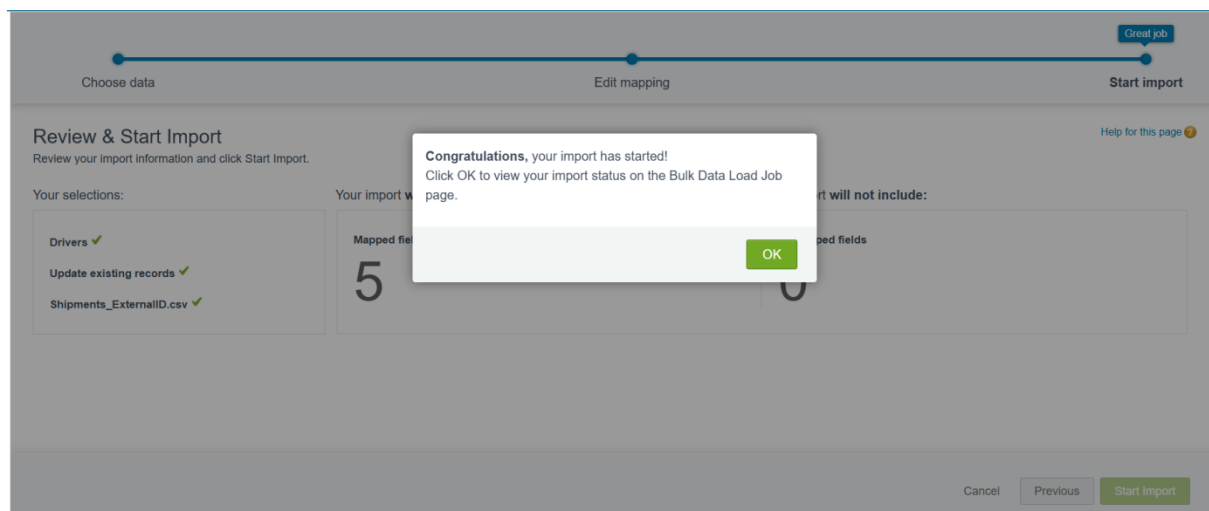


Phase 8: Data Management & Deployment

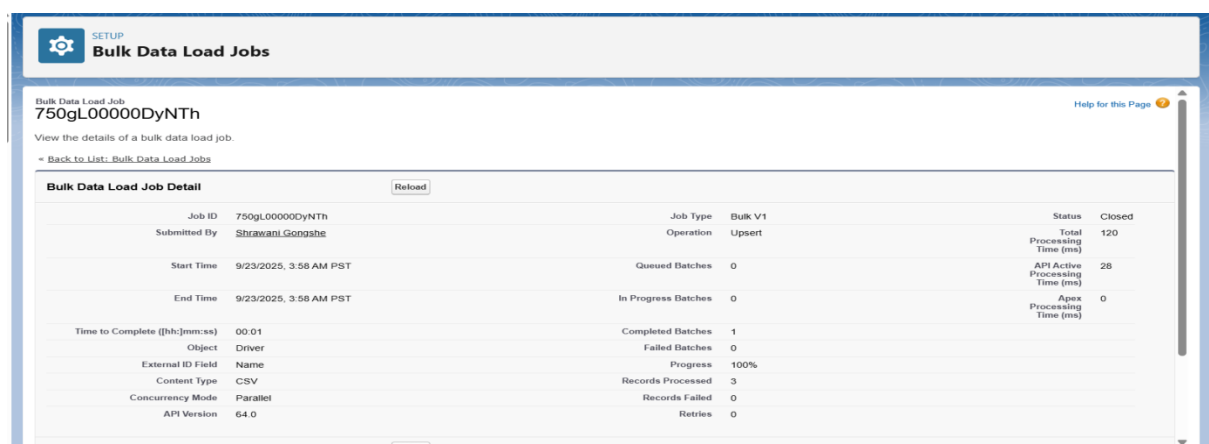
1. Data Import Wizard

- **CSV Import** – Used Data Import Wizard to upload shipment data (*Shipments_ExternalID.csv*) and update existing records with mapped fields.
- **Field Mapping** – Successfully mapped 5 fields with no unmapped fields, ensuring accurate data import for logistics records.




