

Phase 8 Data Management & Deployment

»» Data Import Wizard

- Use for one-off imports of standard and custom objects via Setup.
 - ✓ In Setup → Data Import Wizard → Launch Wizard
 - ✓ Select Volunteer Participation and Volunteer Event objects.
 - ✓ Upload CSV with headers matching field API names:

Volunteer_Event__c:

- Event_Name__c
- Event_Date__c
- Event_Location__c
- Max_Volunteers__c
- Registration_Deadline__c
- Event_Category__c
- Status__c

Volunteer_Participation__c:

- Event__c
- Participant_Name__c
- Participant_Email__c
- Participation_Status__c

- ✓ Map CSV columns to Salesforce fields automatically or manually.
- ✓ Click Start Import, monitor progress, and review results.

SETUP Bulk Data Load Jobs					
Bulk Data Load Job 750gL00000E9Zxr					
View the details of a bulk data load job.					
Back to List: Bulk Data Load Jobs					
Bulk Data Load Job Detail					
Reload					
Job ID	750gL00000E9Zxr	Job Type	Bulk V1	Status	Closed
Submitted By	Aditya Vishwakarma	Operation	Insert	Total Processing Time (ms)	55
Start Time	26/09/2025, 2:46 pm IST	Queued Batches	0	API Active Processing Time (ms)	0
End Time	26/09/2025, 2:46 pm IST	In Progress Batches	0	Apex Processing Time (ms)	0
Time to Complete (hh:mm:ss)	00:03	Completed Batches	1		
Object	Volunteer Event	Failed Batches	0		
External ID Field		Progress	100%		
Content Type	CSV	Records Processed	5		
Concurrency Mode	Parallel	Records Failed	5		
API Version	64.0	Retries	0		

Bulk Data Load Job
750gL00000E9s4P

View the details of a bulk data load job.

[← Back to List: Bulk Data Load Jobs](#)

Bulk Data Load Job Detail				Reload
Job ID	750gL00000E9s4P	Job Type	Bulk V1	
Submitted By	Aditya Vishwakarma	Operation	Insert	
Start Time	26/09/2025, 4:25 pm IST	Queued Batches	0	
End Time	26/09/2025, 4:25 pm IST	In Progress Batches	0	
Time to Complete ([hh]:mm:ss)	00:00	Completed Batches	1	
Object	Volunteer Participation	Failed Batches	0	
External ID Field		Progress	100%	
Content Type	CSV	Records Processed	8	
Concurrency Mode	Parallel	Records Failed	8	
API Version	64.0	Retries	0	

»» Data Loader

- Use for large or scheduled imports/exports and upserts via the CLI or GUI.
- Export Template: Export existing Volunteer_Event__c with Id and Event_Name__c to populate lookup fields in participation CSV.
- Upsert Participation:
 - ✓ Open Data Loader (GUI).
 - ✓ Choose Upsert, select Volunteer_Participation__c.
 - ✓ Browse to CSV with Column “Id” (if updating) or leave blank for insert, include “Event__c” lookup.
 - ✓ Select External Id or “Id” for matching.
 - ✓ Click Next, map fields, click Finish.

dataloader.io™

NEW TASK

UPGRADE

Info Help Center

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☐ Quick find...

AllImportsExportsDeletesScheduledHistory

All

☐ Volunteer Event Export

Task Run 103121322: 2 successes

last run: a few seconds ago

No History

created on September 26th, 2025

»» Duplicate Rules

- Prevent duplicate participants and events.
- Setup → Duplicate Rules → New Rule for Volunteer_Participation__c.
- Label: Prevent Duplicate Participation.
- Matching Rule:

- ✓ Create Matching Rule on Volunteer_Participation__c: match on Participant_Email__c and Event__c (Exact).
- In Duplicate Rule:
 - ✓ Select the matching rule.
 - ✓ Action on Create/Edit: Block.
- Activate both Matching and Duplicate Rules.

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SETUP
Matching Rules

Matching Rule [Help for this Page](#)

Match Participation By Event

Matching Rule Detail [Delete](#) [Clone](#) [Deactivate](#)

Object	Volunteer Participation
Rule Name	Match Participation By Event
Unique Name	Match_Participation_By_Event
Description	
Matching Criteria	(Volunteer Participation: Event EXACT MatchBlank = FALSE) AND (Volunteer Participation: Attendance_Status EXACT MatchBlank = FALSE)
Status	Active
Created By	Aditya Vishwakarma, 26/09/2025, 4:42 pm
Modified By	Aditya Vishwakarma, 26/09/2025, 4:42 pm

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SETUP
Duplicate Rules

Volunteer Participation Duplicate Rule [Help for this Page](#)

Prevent_Duplicate_Participation

Duplicate Rule Detail [Edit](#) [Delete](#) [Clone](#) [Deactivate](#)

