

Phase 8

1. Data Import Wizard

SETUP

Bulk Data Load Jobs

Bulk Data Load Job

750dM00000XYDB9

Help for this Page

View the details of a bulk data load job.

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Bulk Data Load Job Detail

Reload

Job ID	750dM00000XYDB9	Job Type	Bulk V1	Status	Closed
Submitted By	mudhuluri.lakshminarayanavarma	Operation	Insert	Total Processing Time (ms)	107
Start Time	25/09/2025, 1:06 pm IST	Queued Batches	0	API Active Processing Time (ms)	43
End Time	25/09/2025, 1:06 pm IST	In Progress Batches	0	Apex Processing Time (ms)	0
Time to Complete ([hh:mm:ss])	00:00	Completed Batches	1		
Object	Customer	Failed Batches	0		
External ID Field		Progress	100%		
Content Type	CSV	Records Processed	3		
Concurrency Mode	Parallel	Records Failed	0		
API Version	64.0	Retries	0		

Reload

Bulk Data Load Job

750dM00000XYdIT

Help for this Page

View the details of a bulk data load job.

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Bulk Data Load Job Detail

Abort Reload

Job ID	750dM00000XYdIT	Job Type	Bulk V1	Status	Closed
Submitted By	mudhuluri.lakshminarayanavarma	Operation	Insert	Total Processing Time (ms)	0
Start Time	25/09/2025, 1:08 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	Menu Item	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		

Abort Reload

Purpose:

The Data Import Wizard is a Salesforce tool designed to simplify the process of importing data from external sources like CSV files into Salesforce standard and custom objects. It is particularly helpful for admins and users needing to upload data without scripting or programming knowledge. The wizard supports objects such as Customers, Orders, Payments, Restaurants, and more.

Detailed Steps Implemented:

- **Accessing the Wizard:** The process begins by navigating to Salesforce Setup and typing "Data Import Wizard" in the Quick Find box. Selecting the Data Import Wizard from the results launches the import interface.
- **Object Selection:** Users choose the object they want to import data into. For FoodieConnect, both standard and custom objects such as Customers were selected.
- **File Upload:** A CSV file containing the data (e.g., customer details) is uploaded via the wizard.

- **Field Mapping:** The wizard attempts automatic mapping of CSV file headers to Salesforce object fields. Example mappings for Customer data include:
 - CSV First_Name → Salesforce field First Name
 - CSV Last_Name → Salesforce field Last Name
 - CSV Email → Salesforce field Email
 - CSV Phone → Salesforce field Phone
 - CSV Address → Salesforce field Address
 - CSV Loyalty_Points → Salesforce field Loyalty Points
 - Any unmapped fields can be manually corrected before proceeding.
- **Validation & Import:** The wizard verifies the mapping, allowing corrections before starting the import process.
- **Import Success:** Successfully imported records are now available in the Salesforce CRM, ensuring data integrity and completeness.

Outcome:

The import process was smooth and accurate, resulting in a fully populated Customer database in Salesforce that reflects the source CSV data.

2. Data Loader

Purpose:

The Data Loader is a more powerful Salesforce client application ideal for handling large-scale data operations. It supports bulk data insertions, updates, upserts, and exports – especially useful for objects and volumes not supported by the Data Import Wizard.

Detailed Steps Implemented:

- **Installation:** The Data Loader application was downloaded and installed locally.
- **Connection Setup:** Configured connection credentials including Salesforce username, password, and security token to authenticate API access.
- **Bulk Operations:** Used to import large datasets for Orders and Payments which exceeded the Data Import Wizard's practical limits.
- **Data Integrity:** Care was taken to maintain proper data relationships (such as lookup and master-detail relationships) to ensure data consistency across related objects.
- **Error Handling:** The Data Loader's detailed error reports helped quickly identify and fix any issues during upload.

Outcome:

The Data Loader enabled efficient handling of large datasets, significantly supporting testing and validating CRM workflows from order placement to payment and delivery.

3. Duplicate Rules

Matching Rule

Customer Duplicate Rule matching rule

Help for this Page

Matching Rule Detail

EditDeleteCloneActivate

Object	Customer
Rule Name	Customer Duplicate Rule matching rule
Unique Name	Customer_Duplicate_Rule_matching_rule
Description	
Matching Criteria	(Customer: Name EXACT MatchBlank = FALSE) AND (Customer: Restaurant EXACT MatchBlank = FALSE) AND (Customer: Loyalty_Points EXACT MatchBlank = FALSE) AND (Customer: Address EXACT MatchBlank = FALSE) AND (Customer: Email EXACT MatchBlank = FALSE)
Status	Inactive
Created By	mudhukuri.lakshminarayana, 25/09/2025, 1:15 pm
Modified By	mudhukuri.lakshminarayana, 25/09/2025, 1:15 pm

Purpose:

To maintain a clean and reliable customer database, Duplicate Rules are essential. They help detect, prevent, and manage duplicate records, reducing inconsistencies and improving user trust in the data.


