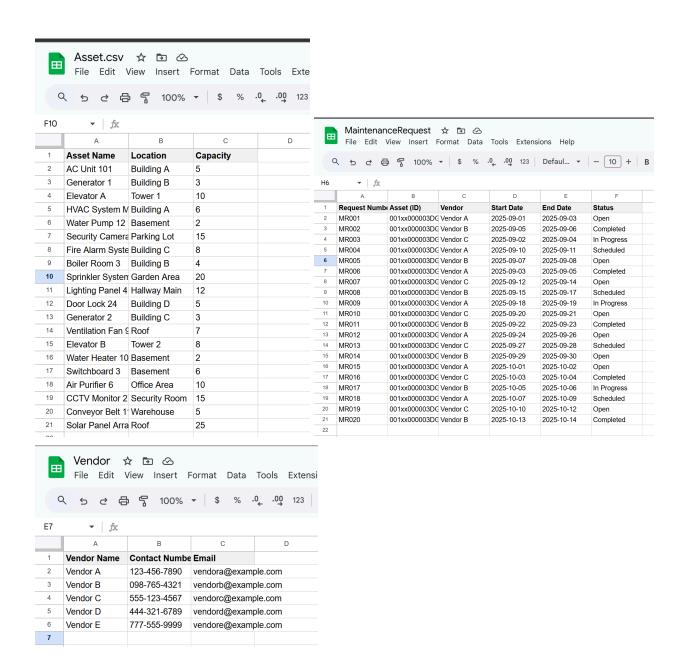
### PHASE 8: DATA MANAGEMENT & DEPLOYMENT

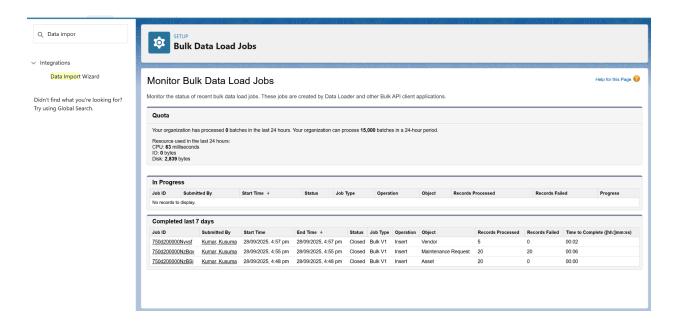
## 1. Prepare Your CSV Files

- Ensure your CSV files for Assets, Vendors, and Maintenance Requests are ready.
- Make sure data is cleaned and formatted correctly, matching Salesforce field API names.
- Save these files in an accessible location on your computer.



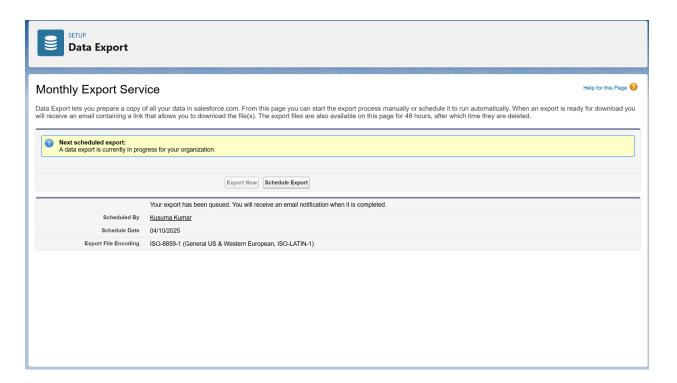
## 2. Import Data Using Salesforce Data Import Wizard

- Log into Salesforce Playground.
- Navigate to Setup → type Data Import Wizard in the Quick Find box → select Data Import Wizard.
- 3. Click Launch Wizard.
- 4. Select the object you want to import:
  - For Asset data: choose Asset.
  - For Vendor data: choose Vendor\_c (custom object).
  - For Maintenance Requests: choose Maintenance\_Request\_\_c.
- Click Add New Records.
- 6. Upload your CSV file:
  - Drag and drop the CSV file or click Choose File and select it.
- 7. Map the CSV fields to Salesforce fields:
  - The wizard automatically maps common fields; verify each mapping.
  - Manually map any remaining fields if necessary.
- 8. Click Next and review the data mappings.
- 9. Click Start Import.
- 10. Monitor progress and check for any error reports or logs.



# 3. Export and Backup Data

- Use Data Export Service (Setup → Data Management → Data Export).
- Schedule an Export Now for relevant objects (Assets, Vendors, Maintenance Requests).
- Download exported ZIP files at regular intervals for backup purposes.



# 4. Configure Duplicate Rules

- In Setup, search for Duplicate Rules.
- Create a new Duplicate Rule for Maintenance\_Request\_\_c or update existing rules.
- Use Matching Rules based on key fields like Request\_ID\_\_c or Asset\_\_c + Request Description c.
- Set rules to Block duplicates on creation.
- Test rules by attempting to insert duplicate records; verify duplicate alerts.

#### 5. Version Control with GitHub

- 1. Initialize a Git repository in your project folder.
- 2. Commit all metadata, Apex classes, LWCs, and configuration files.
- 3. Push changes to your GitHub repository.
- 4. Maintain commit history for traceability and collaboration.

## 6. Deployment Using Salesforce CLI

- 1. Use the command:
- 2. text

sf project deploy start --source-dir force-app/main/default

3.

- 4. Confirm deployment logs show success.
- 5. Deploy metadata updates (Apex, LWCs, Flows) as needed.

## 7. Rollback and Data Safety

- Keep backups from the Data Export step.
- Roll back records by importing a backup CSV (using Data Loader or Data Import Wizard) if necessary.
- Use the Salesforce Recycle Bin for soft deletes during cleanups.

## **Summary**

- Use Data Import Wizard for records.
- Use Data Export for backups.
- Set up Duplicate Rules to prevent data inconsistency.
- Maintain version control with GitHub.
- Deploy updates via Salesforce CLI.