

# Phase 8 – Deployment & Backup

## 1. Introduction


This phase focuses on **safely moving your Salesforce CRM metadata** (objects, flows, Apex classes, triggers, Lightning components) from one org to another, such as from **sandbox to production**, and ensuring **data backups** are maintained.

It includes **click-based (Change Sets)** and **developer-based (VS Code + CLI)** deployment methods, as well as regular **export and backup of data** to prevent loss.

## 2. Admin Deployment (Change Sets)

**Purpose:** Deploy metadata from one Salesforce org to another using Salesforce's UI without code.

### Steps:

1. Navigate: **Setup** → **Quick Find** → **Outbound Change Sets** → **New**
2. Fill details:
  - a. Name: PunjabRelief\_Deployment
  - b. Description: Deploy CRM metadata to Production
3. Add Components → Select all relevant components:
  - a. Objects (Donor, Donation, Volunteer, Relief\_Request, Distribution)
  - b. Flows (record-triggered, screen flows)
  - c. Apex Classes & Triggers
4. Upload the Change Set to the **target org**
5. In the target org → **Inbound Change Sets** → **Deploy**
6. Verify all metadata is deployed successfully 

**SETUP**  
**Matching Rules**

Matching Rule  
**Donor\_EmailPhone\_Match** [Help for this Page](#)

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

Object	Donor
Rule Name	Donor_EmailPhone_Match
Unique Name	Donor_EmailPhone_Match
Description	
Matching Criteria	(Donor: Donor_PhoneNo FUZZY PHONE MatchBlank = FALSE) AND (Donor: Donor_Email EXACT MatchBlank = FALSE)
Status	Active
Created By	Chinmay Choudhari, 9/24/2025, 5:54 AM
Modified By	Chinmay Choudhari, 9/24/2025, 5:54 AM

**SETUP**  
**Duplicate Rules**

Donor Duplicate Rule  
**Donor - Email/Phone** [Help for this Page](#)

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

Rule Name	Donor - Email/Phone	Order	1 of 1 [Reorder]
Description			
Object	Donor		
Record-Level Security	Enforce sharing rules		
Action On Create	Allow	Operations On Create	<input checked="" type="checkbox"/> Alert <input checked="" type="checkbox"/> Report
Action On Edit	Allow	Operations On Edit	<input type="checkbox"/> Alert <input type="checkbox"/> Report
Alert Text	Possible duplicate donor found — please review		
Active	<input checked="" type="checkbox"/>		
Matching Rule	<input checked="" type="checkbox"/> Donor_EmailPhone_Match <input checked="" type="checkbox"/> Mapped	Matching Criteria	(Donor: Donor_PhoneNo FUZZY PHONE MatchBlank = FALSE) AND (Donor: Donor_Email EXACT MatchBlank = FALSE)
Conditions			
Created By	Chinmay Choudhari, 9/24/2025, 5:49 AM	Modified By	Chinmay Choudhari, 9/24/2025, 5:55 AM

### 3. Developer Deployment (VS Code + Salesforce CLI)

**Purpose:** Deploy using code for more control, especially for large projects or Git-managed repositories.

#### Steps:

1. Open project in VS Code → terminal
2. Make sure your **sfdx-project.json** exists and folder structure is correct.
3. Authorize target org if not done:

