Phase 8: Data Management & Deployment

1 Data Import Wizard

Purpose: Simple tool for importing small datasets (≤50,000 records).

Best for: CSV import of Accounts, Contacts, Leads, Custom Objects.

Steps:

Go to Setup → Data Import Wizard.
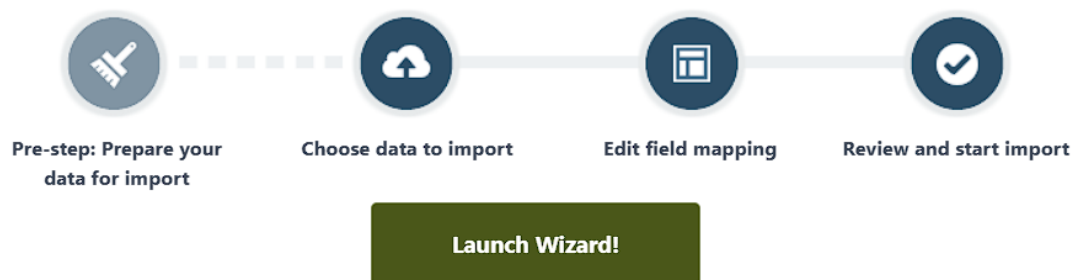
Select the object (e.g., Employee__c).

Upload a CSV file.

Map CSV columns to Salesforce fields.

Start Import → Salesforce shows progress + success/failure.

Where is your data located? ⊙

Drag CSV file here to upload

CSV

File
Choose File | Employee__c.csv

Character Code ⊙
ISO-8859-1 (General US & Western European, ISO-LATIN-1) ▾

Values Separated By
Comma ▾

2 Data Loader

Purpose: Advanced import/export tool for large datasets (>50,000 records).

Best for: Bulk inserts, updates, deletes, upserts.

Steps:

Download Data Loader from Setup.

Login with Salesforce credentials (use security token if required).

Choose operation: Insert / Update / Upsert / Export / Delete.

Select object (e.g., Onboarding_Task__c).

Upload CSV with data.

Run → Check success & error logs.

3 Duplicate Rules

Purpose: Prevent users from creating duplicate records.

Steps:

Setup → Duplicate Rules.

Create New Rule → Select object (Employee__c).

Define Matching Rule (e.g., Email = must be unique).

Choose action: Block or Allow with Alert.

Activate the rule.

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
Matching Rule		Employee	Matching Rule matching rule	☐	nhire	9/25/2025
Standard Account Duplicate Rule	Identify accounts that duplicate other accounts.	Account	Standard Account Matching Rule	✓	OEPIC	7/17/2025
Standard Contact Duplicate Rule	Identify contacts that duplicate other contacts and leads.	Contact	Standard Contact Matching Rule Standard Lead Matching Rule	✓	OEPIC	7/17/2025
Standard Lead Duplicate Rule	Identify leads that duplicate other leads and contacts.	Lead	Standard Contact Matching Rule Standard Lead Matching Rule	✓	OEPIC	7/17/2025

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**

Employee Duplicate Rule
Matching Rule

Help for this Page

Duplicate Rule Detail

Edit | Delete | Clone | Activate

Rule Name	Matching Rule	Order	1 of 1 [Reorder] ℹ
Description			
Object	Employee		
Record-Level Security	Enforce sharing rules		
Action On Create	Allow	Operations On Create	✓ Alert ✓ Report
Action On Edit	Allow	Operations On Edit	☐ Alert ☐ Report
Alert Text	Use one of these records?		
Active	☐		
Matching Rule	✓ Matching Rule matching rule ✓ Mapped	Matching Criteria	Employee: Email EXACT MatchBlank = TRUE
Conditions			
Created By	New Hire, 9/25/2025, 6:05 AM	Modified By	New Hire, 9/25/2025, 6:05 AM

Edit | Delete | Clone | Activate

4 Data Export & Backup

Purpose: Backup Salesforce data.

Options:

Data Export Service (weekly/monthly export from Setup).

Data Loader Export (manual CSV export).

Steps:

Setup → Data Export.

Choose objects to export.

Salesforce emails a download link with .zip files.

In Production → Inbound Change Sets → Validate → Deploy.

5 Unmanaged vs Managed Packages

Unmanaged Packages:

Used for deployment (dev → sandbox/prod).

Code is editable in target org.

Managed Packages:

Used by ISVs on AppExchange.

Code is locked, only upgrades possible.

6 VS Code & SFDX (Salesforce DX)

Purpose: Modern development + deployment toolset.

Best for: Source-driven development, CI/CD.

Steps:

Install VS Code + Salesforce Extensions Pack.

Authorize org:

sfdx force:auth:web:login -a MyOrg

Deploy metadata:

sfdx force:source:deploy -p force-app/main/default -u MyOrg

Retrieve metadata:

sfdx force:source:retrieve -p force-app/main/default -u MyOrg