
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.

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: 'Choose data' (active), 'Edit mapping', and 'Start import'. 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 main sections:

- What kind of data are you importing?**: A list of objects with checkboxes. 'Videos' is selected with a green checkmark. Other objects include Alerts, Clients, and Detection Reports.
- What do you want to do?**: A section for selecting the operation. 'Add new records' is selected with a green checkmark. Below it, there are dropdown menus for 'Match by:', 'Which User field in your file designates record owners?', and 'Which Client field in your file do you want to match against to set the Uploaded By lookup field?'. A checkbox for 'Trigger workflow rules and processes?' is also present.
- Where is your data located?**: A section for uploading the CSV file. It includes a 'Drag CSV file here to upload' area, a 'CSV' icon, a 'File' section with a 'Choose file' button and 'record.csv' filename, a 'Character Code' dropdown set to 'ISO-8859-1 (General US & Western European, ISO-LATIN-1)', and a 'Values Separated By' dropdown set to 'Comma'.

At the bottom right, there are three buttons: 'Cancel', 'Previous', and 'Next' (highlighted in green).

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
Change	Video Name	Video	Title	ID	Fake News
Change	Record Owner	Uploaded_bUpload_	Source_URL	y	Rajesh
Change	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.
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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.



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

dhe

Tips:

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

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.

The screenshot shows the 'Schedule Data Export' configuration page in Salesforce. At the top, there's a 'SETUP' link and a 'Data Export' header. The main title is 'Schedule Data Export' with a 'Help for this Page' link. Below the title, there are 'Save' and 'Cancel' buttons. The configuration options include:

- Export File Encoding:** A dropdown menu set to 'ISO-8859-1 (General US & Western European, ISO-LATIN-1)'.
- Include images, documents, and attachments:** An unchecked checkbox.
- Include Salesforce Files and Salesforce CRM Content document versions:** An unchecked checkbox.
- Replace carriage returns with spaces:** A checked checkbox.
- Schedule Data Export:** A section containing:
 - Frequency:** Radio buttons for 'On day 1 of every month' (selected) and 'On the 1st Sunday of every month'.
 - Start:** A date field set to '9/24/2025' with a calendar icon.
 - End:** A date field set to '10/24/2025' with a calendar icon.
 - Preferred Start Time:** A dropdown menu set to '10:00 AM'.
 - A note at the bottom: 'Exact start time will depend on job queue activity.'

At the bottom of the form, there are 'Save' and 'Cancel' buttons.

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



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.

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.