

# Phase 8: Data Management & Deployment

## Objective


Manage Salesforce data lifecycle (export, deduplication, backup) and ensure smooth deployment from sandbox → 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.

 **Matching Rules**

Matching Rule

Repeat Customer

Help for this Page ?

Matching Rule Detail

Delete


Clone

Deactivate

Object	Account
Rule Name	Repeat Customer
Unique Name	Repeat_Customer
Description	This helps to identify the count of repeat customer
Matching Criteria	(Account: Name EXACT MatchBlank = TRUE) AND (Account: ShippingPostalCode EXACT MatchBlank = TRUE)
Status	Active
Created By	Aditi Sharma, 9/25/2025, 1:35 AM
Modified By	Aditi Sharma, 9/25/2025, 1:35 AM

## 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.

 **SETUP**  
**Data Export**

### Monthly Export Service [Help for this Page](#)

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 Now](#) [Schedule Export](#)

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

Scheduled By	<a href="#">Aditi Sharma</a>
Schedule Date	9/25/2025
Export File Encoding	ISO-8859-1 (General US & Western European, ISO-LATIN-1)

## 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.