2. Data Loader

- **Bulk API Upsert** – Used Bulk API (V1) to upsert Driver records from a CSV file with Name as the External ID field.
- **Efficient Processing** – The job completed successfully with 100% progress, processing 3 records in parallel with zero failures.



3. Duplicate Rules



- **Shipment, Customer, and Checkpoint Validation** – Duplicate rules prevent duplicate records by blocking or alerting when Shipment Number/Tracking ID, Customer Email/Phone, or Checkpoint Location already exist.
- **Data Quality Enforcement** – Ensures data integrity by blocking duplicates on creation and showing alerts on edits, maintaining clean and reliable records across logistics and tracking.

 SETUP

Duplicate Rules


Account Duplicate Rule

DR_Customer_Alert

 Help for this Page 

Duplicate Rule Detail

EditDeleteCloneDeactivate

Order 2 of 2 [Reorder] 

Rule Name	DR_Customer_Alert		
Description			
Object	Account		
Record-Level Security	Enforce sharing rules		
Action On Create	Allow	Operations On Create	<input checked="" type="checkbox"/> Alert <input type="checkbox"/> Report
Action On Edit	Allow	Operations On Edit	<input checked="" type="checkbox"/> Alert <input type="checkbox"/> Report
Alert Text	⚠ Possible duplicate customer record (same email/phone).		
Active	<input checked="" type="checkbox"/>		
Matching Rule	<input checked="" type="checkbox"/> MR_Customer_Email_Phone <input checked="" type="checkbox"/> Mapped	Matching Criteria	(Account: Email EXACT MatchBlank = FALSE) AND (Account: Phone EXACT MatchBlank = FALSE)
Conditions			
Created By	Shrawani Gongshe, 9/24/2025, 5:40 AM	Modified By	Shrawani Gongshe, 9/24/2025, 5:40 AM

EditDeleteCloneDeactivate

 SETUP

Duplicate Rules

Shipment Duplicate Rule

DR_Shipment_Block

 Help for this Page 


Duplicate Rule Detail

EditDeleteCloneDeactivate

Order 1 of 1 [Reorder] 

Rule Name	DR_Shipment_Block		
Description			
Object	Shipment		
Record-Level Security	Enforce sharing rules		
Action On Create	Block	Operations On Create	<input type="checkbox"/> Alert <input type="checkbox"/> Report
Action On Edit	Allow	Operations On Edit	<input checked="" type="checkbox"/> Alert <input type="checkbox"/> Report
Alert Text	⛔ Duplicate Shipment Found: Shipment Number or Tracking ID already exists.		
Active	<input checked="" type="checkbox"/>		
Matching Rule	<input checked="" type="checkbox"/> MR_Shipment_Number_Tracking <input checked="" type="checkbox"/> Mapped	Matching Criteria	(Shipment: Shipment_Number EXACT MatchBlank = FALSE) AND (Shipment: Shipment_ID EXACT MatchBlank = FALSE)
Conditions			
Created By	Shrawani Gongshe, 9/24/2025, 5:30 AM	Modified By	Shrawani Gongshe, 9/24/2025, 5:36 AM

EditDeleteCloneDeactivate



SETUP

Duplicate Rules

Checkpoint Duplicate Rule

DR_Checkpoint_Block

Help for this Page

Duplicate Rule Detail


Edit Delete Clone Deactivate

Rule Name	DR_Checkpoint_Block	Order	1 of 1 [Reorder]
Description			
Object	Checkpoint		
Record-Level Security	Enforce sharing rules		
Action On Create	Block	Operations On Create	<input type="checkbox"/> Alert <input type="checkbox"/> Report
Action On Edit	Allow	Operations On Edit	<input checked="" type="checkbox"/> Alert <input type="checkbox"/> Report
Alert Text	Duplicate Checkpoint: This location already exists.		
Active	<input checked="" type="checkbox"/>		
Matching Rule	<input checked="" type="checkbox"/> MR_Checkpoint_Code <input checked="" type="checkbox"/> Mapped	Matching Criteria	Checkpoint: Location EXACT MatchBlank = FALSE
Conditions			
Created By	Shrawani Gongshe, 9/24/2025, 5:43 AM	Modified By	Shrawani Gongshe, 9/24/2025, 5:44 AM

Edit Delete Clone Deactivate

4. Data Export & Backup

- **Scheduled Monthly Export** – Data Export Service allows scheduling regular backups of Salesforce data, ensuring availability for recovery or offline use.
- **Secure Download** – Export files are provided in compressed format and remain available for 48 hours, with email notifications sent upon completion.



