

# Phase 8: Data Management & Deployment

## 1. Data Import Wizard

- Used to upload sample data like Departments, Travel Approvals, and Expense Items.
- Example: Import a CSV with 10 department records (HR, IT, Finance, etc.) and 20 travel requests.
- Provides a simple UI for small-scale imports.

The screenshot shows the Salesforce Data Import Wizard interface. At the top, there's a navigation bar with 'Setup', 'Home', and 'Object Manager'. Below this, a progress bar indicates three steps: 'Choose data', 'Edit mapping', and 'Start import'. The main heading is 'Import your Data into Salesforce', with a subtext '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?', 'What do you want to do?', and 'Where is your data located?'. The first column has tabs for 'Standard objects' and 'Custom objects'. Under 'Standard objects', there are three rows: 'Department', 'Expense Items', and 'Travel Approvals', each with a right-pointing arrow. The other two columns are currently empty. At the bottom right, there are 'Cancel', 'Previous', and 'Next' buttons.

## 2. Data Loader

- Used for bulk data import/export when records are large in number.
- Example: Import 1000+ travel expense records for testing scalability.
- Supports scheduling and handling large CSV files

The screenshot shows the Salesforce Bulk Data Load Jobs interface. On the left, there's a sidebar with a search bar containing 'Data Import', a 'Data Import Wizard' link, and a message: 'Didn't find what you're looking for? Try using Global Search.' The main area is titled 'Bulk Data Load Jobs' and contains a 'Bulk Data Load Job Detail' table. The table has columns for Job ID, Submitted By, Job Type, Bulk V1, Status, and Closed. The data rows show a job with ID '750d20000Npq4b' submitted by 'Ningara Gani', with a status of 'Closed'. The table also includes rows for 'Start Time', 'End Time', 'Time to Complete', 'Object', 'External ID Field', 'Content Type', 'Concurrency Mode', and 'API Version'. The 'Status' column shows 'Total Processing Time (ms)', 'API Active Processing Time (ms)', and 'Apex Processing Time (ms)'. The 'Closed' column shows '0'. The 'Time to Complete' row shows '0'. The 'Object' row shows 'Travel Approval'. The 'External ID Field' row shows '0'. The 'Content Type' row shows 'CSV'. The 'Concurrency Mode' row shows 'Parallel'. The 'API Version' row shows '64.0'. The table also includes rows for 'Queued Batches', 'In Progress Batches', 'Completed Batches', 'Failed Batches', 'Progress', 'Records Processed', 'Records Failed', and 'Retries'. The 'Queued Batches' row shows '1'. The 'In Progress Batches' row shows '0'. The 'Completed Batches' row shows '0'. The 'Failed Batches' row shows '0'. The 'Progress' row shows '0%'. The 'Records Processed' row shows '0'. The 'Records Failed' row shows '0'. The 'Retries' row shows '0'. At the bottom of the table, there are 'Abort' and 'Reload' buttons.

Job ID	Submitted By	Job Type	Bulk V1	Status	Closed
750d20000Npq4b	Ningara Gani	Operation	Insert	Total Processing Time (ms)	0
Start Time	25/09/2025, 11:32 pm IST	Queued Batches	1	API Active Processing Time (ms)	0
End Time		In Progress Batches	0	Apex Processing Time (ms)	0
Time to Complete (hh:mm:ss)		Completed Batches	0		
Object	Travel Approval	Failed Batches	0		
External ID Field		Progress	0%		
Content Type	CSV	Records Processed	0		
Concurrency Mode	Parallel	Records Failed	0		
API Version	64.0	Retries	0		

### 3. Duplicate Rules

- Prevents users from creating duplicate records.
- Example: Avoids creating two departments with the same name or two travel requests with the same ID.
- Ensures data integrity in the system.

### 4. Data Export & Backup

- Exports Salesforce data regularly to create backups.
- Example: Weekly export of Travel Approval and Expense Item records for recovery.
- Ensures business continuity and protects against accidental deletions.

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 shows three steps: 'Choose data' (active), 'Edit mapping', and 'Start import'. The main heading is 'Import your Data into Salesforce' with a subtext 'You can import up to 50,000 records at a time.' and a 'Help for this page' link. There are three sections: 'What kind of data are you importing?' with tabs for 'Standard objects' and 'Custom objects'; 'What do you want to do?' with a large empty box; and 'Where is your data located?' with another large empty box. Under 'Standard objects', there's a list with 'Department', 'Expense Items', and 'Travel Approvals', each with a right arrow. At the bottom right, there are 'Cancel', 'Previous', and 'Next' buttons. A URL is visible at the very bottom: 'https://my.salesforce.com/dataimporter/dataimporter.aspx?...'.

### 5. Change Sets

- Used to move custom objects, fields, validation rules, and flows from Sandbox to Production.
- Example: Move Travel Approval object with its fields and approval process from test environment to live system.

### 6. Unmanaged vs Managed Packages

- **Unmanaged Packages:** Used to share project configuration for development/testing.
- **Managed Packages:** Used for distribution (like apps on AppExchange).
- Example: The Travel Approval App could be shared with other orgs via an Unmanaged Package.