**Phase 8: Data Management & Deployment**

In this phase, we focused on managing data in Salesforce, preventing duplicates, ensuring backups, and deploying configurations between environments.

**Data Import Wizard**

Used the Data Import Wizard to import sample data for Accounts and Contacts.

Prepared CSV files with columns: Name, Phone, Email, Website, and External\_ID\_\_c.

Mapped CSV fields to Salesforce fields during import.

Verified imported records in the Accounts and Contacts tabs.



**Data Loader**

Explored Data Loader for importing objects not supported by the wizard, such as Product2 and OrderItem.

Installed Data Loader locally.

Inserted Product2 records with fields: Name, ProductCode, Stock\_\_c, and IsActive.

Reviewed success and error CSV logs after upload.

**Duplicate Rules**

Created a Duplicate Rule for Accounts to prevent duplicates.

Matching Criteria: Account Name must be unique.

Configured rule to Block creation and Show Alert message: "Duplicate Account detected."



**Data Export & Backup**

Setup → Data Export → Scheduled weekly exports.

Selected Accounts, Contacts, Products, Orders, and Order Items.

Salesforce generated a ZIP file containing CSV backups for download.

Change Sets

Outbound Change Set created to migrate metadata.

Added custom fields, validation rules, and flows into the Change Set.

Uploaded from Developer org to target environment.



**Managed vs Unmanaged Packages**

Reviewed package types:

Managed Packages: Typically used by ISVs for distribution on AppExchange.

Unmanaged Packages: Used for sharing customizations in development or projects.

For this project, we packaged our custom fields, flows, and Apex as an Unmanaged Package for portability.

**ANT Migration Tool**

Explored ANT Migration Tool for command-line deployments.

Not fully used in this project but documented for future CI/CD pipelines.

**VS Code & SFDX**

Installed Salesforce CLI (sf) and VS Code extensions.

Created a Salesforce DX project structure.

Retrieved metadata from the org (objects, Apex classes, LWC).