

Phase 8: Data Management & Deployment

1. Data Import Wizard

Purpose:

Easily import standard and custom object records into Salesforce.

Steps:

1. Go to Setup → Data → Data Import Wizard.
2. Click Launch Wizard.
3. Choose the object to import (e.g., CarbonFootprint__c, Subscription__c).
4. Select CSV file with your data.
5. Map CSV columns to Salesforce fields.
6. Optional: Choose Trigger workflow rules and processes if needed.
7. Click Start Import.
8. Monitor the import status via the Bulk Data Load Jobs link.

Outcome:

All initial data (subscriptions, carbon footprints, users) imported into Salesforce.


Data Import Wizard

[Help for this page](#)

Recent Import Jobs

Status	Object	Records Created	Records Updated	Records Failed	Start Date	Processing Time (ms)
Closed	Subscription	0	0	5	09-27-2025 04:53	82
Closed	Carbon Footprint	0	0	5	09-27-2025 04:51	40

Bulk Api Monitoring



Before you import your data...

Clean up your data import file

You'll have fewer errors to resolve if your data file is clean and free of duplicates. [Watch video](#)

Make sure your field names match Salesforce field names

You'll be required to map your data fields to Salesforce data fields. Data in unmapped fields is not imported. [View a list of Salesforce data fields.](#)

Don't import too many records at once

Using the Data Import Wizard, import up to 50,000 records at a time. Importing too many records can slow down your org for all users, especially during periods of peak usage.

[Collapse](#)

Import your data in 3 easy steps!

Launch the Data Import Wizard to import your data.

2. Data Loader

Purpose:

Bulk import/export data, or perform update/delete operations not possible with Data Import Wizard.

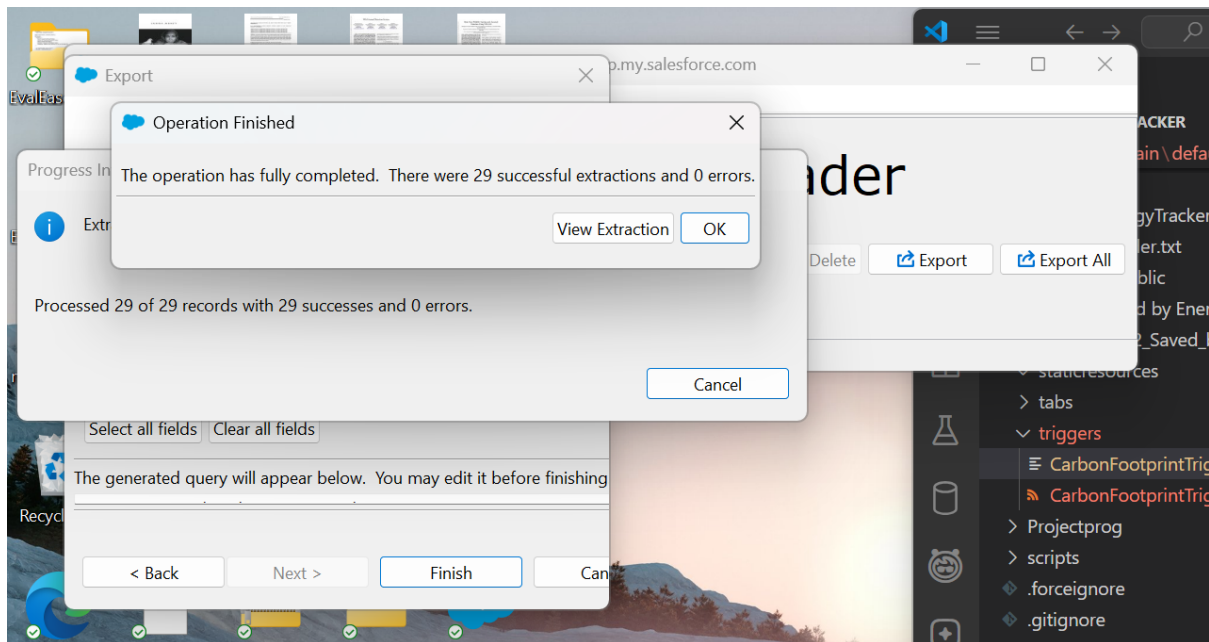
Steps:

1. Download Data Loader: Go to Setup → Data Loader → Download.
2. Install and open Data Loader on your machine.
3. Login with Salesforce credentials (use Security Token if needed).
4. Select CSV file.
5. Map CSV columns to Salesforce fields.
6. Click Finish to start the operation.
7. Check the success.csv and error.csv files for results.

Outcome:

Bulk data management done efficiently.

