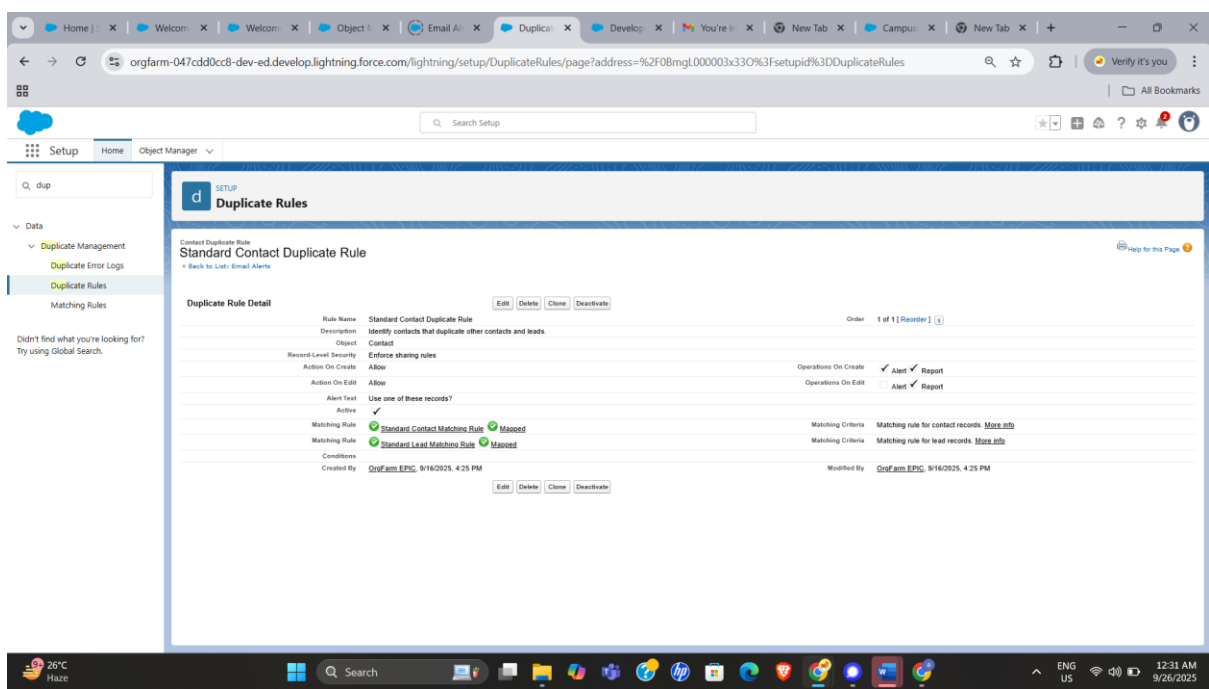


# Phase 8: Data Management & Deployment (Campus CRM + Student Club)

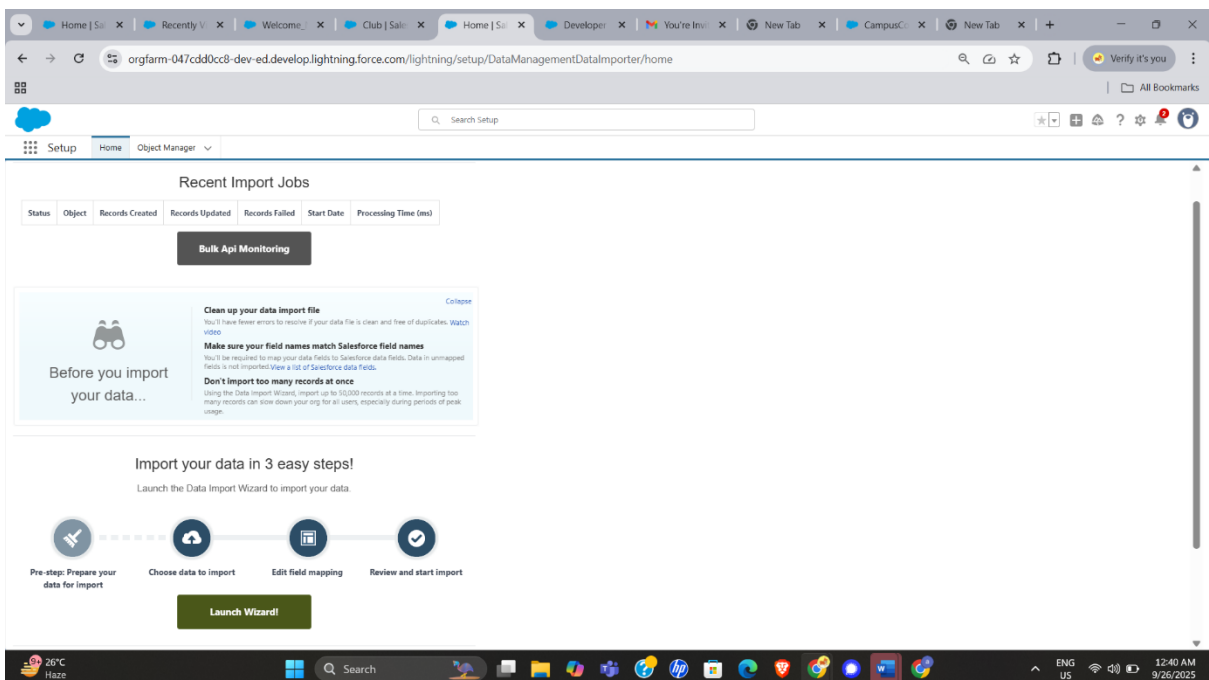
## Duplicate Rules:-



The screenshot shows the Salesforce Duplicate Rules configuration page. The browser address bar displays the URL: `orgfarm-047cdd0cc8-dev-ed.develop.lightning.force.com/lightning/setup/DuplicateRules/page?address=%2F0BmgL000003x330%3Fsetupid%3DDuplicateRules`. The left sidebar contains navigation links: Setup, Home, Object Manager, and a search bar. The main content area is titled "Duplicate Rules" and shows a "Standard Contact Duplicate Rule". The rule details include: Rule Name: Standard Contact Duplicate Rule; Description: Identify contacts that duplicate other contacts and leads; Object: Contact; Record-Level Security: Enforce sharing rules; Action On Create: Allow; Alert Text: Use one of these records?; Active: Active; Matching Rule: Standard Contact Matching Rule (Matched); Matching Criteria: Matching rule for contact records; Matching Rule: Standard Lead Matching Rule (Matched); Matching Criteria: Matching rule for lead records; Conditions: Created By: OrgFarm EPIC; 9/16/2025, 4:25 PM; Modified By: OrgFarm EPIC; 9/16/2025, 4:25 PM. The bottom of the page shows a Windows taskbar with the date 12:31 AM 9/26/2025.

## Here we upload data:-

## By clicking launch wizard:-



The screenshot shows the Salesforce Data Import Wizard page. The browser address bar displays the URL: `orgfarm-047cdd0cc8-dev-ed.develop.lightning.force.com/lightning/setup/DataManagementDataImporter/home`. The left sidebar contains navigation links: Setup, Home, Object Manager, and a search bar. The main content area is titled "Recent Import Jobs" and shows a "Bulk API Monitoring" button. Below this, there is a section titled "Before you import your data..." with a checklist of instructions: "Clean up your data import file", "Make sure your field names match Salesforce field names", and "Don't import too many records at once". The bottom of the page shows a Windows taskbar with the date 12:40 AM 9/26/2025.

## **Documentation:-**

### **Data Import Wizard**

- Web-based, simple import tool in Salesforce Setup.
  - Supports importing **standard and custom objects** (e.g., Students, Clubs, Club Memberships).
  - Allows mapping CSV columns to Salesforce fields.
  - Supports basic duplicate management during import.
  - Example: Import bulk student data (Name, Email, Year, Branch, Mood).
- 

