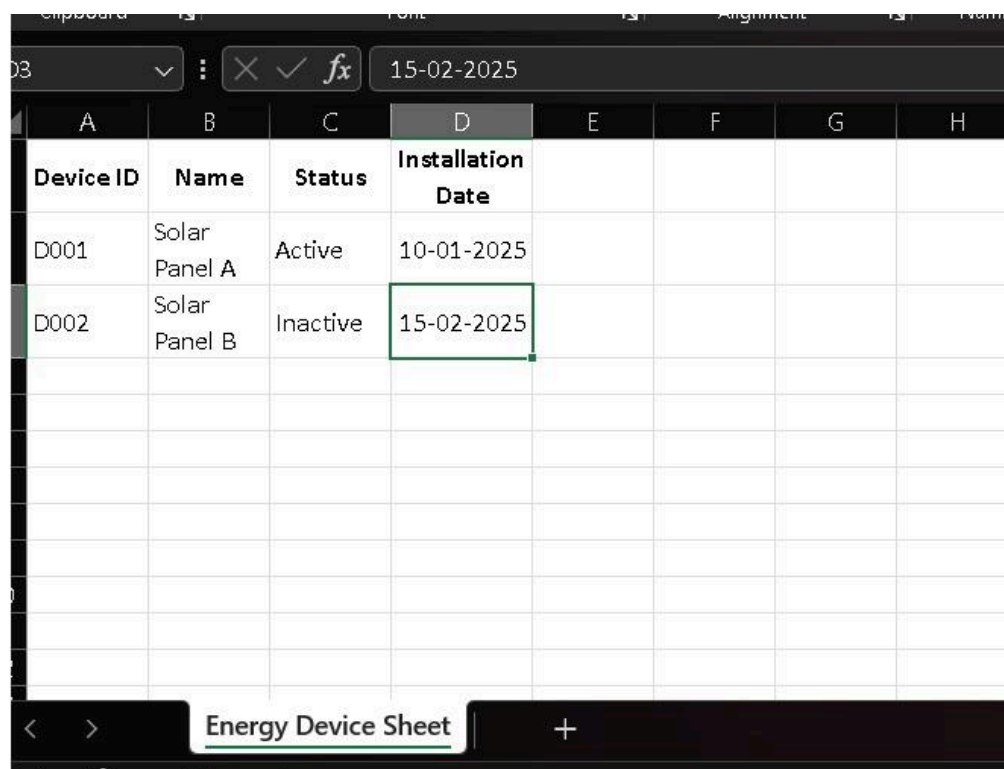# Phase 8 Completion Report — Data Management & Deployment

1. Data Import & Duplicate Management

• Prepared validated data files (CSV/Excel) for Energy Device, Energy Usage Record, Personnel, and Device Assignment.
• Used Data Import Wizard for small to medium imports, mapping fields accurately and testing in sandbox.
• Configured Data Loader for large/complex imports, including batch size, field mappings, and error logs.
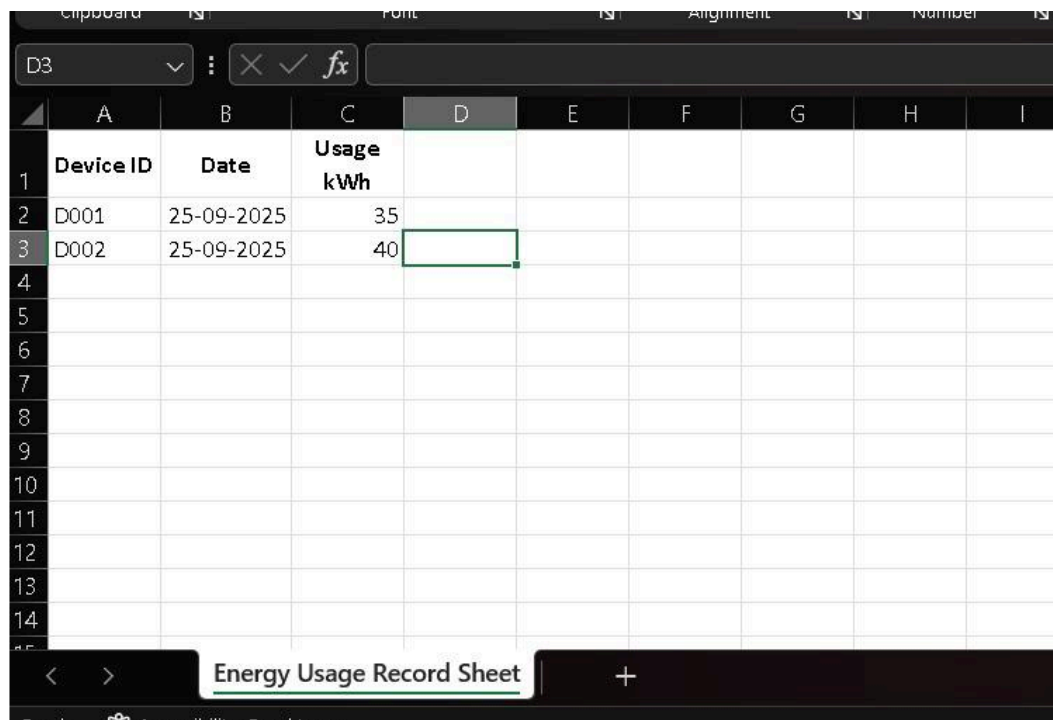• Set up Duplicate Rules and Matching Rules to prevent duplicate entries and tested with sample records.

