

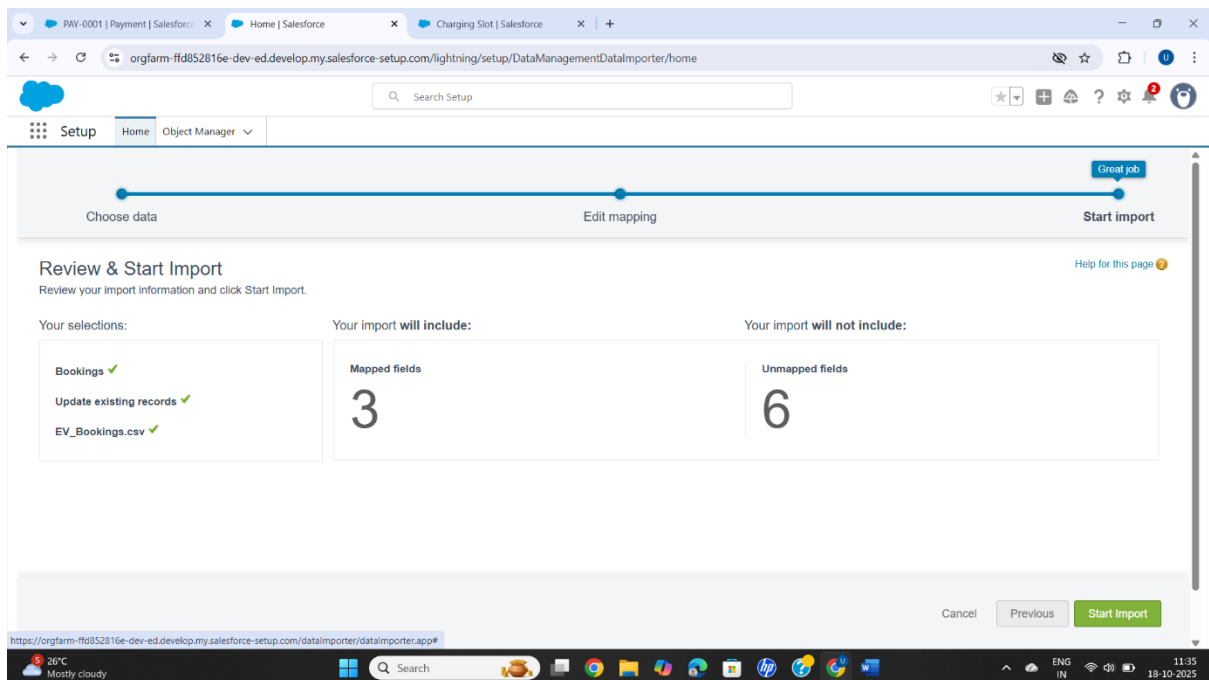
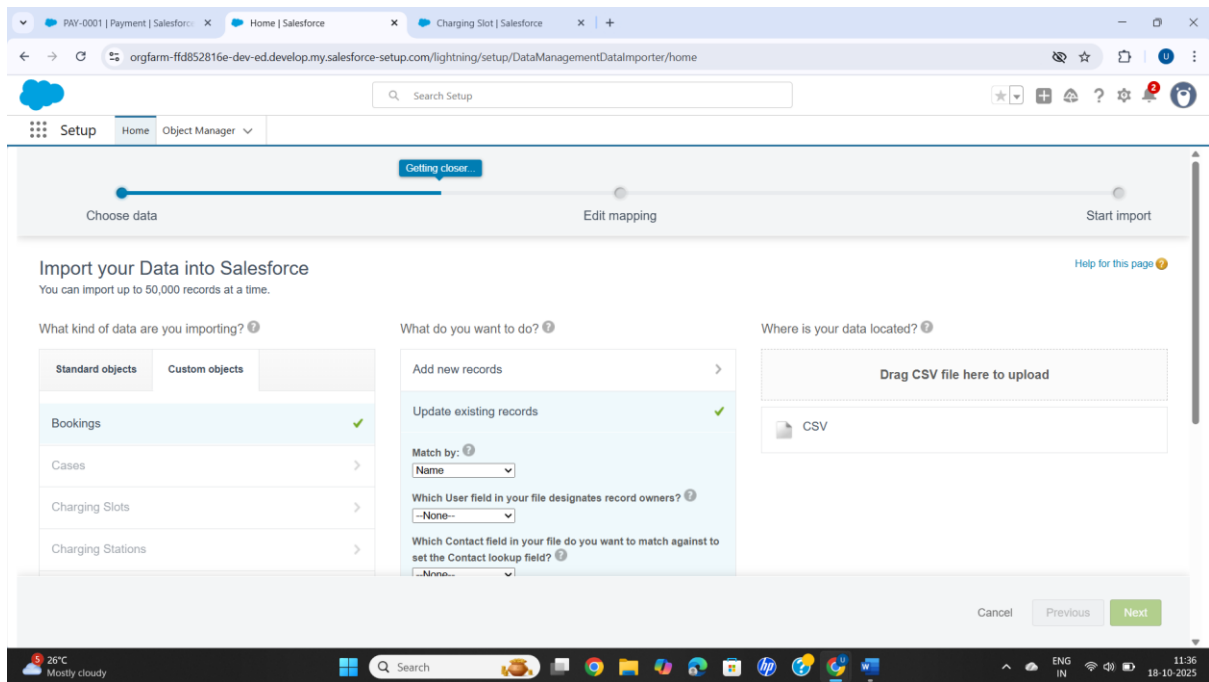
Phase 8: Data Management & Deployment

