

Phase 8: Data Management & Deployment

Manage, migrate, and secure Salesforce data while preparing the org for deployment.

Data Import Wizard

Tool to easily import records like Leads, Contacts, and Accounts into Salesforce.

Data Loader

A client application for bulk import, update, export, and delete of Salesforce records.

Duplicate Rules

Set rules to prevent or alert users about duplicate records in the system.

Data Export & Backup

Regularly export Salesforce data for backup, compliance, and recovery purposes.

Change Sets

Deploy metadata between Salesforce orgs without manual configuration.

Unmanaged vs Managed Packages

Unmanaged packages are for sharing code without versioning; managed packages allow upgrades and licensing.

ANT Migration Tool

Command-line utility for deploying and retrieving metadata in Salesforce.

VS Code & SFDX

Use Visual Studio Code with Salesforce DX for development, testing, and deployment automation.

Result of Phase 8:

- Data is securely imported, exported, and backed up while metadata and org configurations are efficiently deployed across environments.
- Duplicates are controlled, and development tools like VS Code, SFDX, and ANT ensure smooth migration and package management.