### **Data Loader**

- Desktop client for bulk data operations: **Insert, Update, Upsert, Delete, Export**.
  - Supports up to millions of records efficiently.
  - Allows mapping **external IDs** for upsert operations.
  - Example: Bulk import ClubMembership\_\_c with Student and Club references using record IDs.
- 

### **Duplicate Rules**

- Prevent creation of duplicate records based on **matching rules**.
  - Can **block** or **allow with alert** duplicates.
  - Example: Ensure no student is registered twice for the same club.
  - Works with **standard and custom objects**.
- 

### **Data Export & Backup**

- Salesforce provides **weekly or monthly export** options.
  - Can export standard and custom objects in CSV format.
  - Supports automated backup scheduling.
  - Example: Export all ClubEvent\_\_c and Volunteer\_\_c records for offline reporting.
- 

### **Change Sets**

- Declarative deployment tool for **moving metadata** (objects, fields, layouts, flows) between orgs.

- Components can be added to **Outbound Change Set** → deployed to target org (e.g., sandbox → production).
  - Example: Deploy Club\_\_c, ClubMembership\_\_c objects, and page layouts from dev org to QA org.
- 

## **Unmanaged vs Managed Packages**

- **Unmanaged Package:** Source code and metadata are visible; can be customized.
  - **Managed Package:** IP-protected; updates handled via AppExchange; used for ISV apps.
  - Example: CampusConnect customizations delivered as **unmanaged package** to another dev org for testing.
- 

## **ANT Migration Tool**

- Command-line tool for metadata deployment.
  - Uses XML configuration to **retrieve/deploy components**.
  - Useful for scripted or automated deployments.
  - Example: Deploy ClubEvent\_\_c record types, flows, and validation rules between orgs.
- 

## **VS Code & SFDX (Salesforce DX)**

- **VS Code:** IDE for Salesforce development.
  - **SFDX:** CLI for modern development workflow: **scratch orgs, source control, metadata deployment**.
  - Example: Pull source from sandbox → commit to Git → push to production using SFDX commands.
  - Enables **version control and continuous integration**.
- 

## **Phase 8 Key Takeaways:**

- Salesforce provides multiple tools for **importing, exporting, backing up, and deploying data and metadata**.
- **Data Loader** and **Import Wizard** handle data.
- **Change Sets, ANT, and SFDX** handle metadata.
- **Duplicate Rules** ensure data integrity. This phase ensures CampusConnect CRM can **scale, migrate, and maintain clean data** efficiently.

