

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.

Asset.csv

File Edit View Insert Format Data Tools Extensions Help

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F10

	A	B	C	D
1	Asset Name	Location	Capacity	
2	AC Unit 101	Building A	5	
3	Generator 1	Building B	3	
4	Elevator A	Tower 1	10	
5	HVAC System M	Building A	6	
6	Water Pump 12	Basement	2	
7	Security Camera	Parking Lot	15	
8	Fire Alarm System	Building C	8	
9	Boiler Room 3	Building B	4	
10	Sprinkler System	Garden Area	20	
11	Lighting Panel 4	Hallway Main	12	
12	Door Lock 24	Building D	5	
13	Generator 2	Building C	3	
14	Ventilation Fan 5	Roof	7	
15	Elevator B	Tower 2	8	
16	Water Heater 10	Basement	2	
17	Switchboard 3	Basement	6	
18	Air Purifier 6	Office Area	10	
19	CCTV Monitor 2	Security Room	15	
20	Conveyor Belt 1	Warehouse	5	
21	Solar Panel Array	Roof	25	

MaintenanceRequest

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H6

	A	B	C	D	E	F
1	Request Number	Asset (ID)	Vendor	Start Date	End Date	Status
2	MR001	001xx000003DC	Vendor A	2025-09-01	2025-09-03	Open
3	MR002	001xx000003DC	Vendor B	2025-09-05	2025-09-06	Completed
4	MR003	001xx000003DC	Vendor C	2025-09-02	2025-09-04	In Progress
5	MR004	001xx000003DC	Vendor A	2025-09-10	2025-09-11	Scheduled
6	MR005	001xx000003DC	Vendor B	2025-09-07	2025-09-08	Open
7	MR006	001xx000003DC	Vendor A	2025-09-03	2025-09-05	Completed
8	MR007	001xx000003DC	Vendor C	2025-09-12	2025-09-14	Open
9	MR008	001xx000003DC	Vendor B	2025-09-15	2025-09-17	Scheduled
10	MR009	001xx000003DC	Vendor A	2025-09-18	2025-09-19	In Progress
11	MR010	001xx000003DC	Vendor C	2025-09-20	2025-09-21	Open
12	MR011	001xx000003DC	Vendor B	2025-09-22	2025-09-23	Completed
13	MR012	001xx000003DC	Vendor A	2025-09-24	2025-09-26	Open
14	MR013	001xx000003DC	Vendor C	2025-09-27	2025-09-28	Scheduled
15	MR014	001xx000003DC	Vendor B	2025-09-29	2025-09-30	Open
16	MR015	001xx000003DC	Vendor A	2025-10-01	2025-10-02	Open
17	MR016	001xx000003DC	Vendor C	2025-10-03	2025-10-04	Completed
18	MR017	001xx000003DC	Vendor B	2025-10-05	2025-10-06	In Progress
19	MR018	001xx000003DC	Vendor A	2025-10-07	2025-10-09	Scheduled
20	MR019	001xx000003DC	Vendor C	2025-10-10	2025-10-12	Open
21	MR020	001xx000003DC	Vendor B	2025-10-13	2025-10-14	Completed

Vendor

File Edit View Insert Format Data Tools Extensions Help

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E7

	A	B	C	D
1	Vendor Name	Contact Number	Email	
2	Vendor A	123-456-7890	vendora@example.com	
3	Vendor B	098-765-4321	vendorb@example.com	
4	Vendor C	555-123-4567	vendorc@example.com	
5	Vendor D	444-321-6789	vendord@example.com	
6	Vendor E	777-555-9999	vendore@example.com	

2. Import Data Using Salesforce Data Import Wizard

1. Log into Salesforce Playground.
2. 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.
5. 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.

Bulk Data Load Jobs

Monitor Bulk Data Load Jobs

Monitor the status of recent bulk data load jobs. These jobs are created by Data Loader and other Bulk API client applications.

Quota

Your organization has processed 0 batches in the last 24 hours. Your organization can process 15,000 batches in a 24-hour period.

Resource used in the last 24 hours:
CPU: 63 milliseconds
IO: 0 bytes
Disk: 2,839 bytes

In Progress


Job ID	Submitted By	Start Time	Status	Job Type	Operation	Object	Records Processed	Records Failed	Progress
No records to display.									

Completed last 7 days

Job ID	Submitted By	Start Time	End Time	Status	Job Type	Operation	Object	Records Processed	Records Failed	Time to Complete (hh:mm:ss)
750d200000Nyxof	Kumar_Kusuma	28/09/2025, 4:57 pm	28/09/2025, 4:57 pm	Closed	Bulk V1	Insert	Vendor	5	0	00:02
750d200000Nz8qv	Kumar_Kusuma	28/09/2025, 4:55 pm	28/09/2025, 4:55 pm	Closed	Bulk V1	Insert	Maintenance Request	20	20	00:06
750d200000NzBSj	Kumar_Kusuma	28/09/2025, 4:48 pm	28/09/2025, 4:48 pm	Closed	Bulk V1	Insert	Asset	20	0	00:00

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.


SETUP
Data Export

Monthly Export Service Help for this Page ?

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.

Next scheduled export:
 A data export is currently in progress for your organization.

Export Now Schedule Export

Your export has been queued. You will receive an email notification when it is completed.

Scheduled By	Kusuma Kumar
Schedule Date	04/10/2025
Export File Encoding	ISO-8859-1 (General US & Western European, ISO-LATIN-1)

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.