CSV Viewer				
Row Number	CO2_Saved_c	CreatedById	Energy_Type_c	Entry_Date_c
1	70.0	005gK000005CSQfQAO	Wind	2025-09-21T19:00:00.000Z
2	50.0	005gK000005CSQfQAO	Solar	2025-09-21T19:00:00.000Z
3	30.0	005gK000005CSQfQAO		2025-09-21T19:00:00.000Z
4	40.0	005gK000005CSQfQAO	Wind	2025-09-22T18:15:00.000Z
5	70.0	005gK000005CSQfQAO	Solar	2025-09-16T18:15:00.000Z
6	80.0	005gK000005CSQfQAO		2025-09-24T19:00:00.000Z
7	500.0	005gK000005CSQfQAO	Solar	2025-09-22T19:00:00.000Z
8	100.0	005gK000005CSQfQAO	Solar	2025-09-24T19:00:00.000Z
9	300.0	005gK000005CSQfQAO	Solar	2025-09-16T19:00:00.000Z
10	40.0	005gK000005CSQfQAO	Solar	2025-09-23T19:00:00.000Z
11	90.0	005gK000005CSQfQAO	Solar	2025-09-17T19:00:00.000Z
12	60.0	005gK000005CSQfQAO	Solar	2025-09-25T19:00:00.000Z
13	800.0	005gK000005CSQfQAO	Solar	2025-09-17T19:00:00.000Z
14	30.0	005gK000005CSQfQAO	Solar	2025-09-24T19:00:00.000Z
15	90.0	005gK000005CSQfQAO	Solar	2025-09-26T19:00:00.000Z
16	80.0	005gK000005CSQfQAO	Solar	2025-09-25T19:00:00.000Z
17	30.0	005gK000005CSQfQAO	Wind	2025-09-26T19:00:00.000Z
18	40.0	005gK000005CSQfQAO	Solar	2025-09-25T19:00:00.000Z
19	70.0	005gK000005CSQfQAO	Solar	2025-09-19T19:00:00.000Z
20	70.0	005gK000005CSQfQAO	Solar	2025-09-25T19:00:00.000Z
21	80.0	005gK000005CSQfQAO	Solar	2025-09-25T19:00:00.000Z
22	90.0	005gK000005CSQfQAO	Solar	2025-09-25T19:00:00.000Z
23	80.0	005gK000005CSQfQAO	Solar	2025-09-26T19:00:00.000Z
24	80.0	005gK000005CSQfQAO	Solar	2025-09-18T19:00:00.000Z
25	80.0	005gK000005CSQfQAO	Wind	2025-09-26T19:00:00.000Z
26	75.0	005gK000005CSQfQAO		2025-09-26T19:00:00.000Z



3. Duplicate Rules

Purpose:

Prevent duplicate records in key objects like Subscription__c or CarbonFootprint__c.

Steps:

1. Go to **Setup** → **Duplicate Management** → **Duplicate Rules**.
2. Click **New Rule**.
3. Select object (e.g., Subscription__c).
4. Define **matching rules** (e.g., match on Email, User ID).
5. Set actions:
 - **Alert** user when duplicate is found.
 - **Block** creation if necessary.
6. Save and **Activate** the rule.

Outcome:

System prevents duplicate subscriptions or footprint entries.

4. Data Export & Backup

Purpose:

Regularly backup org data to prevent loss.

Steps:

1. Go to **Setup** → **Data** → **Data Export**.
2. Click **Export Now** or schedule a **weekly/monthly export**.
3. Select objects to export (e.g., CarbonFootprint__c, Subscription__c).
4. Choose file format (CSV recommended).
5. Click **Start Export**.
6. Download the ZIP file containing CSVs for backup.

Outcome:

All Salesforce data is safely backed up.

5. Unmanaged vs Managed Packages

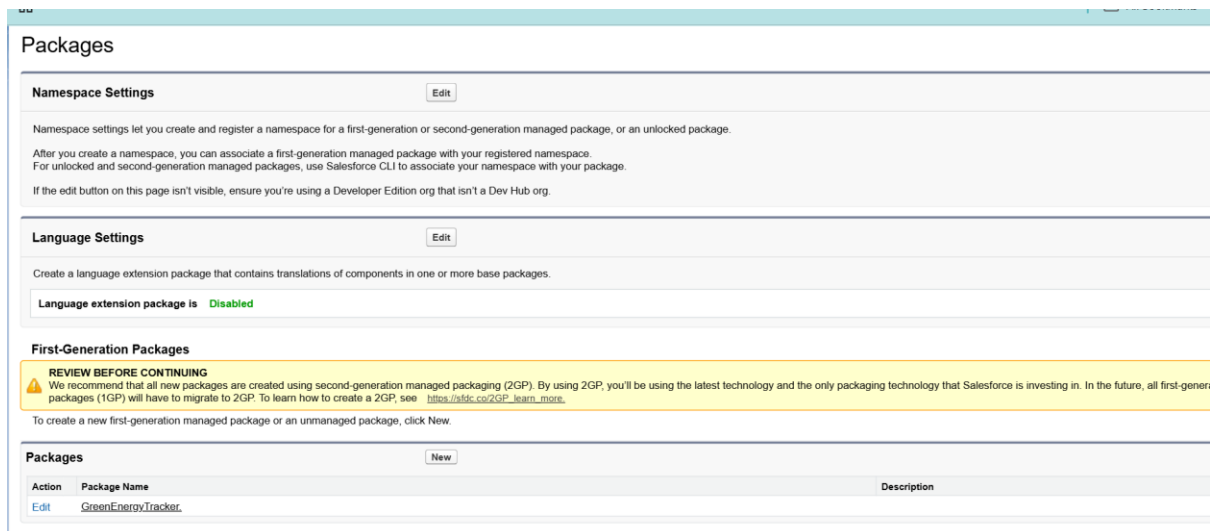
Purpose:

