

## Phase 8: Data Management

In this phase, we focus on **importing, managing duplicates, and backing up Salesforce data**. These tasks are important for keeping data clean, secure, and up to date in the Groundnut Mill Management project.

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### 1. Data Import Wizard

#### Why?

To easily import data like Customers, Suppliers, or Sales Orders from Excel/CSV files into Salesforce without using any external tool.

#### Steps:

1. Go to **Setup → Data Import Wizard**.
2. Click **Launch Wizard**.
3. Choose the object (e.g., **Customer** or **Contact**).
4. Upload your **CSV file**.
5. Map the CSV columns to Salesforce fields (e.g., Customer Name → Name, Phone → Phone\_\_c).
6. Click **Start Import**.
7. After import, check the status in the Import Queue.

**Outcome:** New customer, supplier, or order records are added into Salesforce quickly.



orgfarm-1ea2c7c43b-dev-ed.develop.lightning.force.com/lightning/setup/DataManagementDataImporter/home

Setup Home Object Manager

Choose data Edit mapping Start import

Review & Start Import

Review your import information and click Start Import.

Your selections:

- Customers ✓
- Add new records ✓
- Customer.csv ✓

Your import will not include:

Mapped fields

1

OK

Cancel Previous Start Import

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Setup Home Object Manager

Data Import Wizard

Integrations

Data Import Wizard

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### Bulk Data Load Jobs

View details of a bulk data load job.

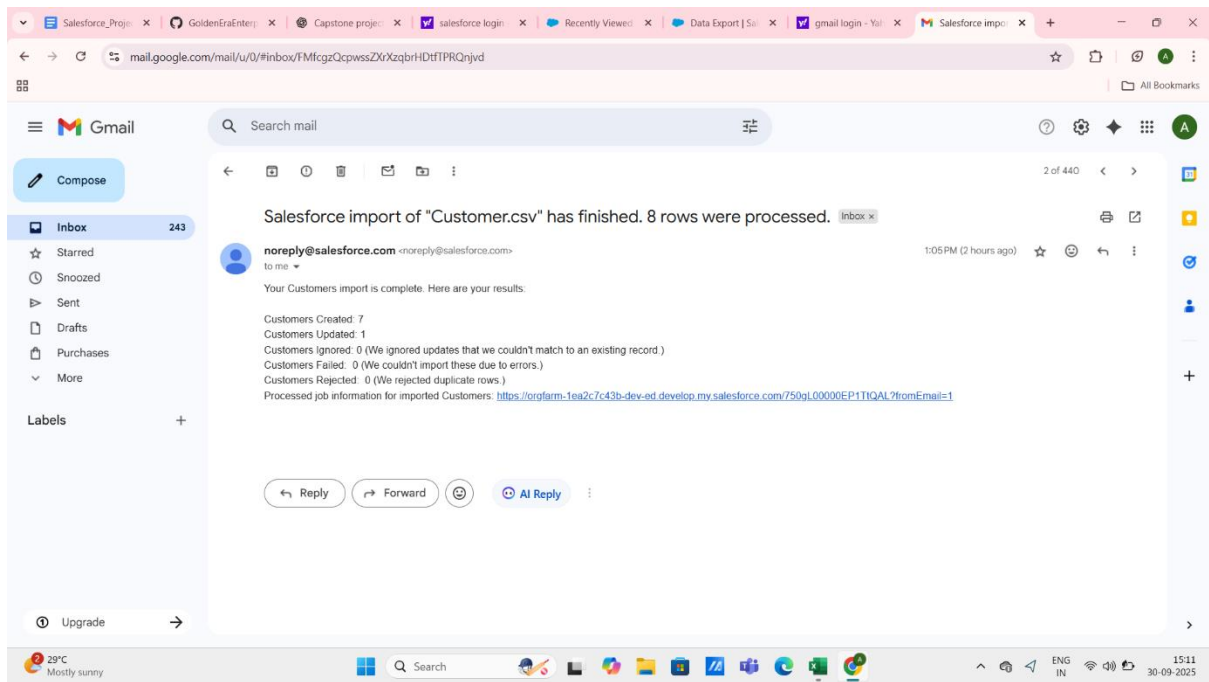
Back to List: Bulk Data Load Jobs

#### Bulk Data Load Job Detail

Reload

Job ID	750gL00000EP11t	Job Type	Bulk V1	Status	Closed
Submitted By	Anshya Shalk	Operation	Upsert	Total Processing Time (ms)	199
Start Time	9/30/2025, 12:35 AM PST	Queued Batches	0	API Active Processing Time (ms)	111
End Time	9/30/2025, 12:35 AM PST	In Progress Batches	0	Apex Processing Time (ms)	0
Time to Complete (hh:mm:ss)	00:01	Completed Batches	1		
Object	Customer	Failed Batches	0		
External ID Field	Name	Progress	100%		
Content Type	CSV	Records Processed	8		
Concurrency Mode	Parallel	Records Failed	0		
API Version	64.0	Retries	0		

