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## Phase 8: Data Management & Deployment – Deepfake CRM

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### 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.

The screenshot shows the Salesforce Data Import Wizard interface. At the top, there's a navigation bar with 'Setup', 'Home', and 'Object Manager'. Below it, a progress bar indicates the current step: 'Getting closer...' (highlighted in blue), with 'Choose data' and 'Edit mapping' as previous steps, and 'Start import' as the next step. The main heading is 'Import your Data into Salesforce' with a sub-note: 'You can import up to 50,000 records at a time.' and a 'Help for this page' link. The interface is divided into three columns:

- What kind of data are you importing?**: A list of objects under 'Standard objects' and 'Custom objects'. 'Videos' is selected with a green checkmark.
- What do you want to do?**: Options include 'Add new records' (selected with a green checkmark), 'Match by' (set to '--None--'), 'Which User field in your file designates record owners?' (set to '--None--'), 'Which Client field in your file do you want to match against to set the Uploaded By lookup field?' (set to '--None--'), and 'Trigger workflow rules and processes?'.
- Where is your data located?**: A section for uploading a CSV file. It shows a 'File' section with a 'Choose file' button and the filename 'record.csv'. Below that, 'Character Code' is set to 'ISO-8859-1 (General US & Western European, ISO-LATIN-1)' with a green checkmark, and 'Values Separated By' is set to 'Comma'.

At the bottom right, there are 'Cancel', 'Previous', and 'Next' buttons.

### Edit Field Mapping: Videos

Your file has been auto-mapped to existing Salesforce fields, but you can edit the mappings if you wish. Unmapped fields will not be imported.

[Help for this page](#)

Edit	Mapped Salesforce Object	CSV Header	Example	Example	Example
<a href="#">Change</a>	Video Name	Video	Title	ID	Fake News
<a href="#">Change</a>	Record Owner	Uploaded_bUpload_	Source_URL	y	Rajesh
<a href="#">Change</a>	Source URL	Column-3	Status	Date	2025-09-

Great job

Choose data

Edit mapping

Start import

### Review & Start Import

Review your import information and click Start Import.

Your selections:

- Videos ✓
- Add new records ✓
- record.csv ✓

Your import will include:

Mapped fields: 3

Fields not included: 0

**Congratulations, your import has started!**  
Click OK to view your import status on the Bulk Data Load Job page.

OK

Cancel Previous Start Import

### Tips:

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

## 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.

## 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.



SETUP

## Matching Rules

Matching Rule

[Help for this Page](#)

### Alert rule matching rule

#### Matching Rule Detail

[Delete](#)[Clone](#)[Deactivate](#)

Object	Alert		
Rule Name	Alert rule matching rule		
Unique Name	Alert_rule_matching_rule		
Description			
Matching Criteria	Alert: Alert_Type EXACT MatchBlank = FALSE		
Status	Active		
Created By	<u>shreyansh dubey,</u> 9/24/2025, 10:21 PM	Modified By	<u>shreyansh dubey,</u> 9/24/2025, 10:21 PM



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

Created By [shreyansh dubey](#),  
9/24/2025, 10:20  
PMModified By [shreyansh dubey](#), 9/24/2025,  
10:22 PM

## Your Salesforce matching rule is now activated



Inbox x



**Salesforce Duplicate Management** (... 10:51AM (1 minute ago)



to me ▼

Hello shreyansh dubey,

Your matching rule Alert rule matching rule for identifying duplicate records has been activated and is now ready to use.

Salesforce Duplicate Management

You're registered as [dubeyshreyansh20@gmail.com](mailto:dubeyshreyansh20@gmail.com) in Deepfake Incident Management System.. Need help? Contact Salesforce Customer Support.

↩ Reply

➦ Forward



### 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.



SETUP

Data Export

Schedule Data Export Help for this Page

Schedule Data Export

Save

Cancel

Export File Encoding

ISO-8859-1 (General US & Western European, ISO-LATIN-1)

Include images, documents, and attachments

☐

Include Salesforce Files and Salesforce CRM Content document versions

☐

Replace carriage returns with spaces

☒

Schedule Data Export

Frequency

On day

1

of every month

On

the 1st

Sunday

of every month

Start

9/24/2025

9/24/2025

End

10/24/2025

9/24/2025

Preferred Start Time

10:00 AM

Exact start time will depend on job queue activity.

Save

Cancel

Your Organization Data Export has completed - Deepfake Incident Management System. Inbox x



**Do not reply** <noreply@salesforce.com>  
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://orgfarm-dcdf0dd826-dev-ed.develop.my.salesforce.com/ui/setup/export/DataExportPage/d>

Thank you,  
Salesforce

↩ Reply
➡ Forward
😊

## Tips:

- Maintain versioned backups.
- Store securely.

## 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.
- 

## **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.
-

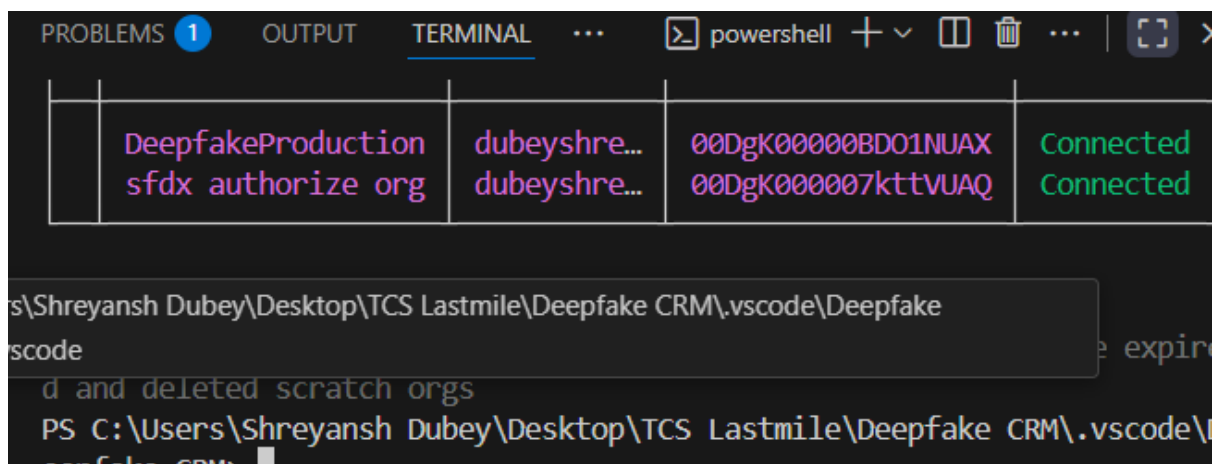


## 8. VS Code & SFDX

**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.