2. Data Export & Backup

• Scheduled regular Data Exports via Setup and Workbench to maintain backups.
• Stored backups securely for recovery and audit purposes.

• For high-volume Energy Usage Records, considered automation with native exports or third-party backup tools.

3. Deployment Preparation & Change Sets

• Grouped and deployed metadata changes (objects, fields, layouts, automation) using Change Sets.
• Performed validations before activation to ensure error-free deployment.
• Created a detailed deployment checklist and tested in sandbox environments to reduce production risk

SETUP
Data Export

TenantSecurityGuestUserAnomaly	ApprovalSubmission	ApprovalWorkItem
DataCommCapActvTarget	DataKitDeploymentLog	DeliveryEstimationSetup
LocationShippingCarrierMethod	MLModelDataAlert	PaymentGatewayCredStore
RebatePayoutSnapshot	RetentionStoreUsage	SearchIndexFieldConfig
SearchIndexObjectConfig	ServiceAppointmentShift	ShippingCarrier
ShippingCarrierMethod	TenantSecurityEncryptedField	UserCapabilityPreference
AiGroundingFileRef	AiMetadataSyncStatus	ApprovalSubmissionDetail
CommerceSearchIndexError	DataLineageDefSyncLog	DataLineageNodeDefSyncLog
DataMaskCustomValueLibrary	FlowOrchestration	FlowOrchestrationVersion
FlowRecordElementOccurrence	MessagingSessionMetrics	PackageSubscriberOrgInfo
SearchRecencyIndexingJob	TenantSecurityCustomMetricDetail	UserLocalWebServerIdentity
Actor	ActorLock	ActorMessage
ActorSubscription	AgentWorkActionVisibility	AnalyticsUserAttrFuncTkn
BatchPaymentJob	CdnTaskConfiguration	ConversationApiLog
ConversationApiLogObjSum	DataObjSecondaryIndex	FeatureConfigProgress
FeatureGroupSetupProgress	FeatureSetupProgress	FlowRecElementWinningPath
TenantConsumptionAlert	TenantSecurityCertificate	TenantSecurityTrigTransactionSecurityPol
AiJobRun	AiJobRunItem	DataHarmonizedModelObjRef
WebCartCredit	BatchPaymentJobItem	AiGroundingSourceStage
AiGroundingWebRef	ContactCenterBulkOp	Student__c
Mentor__c	Device_c__c	Work_Order_c__c
☑ Energy_Usage_Record__c	☑ Energy_Device__c	☑ Personnel__c
☑ Device_Assignment__c		

4. Advanced Deployment Tools

• Learned the use of Unmanaged Packages (internal solutions) vs Managed Packages (for ISV distribution).
• Used ANT Migration Tool for scripted deployments, managing metadata via XML package files.
• Ensured version control and reusability for repeat deployments.

Setup   Home   Object Manager ∨

Almost done

Choose data   Edit mapping

Edit Field Mapping: Energy Usage Records
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.

🛑 Show errors

Edit	Mapped Salesforce Object	CSV Header	Example	Example
Change	Energy Usage Record Name	Device ID	D001	D002
Change	Record Date	Date	25-09-2025	25-09-2025
Change	Energy Consumed	Usage kWh	35	40

5. Developer Environment & Automation

• Set up VS Code with Salesforce Extensions for modern development workflows.
• Configured SFDX CLI for source-driven development and CI/CD flows.
• Used SFDX commands for org authoriz