Salesforce Project Phase-8

Phase 8: Data Management & Deployment

1. Data Import Wizard

Purpose: Import new records into Salesforce using UI-based wizard.

Steps:

1.   Setup → Data Import Wizard → Launch Wizard.

2.   Select object (Student , Internship Application , Internship).

3.   Choose operation: Add New Records / Update / Upsert.

4.   Upload CSV (headers = Salesforce API Names).

5.   Map fields manually if required.

6.   Start import → Monitor progress → Check success/error report.

Edit Field Mapping: Students

Your file has been auto-mapped to existing Salesforce fields, but you can edit the mappings if you wish. Unmapped fields will not be imported.

Help for this page ❓

| Edit	Mapped Salesforce Object	CSV Header	Example	Example	Example
Change	Student External ID	Student_External_ID	STU001	STU002	STU003
Change	Student Name	Student Name	Anita	Rahul	Auc
Change	Email	Email	anita.sharma@e:	anita.sharma@e:	anita.sharma@example.com
Change	Department	Department	CS	DS	IOT
Change	Skills	Skills	Java , Python	C , C++	C , JAVA
Change	Resume Link	Resume Link	https://drive.link/r	https://drive.link/r	https://drive.link/resume1.pdf
Change	CGPA/GPA	CGPA_GPA__c	8.2	7.6	8.5

Tips:

- Unique identifiers (Student External ID) must match.

- Required fields must be filled.

- Check lookup fields for related objects.

2. Data Loader

Purpose: Bulk import/update/delete/export records.

Steps:

1. Install & open Data Loader.

2. Login → choose environment (Sandbox/Production).

3. Select operation: Insert / Update / Upsert / Delete / Export.
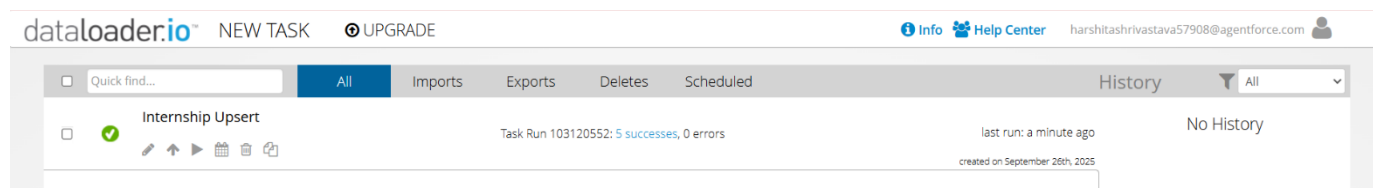
4. Select object → Select CSV file.

5. Map fields → Save mapping.

6. Run operation → Download success & error files.

7. Verify data in Salesforce.
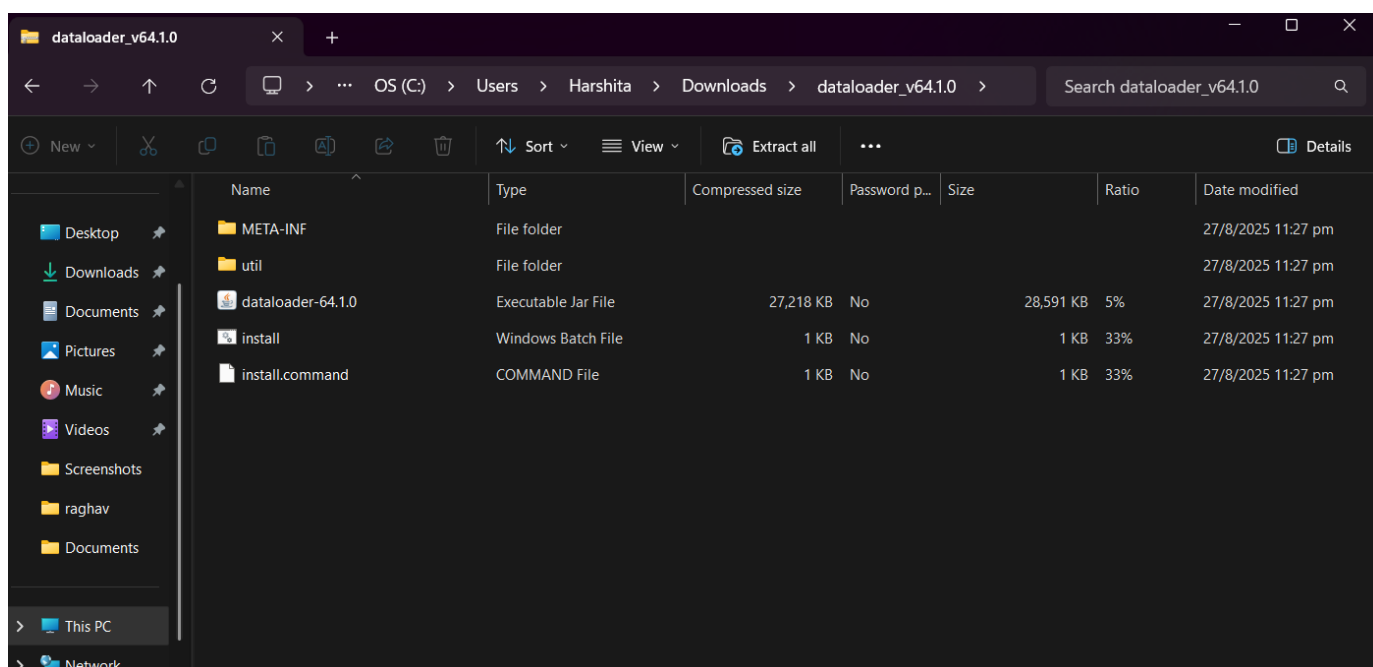
Tips:

- Internship_External_ID__c as external ID for Upsert.

