Phase 8: Data Management & Deployment

Objective

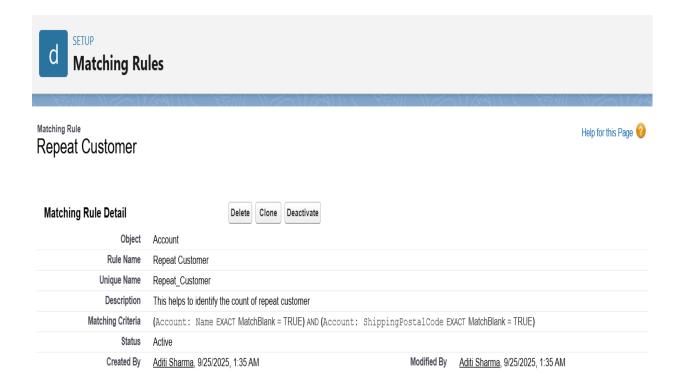
Manage Salesforce data lifecycle (export, deduplication, backup) and ensure smooth deployment from sandbox \rightarrow production using proper tools and best practices.

1. Duplicate Rules (Keep Data Clean)

- Prevents duplicate accounts/orders.
- Define matching rules for objects.

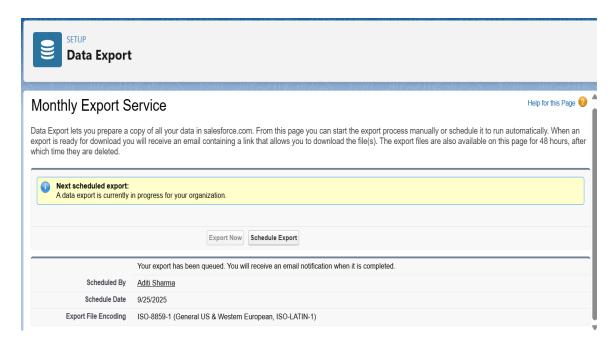
Examples:

- Account Rule: Duplicate if Retailer Name + Phone match.
- Order Rule: Duplicate if Retailer + Product + Date match.



2. Data Export & Backup (Disaster Recovery)

- Weekly Data Export Service → full CSV backup.
- Scheduled Data Loader exports → daily incremental backup.
- 3rd-party backup tools (OwnBackup, Spanning) for enterprise recovery.



3. Deployment Tools (Moving Setup → Production)

Change Sets:

- Point-and-click inside Salesforce.
- Good for small deployments (fields/objects).

Packages:

- Unmanaged Packages → internal, editable.
- Managed Packages → locked, for AppExchange.

ANT Migration Tool:

- XML-based CLI deployment.
- Good for large/repetitive deployments.

VS Code + Salesforce CLI:

- Source-driven development.
- Scratch orgs for safe testing.
- Integrates with GitHub + CI/CD pipelines.

