

## Phase 8: Data Management & Deployment

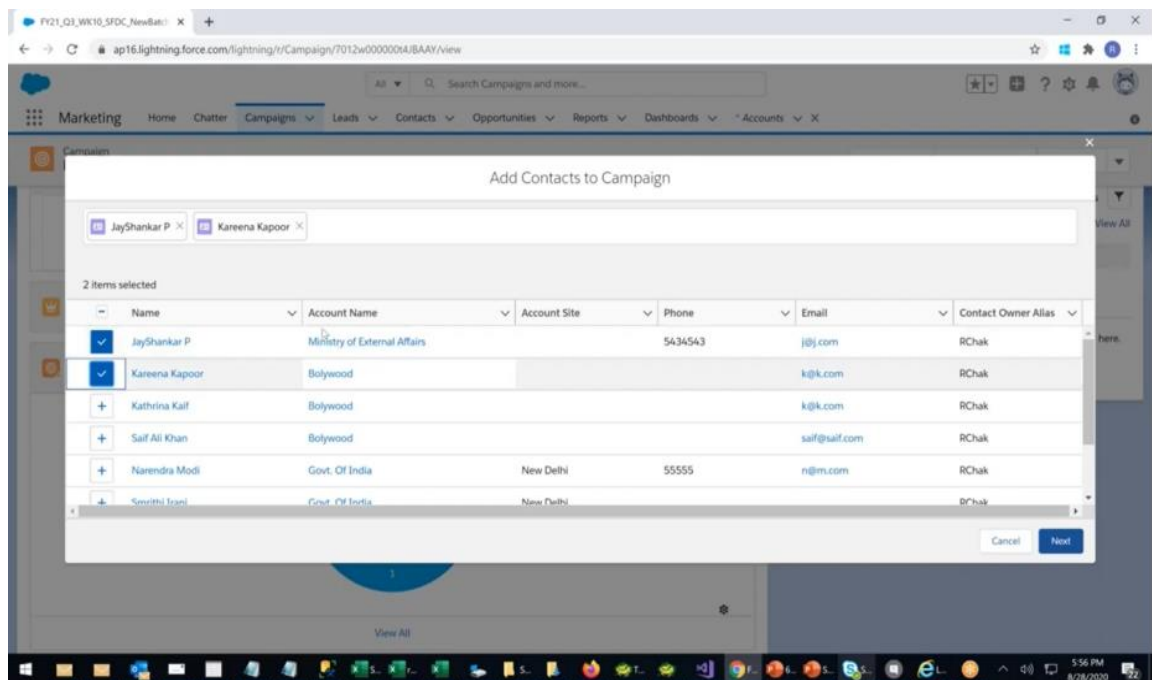
### Goal

To manage lead data efficiently and deploy Salesforce configurations from a development environment (sandbox/Developer Org) to production.

---

### 1. Data Import Wizard

- Used for **importing small volumes of records** (up to 50,000).
- **Example:** Import demo **Lead records** with Name, Company, Email, Phone, Lead Source, and Status.



### 2. Data Loader

- Tool for **bulk data import/export**.
  - **Example:** Import a large number of Leads or Lead Interactions from CSV files.
  - Can also be used to update existing records in bulk.
- 

### 3. Duplicate Rules

- Prevent duplicate lead entries by checking **Email, Phone, or Company** fields.
  - Helps maintain **clean and accurate lead data**.
-

#### 4. Data Export & Backup

- Schedule **weekly backups** of all Leads, Opportunities, Contacts, and custom objects.
  - Ensures **data safety** in case of accidental deletion or data corruption.
- 

#### 5. Change Sets

- Deploy Salesforce **configurations, objects, fields, page layouts, and flows** from sandbox/Developer Org to production.
  - Ensures that tested changes are safely moved to live environment.
- 

#### 6. Unmanaged vs Managed Packages

- **Unmanaged Packages:** Useful for deploying custom objects and configurations within your org.
  - **Managed Packages:** Used if you want to distribute the app publicly on **AppExchange** (not required for your project).
- 

#### 7. ANT Migration Tool

- Command-line tool for advanced deployment and automation.
  - Not required for a simple declarative project, but useful in enterprise scenarios.
- 

#### 8. VS Code & Salesforce DX (SFDX)

- Useful for **development, source control, and deployment** in larger Salesforce projects.
- This step is not implemented for this project as there is no need for code .