

Phase 8: Data Management & Deployment

1. Data Import Wizard

1. Go to App Launcher → Data Import Wizard.
2. Select object (e.g., Product Inventory) and upload CSV file.
3. Map CSV columns to Salesforce fields.
4. Start import and check success/failure report.

2. Data Loader

1. Open Data Loader and login with Salesforce credentials.
2. Choose operation: Insert, Update, Upsert, Delete, Export.
3. Select object and upload CSV file.
4. Map fields and run operation; review success/error files.

3. Duplicate Rules

1. Go to Setup → Duplicate Management → Duplicate Rules.
2. Create new rule and select object.
3. Configure Matching Rules for duplicates.
4. Define actions: Alert or Block, then activate rule.

The screenshot shows the Salesforce Duplicate Rules configuration page. The left sidebar contains a search bar with 'duplicate' and a navigation menu with 'Data', 'Duplicate Management', 'Duplicate Error Logs', 'Duplicate Rules' (selected), and 'Matching Rules'. The main content area is titled 'Duplicate Rules' and includes a 'What Are Duplicate Rules?' section with an 'Expand' link. Below this is a table listing existing duplicate rules.

Rule Name	Description	Object	Matching Rule	Active	Last Modified By	Last Modified Date
Standard Account Duplicate Rule	Identify accounts that duplicate other accounts.	Account	Standard Account Matching Rule	✓	CEPIC	9/16/2025
Standard Contact Duplicate Rule	Identify contacts that duplicate other contacts and leads.	Contact	Standard Lead Matching Rule Standard Contact Matching Rule	✓	CEPIC	9/16/2025
Standard Lead Duplicate Rule	Identify leads that duplicate other leads and contacts.	Lead	Standard Lead Matching Rule Standard Contact Matching Rule	✓	CEPIC	9/16/2025

4. Data Export & Backup

1. Go to Setup → Data Export.
2. Choose Export Now or schedule Weekly Export.
3. Select objects to include (e.g., Orders, Product Inventory).
4. Download ZIP files with CSV backups.

5. Change Sets

1. Go to Setup → Outbound Change Sets in source org.
2. Create new change set and add components.
3. Upload to target org (Production).
4. Validate & deploy in target org.

6. Packages (Managed vs Unmanaged)

1. Go to Setup → Packaging → Packages → New.
2. Choose Managed or Unmanaged.
3. Add components (objects, fields, flows).
4. Upload and install in other orgs.

7. ANT Migration Tool

1. Download and configure ANT Migration Tool.
2. Prepare build.xml and package.xml.
3. Run commands: retrieve or deploy.
4. Validate logs for deployment results.

8. VS Code & SFDX

1. Install VS Code + Salesforce Extension Pack.
2. Authorize org with SFDX CLI.
3. Retrieve metadata: `sfdx force:source:retrieve`.
4. Deploy metadata: `sfdx force:source:deploy`.