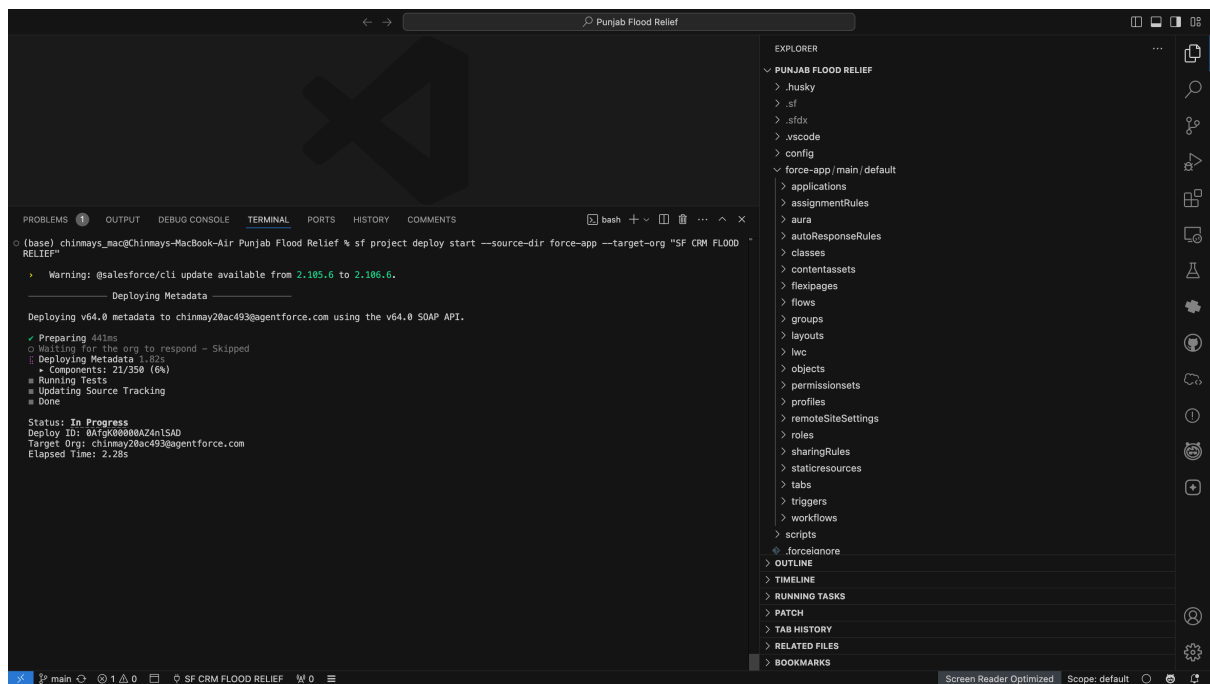
```
sf org login web --alias "SF CRM FLOOD RELIEF"
```

4. Deploy metadata:

```
sf project deploy start --source-dir force-app --target-org "SF CRM FLOOD RELIEF"
```

5. Monitor deployment logs in terminal.

6. Confirm all classes, triggers, objects, and flows are deployed correctly



## 4. Data Backup & Export

**Purpose:** Ensure all CRM data is safely backed up before deployment or updates.

**Steps:**

1. Navigate: **Setup** → **Quick Find** → **Data Export**

2. Select objects to export:

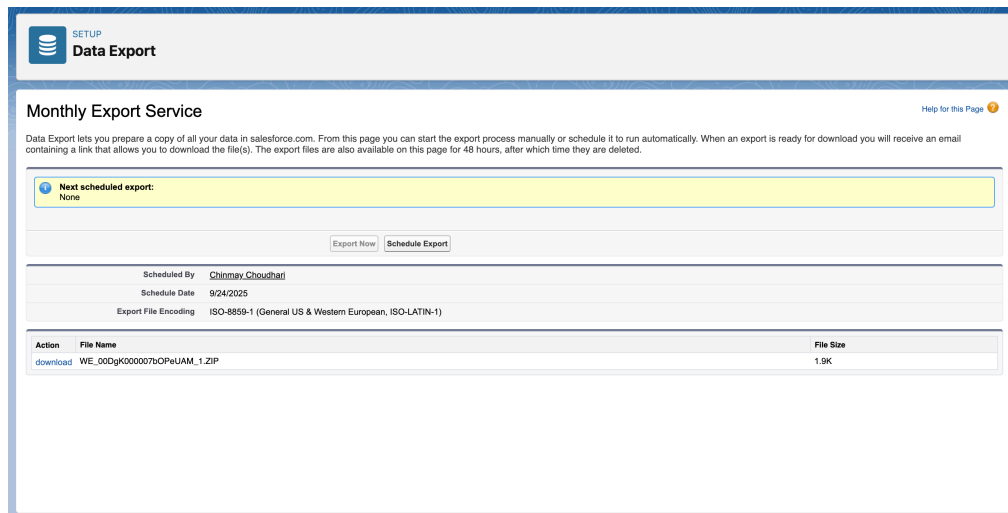
a. Donor, Donation, Volunteer, Relief\_Request, Distribution

### 3. Choose:

- a. **Export Now** → immediate export
- b. OR **Schedule Export** → weekly or monthly backup

### 4. Download ZIP containing CSV files

### 5. Store backup safely offline or in cloud



## 5. Conclusion

Phase 8 ensures your **CRM is safely deployed** and **backed up**, protecting against data loss and enabling smooth updates.

Using both **admin-friendly Change Sets** and **developer-friendly CLI deployment**, you can maintain flexibility depending on the team and project needs.

Regular **data export** guarantees a fallback in case of accidental changes or org issues.