

Salesforce Project Phase-8 :- Data Management & Deployment

Title :- Dairy Management System Private Limited Using Salesforce CRM

1. Data Import Wizard

- **Purpose:**
Salesforce Data Import Wizard allows importing data into standard or custom objects without needing advanced technical skills. It's ideal for small to medium-sized datasets (up to 50,000 records).
- **Use in Project:**
 - Imported **Farmer records**: Name, Phone, Email, Farm Size, Region, and other attributes to maintain a complete farmer database.
 - Imported **Festival records**: Festival Name, Start Date, End Date, Discount/Offer Details. These records help the system automatically apply festival offers during order processing.
- **Steps to Import:**
 1. Navigate to **Setup** → **Data Import Wizard**.
 2. Select the object to import (e.g., **Farmer__c** or **Festival__c**).
 3. Upload the CSV file containing the records.
 4. Map CSV columns to Salesforce fields accurately.
 5. Click **Start Import**.
 6. Verify imported records in the system to ensure no data is missing or incorrect.
- **Outcome:**
 - Farmers and Festivals are registered in Salesforce.
 - Festival offers can now be applied automatically to orders during the specified dates.

Setup Home Object Manager

Getting closer

Choose data Edit mapping Start import

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

Cattles Distributors Farmers Festival Offers

What do you want to do?

Add new records

Match by: Name

Which User field in your file designates record owners? -None-

Which Inventory field in your file do you want to match against to set the Inventory lookup field? -None-

Trigger workflow rules and processes?

Where is your data located?

Drag CSV file here to upload

CSV

File Choose File festival.csv

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

Values Separated By Comma

Cancel Previous Next

Almost done

Choose data Edit mapping

Edit Field Mapping: Festival Offers

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	Offer Name	Month	January	February	February
Change	Festival Offer Name	Festival	Makarsankranti c	Vasant Pancham	Thaipusam
Change	Start Date	Date	14-Jan-25	02-Feb-25	11-Feb-25
Change	End Date	Day	Wednesday	Sunday	Tuesday

Great job

Choose data Edit mapping Start import

Review & Start Import

Review your import information and click Start Import.

Your selections:

Festival Offers

Add new records

festival.csv

Your import will include:

Mapped fields

4

Your import will not include:

Unmapped fields

0

2. Data Loader

- Purpose:**


Salesforce Data Loader is a desktop application for **bulk data operations** (insert, update, upsert, delete, export). It supports larger datasets (>50,000 records) and is suitable for scheduled or repetitive data management tasks.

- **Use in Project:**

- Could be used to bulk update farmer or festival records if needed (for example, adding new fields or updating discount values).

- **Steps:**

1. Install **Salesforce Data Loader**.
2. Log in using Salesforce credentials.
3. Choose operation: Insert / Update / Upsert.
4. Upload CSV file and map columns to Salesforce fields.
5. Run the job and check **Success** and **Error logs**.

 Bulk Data Load Jobs					
Bulk Data Load Job 750gL00000E8usz					
View the details of a bulk data load job.					
« Back to List: Bulk Data Load Jobs					
<div> Bulk Data Load Job Detail Reload </div>					
Job ID	750gL00000E8usz	Job Type	Bulk V1	Status	Closed
Submitted By	RAVI SUNNY KUMAR	Operation	Insert	Total Processing Time (ms)	99
Start Time	9/25/2025, 9:55 PM PST	Queued Batches	0	API Active Processing Time (ms)	0
End Time	9/25/2025, 9:55 PM PST	In Progress Batches	0	Apex Processing Time (ms)	0
Time to Complete ([hh:mm:ss])	00:00	Completed Batches	1		
Object	Farmer	Failed Batches	0		
External ID Field		Progress	100 %		
Content Type	CSV	Records Processed	2		
Concurrency Mode	Parallel	Records Failed	2		
API Version	64.0	Retries	0		

3. Duplicate Rules


- **Purpose:** Prevent creation of duplicate records, ensuring **data integrity**.

