

## Phase 8: Data Management & Deployment

### Data Import Wizard

The Data Import Wizard in Salesforce allows importing records for standard and custom objects.

For this project, government scheme-related data such as **Schemes**, **Scheme Applications**, **Fund Transactions**, and **Grievances** can be imported into their respective custom objects with the defined fields:

- **Schemes:** Scheme Code, Scheme Name, Description, Eligibility Criteria, Start Date, End Date, Max Amount, Active
- **Scheme Applications:** Application Name, Citizen Email, Citizen User, Contact, Requested Amount, Approved Amount, Date, Stage, Scheme
- **Fund Transactions:** Fund Transaction Name, Amount, Payment Date, Payment Status, Scheme Application
- **Grievances:** Grievance Name, Category, Contact, Resolution Notes, Scheme Application

This helps in populating sample/test data during development.

The screenshot shows the Salesforce Data Import Wizard interface. At the top, there's a navigation bar with tabs for Home, Chatter, Libraries, Content, Subscriptions, Scheme Applications, Fund Transactions, Grievances, and Schemes. Below this is a search bar and a 'Switch to Lightning E' button. The main content area is titled 'Data Import Wizard' and includes a 'Help for this page' link. A table titled 'Recent Import Jobs' has columns for Status, Object, Records Created, Records Updated, Records Failed, Start Date, and Processing Time (ms). Below the table is a 'Bulk Api Monitoring' button. A large section titled 'Before you import your data...' contains three key points: 'Clean up your data import file', 'Make sure your field names match Salesforce field names', and 'Don't import too many records at once'. The left sidebar shows the 'Administer' menu with various options like Manage Users, Manage Apps, and Manage Territories.

salesforce

Search...

Search

Switch to Lightning E

Home Chatter Libraries Content Subscriptions Scheme Applications Fund Transactions Grievances Schemes

Quick Find / Search... Expand All Collapse All

Salesforce Mobile Quick Start

Home

Administer

- Release Updates
- Manage Users
- Manage Apps
- Manage Territories
- Company Profile
- Data Classification
- Privacy Center
- Security Controls
- Domain Management
- Communication Templates
- Translation Workbench
- Data Management
- Mobile Administration
- Desktop Administration
- Outlook Integration and Sync
- Gmail Integration and Sync
- Email Administration
- Google Apps

### Data Import Wizard

Help for this page

#### Recent Import Jobs

Status	Object	Records Created	Records Updated	Records Failed	Start Date	Processing Time (ms)
--------	--------	-----------------	-----------------	----------------	------------	----------------------

**Bulk Api Monitoring**

#### Before you import your data...

**Clean up your data import file**  
You'll have fewer errors to resolve if your data file is clean and free of duplicates. [Watch video](#)

**Make sure your field names match Salesforce field names**  
You'll be required to map your data fields to Salesforce data fields. Data in unmapped fields is not imported. [View a list of Salesforce data fields.](#)

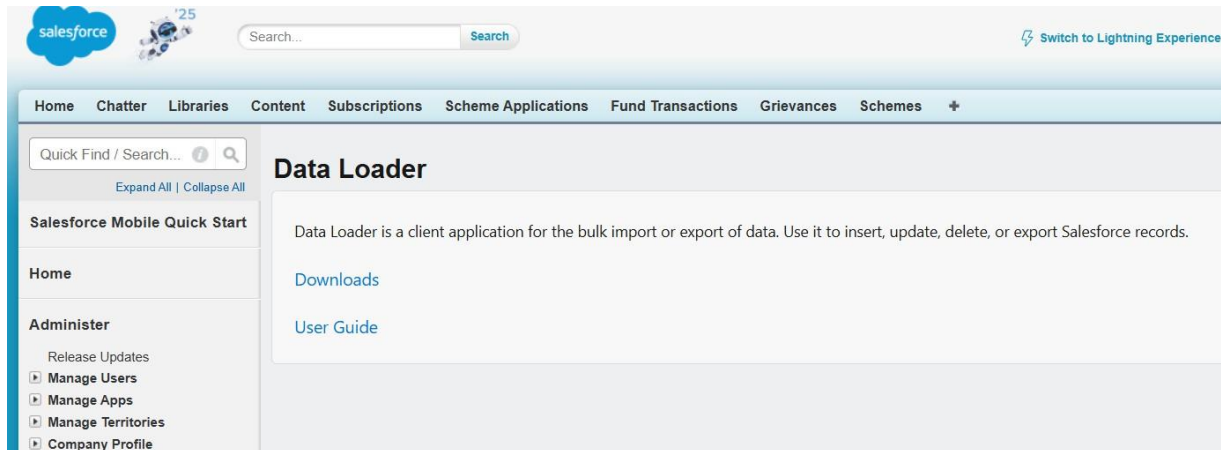
**Don't import too many records at once**  
Using the Data Import Wizard, import up to 50,000 records at a time. Importing too many records can slow down your org for all users, especially during periods of peak usage.