Understand how to deploy and share your app.

- **Unmanaged Package:**
 - Contains metadata only, can be modified after installation.
 - Ideal for internal org deployment or sharing code for learning.
- **Managed Package:**
 - Locked components, upgradeable, used for AppExchange distribution.

Steps to create (Unmanaged):

1. Go to **Setup** → **Packages** → **New**.
2. Name: GreenEnergyTracker.
3. Add components: Objects, Flows, Apex, Named Credentials.
4. Save → Upload → Get installation link for another org.



VS Code & Salesforce DX (SFDX)

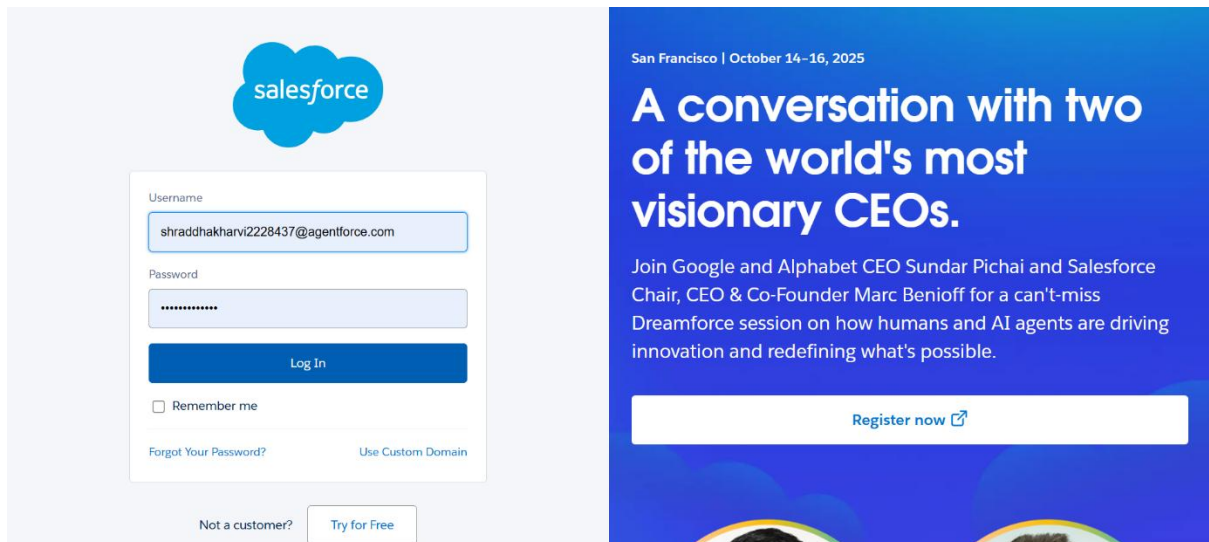
Purpose:

Modern development, source control, and CI/CD for Salesforce.

Steps:

1. **Install VS Code** → **Install Salesforce Extension Pack**.
2. **Authorize org:**

```
sfdx auth:web:login -a GreenEnergyTrackerDev
```



```
C:\Users\Shraddha\GreenEnergyTracker>sf org login web --alias MyDevOrg --set-default
Successfully authorized shraddhakharvi2228437@agentforce.com with org ID 00DgK000007XTC5UA0
```

```
C:\Users\Shraddha\GreenEnergyTracker>sf org list
```

	Alias	Username	Org Id	Status
	debuggerorg	shraddhakharvi2228@mindful-unicorn-e6ts4x.com	00DdM00000cE5JhUAK	Connected
	MyDevOrg	shraddhakharvi2228437@agentforce.com	00DgK000007XTC5UA0	Connected
		recordtriggertrailhead2025@gmail.com	00DNS00000auT2c2AE	Connected

Legend: 🌱=Default DevHub, 🍁=Default Org Use --all to see expired and deleted scratch orgs

3.Create SFDX Project:

```
sfdx force:project:create -n GreenEnergyTracker
```

4.Retrieve metadata from org:

```
sfdx force:source:retrieve -m ApexClass,ApexTrigger,CustomObject
```