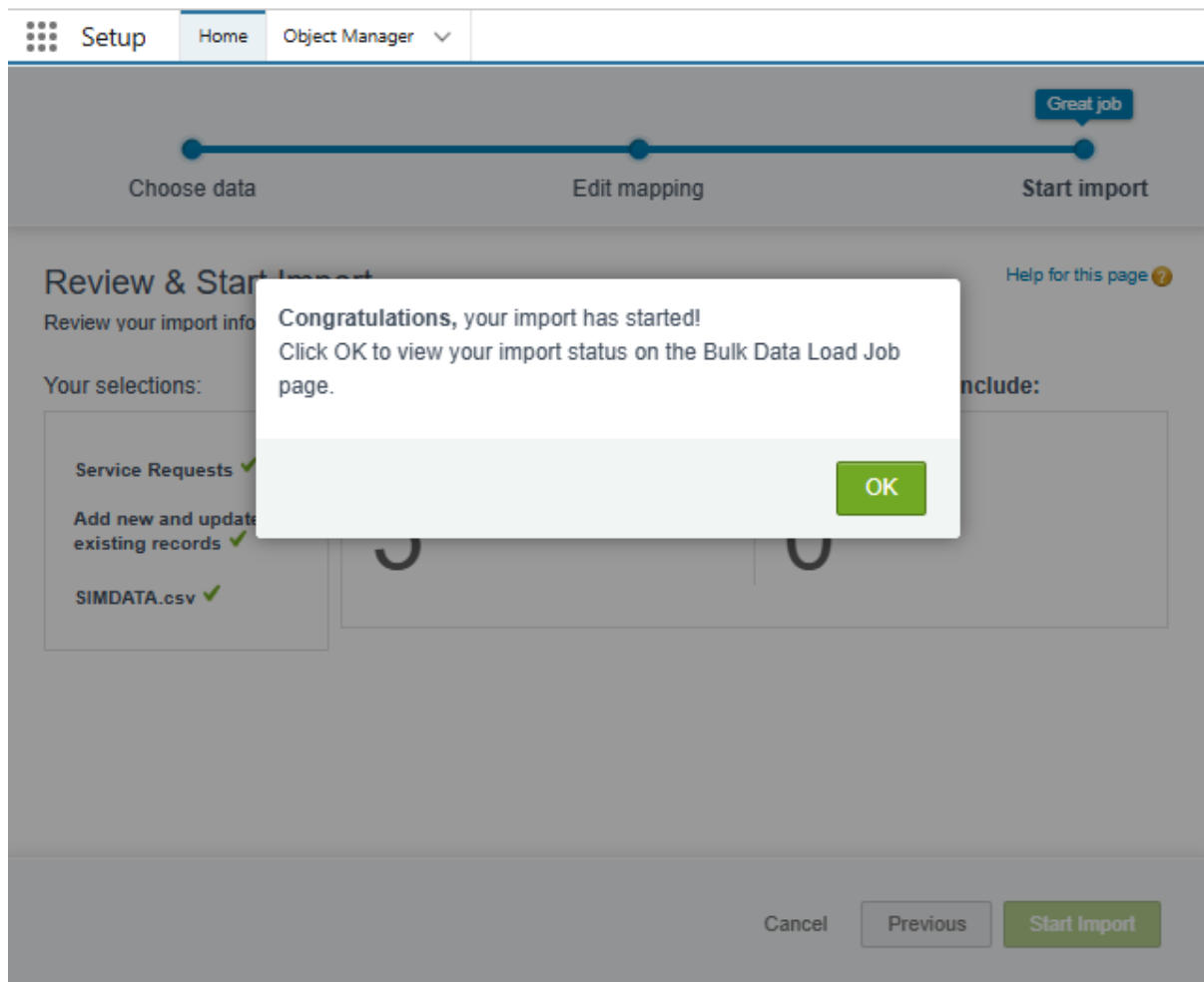
1. Data Import Wizard

Purpose: Quickly import records into Salesforce.

Steps:

1. **Setup** → **Data** → **Data Import Wizard**
2. Choose object: **Customer__c, Service_Request__c, Plan__c**
3. Upload CSV → Map fields → Start Import
4. Review import results

Impact: Populate initial data for testing or demonstration.



2. Duplicate Rules

Purpose: Prevent duplicate records (important for Customer data).

Steps:

1. **Setup → Duplicate Management → Duplicate Rules → New Rule**
2. Select object: **Customer__c**
3. Matching Rule: **Email__c + SIM_Number__c**
4. Action: **Alert / Block duplicates** → Activate

Impact: Ensures data integrity and avoids duplicate entries.

