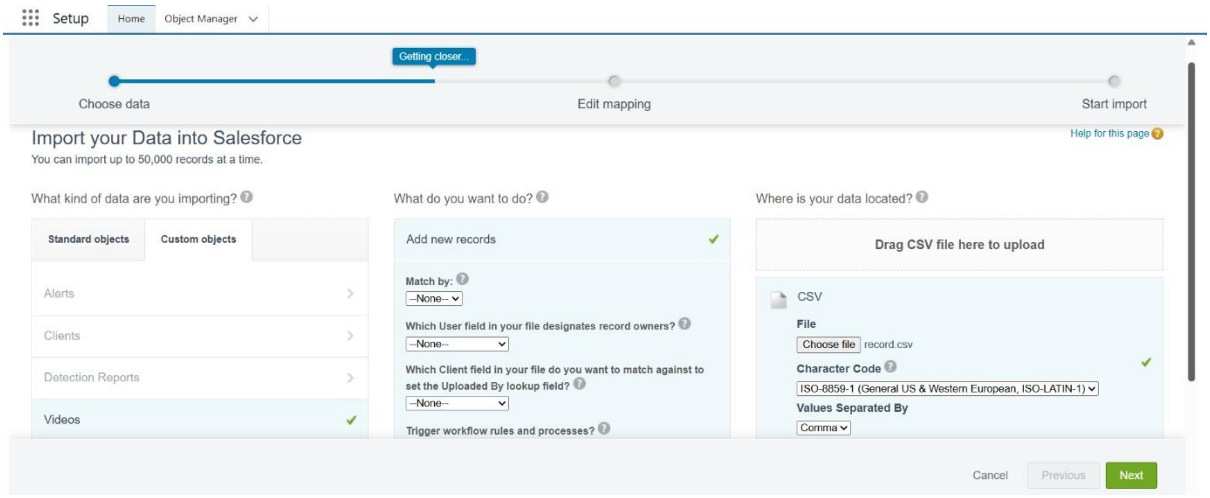
Phase 8: Data Management & Deployment – Deepfake CRM

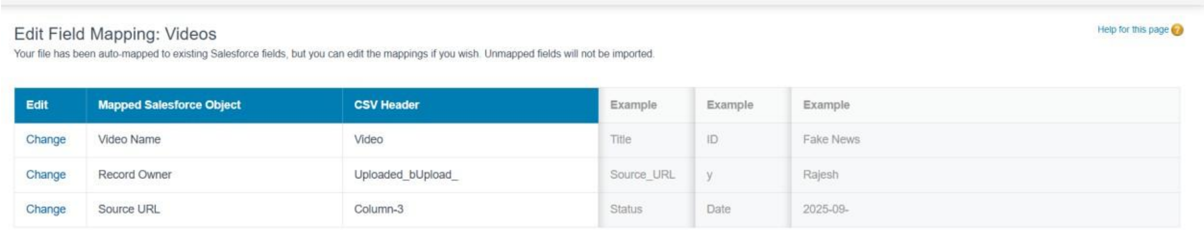
1. Data Import Wizard

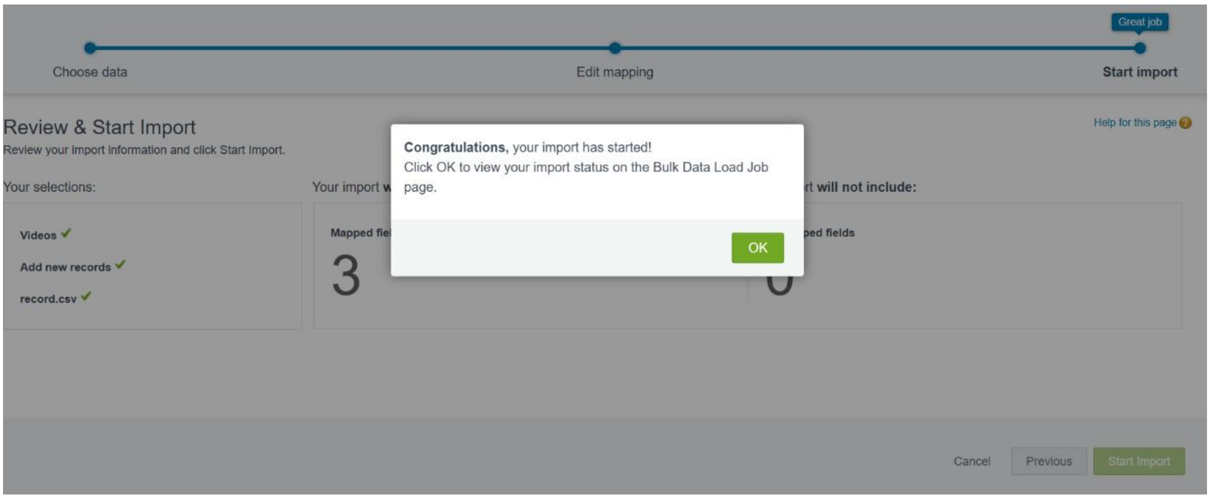
Purpose: Import new records into Salesforce using UI-based wizard.

