

Phase 8: Data Management & Deployment

1. Data Import Wizard

Use Case:

When starting the Corporate Training CRM project, you may need to bulk import employee, trainer, and course data into Salesforce.

The Data Import Wizard is a user-friendly, web-based tool that lets you import standard and custom object records via CSV files.

Implementation Steps:

1. Go to **Setup** → **Data** → **Data Import Wizard**.
2. Select **Custom Objects** (Employee, Trainer, Course, Registration).
3. Upload a **CSV file** containing the records.
4. Map CSV columns to Salesforce fields (e.g., Employee Name → Name, Email → Email__c).
5. Click **Start Import**.

The screenshot displays the Salesforce Bulk Data Load Jobs interface. The left sidebar shows the navigation menu with 'Setup' selected. The main content area is titled 'Bulk Data Load Jobs' and shows details for a specific job with ID '750gK00000FOHQU'. The job is in a 'Closed' status. The details table includes fields such as Job ID, Job Type, Bulk V1, Status, Submitted By, Operation, Insert, Start Time, Queued Batches, End Time, In Progress Batches, Time to Complete, Completed Batches, Object, Failed Batches, External ID Field, Progress, Content Type, Records Processed, Concurrency Mode, Records Failed, and API Version. The job was submitted by 'Permatasa Dhanraj Vidyia Prabha' and is for the 'Course' object. The progress is 100%.

Bulk Data Load Job Detail		Status	
Job ID	750gK00000FOHQU	Job Type	Bulk V1
Submitted By	Permatasa Dhanraj Vidyia Prabha	Operation	Insert
Start Time	10/15/2025, 2:26 AM PST	Queued Batches	0
End Time	10/15/2025, 2:26 AM PST	In Progress Batches	0
Time to Complete @1h:jmm:ss	00:01	Completed Batches	1
Object	Course	Failed Batches	0
External ID Field		Progress	100%
Content Type	CSV	Records Processed	1
Concurrency Mode	Parallel	Records Failed	0
API Version	65.0	Retries	0

2. Duplicate Rules

Use Case:

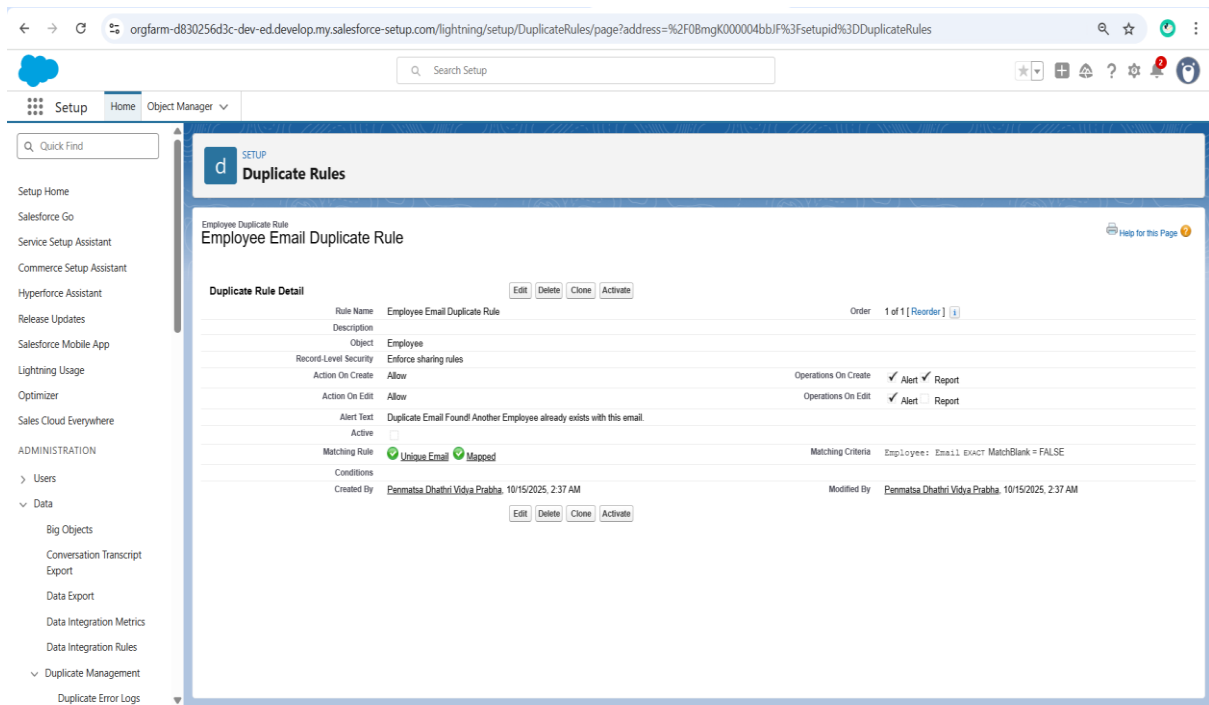
To prevent duplicate employee or trainer records, configure Duplicate Rules and Matching Rules.

