Phase 8 – Data Management & Deployment

This phase focused on understanding how Salesforce manages, protects, and moves data between environments. It covered importing data into Salesforce, avoiding duplicate records, backing up information, and deploying customizations from one org to another. These activities are essential for keeping data accurate, secure, and consistent in a production system.

---

1. **Data Import Wizard**

Definition:
The Data Import Wizard is a built-in Salesforce tool that lets you upload and insert data records into Salesforce without installing any extra software. It is ideal for small to medium-sized data loads (up to 50,000 records).
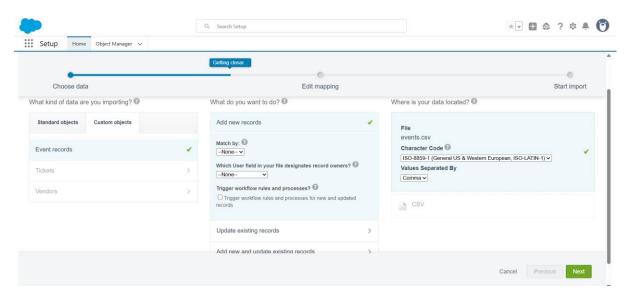
What we did:

- Navigated to **Setup → Data Import Wizard**.

- Selected **Custom Objects** such as *Event*, *Ticket*, and *Vendor*.

- Chose **"Add New Records"** to load initial data sets.

- Uploaded our prepared CSV files containing Event, Ticket, and Vendor details.

- Used the field-mapping screen to match CSV columns to Salesforce fields (e.g., Event Name → Name field).

- Enabled "Trigger workflow rules and processes" so that automations run after import.

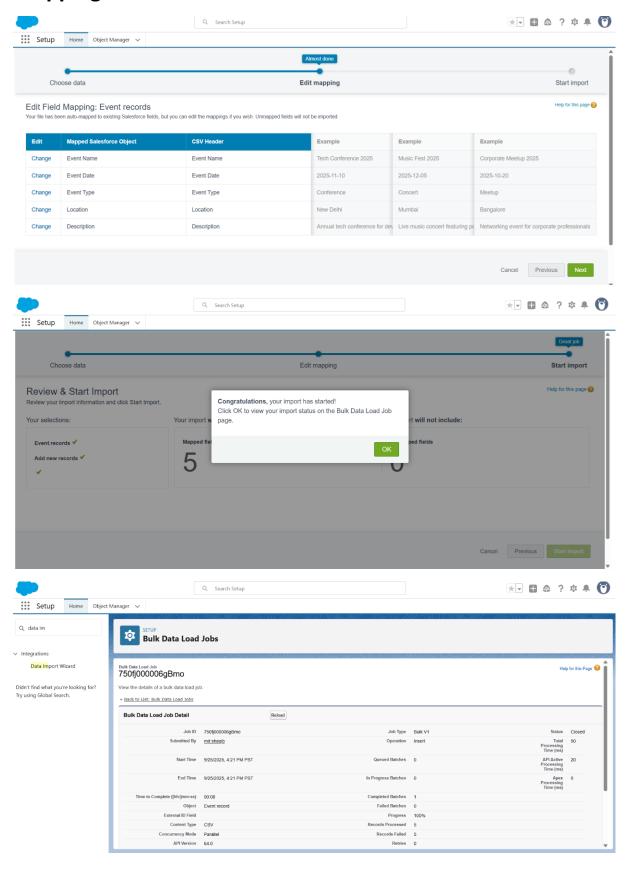- Verified that imported records appeared correctly on their respective object tabs.

Benefit:
This step ensures data can be quickly brought into Salesforce from spreadsheets or other systems, reducing manual entry and saving time.

ScreenShot :

Mapping :

Edit Field Mapping: Event records

Your file has been auto-mapped to existing Salesforce fields, but you can edit the mappings if you wish. Unmapped fields will not be imported.

Edit	Mapped Salesforce Object	CSV Header	Example	Example	Example
Change	Event Name	Event Name	Tech Conference 2025	Music Fest 2025	Corporate Meetup 2025
Change	Event Date	Event Date	2025-11-10	2025-12-05	2025-10-20
Change	Event Type	Event Type	Conference	Concert	Meetup
Change	Location	Location	New Delhi	Mumbai	Bangalore
Change	Description	Description	Annual tech conference for dev	Live music concert featuring po	Networking event for corporate professionals

Review & Start Import

Review your import information and click Start Import.