This phase covers the loading of initial data into the system and the processes for moving configurations and code between Salesforce environments.

Data Import Wizard (Initial Data Upload)

The Data Import Wizard is suitable for importing foundational data like Accounts and Contacts, especially for smaller volumes (under 50,000 records).

- **Process:**
 1. **Prepare Data:** Create CSV files (e.g., sample_accounts.csv) with column headers matching Salesforce field names.
 2. **Launch Wizard:** Navigate via Setup \rightarrow Integrations \rightarrow Data Import Wizard \rightarrow Launch Wizard!
 3. **Select Object & Action:** Choose the object (e.g., Accounts) and action (e.g., Add new records).
 4. **Upload CSV:** Upload the prepared file.
 5. **Map Fields:** Review and confirm the mapping between CSV columns and Salesforce fields.
 6. **Start Import:** Initiate the import process and wait for email confirmation.
- **Use Case:** Used for the initial upload of basic Account and Contact records provided in sample_accounts.csv.



Duplicate Rules

Duplicate rules help maintain data quality by identifying or blocking potentially duplicate records.

- **Setup Example:** Blocking duplicate Contact emails.
 1. **Matching Rule:** Created a rule (Contact_Email_Matching_Rule) on the Contact object to

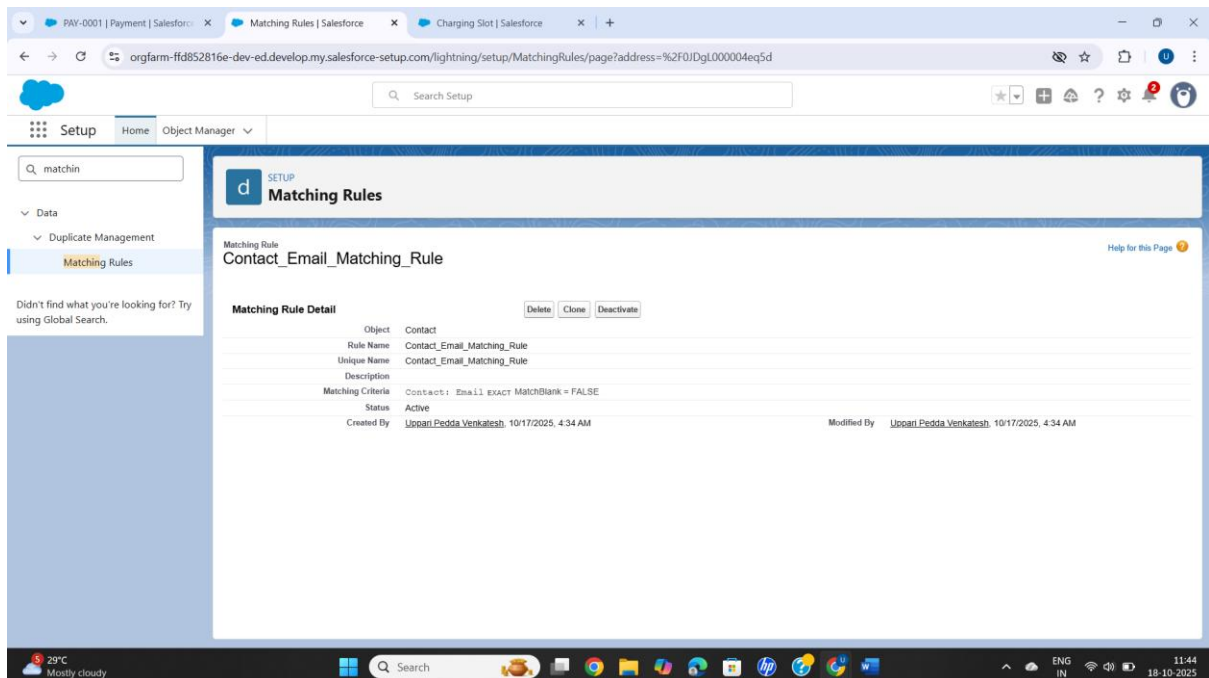
identify records where the Email field has an exact match.
(Setup → Data → Duplicate Management → Matching Rules).

