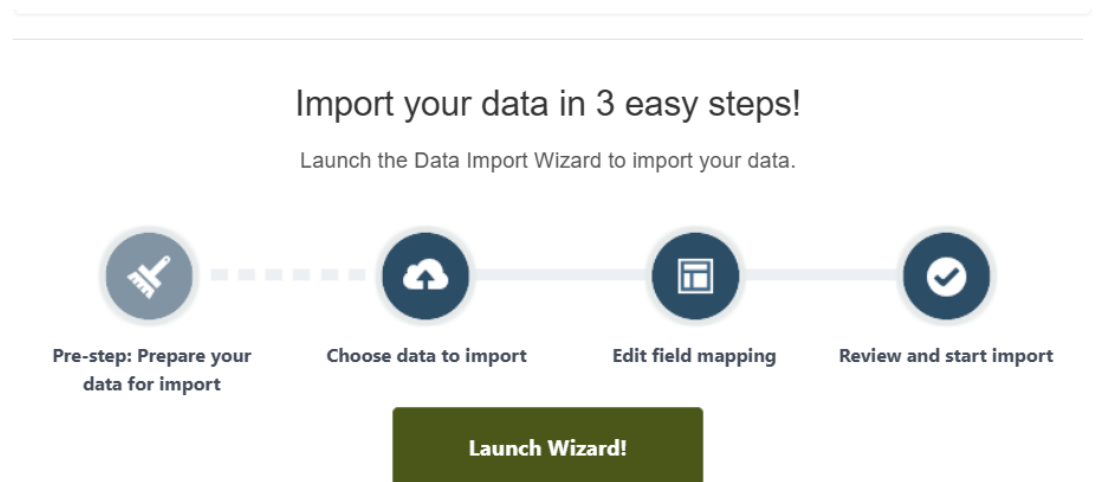


Phase 8: Data Management & Deployment

• Data Import Wizard

Step-wise Process (Explored):

1. Navigate to Data Import Wizard → Setup → Data Import Wizard → Launch Wizard.



2. Select Object → Complaint

Import your Data into Salesforce

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

What kind of data are you importing? ?

Standard objects	Custom objects	
Candidates		>
Complaints		✓


3. Upload CSV File → Choose the file containing records.

[illegible]


4. Map Fields → Match CSV columns with Salesforce fields (e.g., Complaint Number → Complaint Number).
5. Select Import Options → Trigger workflow rules or set record owner if needed.
6. Start Import → Salesforce validates and imports records.
7. Review Results → Check for success or errors.

Project Note:

- We explored using Data Import Wizard with external sources.
- Since our dataset is **small (10–12 complaints)**, we created all records manually instead of importing.








Complaints













All



New
Import
Change Owner
Printable View
Assign Label

12 items • Sorted by Complaint Number • Updated a few seconds ago

	<input type="checkbox"/> Complaint Number ↑	
1	<input type="checkbox"/> CMP-0004	
2	<input type="checkbox"/> CMP-0005	
3	<input type="checkbox"/> CMP-0009	
4	<input type="checkbox"/> CMP-0013	
5	<input type="checkbox"/> CMP-0014	
6	<input type="checkbox"/> CMP-0015	
7	<input type="checkbox"/> CMP-0016	
8	<input type="checkbox"/> CMP-0017	
9	<input type="checkbox"/> CMP-0018	
10	<input type="checkbox"/> CMP-0019	
11	<input type="checkbox"/> CMP-0020	
12	<input type="checkbox"/> CMP-0021	

• Duplicate Rules

Purpose: Prevent duplicate complaints and maintain data integrity.

Step-wise Setup:

1. Create Matching Rule

- Setup → Matching Rules → New Rule → Object: Complaint
- Rule Name: Complaint Number Match
- Matching Criteria: Field: Complaint Number, Method: **Exact**, Match Blank Fields: unchecked
- Save and **Activate**

Matching Rule Help for 1

Complaint Duplicate Rule

Matching Rule Detail Delete Clone Deactivate

Object	Complaint
Rule Name	Complaint Duplicate Rule
Unique Name	Complaint_Duplicate_Rule
Description	
Matching Criteria	Complaint: Name EXACT MatchBlank = FALSE
Status	Active
Created By	Somya Nema, 9/25/2025, 11:44 AM
Modified By	Somya Nema, 9/25/2025, 11:44 AM

Matching Rule: Complaint Duplicate Rule ~ Salesforce - Developer Edition

2. Create Duplicate Rule

- Setup → Duplicate Rules → New Rule → Object: Complaint
- Rule Name: Complaint Duplicate Rule, Unique Name: Complaint_Duplicate_Rule
- Matching Rule: Complaint Number Match
- Actions on Create/Edit: **Block**, Alert Text: "Duplicate complaint detected!"
- Save and **Activate**

Complaint Duplicate Rule Help for this Page

Complaint Duplicate Rule

Duplicate Rule Detail Edit Delete Clone Deactivate

Rule Name	Complaint Duplicate Rule	Order	1 of 1 Reorder
Description			
Object	Complaint		
Record-Level Security	Enforce sharing rules		
Action On Create	Block	Operations On Create	<input type="checkbox"/> Alert <input type="checkbox"/> Report
Action On Edit	Block	Operations On Edit	<input type="checkbox"/> Alert <input type="checkbox"/> Report
Alert Text	Duplicate complaint detected!		
Active	<input checked="" type="checkbox"/>		
Matching Rule	<input checked="" type="checkbox"/> Complaint Duplicate Rule <input checked="" type="checkbox"/> Mapped	Matching Criteria	Complaint: Name EXACT MatchBlank = FALSE
Conditions			
Created By	Somya Nema, 9/25/2025, 11:21 AM	Modified By	Somya Nema, 9/25/2025, 11:47 AM

Edit Delete Clone Deactivate

3. Test the Duplicate Rule

- Try creating a complaint with an existing Complaint Number → Salesforce blocks it successfully.

The screenshot shows a Salesforce interface for managing complaints. On the left, there is a list of 12 items under the heading 'Complaints Recently Viewed'. The list includes complaint numbers from CMP-0021 down to CMP-0005. On the right, a form titled 'Information' is displayed for creating a new complaint. The form fields are: Complaint Number (CMP-0021), Customer Name (Emily Scott), Complaint Type (Delivery), Status (Resolved), Priority (Low), and Resolution. A red error message box is overlaid on the form, stating: 'We hit a snag. You can't save this record because a duplicate record already exists. To save, use different information. View Duplicates'. The error message is accompanied by a red 'X' icon. At the bottom of the form, there are three buttons: 'Cancel', 'Save & New', and 'Save'.

4. Outcome:

- Duplicate complaints cannot be created.
- Maintains **data quality and integrity** in the system.

• Data Loader

- Not used; intended for large datasets only.

• Data Export & Backup

- Optional; not performed. Used for scheduled or manual backup of Salesforce data.
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