

Corporate IT Helpdesk System

Phase 8: Data Management & Deployment

Project: Corporate IT Helpdesk System

Purpose:

This phase focuses on key administrative skills in **data management** for the IT Helpdesk system. To demonstrate this, two core tasks were performed: importing new employee and IT asset data using the Data Import Wizard, and configuring a **data backup strategy** using the Data Export service. Complex deployment topics were not included to maintain simplicity.

1. Data Import using the Data Import Wizard

Goal:

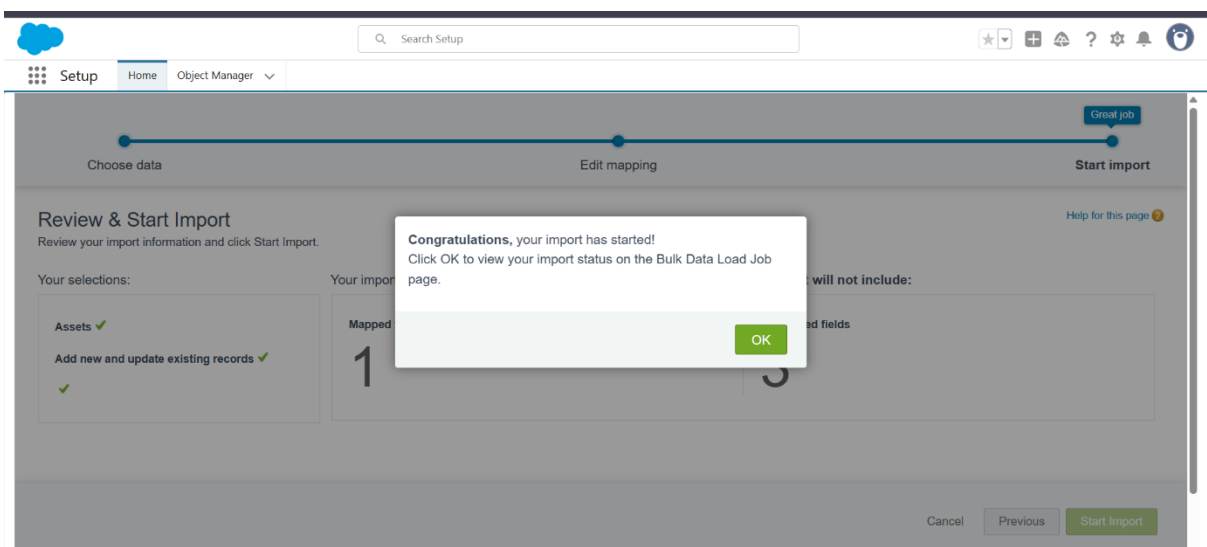
To efficiently add multiple new **IT Asset** records into the system from external CSV files, demonstrating how to populate the IT Helpdesk with bulk data.

Implementation:

