

# Farmers Market Project – Phase 8: Data Management & Deployment

This document explains the execution steps for **Phase 8** of the Farmers Market Salesforce project. It covers Data Import, Data Loader, Duplicate Rules, Data Export, Change Sets, and Packages.

## 1. Data Import Wizard

### Steps:

1. Setup → **Data Import Wizard** → Launch.
2. Select the object (Vendor, Product, Stall, MarketDay, Booking, or Produce).
3. Upload a **CSV file** (e.g., produce.csv with Farmer, Produce Name, Harvest Date, Price, Quantity).
4. Map CSV columns to Salesforce fields.
5. Start Import and review Success/Error reports.

 Example: Import 50 Farmers and their Produce into Salesforce.

## 2. Data Loader

### Steps: 1. Install **Data Loader** on your computer.

2. Login with Salesforce credentials + security token.
3. Choose an operation: Insert, Update, Upsert, Export, Delete.
4. Select object (e.g., Product\_\_c).
5. Upload **CSV file**.
6. Map fields manually or with Auto-map.
7. Run and check Success/Error CSVs.

 Example: Bulk upload 10,000 Produce records.

Bulk Data Load Jobs					
Bulk Data Load Job 750gK00000Dnguf					
View the details of a bulk data load job.	Help for this Page 				
<a href="#">« Back to List: Bulk Data Load Jobs</a>					
<b>Bulk Data Load Job Detail</b>	<input type="button" value="Reload"/>				
Job ID	750gK00000Dnguf	Job Type	Bulk V1	Status	Closed
Submitted By	<a href="#">Thrishamahi Bandari</a>	Operation	Insert	Total Processing Time (ms)	66
Start Time	9/25/2025, 11:43 AM PST	Queued Batches	0	API Active Processing Time (ms)	3
End Time	9/25/2025, 11:43 AM PST	In Progress Batches	0	Apex Processing Time (ms)	0
Time to Complete ([hh:]mm:ss)	00:01	Completed Batches	1		
Object	Produce	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		

### 3. Duplicate Rules

- Steps:** 1. Setup → **Duplicate Rules** → New Rule.  
 2. Select Object = Farmer\_\_c.  
 3. Define Matching Criteria (Name = Exact, OR Email = Exact, OR Phone = Exact).  
 4. Choose Action: - **Block** → prevents saving duplicates. - **Allow but Alert** → warns user but saves.  
 5. Save & Activate.

Matching Rules	
Matching Rule	<a href="#">Farmer_Duplicate_Rule</a> . matching rule
	Help for this Page 
<b>Matching Rule Detail</b>	<input type="button" value="Edit"/> <input type="button" value="Delete"/> <input type="button" value="Clone"/> <input type="button" value="Activate"/>
Object	Farmer
Rule Name	Farmer_Duplicate_Rule.matching rule
Unique Name	Farmer_Duplicate_Rule_matching_rule
Description	
Matching Criteria	(Farmer: Email EXACT MatchBlank = TRUE) AND (Farmer: Phone EXACT MatchBlank = TRUE)
Status	Inactive
Created By	<a href="#">Thrishamahi Bandari</a> 9/25/2025, 11:52 AM
Modified By	<a href="#">Thrishamahi Bandari</a> 9/25/2025, 11:52 AM

## 4. Data Export (Backup)

### Steps:

1. Setup → **Data Export**.
2. Select **Export Now** or schedule weekly/monthly.
3. Choose objects (Farmers, Produce, Stalls, MarketDays, Bookings).
4. Salesforce prepares a **.zip file** with CSVs.
5. Download within 48 hours and store securely.

The screenshot shows the 'Data Export' page in Salesforce. At the top, there's a 'SETUP' button and a 'Data Export' section. Below that, a banner says 'Monthly Export Service'. A message indicates a 'Next scheduled export' is in progress. At the bottom, it shows export details: 'Your export has been queued. You will receive an email notification when it is completed.' and lists 'Scheduled By: Thirishamahi Bandari', 'Schedule Date: 9/25/2025', and 'Export File Encoding: ISO-8859-1 (General US & Western European, ISO-LATIN-1)'. There are 'Export Now' and 'Schedule Export' buttons.

The screenshot shows the Salesforce Data Export page. At the top, there's a header with the Salesforce logo, a search bar, and navigation links like 'Switch to Lightning Experience', 'Thrishamahi Bandari', 'Setup', 'Help', and 'Sales'. Below the header is a navigation bar with links for Home, Chatter, Campaigns, Leads, Accounts, Contacts, Opportunities, Forecasts, Contracts, Orders, Cases, Solutions, Products, Reports, Dashboards, Students, Mentors, Albums, Artists, and a plus sign. A sidebar on the left titled 'Salesforce Mobile Quick Start' includes sections for Home, Administrator (with sub-links like Release Updates, Manage Users, Manage Apps, Manage Territories, Company Profile, Data Classification, Privacy Center, Security Controls, Domain Management, Communication Templates, Translation Workbench, Data Management, Duplicate Management, Data Integration Rules, Data Integration Metrics, Reporting Snapshots, Data Import Wizard), and Data Export (with sub-links like Storage Usage and Mass Transfer Records). The main content area is titled 'Monthly Export Service' and contains a message about preparing a copy of all data. It shows a table for 'Next scheduled export' with one entry: 'None'. There are 'Export Now' and 'Schedule Export' buttons. Below this is another table showing export details: Scheduled By (Thrishamahi Bandari), Schedule Date (9/25/2025), and Export File Encoding (ISO-8859-1 (General US & Western European, ISO-LATIN-1)). The final table lists a single download entry: Action (download), File Name (WE\_00DgK000007g3DZUAY\_1.ZIP), and File Size (2.2K).

## 5. Change Sets (Deploying Farmers Market Project)

### Steps in Sandbox:

1. Setup → **Outbound Change Sets** → New → Name = FarmersMarket\_Deployment.
2. Add Components: - Custom Objects (Farmer, Produce, Stall, MarketDay, Booking) - Tabs, Record Pages, Flows - Validation Rules, Apex Classes, LWCs
3. Upload to Production.

### Steps in Production:

1. Setup → **Inbound Change Sets**.
2. Find FarmersMarket\_Deployment.
3. Validate (runs Apex tests).
4. If successful → Deploy.

## 6. Packages (Unmanaged vs Managed)

### Unmanaged Package (best for dev/test)

1. Setup → **Package Manager** → **New Package** → Type = Unmanaged.
2. Add components (Objects, Tabs, Pages, LWCs, Flows).
3. Upload → Salesforce generates an Install Link.
4. Share the link → others install and can edit metadata.

 Example: Share Farmers Market project with classmates.

### Managed Package (for commercial apps)

1. Requires a **Partner Developer Org**.
2. Setup → **Package Manager** → **New Package** → Type = Managed.
3. Add components and upload.
4. Metadata is locked in target orgs.
5. Publisher can release new versions and push upgrades.

 Example: Release Farmers Market as an AppExchange product.