Matching rules:

The screenshot displays the Salesforce Duplicate Management interface. On the left, a sidebar contains navigation links: 'Duplicate', 'Data', 'Duplicate Management' (checked), 'Duplicate Error Logs', 'Duplicate Rules', and 'Matching Rules'. The main content area is titled 'Matching Rules' and shows a specific rule named 'Customer Email and SIM'. The rule is currently 'Inactive'. The 'Matching Criteria' field contains a complex formula: (Customer: Email EXACT MatchBlank = TRUE) AND (Customer: Phone EXACT MatchBlank = FALSE) AND (Customer: Status EXACT MatchBlank = FALSE) AND (Customer: SIM_Number EXACT MatchBlank = FALSE) AND (Customer: Region EXACT MatchBlank = FALSE). The rule was created by 'savitri koparde' on 9/26/2025 at 11:37 AM and was last modified by the same user at the same time.

Matching Rule Detail		Edit	Delete	Clone	Activate
Object	Customer				
Rule Name	Customer Email and SIM				
Unique Name	Customer_Email_and_SIM				
Description					
Matching Criteria	(Customer: Email EXACT MatchBlank = TRUE) AND (Customer: Phone EXACT MatchBlank = FALSE) AND (Customer: Status EXACT MatchBlank = FALSE) AND (Customer: SIM_Number EXACT MatchBlank = FALSE) AND (Customer: Region EXACT MatchBlank = FALSE)				
Status	Inactive				
Created By	savitri koparde, 9/26/2025, 11:37 AM				
Modified By	savitri koparde, 9/26/2025, 11:37 AM				

Duplicate rules:

The screenshot shows the 'Duplicate Rules' setup page in Salesforce. The page title is 'Duplicate Rules' with a 'SETUP' link. Below the title, it says 'Edit Duplicate Rule' and 'Customer Email and SIM Match'. There are buttons for 'Save', 'Save & New', and 'Cancel'. The page is divided into three main sections: 'Rule Details', 'Actions', and 'Matching Rules'. In the 'Rule Details' section, the 'Rule Name' is 'Customer Email and SIM M', the 'Description' is 'Blocks new records when Customer Email and SIM Number match.', the 'Object' is 'Customer', and 'Record-Level Security' is set to 'Enforce sharing rules'. The 'Actions' section shows 'Action On Create' as 'Block', 'Action On Edit' as 'Allow' with 'Alert' checked, and an 'Alert Text' of 'A Customer with the same Email and SIM Number already exists.'. The 'Matching Rules' section shows 'Compare Customers With' as 'Customers', 'Matching Rule' as 'Customer Email and SIM Match matching rule', and 'Matching Criteria' as '(Customer: Email EXACT MatchBlank = TRUE) AND (Customer: SIM Number EXACT MatchBlank = FALSE)'.

SETUP
Duplicate Rules

Edit Duplicate Rule
Customer Email and SIM Match

Help for this Page ?

Duplicate Rule Edit Save Save & New Cancel

Rule Details ⓘ Required Information

Rule Name: Customer Email and SIM M
Description: Blocks new records when Customer Email and SIM Number match.
Object: Customer
Record-Level Security: ☒ Enforce sharing rules ⓘ ☐ Bypass sharing rules

Actions

Specify what happens when a user tries to save a duplicate record.

Action On Create: Block
Action On Edit: Allow ⓘ Alert ☒ Report ☐
Alert Text: A Customer with the same Email and SIM Number already exists. ⓘ

Matching Rules

Define how duplicate records are identified.

Compare Customers With: Customers
Matching Rule: Customer Email and SIM Match matching rule
Matching Criteria: (Customer: Email EXACT MatchBlank = TRUE) AND (Customer: SIM Number EXACT MatchBlank = FALSE)

3. Change Sets

Purpose: Deploy metadata (objects, flows, triggers) from Sandbox to Production.

Steps:

1. Setup → Outbound Change Sets → New Change Set
2. Add components: Custom Objects, Flows, Apex Classes
3. Upload to target org → Validate & Deploy

Impact: Moves Salesforce configurations safely between environments.

4. VS Code & Salesforce CLI (SFDX)

Purpose: Optional but helpful for deployment and version control.

Steps:

1. Install VS Code + Salesforce Extension Pack
2. Authenticate org:

```
sfdx force:auth:web:login -a DevOrg
```

3. Deploy metadata:

```
sfdx force:source:deploy -p force-app
```

Impact: Provides developer-friendly deployment workflow.