Steps:

1. Setup → Data Import Wizard → Launch Wizard.
2. Select object (Clients, Videos, Alerts, Detection_System).
3. Choose operation: Add New Records / Update / Upsert.
4. Upload CSV (headers = Salesforce API Names).
5. Map fields manually if required.
6. Start import → Monitor progress → Check success/error report.







Tips:

- Unique identifiers (Email, Video_ID) must match.
- Required fields must be filled.
- Check lookup fields for related objects.

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2. Data Loader

Purpose: Bulk import/update/delete/export records.

Steps:

1. Install & open Data Loader.
2. Login → choose environment (Sandbox/Production).
3. Select operation: Insert / Update / Upsert / Delete / Export.
4. Select object → Select CSV file.
5. Map fields → Save mapping.

6. Run operation → Download success & error files.
7. Verify data in Salesforce.

Name	Type	Compressed size	Password p...	Size	Ratio	Date modified
META-INF	File folder					27-08-2025 23:27
util	File folder					27-08-2025 23:27
dataloader-64.1.0.jar	JAR File	27,218 KB	No	28,591 KB	5%	27-08-2025 23:27
install	Windows Batch File	1 KB	No	1 KB	33%	27-08-2025 23:27
install.command	COMMAND File	1 KB	No	1 KB	33%	27-08-2025 23:27

Tips:

- Video_ID__c as external ID for Upsert.
- Always backup data before bulk operations.

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3. Duplicate Rules

Purpose: Maintain data quality by preventing duplicates.

Steps:

1. Create Matching Rule: Setup → Matching Rules → New. ○ Define fields to match (e.g., Email for Clients).
2. Create Duplicate Rule: Setup → Duplicate Rules → New.
    - Select Matching Rule. ○ Action on Create/Edit: Block / Alert.
    - Activate rule.
3. Test rule by inserting duplicate record.

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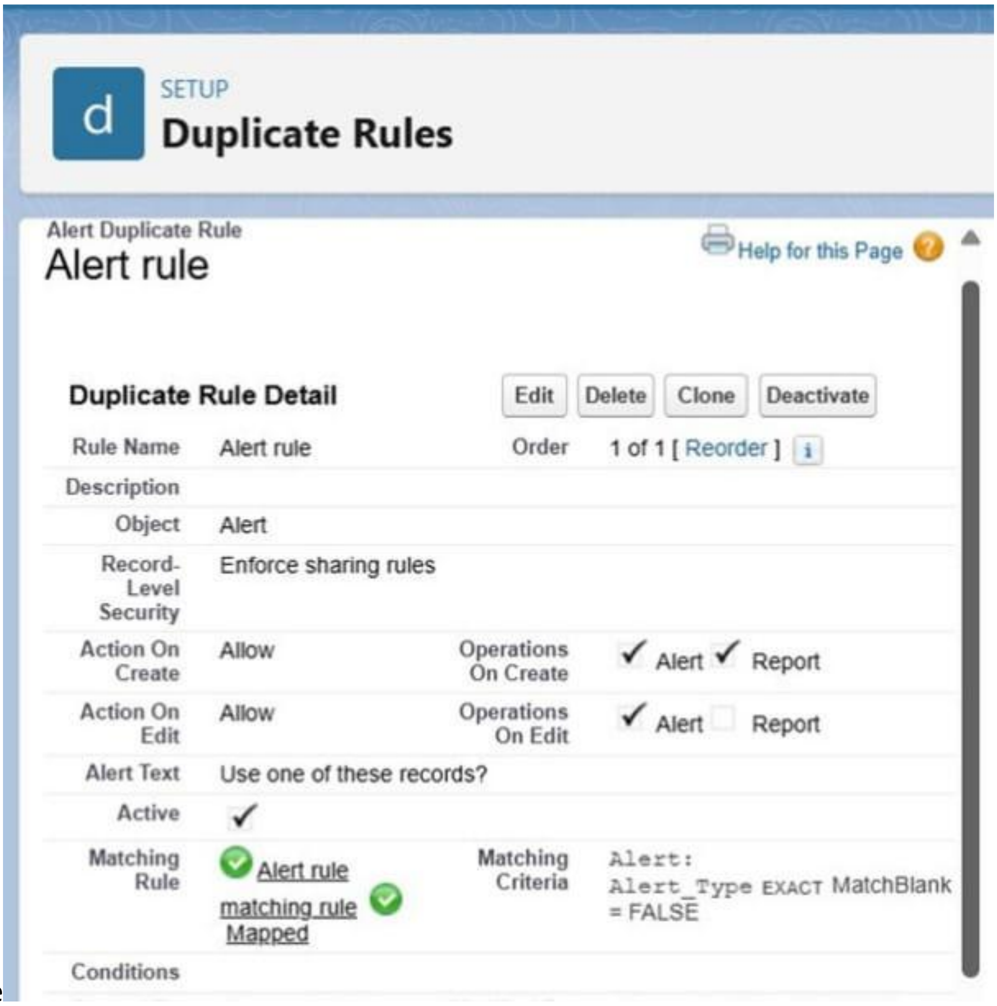