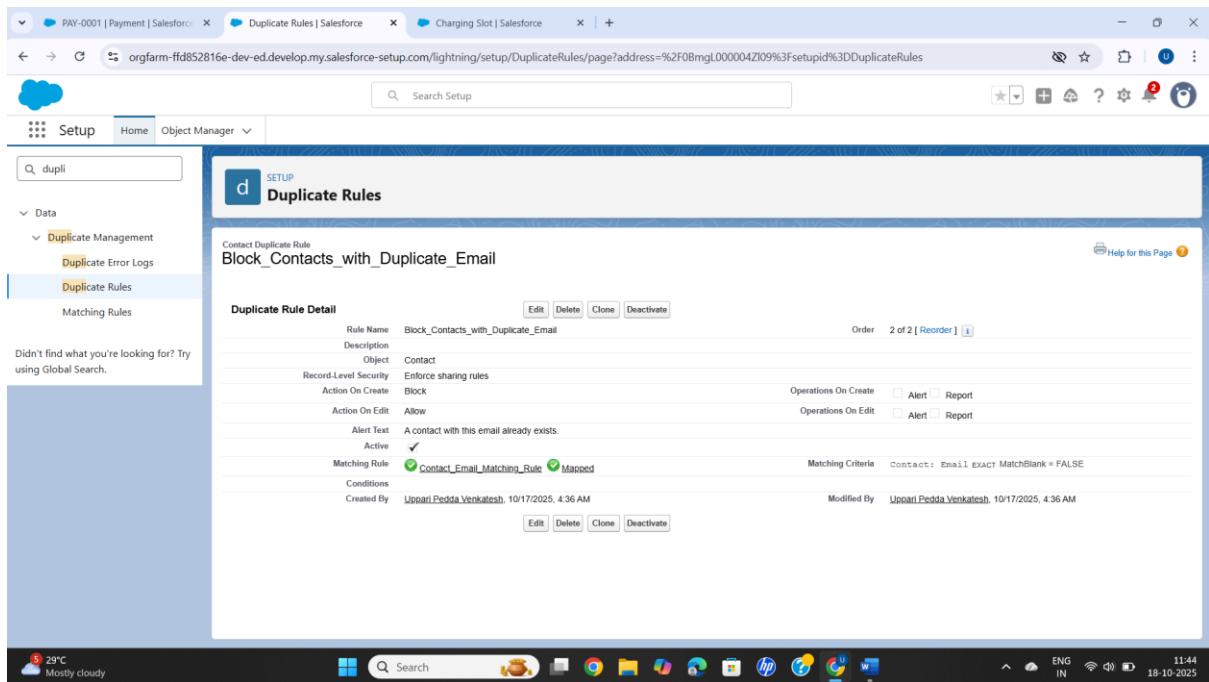
2. **Duplicate Rule:** Created a rule
(Block_Contacts_with_Duplicate_Email) on the Contact object.

- **Action on Create:** Set to Block.
- **Matching Rule:** Linked to the Contact_Email_Matching_Rule.
- **Alert Text:** Configured to display "A contact with this email already exists."

3. **Activation:** Both the Matching Rule and Duplicate Rule were activated.

- **Purpose:** Prevents users from accidentally creating multiple Contact records for the same person based on their email address.