Detailed Steps Implemented:

- **Setup Navigation:** Accessed through Setup under Duplicate Management.
- **Rule Creation:** A Duplicate Rule for the Customer object was created and configured.
- **Matching Logic:** The rule matches records based on critical criteria like Customer Name, Restaurant affiliation, Loyalty Points, Address, and Email.
- **User Experience:** When duplicates are detected during record creation or edits, users are alerted with options for resolution.
- **Reporting:** Duplicate detection is logged for administrative oversight.

Outcome:

Duplicate entries are minimized, which enhances CRM data quality and operational efficiency.

4. Data Export & Backup

 **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:
None






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

Scheduled By: **mudhuluri.lakshminarayanan**



Schedule Date: **25/09/2025**

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

Action	File Name	File Size
download	WE_00DdM00000d6IBUAM_1.ZIP	1.1K



[Sort](#) [View](#) [...](#)

Name	Date modified	Type	Size
▼ Today			
 Customer_.csv	25-09-2025 17:00	Microsoft Excel Co...	3 KB
 Menu_Item_.csv	25-09-2025 17:00	Microsoft Excel Co...	1 KB

Purpose:

Regular data backups are critical for disaster recovery, compliance, and offline access. Salesforce’s Data Export feature automates this process.

Detailed Steps Implemented:

- **Access:** Located in Setup under Data Export.
- **Scheduling:** Configured manual and recurring export schedules to cover all relevant Salesforce objects including Customers, Orders, Payments, etc.
- **Export Format:** Data was exported as CSV files packaged inside ZIP archives, using the ISO-8859-1 encoding to accommodate special characters.
- **Download & Storage:** Exported ZIP files downloaded and safely stored outside Salesforce for redundancy.
- **Restore Readiness:** Data is ready for import back into Salesforce or migration to other environments if needed.

Outcome:

A reliable backup strategy is in place ensuring data safety and availability.

5. Change Sets

Purpose:

Change Sets simplify deployment by transferring metadata changes (like new fields or triggers) between Salesforce orgs, typically from sandbox to production environments.

Implementation Status:

Although Change Sets were noted, they were not visible or actively used in this FoodieConnect org because all work was done within a single environment, making Change Sets optional.

Outcome:

No deployment disruptions from Change Sets; future deployments can consider using Change Sets if multi-org rollout is introduced.

6. Unmanaged vs Managed Packages

SETUP

Package Manager

Package
FoodieConnect_Unmanaged

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Package Detail

EditDeleteUpload

Package Name

FoodieConnect_Unmanaged

Type

Unmanaged

Language

English

Notify on Apex Error

mudhukuri.lakshminarayanavarma

Created By

mudhukuri.lakshminarayanavarma 25/09/2025, 5:06 pm

Last Modified By

mudhukuri.lakshminarayanavarma 25/09/2025, 5:06 pm

Description

FoodieConnect CRM App (Restaurants, Orders, Payments)

Components

Versions

Purpose:

Packaging bundles all necessary components (objects, fields, validation rules, Apex code) for reuse or distribution in other Salesforce orgs.

Detailed Steps Implemented:

- Created an Unmanaged Package named FoodieConnect_Unmanaged containing:
 - Core Objects: Customer, Order, Payment, Delivery, Restaurant, Menu Item, Issue.

- Custom fields and validation rules enforcing business logic (e.g., positive order totals).
 - User interface elements: Page layouts, tabs, Lightning pages, and utility bar components.
 - Apex classes and triggers for business automation.
- Attempted to upload the package to the AppExchange or another org but failed due to missing dependent components (fields/layouts referenced in triggers and validation rules).

Outcome:

Though packaging was mostly completed, the importance of ensuring all dependencies are included was highlighted for successful package upload and installation.

Summary of Achievements

- The Data Import Wizard facilitated easy, accurate import of Customer data from CSV sources.
- The Data Loader empowered bulk uploads for Orders and Payments, ensuring robust data handling.
- Duplicate Rules actively protect against redundant customer records, improving data quality.
- Data Export configured regular backups for disaster recovery and compliance.
- Change Sets were noted as optional since development was confined to a single org.
- Unmanaged Package creation was successful in bundling the app but requires dependency resolution for deployment.

This comprehensive data and integration management approach strengthens FoodieConnect's Salesforce CRM deployment by ensuring high-quality data, streamlined workflows, and preparation for scalable deployment scenarios.