SETUP
Duplicate Rules
Alert Duplicate Rule
Alert rule
Help for this Page
Duplicate Rule Detail
Edit
Delete
Clone
Deactivate
Rule Name
Alert rule
Order
1 of 1 [Reorder]
Description
Object
Alert
Record-Level Security
Enforce sharing rules
Action On Create
Allow
Operations On Create
Alert Report
Action On Edit
Allow
Operations On Edit
Alert Report
Alert Text
Use one of these records?
Active
Matching Rule
Alert rule matching rule Mapped
Matching Criteria
Alert: Alert_Type EXACT MatchBlank = FALSE
Conditions

Tips:

- Clients → Email unique.
- Videos → Video_ID__c unique.
- Alerts & Detection_System → ID fields unique.

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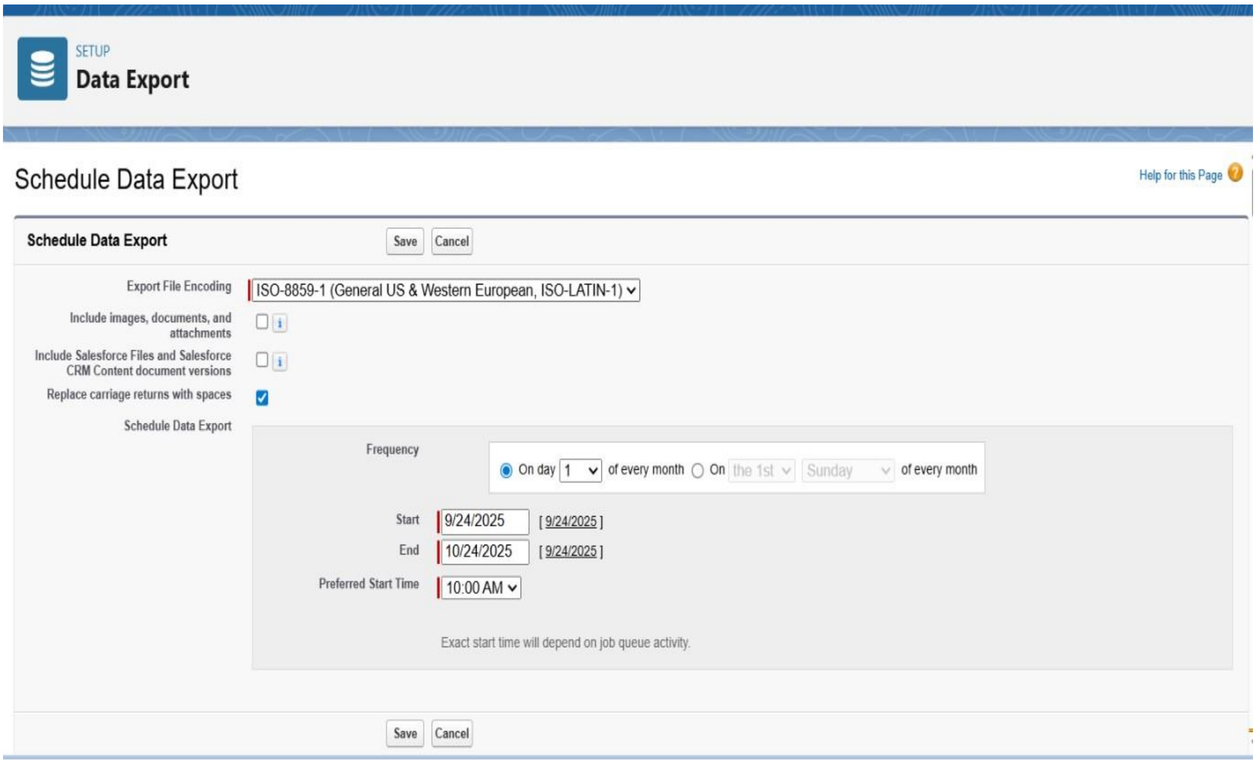
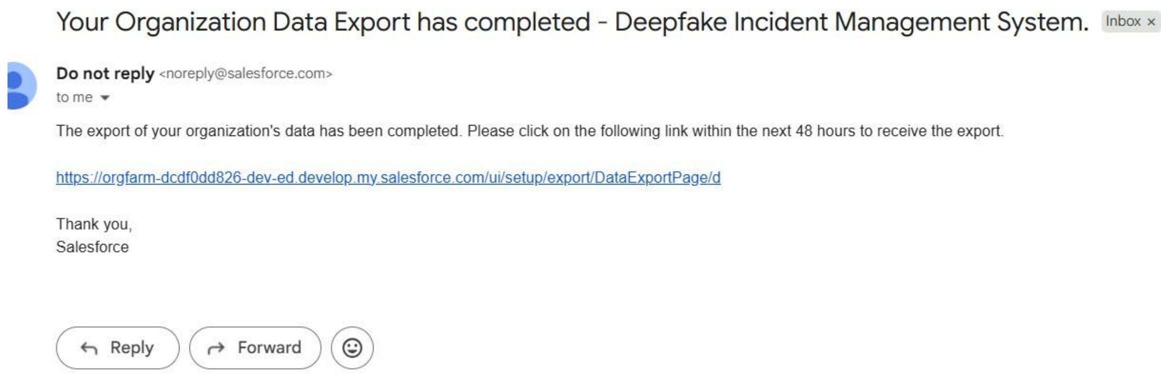
4. Data Export & Backup Purpose: Backup Salesforce data.