Implementation Steps:

1. Go to **Setup** → **Duplicate Rules** → Click **New Rule**.
2. Select object, e.g., **Employee**.
3. Define matching logic.
4. Set action: **Block** or **Alert** if duplicate is found.
5. Activate the rule.

The screenshot displays the Salesforce Setup interface for configuring a Matching Rule. The browser address bar shows the URL: `orgfarm-d830256d3c-dev-ed.develop.my.salesforce-setup.com/lightning/setup/MatchingRules/page?address=%2F01DgK000000417eb`. The left sidebar contains the navigation menu with 'Setup' selected, and 'Duplicate Management' expanded, showing 'Duplicate Error Logs' and 'Duplicate Rules'. The main content area is titled 'Matching Rules' and shows a specific rule named 'Unique Email' for the 'Employee' object. The rule is active and has the matching criteria 'Employee: Email EXACT MatchBlank = FALSE'. The 'Created By' and 'Modified By' fields both show 'Pannatsa Dhattni Vidya Prabha' with a timestamp of '10/15/2025, 2:35 AM'. Action buttons for 'Delete', 'Clone', and 'Deactivate' are visible at the top right of the rule details.

Matching Rule Detail	
Object	Employee
Rule Name	Unique Email
Unique Name	Unique_Email
Description	
Matching Criteria	Employee: Email EXACT MatchBlank = FALSE
Status	Active
Created By	Pannatsa Dhattni Vidya Prabha 10/15/2025, 2:35 AM
Modified By	Pannatsa Dhattni Vidya Prabha 10/15/2025, 2:35 AM



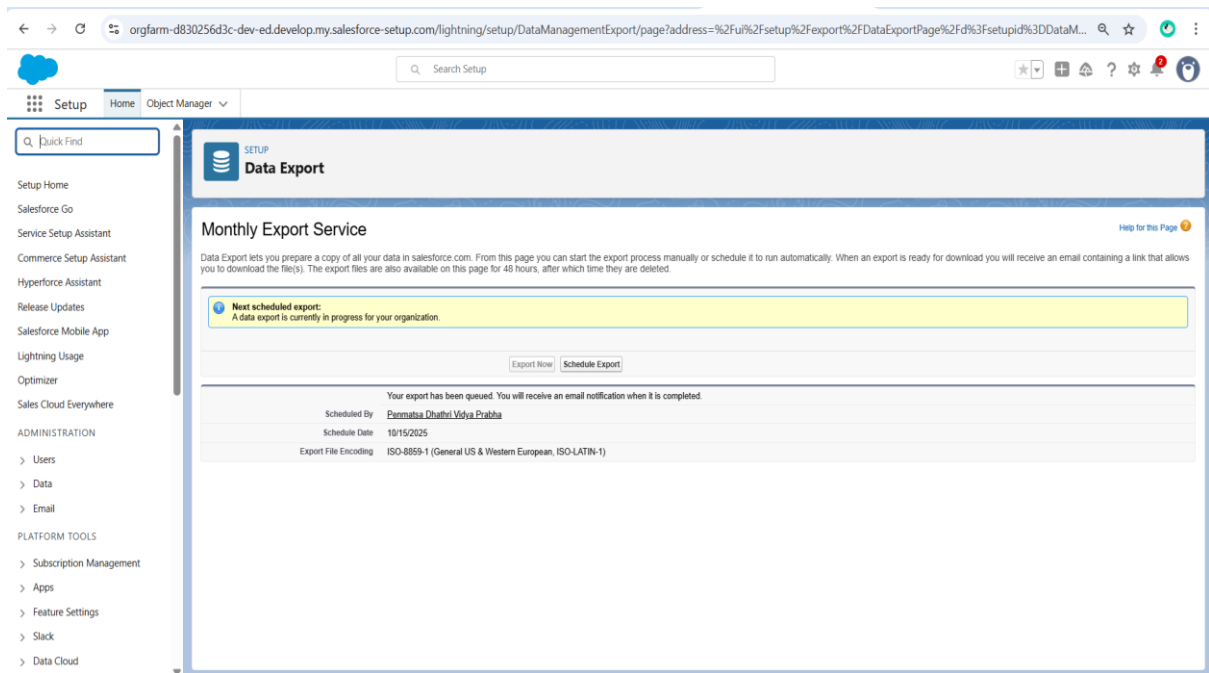
3. Data Export & Backup

Use Case:

Regular backups ensure safety of all training, employee, and registration records.

Implementation Steps:

1. Go to **Setup** → **Data** → **Data Export**.
2. Choose objects (Employee, Trainer, Course, Registration).
3. Select **Include all data** / **Schedule export weekly/monthly**.
4. Download the generated ZIP files for backup.



Summary:

By implementing Data Import, Duplicate Rules, and Data Export, the Corporate Training CRM now maintains:

- Clean and validated data,
- Consistent and duplicate-free records, and
- Reliable backups for data recovery and deployment.