**Import your data in 3 easy steps!**

## Data Loader

Data Loader is used for bulk data import, export, update, and deletion.

In this project, **bulk Scheme Applications, Fund Transactions, and Grievances** can be uploaded through Data Loader using CSV files mapped to the above fields.



## Duplicate Rules

Duplicate rules prevent the creation of duplicate records in the system. Duplicate Rules were created for each custom object to ensure no duplicate entries are allowed.

### 1. Scheme Duplicate Rule

- Prevent duplicate scheme records based on Scheme Code.
- **Action on Create:** Alert
- **Action on Edit:** Alert
- **Matching Criteria:** Scheme Code\_\_c field checked to prevent duplication

### 2. Scheme Application Duplicate Rule

- Prevent duplicate applications for the same citizen and scheme.
- **Action on Create:** Alert
- **Action on Edit:** Alert
- **Matching Criteria:** Citizen Email\_\_c + Scheme\_\_c fields checked to prevent duplication

### 3. Fund Transaction Duplicate Rule

- Prevent duplicate fund transactions for the same application on the same date and amount.
- **Action on Create:** Alert

- **Action on Edit:** Alert
- **Matching Criteria:** Payment Date\_\_c + Amount\_\_c + Scheme Application\_\_c fields checked to prevent duplication

#### 4. Grievance Duplicate Rule

- Prevent duplicate grievances for the same citizen, scheme application, and category.
- **Action on Create:** Alert
- **Action on Edit:** Alert
- **Matching Criteria:** Citizen\_\_c + Scheme Application\_\_c + Category\_\_c fields checked to prevent duplication

Quick Find / Search... [Expand All](#) / [Collapse All](#)

Salesforce Mobile Quick Start

Home

Administer

- Release Updates
- Manage Users
- Manage Apps
- Manage Territories
- Company Profile
- Data Classification
- Privacy Center
- Security Controls

Scheme Duplicate Rule

[Back to List: Duplicate Rules](#)

[Portable View](#) | [Help](#)

**Duplicate Rule Detail** [Edit](#) [Delete](#) [Clone](#) [Activate](#)

Rule Name	Scheme Duplicate Rule	Order	1 of 1	<a href="#">Reorder</a>
Description	Prevent duplicate scheme records based on Scheme Code			
Object	Scheme			
Record-Level Security	Enforce sharing rules			
Action On Create	Allow	Operations On Create	<input checked="" type="checkbox"/> Alert	<input type="checkbox"/> Report
Action On Edit	Allow	Operations On Edit	<input checked="" type="checkbox"/> Alert	<input type="checkbox"/> Report
Alert Text	Use one of these records?			
Active	<input checked="" type="checkbox"/>			
Matching Rule	<input checked="" type="checkbox"/> Scheme Duplicate Rule matching rule	<input checked="" type="checkbox"/> Mapped		
Conditions				
Matching Criteria	Scheme: Scheme_Code EXACT MatchBlank = FALSE			

Quick Find / Search... [Expand All](#) / [Collapse All](#)

Salesforce Mobile Quick Start

Home

Administer

- Release Updates
- Manage Users
- Manage Apps
- Manage Territories
- Company Profile
- Data Classification
- Privacy Center
- Security Controls

Scheme Application Duplicate Rule

[Back to List: Duplicate Rules](#)

[Portable View](#) | [Help for this Page](#)

**Duplicate Rule Detail** [Edit](#) [Delete](#) [Clone](#) [Activate](#)

Rule Name	Scheme Application Duplicate Rule	Order	1 of 1	<a href="#">Reorder</a>
Description	Prevent duplicate applications based on Application Name			
Object	Scheme Application			
Record-Level Security	Enforce sharing rules			
Action On Create	Allow	Operations On Create	<input checked="" type="checkbox"/> Alert	<input type="checkbox"/> Report
Action On Edit	Allow	Operations On Edit	<input checked="" type="checkbox"/> Alert	<input type="checkbox"/> Report
Alert Text	Duplicate application found. Use existing record.			
Active	<input checked="" type="checkbox"/>			
Matching Rule	<input checked="" type="checkbox"/> Scheme Application Duplicate Rule matching rule	<input checked="" type="checkbox"/> Mapped		
Conditions				
Matching Criteria	Scheme Application: Name EXACT MatchBlank = FALSE			