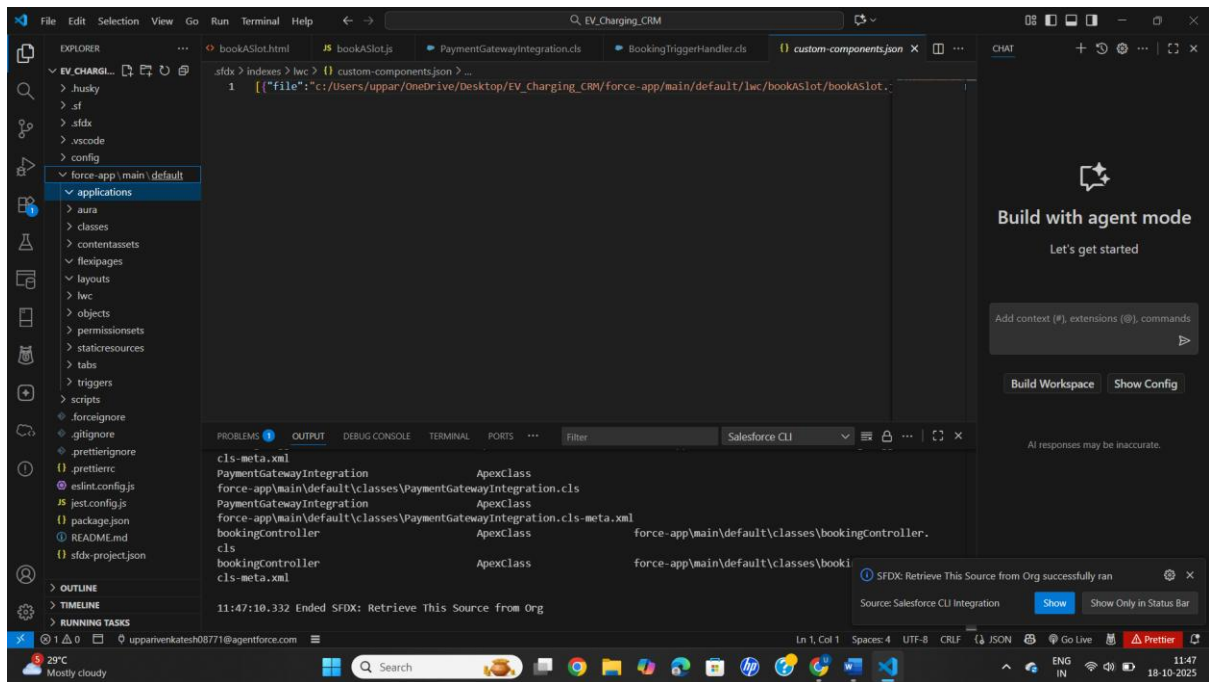




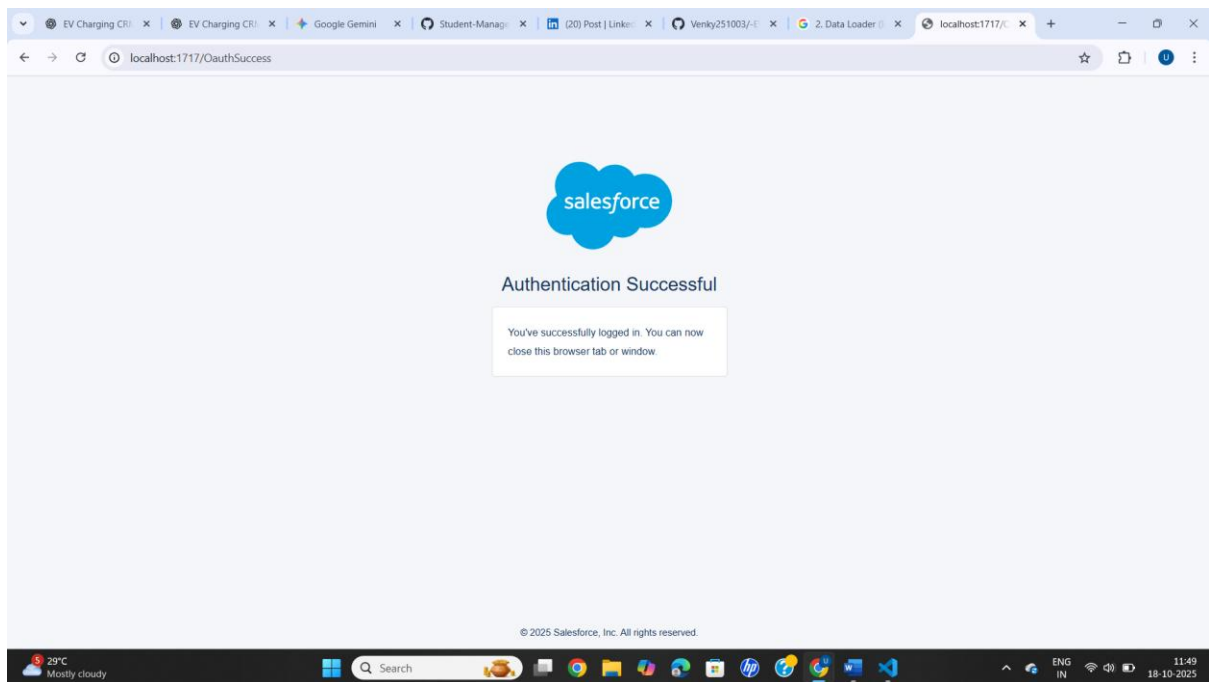
Deployment Methods

Moving customizations (objects, fields, code, flows, etc.) between Salesforce orgs (e.g., from Sandbox/Developer Org to Production).

- **SFDX (Salesforce Developer Experience via VS Code):**
 - **Process:**
 1. **Authorize Target Org:** Connect VS Code to the destination org using SFDX: Authorize an Org.
 2. **Retrieve (if needed):** Ensure the project manifest (manifest/package.xml) includes all components to be deployed. Use SFDX: Retrieve Source in Manifest from Org to pull necessary metadata.
 3. **Deploy:** Right-click the force-app/main/default folder (or specific components) and select SFDX: Deploy Source to Org, ensuring the correct target org alias is selected.



1. SFDX: Retrieve Source in Manifest from Org.



2. SFDX: Authorize an Org.