

Phase 8 — Data Management & Deployment (step-by-step)

1. Data Import Wizard — simple imports (UI)

When to use: small imports (up to 50,000 rows), quick mapping for standard/custom objects.

Step-by-step:

1. Setup → Data Import Wizard → Launch Wizard.
2. Choose the object (Account, Contact, or custom object like Shipment__c).
3. Upload CSV (max ~50,000 rows / file). Include header row.
4. Map CSV columns to Salesforce fields (use exact API names if possible).
5. Select operation: Insert / Update / Upsert (pick External ID if upsert).
6. Run import on the small test file first. Review success/error files and correct CSV or mappings.
7. Run full import once test passes.

The screenshot shows the Salesforce Data Import Wizard interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The left sidebar has a search bar and a list of integrations, with 'Data Import Wizard' highlighted. The main content area is titled 'Bulk Data Load Jobs' and displays details for a specific job (Job ID: 750gl.00000EK0bn). The job details include: Submitted By: Gaut.Ladikar, Job Type: Bulk V1, Operation: Insert, Status: Closed, Total Processing Time (ms): 333, Queued Batches: 0, In Progress Batches: 0, Completed Batches: 1, Failed Batches: 0, Progress: 100%, Records Processed: 12, Records Failed: 12, and Retries: 0. Below the job details is a table of batches.

View Request	View Result	Batch ID	Start Time	End Time	Total Processing Time (ms)	API Active Processing Time (ms)	Apex Processing Time (ms)	Records Processed	Records Failed	Retry Count	State Message	Status
View Request	View Result	751gl.00000BqH11	9/28/2025, 11:02 PM	9/28/2025, 11:02 PM	333	155	76	12	12	0		Completed

2. Data Loader — bulk & reliable loads (UI + CLI)

When to use: large volumes, scheduled/automated loads, export large datasets. Data Loader is designed for bulk operations and supports large imports.

Step-by-step (UI):

1. Install Data Loader (Windows / Mac) from Salesforce.
2. Open Data Loader → Login (username/password + security token or OAuth).
3. Choose action: Insert / Update / Upsert / Delete / Export.

4. Select object (e.g., Shipment__c) and point to CSV.
5. Click Create or Edit a Map — map CSV columns → Salesforce fields (save the mapping file).
6. Configure settings: use Bulk API for large loads; set batch size (default 200).
7. Run on a small test CSV → check success.csv and error.csv. Fix failures and re-run if needed.
8. Run full load. Save success/error files for audit.

The screenshot shows the Salesforce Setup interface for Bulk Data Load Jobs. The left sidebar contains navigation links for Setup, Home, and Object Manager. The main content area is titled 'Bulk Data Load Jobs' and includes a 'Monitor Bulk Data Load Jobs' section. This section provides a summary of the organization's bulk data load status, including a quota of 15,000 batches in a 24-hour period. Below the summary, there are two tables: 'In Progress' and 'Completed last 7 days'. The 'In Progress' table is currently empty, while the 'Completed last 7 days' table shows a single job completed on 9/28/2025.

Job ID	Submitted By	Start Time	End Time	Status	Job Type	Operation	Object	Records Processed	Records Failed	Time to Complete (hh:mm:ss)
750gl000005EK0bn	Ladvikar, Gauri	9/28/2025, 11:02 PM	9/28/2025, 11:02 PM	Closed	Bulk V1	Insert	Account	12	12	00:03

3. Duplicate Rules & Matching Rules — prevent duplicates

Why: avoid duplicate Accounts/Contacts/Shipments and maintain data quality.

Step-by-step:

1. Setup → Duplicate Rules → click New Rule (choose the object).
2. Create or reuse a Matching Rule (Setup → Matching Rules) that defines match logic (Exact / Fuzzy).
3. In Duplicate Rule: pick action when duplicate found (Block or Allow with Alert), and set when to run (Create / Edit / API).
4. Save and Activate the matching rule first, then activate the duplicate rule.
5. Test: create records that should match and verify the rule behavior.

SETUP

Matching Rules

Matching Rule

Shipment Number

Help for this Page

Matching Rule Detail

Edit

Delete

Clone

Activate

Object	Shipment
Rule Name	Shipment Number
Unique Name	Shipment_Number
Description	
Matching Criteria	Shipment: Tracking_Number EXACT MatchBlank = FALSE
Status	Inactive
Created By	Gauri Ladvikar, 9/29/2025, 12:33 AM
Modified By	Gauri Ladvikar, 9/29/2025, 12:33 AM

SETUP

Duplicate Rules

All Duplicate Rules

Help for this Page

What Are Duplicate Rules?

