

FinSmart CRM Project – Phase 8:

Data Import & Duplicate Management (Step by Step Procedure)

Preparation — Create External ID Fields

What I did: I created External ID fields on Customer__c to ensure clean parent–child relationships during CSV imports.

Reason: External ID fields allow Salesforce to match and link records using unique values from CSVs. This is important when importing data with relationships (e.g., Loans linked to Customers).

Steps:

1. Setup → Object Manager → Customer__c → Fields & Relationships → New → Text (Length 20).
2. Label: Customer ID, Field Name: Customer_ID__c.
3. Mark as External ID and Unique (optional) → Save.

1: Import Data using Data Import Wizard

What I did: I used Salesforce Data Import Wizard to upload Customer data from CSV.

Reason: The Data Import Wizard is simple, user-friendly, and ideal for small datasets. It automatically maps fields when column headers match API field names.

Steps:

1. Setup → Data Import Wizard → Launch Wizard.
2. For Customers:
 - Select Custom Objects → choose Customer (Customer__c).
 - Upload Customer.csv.
 - Map fields if required (auto-map works when names match).
 - Start Import → Wait → Review results.

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Getting closer...

Choose data

Edit mapping

Start import

Import your Data into Salesforce

You can import up to 50,000 records at a time.

Help for this page

What kind of data are you importing?

What do you want to do?

Where is your data located?

Standard objects

Custom objects

Bank_Customers

Documents

Loan_Applications

Offers

Repayments

Add new records

Match by: Customer_ID (External ID)

Which User field in your file designates record owners?

Trigger workflow rules and processes?

Update existing records

Drag CSV file here to upload

CSV

File

Choose File

Customer.csv

Character Code

ISO-8859-1 (General US & Western European, ISO-LATIN-1)

Values Separated By

Comma

Cancel

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Almost done

Choose data

Edit mapping

Start import

Edit Field Mapping: Bank_Customers

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.