Quick Find / Search... [Expand All](#) / [Collapse All](#)

Salesforce Mobile Quick Start

Home

Administer

- Release Updates
- Manage Users
- Manage Apps
- Manage Territories
- Company Profile
- Data Classification
- Privacy Center
- Security Controls
- Domain Management

Fund Transaction Duplicate Rule

[Back to List: Duplicate Rules](#)

[Portable View](#) | [Help for this Page](#)

**Duplicate Rule Detail** [Edit](#) [Delete](#) [Clone](#) [Activate](#)

Rule Name	Fund Transaction Duplicate Rule	Order	1 of 1	<a href="#">Reorder</a>
Description	Prevent duplicate fund transactions based on Fund Transaction Name			
Object	Fund Transaction			
Record-Level Security	Enforce sharing rules			
Action On Create	Allow	Operations On Create	<input checked="" type="checkbox"/> Alert	<input type="checkbox"/> Report
Action On Edit	Allow	Operations On Edit	<input checked="" type="checkbox"/> Alert	<input type="checkbox"/> Report
Alert Text	Duplicate fund transaction detected.			
Active	<input type="checkbox"/>			
Matching Rule	<input checked="" type="checkbox"/> Fund Transaction Duplicate Rule matching rule	<input checked="" type="checkbox"/> Mapped		
Conditions				
Matching Criteria	Fund Transaction: Payment_Status EXACT MatchBlank = FALSE			

Quick Find / Search...		Grievance Duplicate Rule		Printable View   Help	
Expand All   Collapse All		Grievance Duplicate Rule			
Salesforce Mobile Quick Start		< Back to List: Duplicate Rules			
Home		Duplicate Rule Detail		Edit Delete Clone Activate	
Administrator		Rule Name	Grievance Duplicate Rule	Order	1 of 1 [Reorder]
Release Updates		Description	Prevent duplicate grievances based on Grievance Name		
Manage Users		Object	Grievance		
Manage Apps		Record-Level Security	Enforce sharing rules		
Manage Territories		Action On Create	Allow	Operations On Create	<input checked="" type="checkbox"/> Alert <input type="checkbox"/> Report
Company Profile		Action On Edit	Allow	Operations On Edit	<input checked="" type="checkbox"/> Alert <input type="checkbox"/> Report
Data Classification		Alert Text	Duplicate grievance already exists.		
Privacy Center		Active	<input type="checkbox"/>		
Security Controls		Matching Rule	<input checked="" type="checkbox"/> Grievance Duplicate Rule matching rule <input checked="" type="checkbox"/> Mapped	Matching Criteria	GRIEVANCE: STATUS EXACT MatchBlank = FALSE
		Conditions			

## Data Export & Backup

Regular data exports are required for backup.

For this project, **Schemes, Scheme Applications, Fund Transactions, and Grievances** data can be exported periodically to maintain historical records and ensure data safety.

Your Organization Data Export has completed - Govt Schemes Management System – Dev

Inbox x



**Do not reply** <noreply@salesforce.com>

8:43 PM (33 minutes ago) ☆

to me ▼

The export of your organization's data has been completed. Please click on the following link within the next 48 hours to receive the export.

<https://vrjccollegeofengineering72-dev-ed.develop.my.salesforce.com/ui/setup/export/DataExportPage/d>

Thank you,  
Salesforce

## Change Sets

Change Sets are used to migrate metadata between orgs (Sandbox → Production).

For this project, Change Sets can be used to deploy:

- Custom objects (**Schemes, Scheme Applications, Fund Transactions, Grievances**)
- Custom fields defined in each object
- Flows, email alerts, and other automation

## Unmanaged vs Managed Packages

- **Managed Packages:** Pre-built solutions from Salesforce AppExchange with limited customization.
- **Unmanaged Packages:** Provide full access to configuration and code.

For this project, no external packages were used. All objects, fields, and automation were custom-built.

## ANT Migration Tool

The ANT Migration Tool is a command-line utility for metadata deployment.

For this project, it was **not required**, as all development was done in a single Salesforce org.

## **VS Code & SFDX**

VS Code with Salesforce DX allows advanced development and deployment.

In this project, **all development was done directly in Salesforce UI**, so VS Code and SFDX were not used.