Congratulations, your import has started!
Click OK to view your import status on the Bulk Data Load Job page.

Bulk Data Load Jobs

Bulk Data Load Job
750fj000006gBmo

View the details of a bulk data load job.

« Back to List: Bulk Data Load Jobs

Bulk Data Load Job Detail

Job ID	750fj000006gBmo	Job Type	Bulk V1	Status	Closed
Submitted By	md shaqib	Operation	Insert	Total Processing Time (ms)	50
Start Time	9/25/2025, 4:21 PM PST	Queued Batches	0	API Active Processing Time (ms)	20
End Time	9/25/2025, 4:21 PM PST	In Progress Batches	0	Apex Processing Time (ms)	0
Time to Complete ([hh:]mm:ss)	00:08	Completed Batches	1		
Object	Event record	Failed Batches	0		
External ID Field		Progress	100%		
Content Type	CSV	Records Processed	5		
Concurrency Mode	Parallel	Records Failed	5		
API Version	64.0	Retries	0		

2. Duplicate Rules

Definition:
Duplicate Rules prevent users from creating or editing records that would result in duplicates. They work together with Matching Rules, which define the criteria used to identify duplicates.

What we did:

- Went to **Setup → Duplicate Rules → New Rule**.

- Object: **Event Record**.

- Rule Name: *Event Duplicate Rule*.

- Description: *Used for removing duplicate entities*.

- **Record-Level Security:** Selected "Enforce sharing rules" so only permitted records are checked.

- **Actions:**

  o On Create: **Alert & Report** (shows a warning when a duplicate is about to be created and logs it in a report).

  o On Edit: **Alert & Report**.

  o Alert Text: "Use one of these records?" to guide the user.

- Selected a matching rule to compare Event records based on fields like Name or Date.

- Activated the rule.

Benefit:
Improves data quality and user trust by preventing duplicate event records.

Screen shot:

3. Data Export & Backup

Definition:
Salesforce offers a built-in Data Export feature that allows administrators to download all org data for backup or migration purposes. This is essential for disaster recovery and auditing.
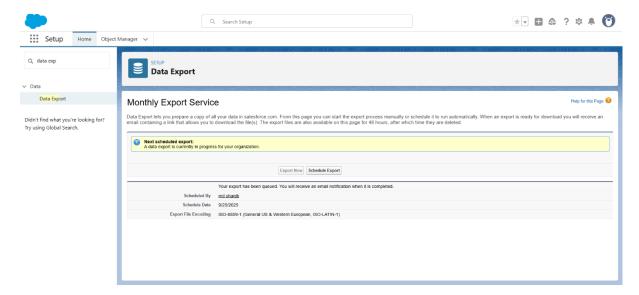
What we did:

- Navigated to **Setup → Data Export**.

- Scheduled a weekly export including Event, Ticket, and Vendor objects.

- Chose "Include Attachments and Files" to back up all related documents.

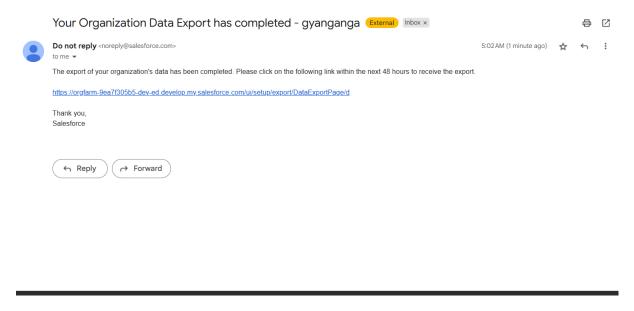- Downloaded the .zip files provided by Salesforce for safe storage.

Benefit:
Provides an offline backup of critical business data, ensuring it can be restored or analyzed outside Salesforce if needed.

ScreenShot :

Export outcome screenshot :

---

4 . Change Sets (Deployment)

Definition:
Change Sets are a Salesforce feature for migrating customizations (metadata) from one Salesforce org to another (for example, from a sandbox to production). This allows teams to test changes before going live.

What we did:

- Went to **Setup → Outbound Change Sets**.

- Created a new change set named *EventManagement_ChangeSet*.

- Added components such as custom objects, fields, validation rules, and automation built in earlier phases.

- Uploaded the change set to the target org.

- Verified and deployed the change set in the destination org.

Benefit:
Allows controlled, repeatable deployment of customizations without manual re-creation, reducing errors and downtime.