

# Phase 8: Data Management & Deployment Report

Project: VendorConnect

Phase: 8 – Data Management & Deployment

Objective: Manage and move vendor and purchase order data, ensure data integrity, and prepare a reliable deployment pipeline.

Deliverable: Data migrated into Salesforce and deployment pipeline (Change Sets / ANT / SFDX) ready.

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## 1. Sample Data Used

Vendors CSV (vendors.csv):

Vendor\_\_External\_Id\_\_c, Name, Email\_\_c, Tax\_Id\_\_c, Rating\_\_c, Compliance\_Status\_\_c

VEND-001, Acme Supplies, [acme@example.com](mailto:acme@example.com), TAX1001, A, Compliant

VEND-002, Blue Widgets, [blue@example.com](mailto:blue@example.com), TAX1002, B, Pending

VEND-003, Green Parts, [green@example.com](mailto:green@example.com), TAX1003, C, Non-Compliant

Purchase Orders CSV (purchase\_orders.csv):

PO\_External\_Id\_\_c, Name, Vendor\_\_External\_Id\_\_c, Amount\_\_c, Status\_\_c, Start\_Date\_\_c, End\_Date\_\_c, Expected\_Delivery\_\_c

PO-001, PO-001, VEND-001, 1000, Completed, 2025-09-01, 2025-09-05, 2025-09-05

PO-002, PO-002, VEND-001, 2000, Completed, 2025-09-06, 2025-09-15, 2025-09-15

PO-003, PO-003, VEND-002, 1500, Submitted, 2025-09-02, 2025-09-10, 2025-09-10

PO-004, PO-004, VEND-002, 2500, Completed, 2025-09-03, 2025-09-12, 2025-09-12

PO-005, PO-005, VEND-003, 3000, Draft, 2025-09-07, 2025-09-17, 2025-09-17

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## 2. Steps Performed

### A. Prepare Org for Import

- Created External ID fields for Vendor\_\_c (Vendor\_\_External\_Id\_\_c) and Purchase\_Order\_\_c (PO\_External\_Id\_\_c).
- Enabled lookup mapping from Purchase\_Order\_\_c → Vendor\_\_c via external id.
- Verified field-level security for the integration user.
- Screenshot placeholder: External ID field setup.

### B. Data Import Wizard

- Setup → Data Import Wizard → Launch Wizard.
- Selected Vendor\_\_c → Add new records.
- Uploaded vendors.csv.
- Mapped fields: External Id, Name, Email, Tax ID, Rating, Compliance Status.

- Ran import; reviewed success/error files.
- Screenshot placeholder: Data Import Wizard field mapping.

#### C. Data Loader (Bulk Upload / Upserts)

- Opened Data Loader → Login → Upsert Vendors using Vendor\_\_External\_Id\_\_c.
- Upserted Purchase Orders using Vendor external ID.
- Generated success.csv and error.csv for verification.
- Screenshot placeholder: Data Loader mapping and external ID selection.
- CLI Example:  
`sf data bulk upsert -s Vendor__c -f vendors.csv -i Vendor__External_Id__c`  
`sf data bulk upsert -s Purchase_Order__c -f purchase_orders.csv -i PO_External_Id__c`

#### D. Duplicate Rules & Matching Rules

- Created Matching Rule for Vendor\_\_c using Name + Email.
- Created Duplicate Rule: Block/Alert on create/edit.
- Activated rules.
- Screenshot placeholder: Duplicate and Matching Rule setup.

#### E. Data Export & Backup

- Scheduled weekly export for Vendor\_\_c and Purchase\_Order\_\_c.
- Included attachments, documents, and file versions.
- Screenshot placeholder: Data export scheduling.

#### F. Deployment Strategy

- Change Sets: Outbound from Sandbox → Upload → Deploy in Production.
- ANT Migration Tool: build.properties, build.xml, package.xml configured.
- SFDX / sf CLI:  
`sf project deploy start --source-dir force-app/main/default --target-org MyTargetOrg`
- Screenshot placeholders: Change Set UI, ANT configuration, SFDX CLI deploy.

#### G. Validation & Post-Load Checks

- Verified counts via SOQL:  
`SELECT COUNT() FROM Vendor__c`  
`SELECT Vendor__r.Name, COUNT(Id), SUM(Amount__c) FROM Purchase_Order__c GROUP BY Vendor__r.Name`
- Verified success/error CSVs.
- Screenshot placeholder: Developer Console query results.

#### H. Rollback & Recovery

- Deleted wrong records via Data Loader if necessary.
- Restored from last backup for large mistakes.