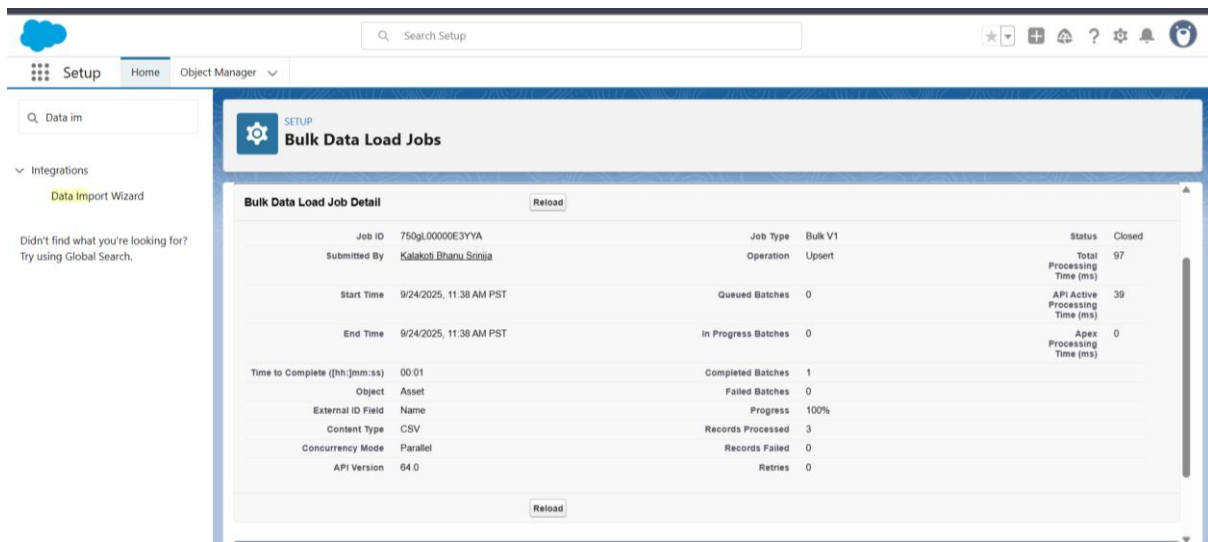
1. Launched the **Data Import Wizard** in Salesforce.
2. Selected the **IT Asset** custom objects for new record imports.
3. Prepared CSV files containing IT asset details (asset name, serial number, purchase date, asset type).

[illegible]

4. Uploaded the CSV file and mapped the fields to the corresponding Salesforce object fields.
5. Submitted the import jobs and monitored their status on the "**Bulk Data Load Jobs**" page.
6. The import jobs completed successfully, with a "**Closed**" status, confirming that multiple records were processed and inserted.



7. Verified the results by navigating to the **IT Assets** tabs in the IT Helpdesk app. The list views now display the newly imported records, confirming that the data import was successful.



The screenshot shows the Salesforce Setup interface with the 'Bulk Data Load Jobs' page open. The left sidebar contains navigation options like 'Setup', 'Home', and 'Object Manager'. The main content area displays a table with details for a specific Bulk Data Load Job.

Bulk Data Load Job Detail			
Job ID	750gLO0000E3YVA	Job Type	Bulk V1
Submitted By	Kalakoti Rhanu Srinija	Operation	Upsert
Status	Closed		
Start Time	9/24/2025, 11:38 AM PST	Queued Batches	0
End Time	9/24/2025, 11:38 AM PST	In Progress Batches	0
Time to Complete (hh:mm:ss)	00:01	Completed Batches	1
Object	Asset	Failed Batches	0
External ID Field	Name	Progress	100%
Content Type	CSV	Records Processed	3
Concurrency Mode	Parallel	Records Failed	0
API Version	64.0	Retries	0

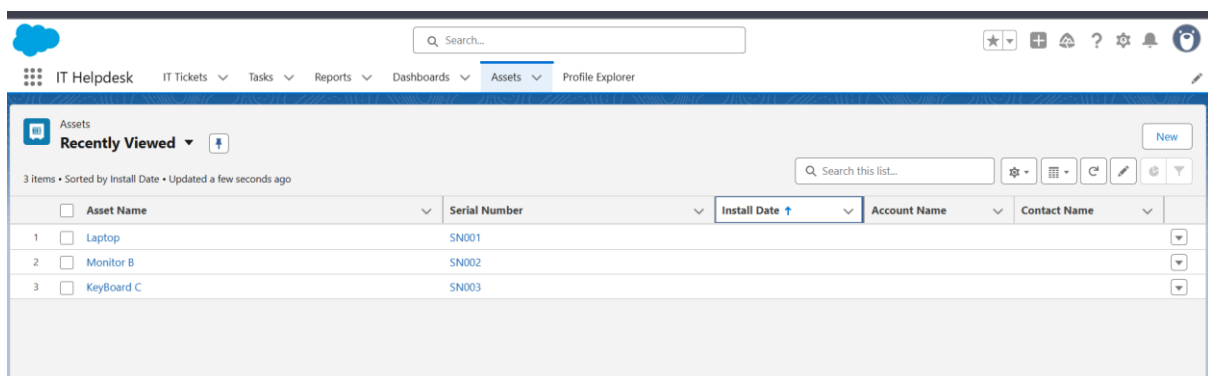
2. Data Backup using the Data Export Service

Goal:

To establish a regular data backup strategy, which is a critical administrative function for **data protection and disaster recovery** in the IT Helpdesk system.