Steps (UI):

1. Setup → Data Export → Export Now / Schedule Export.
2. Select objects → Clients, Videos, Alerts, Detection_System.
3. Include attachments/files if needed.
4. Click Start Export → Download .zip files.





Tips:

- Maintain versioned backups.
- Store securely.

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5. Change Sets

Purpose: Deploy metadata from Sandbox → Production.

Steps:

1. Create Outbound Change Set → Name & Description.
2. Add Components: Objects, Fields, Validation Rules, Flows, Apex, Dashboards.
3. Add Profiles (optional).
4. Upload to target org.
5. Target org → Inbound Change Set → Deploy.

Tips:

- Deploy dependencies in correct order.
- Test flows & validation rules after deployment.

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6. Unmanaged vs Managed Packages

Unmanaged Package: Editable in target org, cannot upgrade.
Managed Package: Mostly protected, upgradeable, used for AppExchange.

Use Cases:

- Deepfake CRM sandbox sharing → Unmanaged.

- Client distribution / production → Managed.

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7. ANT Migration Tool

Purpose: Command-line metadata deployment.

Steps:

1. Install Java & ANT.
2. Download Salesforce ANT Migration Tool.
3. Configure build.properties (org credentials).
4. Create package.xml (metadata to deploy).
5. Retrieve: ant retrieveUnpackaged.
6. Deploy: ant deployCode.
7. Check console output → Fix errors.

Tips:

- Include all dependencies.
- Test in Sandbox first.

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8. VS Code & SFDX

Purpose: Source-driven development & deployment.

Steps:

1. Install VS Code & Salesforce Extension Pack.
2. Install Salesforce CLI (SFDX).
3. Create SFDX project → SFDX: Create Project.
4. Authorize org: sfdx auth:web:login -r <url> -a <alias>.
5. Retrieve metadata: sfdx force:source:retrieve -m CustomObject:Videos__c.
6. Make local changes → Objects, Flows, Validation Rules, LWC.
7. Deploy changes: sfdx force:source:deploy -p force-app -u <alias>.
8. Verify in Salesforce → test functionality.

Tips:

- Always retrieve before deploy.
- Track with Git for version control.
- Test Sandbox changes before Production deployment.