SETUP

Data Export

Monthly Export Service

Help for this Page

Data Export lets you prepare a copy of all your data in salesforce.com. From this page you can start the export process manually or schedule it to run automatically. When an export is ready for download you will receive an email containing a link that allows you to download the file(s). The export files are also available on this page for 48 hours, after which time they are deleted.

Next scheduled export:

A data export is currently in progress for your organization.

Export Now Schedule Export

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

Scheduled By	Shrawani Gongshe
Schedule Date	9/24/2025
Export File Encoding	Unicode (UTF-8)

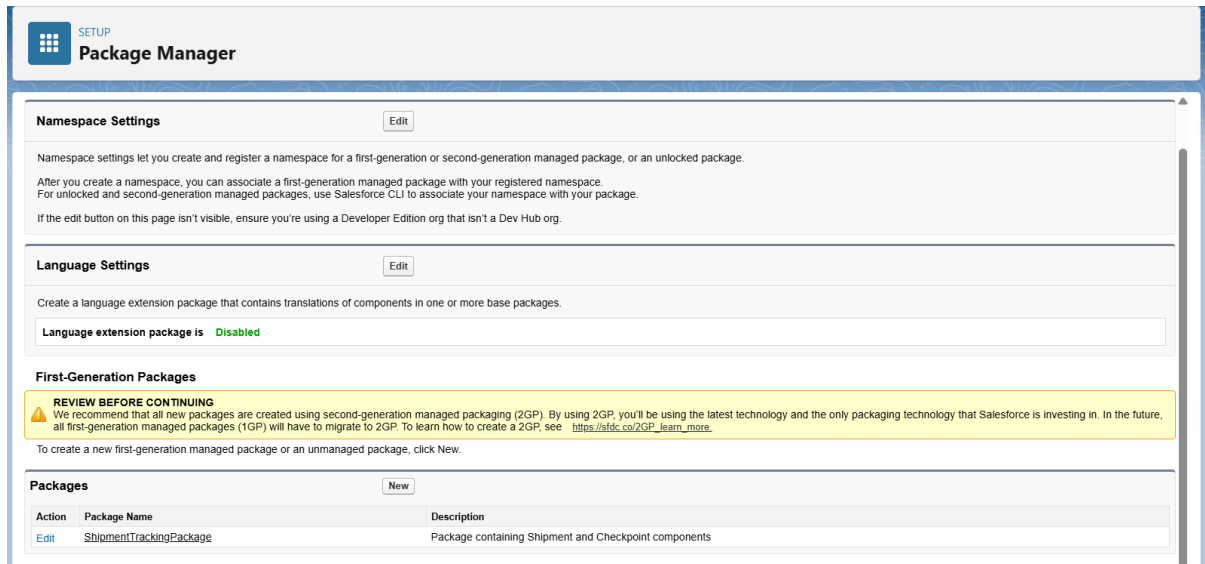
5. Unmanaged vs Managed Packages

Unmanaged Package

- Used to **bundle Shipment & Checkpoint objects, fields, and components** for deployment within your org or to another Salesforce org.
- Best for **development and internal projects**, as the components can be **modified freely after installation**.

Managed Package

1. Used for **distributing apps or solutions to clients via AppExchange**, with **controlled and locked components**.
2. Provides **versioning, upgrades, and licensing**, making it ideal for commercial logistics/shipment tracking products.



6. ANT Migration Tool

- Used for **moving metadata (Shipment, Checkpoint objects, Flows, Apex classes)** between sandbox and production.
- Helpful for **bulk deployments** when exporting/importing many components at once.

7. VS Code & SFDX

- Used for **developing and testing Apex, LWC, and Flows** locally before pushing to Salesforce.
- Supports **version control (Git)** to track changes in shipment tracking configurations and code.