[Expand]

View: All Duplicate Rules

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

New Rule

Rule Name	Description	Object	Matching Rule	Active	Last Modified By	Last Modified Date
Shipment Duplicate Check		Shipment	Shipment Duplicate Check matching rule	<input type="checkbox"/>	gau	9/29/2025
Standard Account Duplicate Rule	Identify accounts that duplicate other accounts.	Account	Standard Account Matching Rule	<input checked="" type="checkbox"/>	OEPIIC	9/15/2025
Standard Contact Duplicate Rule	Identify contacts that duplicate other contacts and leads.	Contact	Standard Lead Matching Rule Standard Contact Matching Rule	<input checked="" type="checkbox"/>	OEPIIC	9/15/2025
Standard Lead Duplicate Rule	Identify leads that duplicate other leads and contacts.	Lead	Standard Lead Matching Rule Standard Contact Matching Rule	<input checked="" type="checkbox"/>	OEPIIC	9/15/2025

SETUP

Duplicate Rules

Shipment Duplicate Rule

Shipment Duplicate Check

Help for this Page

Duplicate Rule Detail

Edit

Delete

Clone

Deactivate

Rule Name	Shipment Duplicate Check	Order	1 of 1 [Reorder]
Description			
Object	Shipment		
Record-Level Security	Enforce sharing rules		
Action On Create	Allow	Operations On Create	<input checked="" type="checkbox"/> Alert <input checked="" type="checkbox"/> Report
Action On Edit	Allow	Operations On Edit	<input type="checkbox"/> Alert <input type="checkbox"/> Report
Alert Text	Use one of these records?		
Active	<input checked="" type="checkbox"/>		
Matching Rule	<input checked="" type="checkbox"/> Shipment Duplicate Check matching rule <input checked="" type="checkbox"/> Mapped	Matching Criteria	Shipment: Tracking_Number EXACT MatchBlank = FALSE
Conditions			
Created By	Gauri Ladvikar, 9/29/2025, 12:36 AM	Modified By	Gauri Ladvikar, 9/29/2025, 12:38 AM

Edit

Delete

Clone

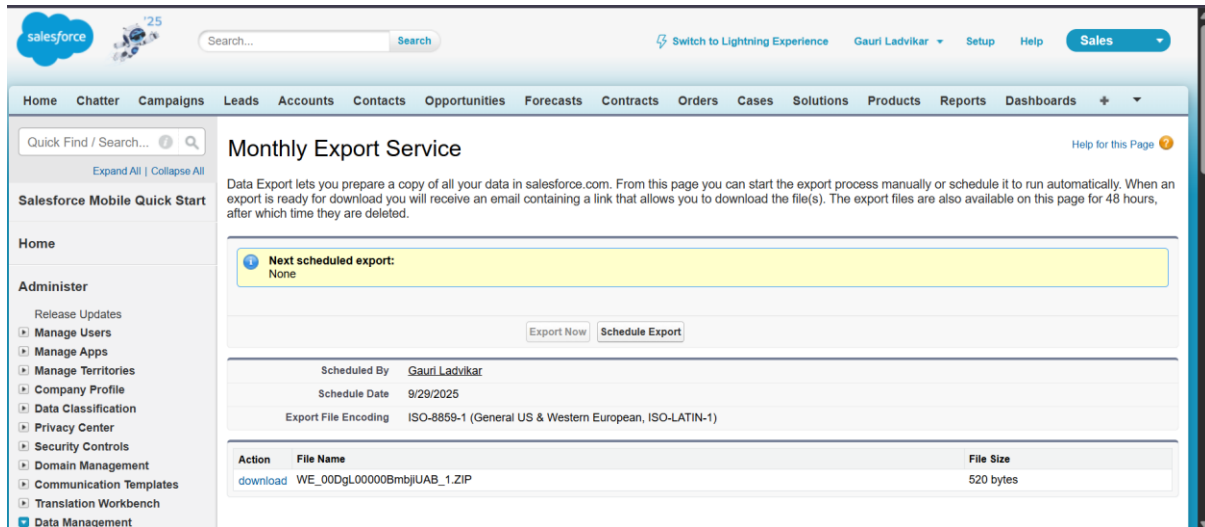
Deactivate

4. Data Export & Backup

Why: keep regular backups before major changes; Salesforce's Data Export is the built-in option.

Step-by-step (manual export):

1. Setup → Data Export → Export Now or Schedule Export.
2. Choose objects (select Shipment__c and related objects).
3. Run export; download the ZIP files and store them securely (cloud storage, encrypted).



5. Unmanaged vs Managed Packages — distribution options

Short differences & steps:

- Unmanaged package: good for transferring editable code/templates; not upgradable. Create in Setup → Packages → New → Add components → create package → distribute.
- Managed package (recommended for productization): supports versioning, licensing, and upgrades; requires a packaging org/Dev Hub and packaging steps (create package, create version). Use second-generation packaging (2GP) via SFDX for modern workflows.

6. VS Code & SFDX (Salesforce CLI) — modern developer workflow

Why: recommended toolchain for source tracking, scratch orgs, CI/CD and automated deployments. Use VS Code with Salesforce extensions and SFDX CLI.

Step-by-step:

1. Install VS Code. Install the Salesforce Extension Pack.
2. Install Salesforce CLI (sf / sfdx).
3. Authorize your org:
 - Scratch org/dev hub (for DX):
 - `sfdx auth:web:login -d -a DevHub`

- Sandbox/Production:
 - `sfdx auth:web:login -a MySandbox`
4. Pull or retrieve source:
 - For source format: `sfdx force:source:retrieve -m "ApexClass:MyClass"` or use project-based commands.
 - For metadata API: `sfdx force:mdapi:retrieve ... / sfdx force:mdapi:deploy ...` (Use `sf project deploy / sfdx force:source:deploy` depending on your project type).
 5. Deploy to target org (example):
 6. `sfdx force:source:deploy -p force-app/main/default -u MySandbox`
 7. For packaging (2GP) & releases, use:
 8. `sfdx force:package:create -n "ShipmentTrack" -t Unlocked -r force-app`
 9. `sfdx force:package:version:create -p "ShipmentTrack" -d force-app -k <password> -w`