

## Phase 8: Data Management & Deployment

**Goal:** Manage leave data and move configuration changes safely between environments.

### 1. Data Import Wizard

- Import **demo employee and leave request records** to test the app.

The screenshot shows the Salesforce Data Import Wizard interface in a web browser. The browser tabs include 'Project phase explanation', 'Data Import Wizard | Salesforce', 'Recently Viewed | Leave Applic...', '(2) WhatsApp', and 'leave tracker app csv file for m...'. The address bar shows the URL: 'orgfarm-be16331ec1-dev-ed.develop.lightning.force.com/lightning/setup/DataManagementDataImporter/home'. The interface has a top navigation bar with 'Setup', 'Home', and 'Object Manager' tabs. Below this is a progress bar with three steps: 'Choose data', 'Edit mapping', and 'Start import'. The 'Choose data' step is currently active. The main content area is titled 'Import your Data into Salesforce' and includes a sub-header 'You can import up to 50,000 records at a time.' There are three columns of options: 1. 'What kind of data are you importing?' with tabs for 'Standard objects' and 'Custom objects'. Under 'Standard objects', 'Leave Requests' is selected with a green checkmark. Other options include 'Leave Applications', 'Mentors', and 'Students'. 2. 'What do you want to do?' with options 'Add new records' and 'Update existing records' (selected with a green checkmark). Below this, there are dropdowns for 'Match by:' (set to 'Name'), 'Which User field in your file designates record owners?' (set to '-None-'), and 'Which User field in your file do you want to match against to set the User lookup field?' (set to '-None-'). 3. 'Where is your data located?' with a section for 'Drag CSV file here to upload'. Below this, there are settings for 'File' (a 'Choose File' button), 'Character Code' (set to 'ISO-8859-1 (General US & Western European, ISO-LATIN-1)'), and 'Values Separated By' (set to 'Comma'). At the bottom right of the wizard are 'Cancel', 'Previous', and 'Next' buttons. The bottom of the screen shows a Windows taskbar with a search bar, various application icons, and system status information including '33°C Partly sunny', 'ENG IN', and the date '23-09-2025'.

### 2. Data Loader

- Import **bulk leave requests or employee data** if needed.

### 3. Duplicate Rules

- Prevent **duplicate employee or leave request entries**.

orgfarm-be16331ec1-dev-ed.develop.lightning.force.com/lightning/setup/DuplicateRules/page?address=%2F0BmgL0000044ruff%3Fsetupid%3DDuplicateRules

Setup Home Object Manager

Q Search Setup

Q dupli

▼ Data

▼ Duplicate Management

Duplicate Error Logs

Duplicate Rules

Matching Rules

Didn't find what you're looking for? Try using Global Search.

### SETUP Duplicate Rules

Leave Application Duplicate Rule

Help for this Page

**Duplicate Rule Detail** Edit Delete Clone Activate

Rule Name Leave Application Duplicate Rule Order 1 of 1 [Reorder]

Description

Object Leave Application

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 Duplicate leave request detected. Please review existing leave before submitting.

Active ☐

Matching Rule [Leave Application Match Rule](#) ☒ Mapped Matching Criteria (Leave Application: Name EXACT MatchBlank = FALSE) AND (Leave Application: Leave\_Type EXACT MatchBlank = FALSE)

Conditions (Leave Application: Status EQUALS Submitted) AND (Leave Application: Leave Type EQUALS Sick,Casual,Paid,Unpaid)

Created By SHASHANK GUPTA, 9/23/2025, 3:13 AM Modified By SHASHANK GUPTA, 9/23/2025, 3:13 AM

Edit Delete Clone Activate

orgfarm-be16331ec1-dev-ed.develop.lightning.force.com/lightning/setup/MatchingRules/page?address=%2F0JDgL0000048zYg

Setup Home Object Manager

Q Search Setup

Q match

▼ Data

▼ Duplicate Management

Duplicate Error Logs

Duplicate Rules

Matching Rules

Didn't find what you're looking for? Try using Global Search.

### SETUP Matching Rules

Matching Rule

Help for this Page

**Matching Rule Detail** Edit Delete Clone Activate

Object Leave Application

Rule Name Leave Application Match Rule

Unique Name Leave\_Application\_Match\_Rule

Description

Matching Criteria (Leave Application: Name EXACT MatchBlank = FALSE) AND (Leave Application: Leave\_Type EXACT MatchBlank = FALSE)

Status Inactive

Created By SHASHANK GUPTA, 9/23/2025, 2:59 AM Modified By SHASHANK GUPTA, 9/23/2025, 2:59 AM

4. **Data Export & Backup**
  - Weekly backup of **Leave Tracker App** data (employees, leave history).
5. **Change Sets**
  - Move configurations (objects, fields, layouts, flows) from **Sandbox** → **Production**.
6. **Unmanaged vs Managed Packages**

- Managed only if you want to **publish the Leave Tracker App** on AppExchange.
- 7. **ANT Migration Tool**
  - Optional command-line deployment for **bulk metadata changes**.
- 8. **VS Code & SFDX**
  - Developer-friendly deployment using **Salesforce DX** for version control and metadata management.