Phase 8 – Data Management & Deployment
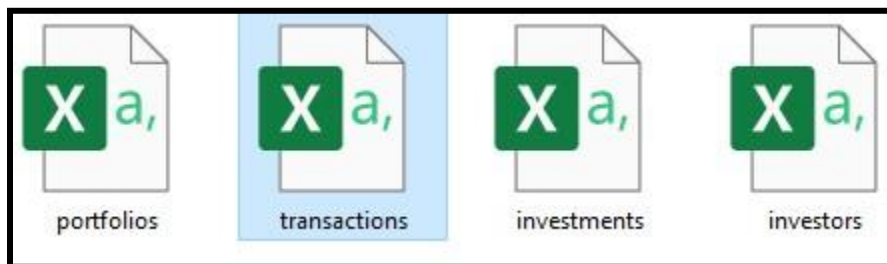
1 - Data Import Wizard

Used the built-in Salesforce **Data Import Wizard** to upload multiple records at once.
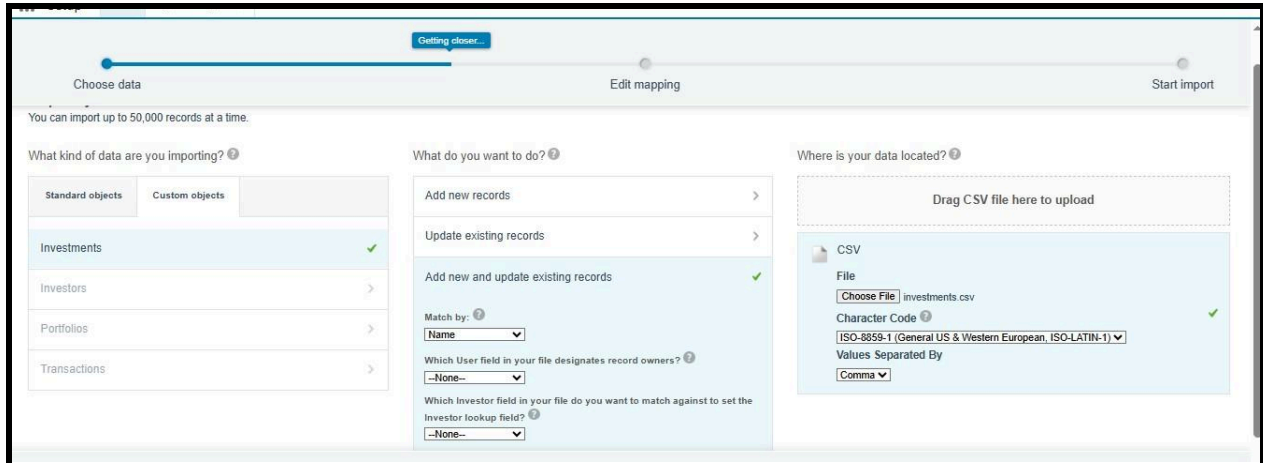
Imported sample data for:

- **Investors** (5 records)

- **Investments** (5 records)

- **Transactions** (5 records)

- **Portfolios** (5 records)

Mapped fields such as *Investor Name → Investor__c*, *Amount → Amount_c__c*, etc.

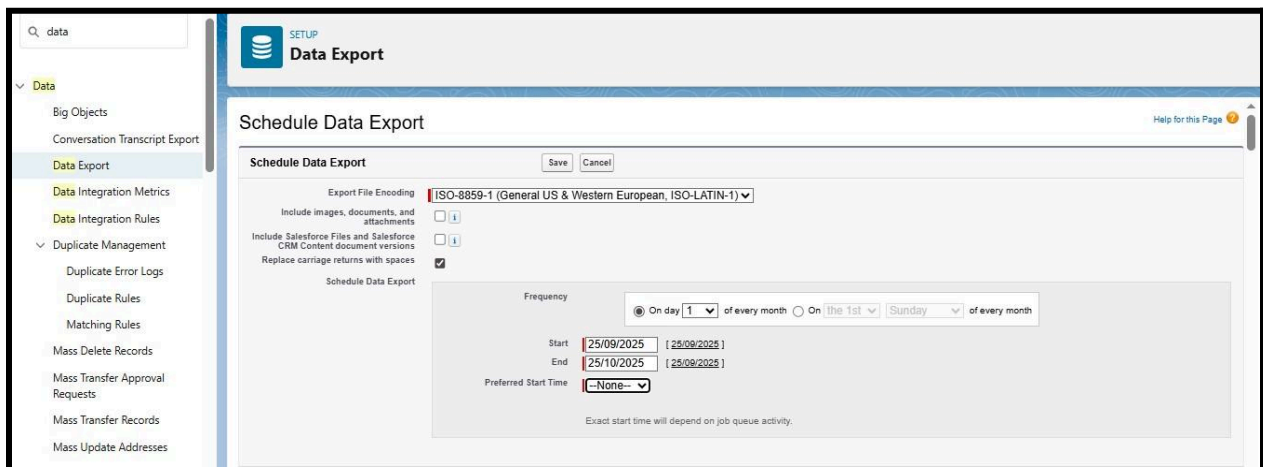Verified records by checking related lists (Investments under Investor, Transactions under Investment).

Screen shot showing dashboard of Import data wizard

2 - Data Export & Backup

- ○ Enabled **Monthly Data Export** in Setup to automatically back up all custom object data in CSV format.

- ○ This ensures data recovery in case of accidental deletion.

3 - **VS Code / SFDX**

Connected Org Using VS Code (SFDX, CLI)

Salesforce CLI

Allow Access?

Salesforce CLI is asking to:

- Access the identity URL service
- Manage user data via Web browsers
- Manage user data via APIs
- Perform requests at any time

Do you want to allow access for
ganeshchoumal@empathetic-goat-vxepq5.com? (Not
you?)

| Deny | Allow |

To revoke access at any time, go to your personal settings.

salesforce

Authentication Successful

You've successfully logged in. You can now
close this browser tab or window.

```
tarting SFDX: Refresh SObject Definitions

2:39:38.703 sf sobject definitions refresh
rocessed 19 Standard sObjects
rocessed 0 Custom sObjects
2:39:39.704 sf sobject definitions refresh
ended with exit code 0


tarting SFDX: Authorize an Org

2:40:23.48 sf org:login:web --alias fin --instance-url https://login.salesforce.com --set-default
»   Warning: @salesforce/cli update available from 2.103.7 to 2.107.6.
uccessfully authorized ganeshchoumal@empathetic-goat-vxepq5.com with org ID 00DdM00000dobh3UAA
2:44:07.58 sf org:login:web --alias fin --instance-url https://login.salesforce.com --set-default
ended with exit code 0

2:44:37.584 Starting SFDX: Retrieve This Source from Org

=== Retrieved Source
ULL NAME           TYPE          PROJECT PATH
_____

reventFutureDates   ApexTrigger   force-app\main\default\triggers\PreventFutureDates.trigger
reventFutureDates   ApexTrigger   force-app\main\default\triggers\PreventFutureDates.trigger-meta.xml

2:44:38.715 Ended SFDX: Retrieve This Source from Org
```


Retrieved trigger and Committed changes into a new branch:

URL - https://github.com/ganesh-mit21/Salesforce-Business-Finance-Investment-Tracker.git