- **Use in Project:**

- Farmers: Duplicate check based on **Phone** or **Email**.
- Festivals: Duplicate check based on **Festival Name** and **Start Date**.

- **Steps to Configure:**

1. Go to **Setup** → **Duplicate Rules**.
2. Create a **matching rule** for each object (e.g., Farmer Email = Exact Match).



SETUP

Matching Rules

Matching Rule

Cattle_Tag__c

Help for this Page

Matching Rule Detail

Edit

Delete

Clone

Activate

Object	Cattle
Rule Name	Cattle_Tag__c
Unique Name	Cattle_Tag__c
Description	
Matching Criteria	Cattle: Name EXACT MatchBlank = FALSE
Status	Inactive
Created By	RAVI SUNNY KUMAR, 9/25/2025, 10:05 PM
Modified By	RAVI SUNNY KUMAR, 9/25/2025, 10:05 PM

3. Set the action: Block or Alert User.

4. Activate the rules.

Cattle Duplicate Rule

Cattle_Tag1__c

Help for this Page



Duplicate Rule Detail

Edit

Delete

Clone

Activate

Rule Name	Cattle_Tag1__c	Order	2 of 2 [Reorder]
Description			
Object	Cattle		
Record-Level Security	Enforce sharing rules		
Action On Create	Block	Operations On Create	<input type="checkbox"/> Alert <input type="checkbox"/> Report
Action On Edit	Allow	Operations On Edit	<input checked="" type="checkbox"/> Alert <input type="checkbox"/> Report
Alert Text	Use one of these records?		
Active	<input type="checkbox"/>		
Matching Rule	 Cattle_Tag__c  Mapped	Matching Criteria	Cattle: Name EXACT MatchBlank = FALSE
Conditions			
Created By	RAVI SUNNY KUMAR, 9/25/2025, 10:07 PM	Modified By	RAVI SUNNY KUMAR, 9/25/2025, 10:07 PM

Edit

Delete

Clone

Activate

4. Data Export & Backup

- **Purpose:** Regular exports ensure **data recovery** in case of accidental deletion, corruption, or migration errors.
- **Use in Project:**
 - Export **Farmer and Festival records** weekly to CSV/ZIP files for backup.
- **Steps:**

1. Navigate to **Setup** → **Data Export**.
2. Select objects to export (Farmer__c, Festival__c).

3. Schedule exports (weekly or monthly).
 4. Download and store backups securely.
- **Outcome:**
 - Complete backup of critical data.
 - Ability to restore or reference historical data anytime.

The screenshot shows the 'Schedule Data Export' dialog box. At the top, there's a title bar with 'Schedule Data Export' and a 'Help for this Page' link. Below the title bar, there are 'Save' and 'Cancel' buttons. The main area contains several sections: 'Export File Encoding' with a dropdown set to 'ISO-8859-1 (General US & Western European, ISO-LATIN-1)'; 'Include images, documents, and attachments' with an unchecked checkbox; 'Include Salesforce Files and Salesforce CRM Content document versions' with an unchecked checkbox; 'Replace carriage returns with spaces' with a checked checkbox; and 'Schedule Data Export' with a checked checkbox. Below these is a 'Frequency' section with radio buttons for 'On day 1 of every month' (selected) and 'On the 1st of every month', and a dropdown for 'Sunday'. There are also date pickers for 'Start' (9/25/2025) and 'End' (10/25/2025), and a 'Preferred Start Time' dropdown set to '--None--'. A note at the bottom states 'Exact start time will depend on job queue activity.' At the very bottom of the dialog are 'Save' and 'Cancel' buttons.

5. VS Code & SFDX (Salesforce DX)

- **Purpose:** Modern **development and deployment tools** for building, managing, and deploying Salesforce projects.
- **Use in Project:**
 - Developed **Apex triggers, classes, and Lightning components**.
 - Managed version control and deployment across **Sandbox** → **Production** environments.
- **Implementation Steps:**
 1. Install **VS Code** and **Salesforce CLI (SFDX)**.
 2. Authenticate org:

