Data Management & Deployment Mastery

Phase 8 focuses on mastering the essential tools for managing data within Salesforce and understanding the various methods for deploying customizations between environments. This comprehensive guide covers both practical data management tasks and deployment strategies that every Salesforce professional needs to know.
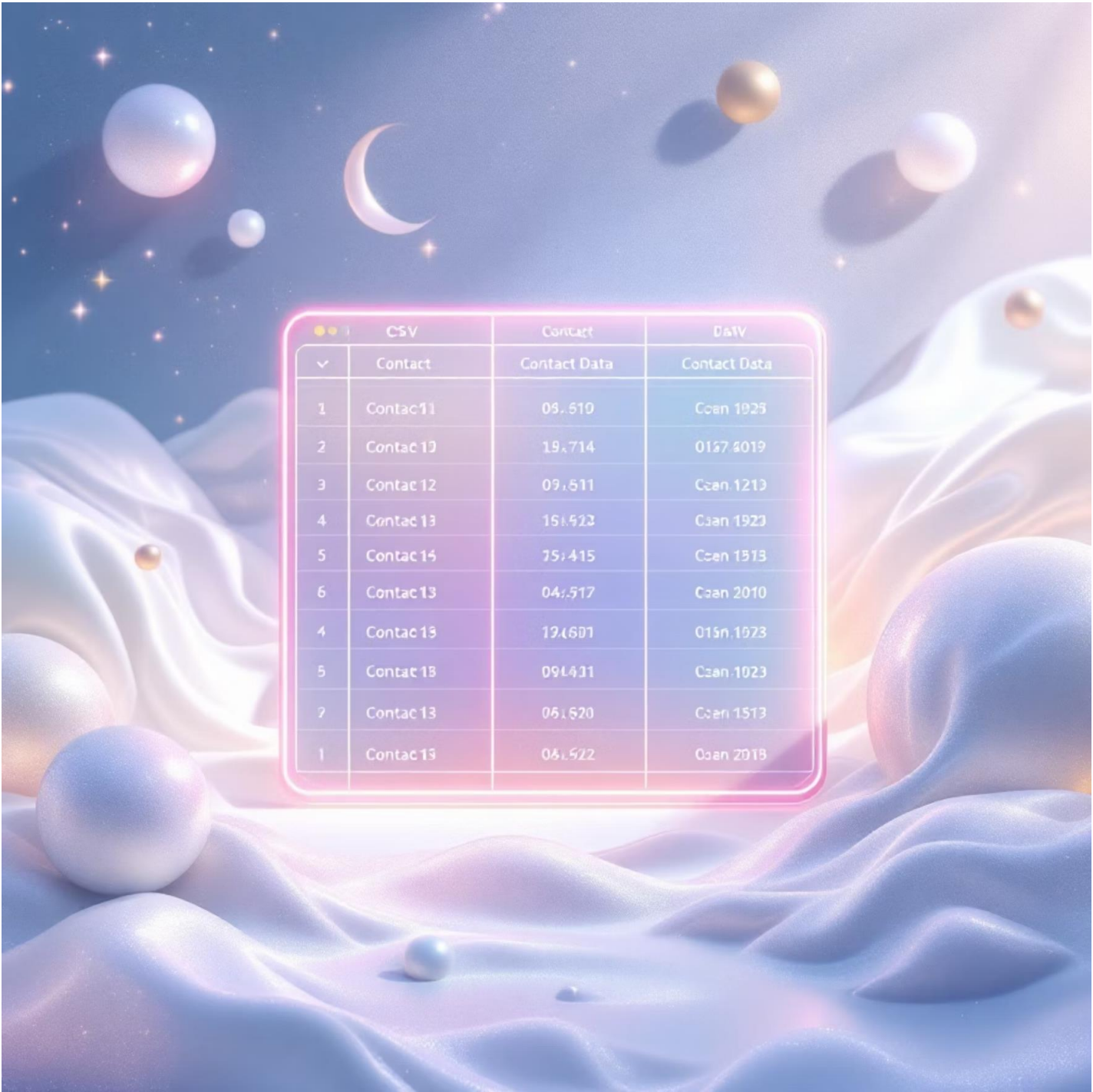
Data Import Wizard: Your Gateway to Efficient Data Entry

Browser-Based Simplicity

The Data Import Wizard provides a user-friendly, browser-based solution for importing small datasets directly into Salesforce. Perfect for quick data uploads without requiring additional software installations.

Key Benefits:

- No software installation required
- Intuitive step-by-step process
- Built-in field mapping capabilities
- Immediate data validation

Search Setup

Data Import Wizard

Recent Import Jobs

Status	Object	Records Created	Records Updated	Records Failed	Start Date	Processing Time (ms)
Closed	Contact	4	0	0	09-21-2025 08:53	319

Bulk Api Monitoring

Collapse

Clean up your data import file

You'll have fewer errors to resolve if your data file is clean and free of duplicates. Watch video

Make sure your field names match Salesforce field names

You'll be required to map your data fields to Salesforce data fields. Data in unmapped fields is not imported. View a list of Salesforce data fields.

Don't import too many records at once

Using the Data Import Wizard, import up to 50,000 records at a time. Importing too many records can slow down your org for all users, especially during periods of peak usage.

Before you import your data...

Import your data in 3 easy steps!

Launch the Data Import Wizard to import your data.

Pre-step: Prepare your   Choose data to import   Edit field mapping   Review and start import

Data Loader: Power Tool for Large-Scale Operations

Desktop Application Power

Data Loader is a robust desktop application designed for handling large datasets and complex data operations that exceed the capabilities of the browser-based wizard.

Advanced Functionality

Supports bulk operations including insert, update, upsert, delete, and export functions with sophisticated field mapping and data transformation capabilities.

Enterprise Ready

Command-line interface support, scheduled operations, and integration with enterprise workflows make it ideal for production environments.
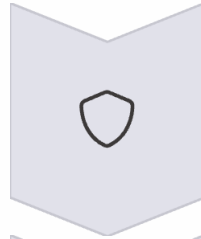
Exporting Appointments: A Practical Example

1. Download and install Data Loader from Setup > Data Loader
2. Launch application and authenticate into your Salesforce org
3. Use Export function to select Appointment (Appointment__c) object
4. Choose specific fields for backup (Id, Name, Appointment_Date_Time__c)
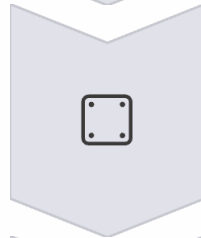5. Execute export and verify CSV file creation on local computer

Duplicate Rules: Maintaining Data Quality

Duplicate rules are essential for maintaining clean, reliable data by preventing the creation of duplicate records and alerting users to potential data quality issues.

Matching Rules Foundation

Create matching rules that define how Salesforce identifies potential duplicates using exact matches, fuzzy logic, or custom criteria.

Duplicate Rule Configuration

Configure duplicate rules to either block creation entirely or allow creation with user warnings based on your data governance requirements.

Quality Assurance

Implement comprehensive data quality measures that protect your organization's most valuable asset - clean, accurate data.

Task A: Email Duplicate Prevention

Block Strategy: Created matching rule for exact email matches with duplicate rule set to **Block** new duplicate contact creation

Task B: Name & Phone Warnings

Alert Strategy: Fuzzy name matching combined with exact phone matching triggers user **Alerts** while allowing creation

duplicate

Didn't find what you're looking for?
Try using Global Search.

SETUP
Duplicate Rules

Contact Duplicate Rule
Prevent Duplicate Contact Emails

Help for this Page ?

Duplicate Rule Detail   Edit   Delete   Clone   Deactivate

Rule Name	Prevent Duplicate Contact Emails
Description	
Object	Contact
Record-Level Security	Enforce sharing rules
Action On Create	Block
Action On Edit	Allow
Alert Text	Use one of these records?
Active	✓
Matching Rule	✓ Standard Contact Matching Rule ✓ Mapped
Conditions	
Created By	Ayush Kumar Dewan, 23/09/2025, 6:10 am

Order   3 of 4 [Reorder] i

Operations On Create   ☐ Alert ☐ Report

Operations On Edit   ☐ Alert ☐ Report

Matching Criteria   Matching rule for contact records. More info

Modified By   Ayush Kumar Dewan, 23/09/2025, 6:13 am

Edit   Delete   Clone   Deactivate

Automated Data Export: Your Safety Net

Weekly Backup Strategy

Scheduled data exports provide automated, comprehensive backups of your entire Salesforce organization, ensuring business continuity and compliance with data retention policies.

Configuration Steps:

- Navigate to Setup > Data Export
- Click Schedule Export for automation
- Set Weekly frequency on preferred day
- Select "Include all data" for complete backup
- Save schedule for automatic execution

Search Setup

Home   Object Manager

data export

Data

Data Export

Didn't find what you're looking for?
Try using Global Search.

SETUP
Data Export

Schedule Data Export

Help for this Page

Schedule Data Export	Save Cancel

Export File Encoding	ISO-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	☑
Schedule Data Export	

Frequency
⦿ On day 1 ▾ of every month   ◯ On the 1st ▾ Sunday ▾ of every month

Start   25/09/2025   [25/09/2025]
End   25/10/2025   [25/09/2025]
Preferred Start Time   7:00 am ▾

Exact start time will depend on job queue activity.

Save   Cancel

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   ☐ Order   ☐ OrderItem
☐ Asset   ☐ Account   ☐ Contact
☐ Lead   ☐ Partner   ☐ Product2
☐ BusinessProcess   ☐ NotificationMember   ☐ UserRole

Mastery Achieved: Your Data & Deployment Toolkit

Congratulations! You've now mastered the essential tools and concepts for data management and deployment in Salesforce. This comprehensive toolkit empowers you to handle everything from simple data imports to complex enterprise deployment strategies.

4

Data Management Tools

Import Wizard, Data Loader, Duplicate Rules, and Scheduled Exports

4

Deployment Methods

VS Code/SFDX, Change Sets, Packages, and ANT Migration Tool

100%

Industry Readiness

Complete preparation for professional Salesforce development workflows