- Always backup data before bulk operations.

Duplicate rules

Purpose: Maintain data quality by preventing duplicates.

Prevent duplicate Student or Company records when importing data.

Steps:

- Create Matching Rule: Setup → Matching Rules → New. Define fields to match (e.g., Email Clients).

- Create Duplicate Rule: Setup → Duplicate Rules → New. Select Matching Rule.

- Action on Create/Edit: Block / Alert.

- Activate rule.

- Test rule by inserting duplicate record.

SETUP
Matching Rules

Matching Rule
Match_Student_By_Email

Help for this Page ❓

Matching Rule Detail   Delete | Clone | Deactivate

Object	Student
Rule Name	Match_Student_By_Email
Unique Name	Match_Student_By_Email
Description	
Matching Criteria	Student: Email EXACT MatchBlank = FALSE
Status	Active
Created By	Harshita Shrivastava, 9/26/2025, 4:27 AM

Modified By   Harshita Shrivastava, 9/26/2025, 4:27 AM

SETUP
Duplicate Rules

Student Duplicate Rule
Prevent_Duplicate_Students

🖨Help for this Page ❓

Duplicate Rule Detail   Edit | Delete | Clone | Deactivate

Rule Name	Prevent_Duplicate_Students	Order	1 of 1 [Reorder] ℹ
Description			
Object	Student		
Record-Level Security	Enforce sharing rules		
Action On Create	Block	Operations On Create	☐ Alert ☐ Report
Action On Edit	Block	Operations On Edit	☐ Alert ☐ Report
Alert Text	Student with this email already exists.		
Active	✓		
Matching Rule	✅ Match_Student_By_Email ✅ Mapped	Matching Criteria	Student: Email EXACT MatchBlank = FALSE
Conditions			
Created By	Harshita Shrivastava, 9/26/2025, 4:30 AM	Modified By	Harshita Shrivastava, 9/26/2025, 4:30 AM

Edit | Delete | Clone | Deactivate

4. Data Export & Backup

Purpose: Backup Salesforce data.

Steps (UI):

1.   Setup → Data Export → Export Now / Schedule Export.

2.   Select objects → Clients, Videos, Alerts, Detection_System.

3.   Include attachments/files if needed.

4.   Click Start Export → Download .zip files.

Monthly Export Service

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.

> ℹ️ **Next scheduled export:**
> None

Export Now | Schedule Export

Scheduled By	Harshita Shrivastava
Schedule Date	9/26/2025
Export File Encoding	ISO-8859-1 (General US & Western European, ISO-LATIN-1)

Action	File Name	File Size
download	WE_00DgL00000C0NtIUAF_1.ZIP	2.4K

Tips:

•   Maintain versioned backups.

•   Store securely.

5. Change Sets

Purpose: Deploy metadata from Sandbox → Production.

Steps:

1.   Create Outbound Change Set → Name & Description.

2.   Add Components: Objects, Fields, Validation Rules, Flows, Apex, Dashboards.

3.   Add Profiles (optional).

1.   Upload to target org.

2.   Target org → Inbound Change Set → Deploy.

Tips:

•   Deploy dependencies in correct order.

•   Test flows & validation rules after deployment.

6. Unmanaged vs Managed Packages

Unmanaged Package: Editable in target org, cannot upgrade. **Managed Package:** Mostly protected, upgradeable, used for AppExchange.

Use Cases:

•   Deepfake CRM sandbox sharing → Unmanaged.

•   Client distribution / production → Managed.

7. ANT Migration Tool

Purpose: Command-line metadata deployment.

Steps:

1.   Install Java & ANT.

2.   Download Salesforce ANT Migration Tool.

3.   Configure build.properties (org credentials).

4.   Create package.xml (metadata to deploy).

5.   Retrieve: ant retrieveUnpackaged.

6.   Deploy: ant deployCode.

7.   Check console output → Fix errors.

Tips:

•   Include all dependencies.

•   Test in Sandbox first.

8. VS Code & SFDX

Purpose: Source-driven development & deployment.

Steps:

1.   Install VS Code & Salesforce Extension Pack.

2.   Install Salesforce CLI (SFDX).

3.   Create SFDX project → SFDX: Create Project.

4.   Authorize org: sfdx auth:web:login -r <url> -a <alias>.

5.   Retrieve metadata: sfdx force:source:retrieve -m CustomObject:Videos__c.

6.   Make local changes → Objects, Flows, Validation Rules, LWC.

7.   Deploy changes: sfdx force:source:deploy -p force-app -u <alias>.

8.   Verify in Salesforce → test functionality.

EXPLORER   ...

∨ OPEN EDITORS

∨ INTERNSHIPMANAGEMENT

> 📁 internship
∨ 📁 InternshipManagement
  > 📁 .husky
  > 📁 .sf
  > 📁 .sfdx
  > 📁 .vscode
  > 📁 config
  ∨ 📁 force-app \ main \ default
    > 📁 applications
    > 📁 aura
    > 📁 classes
    > 📁 contentassets
    > 📁 flexipages
    > 📁 layouts
    ∨ 📁 lwc
      ∨ 📁 studentDashboard
        > 📁 __tests__
          🟧 studentDashboard.html
          JS studentDashboard.js
          <> studentDashboard.js-meta.xml
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    > 📁 permissionsets
    > 📁 staticresources
    > 📁 tabs
    > 📁 triggers
  > 📁 manifest
  > 📁 scripts
    📄 .forceignore
    🔶 .gitignore
    🅿 .prettierignore
    🅿 .prettierrc

> OUTLINE

> TIMELINE

> RUNNING TASKS

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