Implementation:

1. Accessed the **Data Export** service in Salesforce Setup.
2. Scheduled an automated, **Monthly backup** of all IT Helpdesk data, including employee records, tickets, and IT assets.

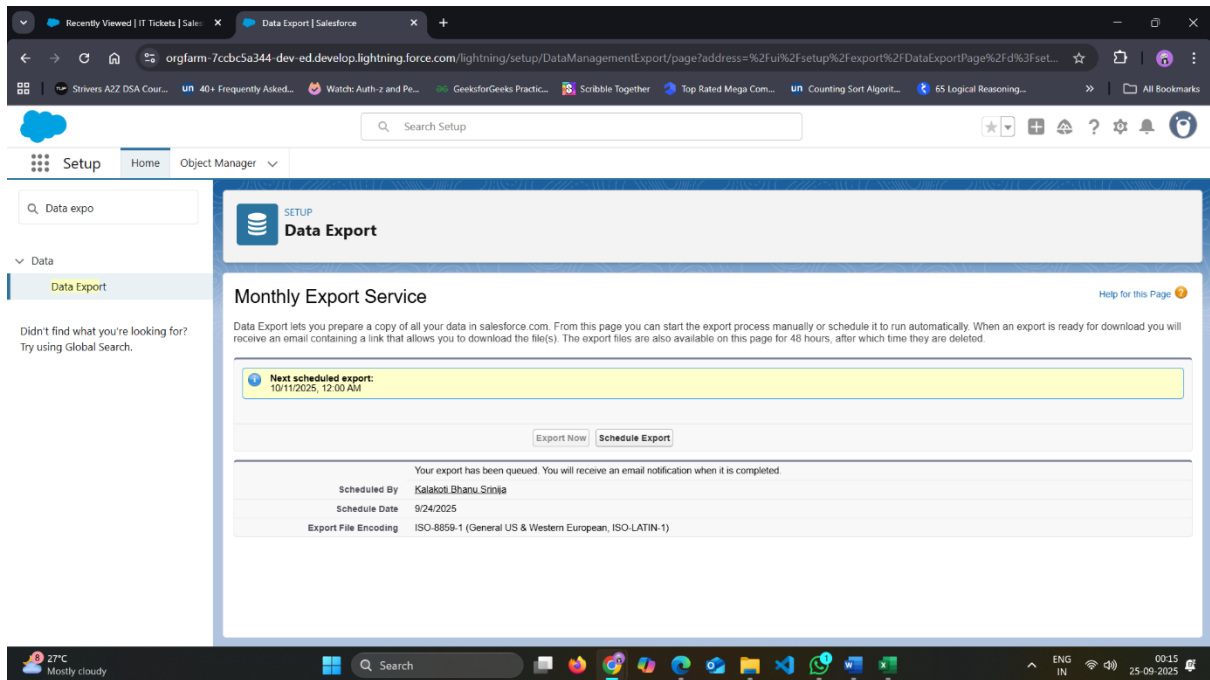


The screenshot shows the Salesforce IT Helpdesk interface with the 'Assets' tab selected. The list view displays a table of recently viewed assets, sorted by Install Date.

Asset Name	Serial Number	Install Date	Account Name	Contact Name
Laptop	SN001			
Monitor B	SN002			
KeyBoard C	SN003			

3. Configured the data set to include all relevant objects to ensure complete coverage.

4. Saved the schedule and confirmed that Salesforce will automatically generate and email the backup files according to the defined frequency.



Conclusion

Key data management tasks have been successfully demonstrated. The IT Helpdesk system can now be populated with bulk employee and asset data via the Import Wizard, and a regular backup schedule is in place to ensure critical data is protected. This completes the **Data Management & Deployment** phase of the project.