Reload



## 2. Duplicate Rules

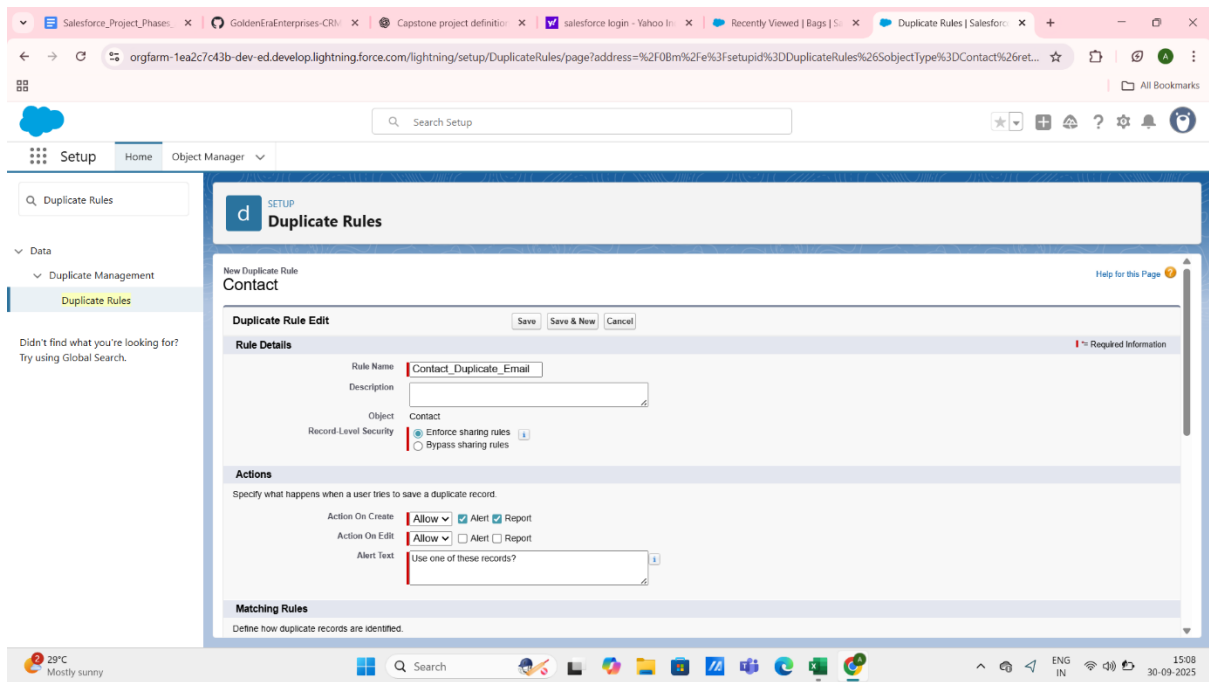
### Why?

To prevent duplicate data entries like two customers with the same phone number or email ID.

### Steps:

1. Go to **Setup** → **Duplicate Rules**.
2. Click **New Rule** → Select Object (e.g., Customer).
3. Add Rule Name: Customer\_Duplicate\_Check.
4. Choose actions:
  - On Create → Block
  - On Edit → Block
5. Add Matching Rule (e.g., check on Email or Phone field).
6. Save & Activate.

**Outcome:** Salesforce will stop users from adding duplicate records and ensure data quality.



### 3. Data Export & Backup

#### Why?

To take regular backups of project data (like Production Batches, Bags, Sales Orders) in case of system failures or data loss.

#### Steps:

1. Go to **Setup** → **Data Export**.
2. Choose **Export Now** or **Schedule Export** (weekly/monthly).
3. Select objects → Include all data and files.
4. Save → Salesforce prepares a **.zip file** with CSV files.
5. Download and store the backup safely.

**Outcome:** All project data is backed up securely and can be restored when needed.

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Search Setup

SetupHomeObject Manager

DataExport

▼ DataData Export

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SETUPData Export

Monthly Export Service

Export File EncodingISO-8859-1 (General US & Western European, ISO-LATIN-1)

Include images, documents, and attachments

Include Salesforce Files and Salesforce CRM Content document versions

Replace carriage returns with spaces

Start ExportCancel

Exported Data

Select what type of information you would like to include in the export. The data types listed below use the Apex API names. If you are not familiar with these names, select Include all data for your export.

Include all data

Contract

Asset

Lead

BusinessProcess

Campaign

CaseContactRole

ContentDocumentLink

ContractContactRole

Order

Account

Partner

NotificationMember

CampaignMember

CaseHistory2

ContentVersion

EmailDisclaimer

OrderItem

Contact

Product2

UserRole

Case

CaseSolution

ContentVersionMap

EmailMessage

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SETUPData Export

Monthly Export Service

Data Export lets you prepare a copy of all your data in salesforce.com. From this page you can start the export process manually or schedule it to run automatically. When an export is ready for download you will receive an email containing a link that allows you to download the file(s). The export files are also available on this page for 48 hours, after which time they are deleted.

Next scheduled export:  
A data export is currently in progress for your organization.

Export NowSchedule Export

Your export has been queued. You will receive an email notification when it is completed.

Scheduled ByArshiva Shale

Schedule Date9/30/2025

Export File EncodingISO-8859-1 (General US & Western European, ISO-LATIN-1)

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