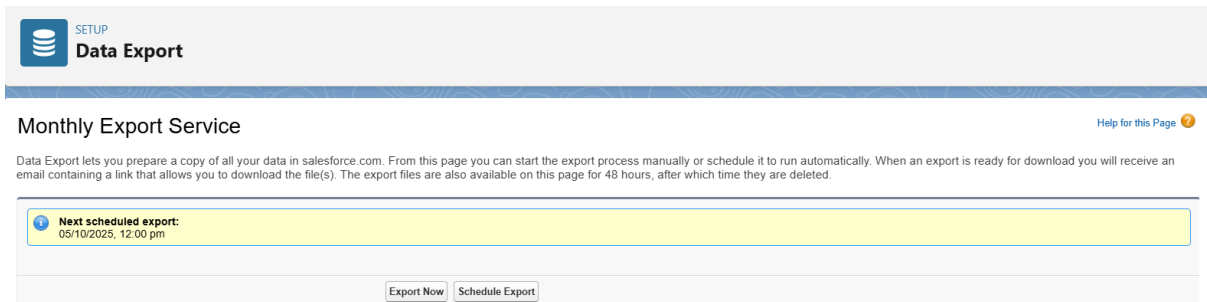
Rule Name	Prevent_Duplicate_Participation	Order	1 of 1 [Reorder]
Description			
Object	Volunteer Participation		
Record-Level Security	Enforce sharing rules		
Action On Create	Block	Operations On Create	<input type="checkbox"/> Alert <input type="checkbox"/> Report
Action On Edit	Block	Operations On Edit	<input type="checkbox"/> Alert <input type="checkbox"/> Report
Alert Text	Duplicate Participation Detected!		
Active	<input checked="" type="checkbox"/>		
Matching Rule	<input checked="" type="checkbox"/> Match Participation By Event <input checked="" type="checkbox"/> Mapped	Matching Criteria	(Volunteer Participation: Event EXACT MatchBlank = FALSE) AND (Volunteer Participation: Attendance_Status EXACT MatchBlank = FALSE)
Conditions			
Created By	Aditya Vishwakarma, 26/09/2025, 4:44 pm	Modified By	Aditya Vishwakarma, 26/09/2025, 4:44 pm

[Edit](#) [Delete](#) [Clone](#) [Deactivate](#)

»» Data Export & Backup

- Schedule weekly org data backups.
- Setup → Data Export → Schedule Export.
- Frequency: Weekly.
- Select Objects:
 - ✓ Volunteer_Event__c
 - ✓ Volunteer_Participation__c

- ✓ Automation_Log__c
- ✓ API_Usage_Log__c
- Include all attachments and documents.
- Save Schedule. Download ZIP exports from email link.



»» Change Sets

- Not used in the Project as Sandbox is not required for the Project.

»» Unmanaged vs Managed Packages

- Not implemented in the current org.
- Package creation requires Developer Edition org or special AppExchange developer permissions not available in standard orgs.
- Current org setup allows viewing and managing installed packages from AppExchange but not creating new packages.

»» Salesforce CLI

- Installed Salesforce CLI (latest version).
- Authorized my production org as a CLI alias.
- Retrieved Metadata from Production.
- Deployed Metadata to Production.

»» VS Code & SFDX

- Source-driven development and scratch org usage.
- Installed Salesforce CLI and VS Code Extension Pack.
- Authorized Dev Org for the Project.

- Pushed source to org.
- Pulled changes from org.
- Deployed to production:
 - ✓ Converted source to metadata format.
 - ✓ Deployed source to org.

17:59:14.254 Starting SFDX: Deploy This Source to Org

=== Deployed Source

STATE	FULL NAME	TYPE	PROJECT
PATH			
	force-app\main\default\classes\VolunteerRegistrationController.cls-meta.xml		
Changed	volunteerEventMap	LightningComponentBundle	
	force-app\main\default\lwc\volunteerEventMap\volunteerEventMap.html		
Changed	volunteerEventMap	LightningComponentBundle	
	force-app\main\default\lwc\volunteerEventMap\volunteerEventMap.js		
Changed	volunteerEventMap	LightningComponentBundle	
	force-app\main\default\lwc\volunteerEventMap\volunteerEventMap.js-meta.xml		
Changed	volunteerRegistrationModal	LightningComponentBundle	
	force-app\main\default\lwc\volunteerRegistrationModal\volunteerRegistrationModal.html		
Changed	volunteerRegistrationModal	LightningComponentBundle	
	force-app\main\default\lwc\volunteerRegistrationModal\volunteerRegistrationModal.js		
Changed	volunteerRegistrationModal	LightningComponentBundle	
	force-app\main\default\lwc\volunteerRegistrationModal\volunteerRegistrationModal.js-meta.xml		
Unchanged	VolunteerRegistrationEventTrigger	ApexTrigger	
	force-app\main\default\triggers\VolunteerRegistrationEventTrigger.trigger		
Unchanged	VolunteerRegistrationEventTrigger	ApexTrigger	
	force-app\main\default\triggers\VolunteerRegistrationEventTrigger.trigger-meta.xml		

17:59:21.142 Ended SFDX: Deploy This Source to Org