## I. Screenshot Checklist

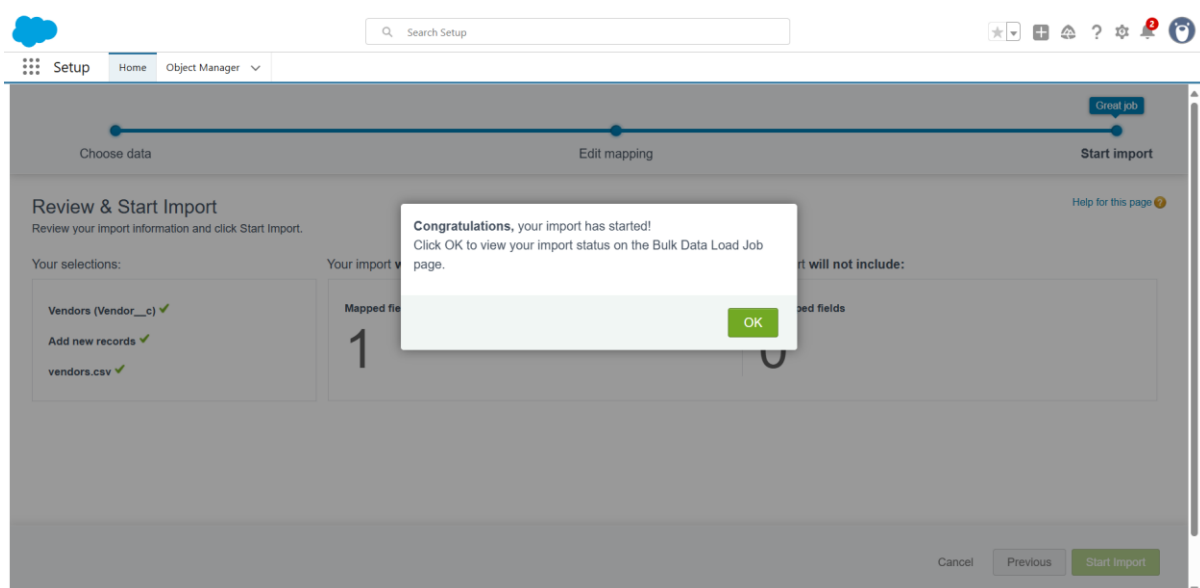
- Vendors CSV file
- Purchase Orders CSV file
- Data Import Wizard mapping
- Data Loader mapping + external ID selection
- Duplicate & Matching Rules setup
- Data Export schedule
- Change Set UI
- ANT configuration screenshot
- SFDX CLI deploy screenshot
- Post-load SOQL verification

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Conclusion: All vendor and purchase order data imported successfully, duplicate prevention active, weekly backups scheduled, and deployment pipeline ready via Change Sets / ANT / SFDX.

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## Screenshots:





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Matching Rules

Vendor\_Name\_Email\_Match

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Matching Rule Detail

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Object	Vendor
Rule Name	Vendor_Name_Email_Match
Unique Name	Vendor_Name_Email_Match
Description	
Matching Criteria	(Vendor: Name EXACT MatchBlank = FALSE) AND (Vendor: Vendor_Email EXACT MatchBlank = FALSE)
Status	Active
Created By	Qm.Pote, 9/25/2025, 1:17 AM
Modified By	Qm.Pote, 9/25/2025, 1:17 AM

Matching Rule: Vendor\_Name\_Email\_Match - Salesforce - Developer Edition

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Duplicate Rules

Prevent\_Vendor\_Duplicates

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Duplicate Rule Detail

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Rule Name	Prevent_Vendor_Duplicates	Order	1 of 1   Reorder
Description	Vendor		
Object	Vendor		
Record-Level Security	Enforce sharing rules		
Action On Create	Allow	Operations On Create	<input checked="" type="checkbox"/> Alert <input checked="" type="checkbox"/> Report
Action On Edit	Allow	Operations On Edit	<input 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"/> Vendor_Name_Email_Match <input checked="" type="checkbox"/> Mapped	Matching Criteria	(Vendor: Name EXACT MatchBlank = FALSE) AND (Vendor: Vendor_Email EXACT MatchBlank = FALSE)
Conditions			
Created By	Qm.Pote, 9/25/2025, 1:20 AM	Modified By	Qm.Pote, 9/25/2025, 1:20 AM

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Data Export

Monthly Export Service

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Next scheduled export:

10/1/2025, 2:00 AM

Export Now

Schedule Export

Your export has been queued. You will receive an email notification when it is completed.

Scheduled By	Qm.Pote
Schedule Date	9/25/2025
Export File Encoding	ISO-8859-1 (General US & Western European, ISO-LATIN-1)



Search Setup



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## SETUP Data Export

### Monthly Export Service

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Monthly Export Service - Salesforce - Developer Edition

Next scheduled export:  
10/1/2025, 2:00 AM

[Export Now](#) [Schedule Export](#)

Your export has been queued. You will receive an email notification when it is completed.

Scheduled By [Om Pote](#)

Schedule Date 9/25/2025

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