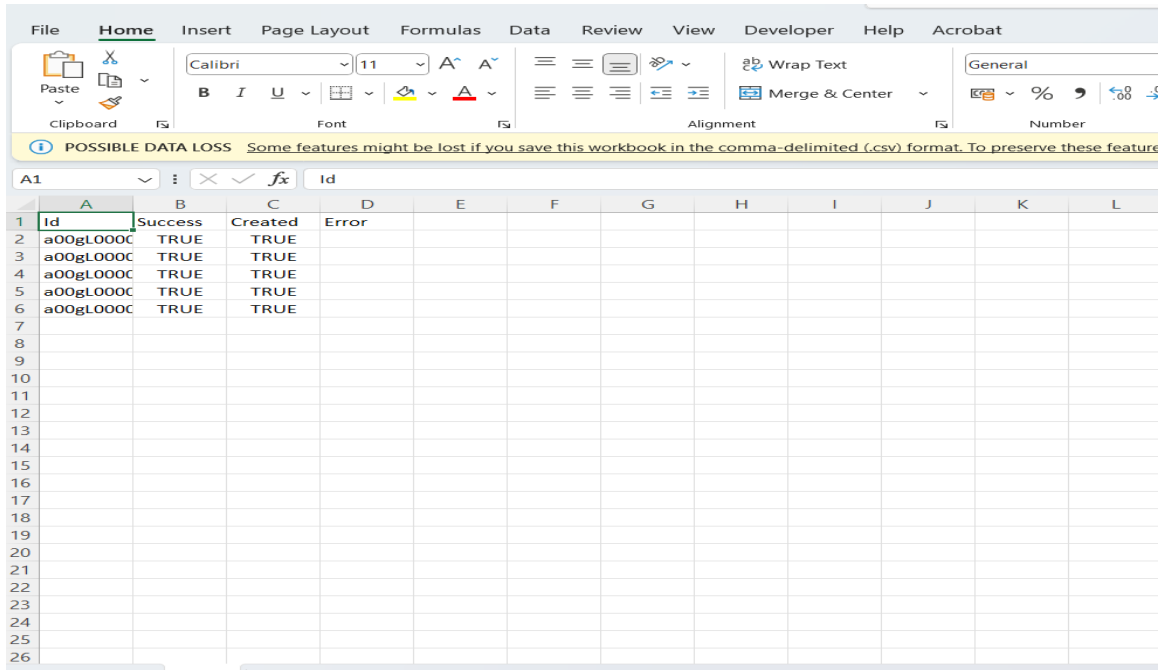
Help for this page

Edit	Mapped Salesforce Object	CSV Header	Example	Example	Example
Change	Customer Name	Name	Rahul Kumar	Priya Sharma	Amit Patel
Change	Customer_ID	Customer_ID__c	CUST001	CUST002	CUST003
Change	Email	Email__c	rahul.kumar@exan	priya.sharma@exa	amit.patel@example.com
Change	Mobile	Mobile__c	9876543210	9123456780	9988776655
Change	DOB	DOB__c	1990-05-10	1988-08-20	1985-02-14
Change	Address	Address__c	123 MG Road, Bar	45 Park Street, Kol	9 Marine Drive, Mumbai

Cancel

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2: Duplicate Management

What I did: I created Matching Rules and Duplicate Rules to prevent duplicate customer records.

Reason: Duplicate management ensures data quality by preventing multiple entries for the same customer based on email or mobile number.

Steps:

- ### 1. Setup → Duplicate Management → **Matching Rules.**

- Customer by Email: New Matching Rule → Object: Customer → add field Email__c (fuzzy/exact match) → Save & Activate.

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Star icon, Plus icon, Refresh icon, Help icon, Settings icon, Notifications icon

duplicate management

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

Rule Details

Object: Bank_Customer

Rule Name: Customer by Email

Unique Name: Customer_by_Email

Description:

Matching Criteria

Tell the rule which fields to compare and how.

Field	Matching Method	Match Blank Fields	
Email	Exact	<input type="checkbox"/>	AND
--None--	Exact	<input type="checkbox"/>	AND
--None--	Exact	<input type="checkbox"/>	AND
--None--	Exact	<input type="checkbox"/>	AND
--None--	Exact	<input type="checkbox"/>	AND

Add Filter Logic...

Previous Save Cancel

- Customer by Mobile: New Matching Rule → Object: Customer → add field Mobile__c → Save & Activate.

The screenshot shows the Salesforce Setup interface. The left sidebar contains a search bar with 'duplicate management' and a navigation menu with 'Data' expanded, showing 'Duplicate Management' (highlighted), 'Duplicate Error Logs', 'Duplicate Rules', and 'Matching Rules' (selected). The main content area is titled 'Matching Rules' and shows the configuration for a rule named 'Customer by Mobile' for the 'Bank_Customer' object. The 'Unique Name' is 'Customer_by_Mobile'. The 'Matching Criteria' section is empty, with a table for adding criteria. The table has columns for 'Field', 'Matching Method', and 'Match Blank Fields'. The first row is pre-filled with 'Mobile', 'Exact', and an empty checkbox. Below the table is a link 'Add Filter Logic...'. At the bottom right are buttons for 'Previous', 'Save', and 'Cancel'.

Rule Details

Object: Bank_Customer

Rule Name: Customer by Mobile

Unique Name: Customer_by_Mobile

Description:

Matching Criteria

Tell the rule which fields to compare and how.

Field	Matching Method	Match Blank Fields	
Mobile	Exact	<input type="checkbox"/>	AND
--None--	Exact	<input type="checkbox"/>	AND
--None--	Exact	<input type="checkbox"/>	AND
--None--	Exact	<input type="checkbox"/>	AND
--None--	Exact	<input type="checkbox"/>	

Add Filter Logic...

Previous Save Cancel

2. Setup → **Duplicate Rules** → New Rule for Customer.

- Choose Object: Customer__c.
- Use matching rules above (Email, Mobile).
- Action: Block or Alert when duplicates detected.
- Activate.

3. When re-importing data, duplicates are flagged.

