

Phase 8 – Data Management & Deployment (Essential Steps)

① Data Import Wizard (Small Data)

Path: Setup → Data → Data Import Wizard

Steps:

1. Select object (Customers or Reservations)
2. Upload CSV
3. Map fields → Start Import

The screenshot shows the Salesforce Data Import Wizard interface. At the top, there's a progress bar with three steps: 'Choose data' (blue), 'Getting closer...', 'Edit mapping' (grey), and 'Start import' (light blue). Below the progress bar, the main area is titled 'Import your Data into Salesforce' and says 'You can import up to 50,000 records at a time.' There are three main sections: 'What kind of data are you importing?' (listing Standard objects like Bills, Customers, Mentors, Reservations, Staffs, employees, students, works), 'What do you want to do?' (listing Add new records (selected), Match by (None), Which User field in your file designates record owners? (None), Trigger workflow rules and processes? (unchecked)), and 'Where is your data located?' (File: Customers.csv, Character Code: ISO-8859-1, Values Separated By: Comma). At the bottom right, there are 'Cancel', 'Previous', and 'Next' buttons.

Getting closer...

Choose data Edit mapping Start import

You can import up to 50,000 records at a time.

What kind of data are you importing? [?](#)

Standard objects	Custom objects
Bills ✓	
Customers >	
Mentors >	
Reservations >	
Staffs >	
employees >	
students >	
works >	

What do you want to do? [?](#)

Add new records ✓
Match by: ? -None- <input type="button" value="▼"/>
Which User field in your file designates record owners? ? -None- <input type="button" value="▼"/>
Which Reservation field in your file specifies the Master/Detail relationship? ? Salesforce.com ID <input type="button" value="▼"/>
Trigger workflow rules and processes? ? <input type="checkbox"/> Trigger workflow rules and processes for new and updated records
Update existing records >
Add new and update existing records >

Where is your data located? [?](#)

File Bills.csv Character Code ? ISO-8859-1 (General US & Western European, ISO-LATIN-1) <input type="button" value="▼"/> Values Separated By Comma <input type="button" value="▼"/>
CSV

Cancel Previous **Next**

Getting closer...

Choose data Edit mapping Start import

[Help for this page](#)

Import your Data into Salesforce

You can import up to 50,000 records at a time.

What kind of data are you importing? [?](#)

Standard objects	Custom objects
Reservations ✓	
Customers >	
Mentors >	
Bills >	
Staffs >	
employees >	
students >	
works >	

What do you want to do? [?](#)

Add new records ✓
Match by: ? Name <input type="button" value="▼"/>
Which User field in your file designates record owners? ? Name <input type="button" value="▼"/>
Which Customer field in your file do you want to match against to set the Customer lookup field? ? -None- <input type="button" value="▼"/>
Which Staff field in your file do you want to match against to set the Assigned Staff lookup field? ? -None- <input type="button" value="▼"/>
Trigger workflow rules and processes? ? <input type="checkbox"/> Trigger workflow rules and processes for new and updated records
Update existing records >
Add new and update existing records >

Where is your data located? [?](#)

File Reservations.csv Character Code ? ISO-8859-1 (General US & Western European, ISO-LATIN-1) <input type="button" value="▼"/> Values Separated By Comma <input type="button" value="▼"/>
CSV

Cancel Previous **Next**

② Data Loader (Bulk Data)

Install Salesforce Data Loader

Steps:

1. Login
2. Select operation (Insert)
3. Choose object (Staff or Bills)
4. Upload CSV → Map fields → Start

The screenshot shows the official Salesforce Data Loader landing page. At the top, there's a navigation bar with links for Products, Industries, Customers, Events, Learning, Support, and Company. On the right side of the top bar are icons for a phone, user login, and a green 'Try for free' button. Below the top bar, there's a secondary navigation bar for 'Developers' with links for Home, Blog, Documentation, APIs, Discover, Build, and Connect, along with a 'Browse trials' button. The main content area features a large, semi-transparent background image of various digital icons like clouds, databases, and mobile phones. Overlaid on this background is the text 'Salesforce Data Loader' in a large, bold, white font. Below this, smaller text reads 'Client application for the bulk import or export of Salesforce data. Use it to insert, update, delete, or export Salesforce records.' and a link to 'Download Summer '25 Release for macOS and Windows (v64.1.0)'. At the bottom of the page, there's a section titled 'What is it?' with a brief description of the Data Loader's function, another download link, and a section titled 'You can use Data Loader in two different ways:' with a bulleted list of usage methods.

Salesforce Data Loader

Client application for the bulk import or export of Salesforce data.
Use it to insert, update, delete, or export Salesforce records.

[Download Summer '25 Release for macOS and Windows \(v64.1.0\)](#)

What is it?

Data Loader is a client application for the bulk import or export of data. Use it to insert, update, delete, or export Salesforce records.

When importing data, Data Loader reads, extracts, and loads data from comma-separated values (CSV) files or from a database connection. When exporting data, it outputs CSV files.

You can use Data Loader in two different ways:

- User interface – Specify configuration parameters and CSV files used for import and export, and define field mappings that map field names in your import file to field names in Salesforce.
- Command line (Windows only) – Specify the configuration, data sources, mappings, and actions in files. The command line enables you to run Data Loader for automated processing.

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3 Weekly Data Export (Backup)

Path: Setup → Data → Data Export

Steps:

1. Select objects → Schedule (weekly)
2. Export → Download ZIP

The screenshot shows the Salesforce Setup interface with the 'Data Export' page selected. The main title is 'Monthly Export Service'. The configuration includes:

- Export File Encoding: ISO-8859-1 (General US & Western European, ISO-LATIN-1)
- Include images, documents, and attachments: Unchecked
- Include Salesforce Files and Salesforce CRM Content document versions: Unchecked
- Replace carriage returns with spaces: Checked

The 'Exported Data' section lists various Salesforce objects with checkboxes:
Contract, Asset, Lead, BusinessProcess, Campaign, CaseContactRole, ContentDocumentLink, ContractContactRole, EmailRoutingAddress, Event, FeedFieldHistory, FieldHistory, Individual, Note, OpportunityContactRole, OrgWideEmailAddress, ProcessInstance, ProcessInstanceStep, Order, Account, Partner, NotificationMember, CampaignMember, CaseHistory2, ContentVersion, EmailDisclaimer, EntityHistory, EventRelation, FeedPost, FiscalYearSettings, LinkReference, Opportunity, Period, ProcessInstanceStep, OrderItem, Contact, Product2, UserRole, Case, CaseSolution, ContentVersionMap, EmailMessage, EntitySubscription, FeedComment, FeedTrackedChange, GroupSubscription, NewsFeed, OpportunityCompetitor, OpportunityLineItem, PricebookEntry, ProcessInstanceWorkitem, Task.

4 Change Sets (Sandbox → Production)

Sandbox: Outbound Change Set → Add components → Upload

Production: Inbound Change Set → Validate → Deploy

5 GitHub Repository (Version Control)

1. Create GitHub repo
2. Push metadata & docs (Flows, Apex, Reports, Dashboards)
3. Maintain commit history