

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).

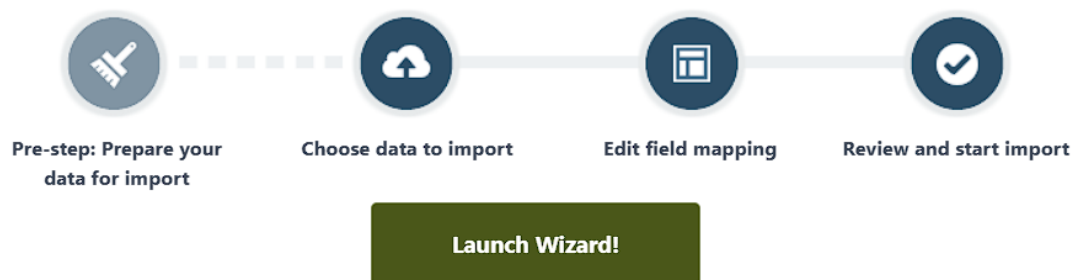
Upload a CSV file.

Map CSV columns to Salesforce fields.

Start Import → Salesforce shows progress + success/failure.

Import your data in 3 easy steps!

Launch the Data Import Wizard to import your data.



Import your Data into Salesforce

You can import up to 50,000 records at a time.

[Help for this page](#)

What kind of data are you importing?

Standard objects	Custom objects
Candidates	>
Departments	>
Documents	>
Employee Records	>

What do you want to do?

Add new records

Match by:
--None--

Which User field in your file designates record owners?
--None--

Which Department field in your file do you want to match against to set the Department lookup field?
--None--

Trigger workflow rules and processes?


Where is your data located?

Drag CSV file here to upload

CSV

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.

SETUP

Duplicate Rules

All Duplicate Rules

What Are Duplicate Rules?

[Expand]

View: All Duplicate Rules

New Rule

Rule Name	Description	Object	Matching Rule	Active	Last Modified By	Last Modified Date
Matching Rule		Employee	Matching Rule matching rule	<input type="checkbox"/>	nhire	9/25/2025
Standard Account Duplicate Rule	Identify accounts that duplicate other accounts.	Account	Standard Account Matching Rule	<input checked="" type="checkbox"/>	OEPIG	7/17/2025
Standard Contact Duplicate Rule	Identify contacts that duplicate other contacts and leads.	Contact	Standard Contact Matching Rule Standard Lead Matching Rule	<input checked="" type="checkbox"/>	OEPIG	7/17/2025
Standard Lead Duplicate Rule	Identify leads that duplicate other leads and contacts.	Lead	Standard Contact Matching Rule Standard Lead Matching Rule	<input checked="" type="checkbox"/>	OEPIG	7/17/2025

SETUP

Duplicate Rules

Employee Duplicate Rule

Matching Rule

Edit

Delete

Clone

Activate

Order

1 of 1

Reorder

Rule Name	Matching Rule
Description	
Object	Employee
Record-Level Security	Enforce sharing rules
Action On Create	Allow
Action On Edit	Allow
Alert Text	Use one of these records?
Active	<input type="checkbox"/>
Matching Rule	<input checked="" type="checkbox"/> Matching Rule matching rule <input checked="" type="checkbox"/> Mapped
Matching Criteria	Employee: Email EXACT MatchBlank = TRUE
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.

The screenshot shows the 'Installed Packages' page in the Salesforce Setup interface. The page has a blue header with the 'SETUP' logo and the title 'Installed Packages'. Below the header, there is a section titled 'Installed Packages' with a 'Help for this Page' link. The main content area contains a table of installed packages. The table has columns for Action, Package Name, Publisher, Version Number, Namespace Prefix, Install Date, Limits, Apps, Tabs, Objects, and AppExchange Ready. Two packages are listed: 'Recruiting App Package' by AW Computing and 'Trailhead Playground' by salesforce. The 'Recruiting App Package' is marked as 'AppExchange Ready' with a checkmark, while 'Trailhead Playground' is marked as 'Not Passed'. Below the table, there is a section for 'Uninstalled Packages' which is currently empty.

Action	Package Name	Publisher	Version Number	Namespace Prefix	Install Date	Limits	Apps	Tabs	Objects	AppExchange Ready
Uninstall	Recruiting App Package	AW Computing	1.0		9/25/2025, 8:42 AM	✓	1	4	4	Not Applicable
Uninstall	Trailhead Playground	salesforce	2.5	trhdtp	9/25/2025, 8:38 AM	✓	1	3	0	Not Passed

The screenshot shows the 'Recruiting App Package' details page in the Salesforce Setup interface. The page has a blue header with the 'SETUP' logo and the title 'Installed Packages'. Below the header, there is a section titled 'Recruiting App Package' with a 'Help for this Page' link. The main content area contains a table of package details. The table has columns for Package Name, Language, Version Name, Publisher, Description, Installed By, Version Number, Package Type, Modified By, Count Towards Limits, Apps, Tabs, and Objects. The package is 'Recruiting App Package' by AW Computing, version 1.0, installed by 'New Hire' on 9/25/2025, 8:42 AM. The package type is 'Unmanaged'. The 'Count Towards Limits' section shows 1 app, 4 tabs, and 4 objects.

Package Name	Language	Version Name	Publisher	Description	Installed By	Version Number	Package Type	Modified By	Count Towards Limits	Apps	Tabs	Objects
Recruiting App Package	English	v1	AW Computing		New Hire, 9/25/2025, 8:42 AM	1.0	Unmanaged	New Hire, 9/25/2025, 8:42 AM	✓	1	4	4

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
```