Phase 8: Data Management & Deployment

1. Data Import Wizard
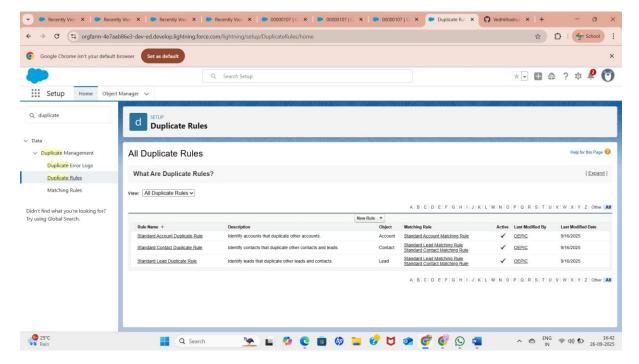
    1. Go to App Launcher → Data Import Wizard.

    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.

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.