

SALESFORCE PROJECT

PROJECT TITLE :RealEstate CRM (Property & Agent Management)

PROBLEM: Real estate firms struggle with property listings, agent performance, and client leads. Solution

Phase 8: Data Management & Deployment

A. Data Import Wizard

Purpose: Import small to medium datasets (up to 50,000 records) without code.

Steps:

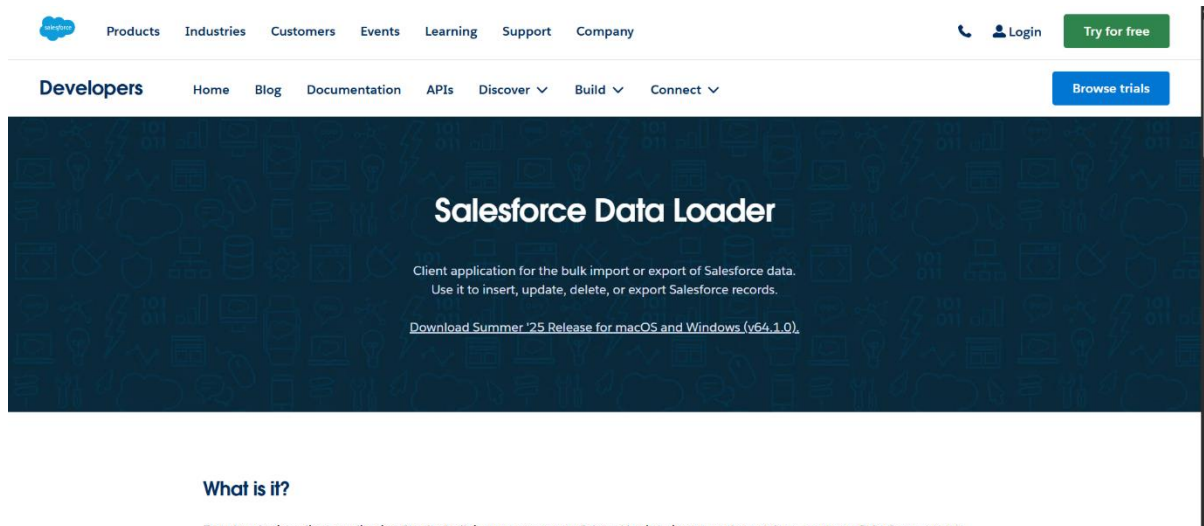
1. **Setup** → **Data Import Wizard**
2. Select Object: Property, Client, Deal, Agent, Contract
3. Choose Action: Add new records / Update existing records
4. Map CSV columns → Salesforce fields
5. Run import & check results (success/failure report)

Use Case: Bulk create initial Properties, Clients, and Agents in Sandbox.

The screenshot displays the Salesforce Data Import Wizard interface. At the top, there's a navigation bar with 'Setup', 'Home', and 'Object Manager'. Below this, a progress bar shows three steps: 'Choose data', 'Edit mapping', and 'Start import'. The 'Choose data' step is currently active. It is divided into three main sections: 'What kind of data are you importing?', 'What do you want to do?', and 'Where is your data located?'. In the first section, 'Standard objects' are listed, with 'Properties' selected and marked with a green checkmark. The second section offers two options: 'Add new records' (selected with a green checkmark) and 'Update existing records'. The third section shows a 'Drag CSV file here to upload' area with a 'CSV' file named 'data.csv' uploaded, also marked with a green checkmark. The 'Character Code' is set to 'ISO-8859-1' and 'Values Separated By' is set to 'Comma'.

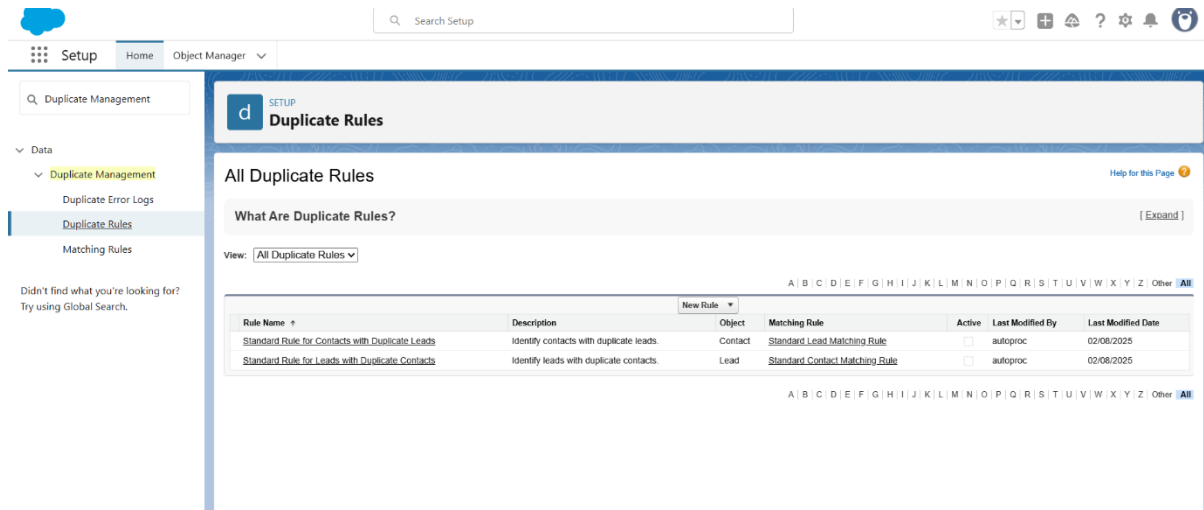
B. Data Loader

Purpose: Bulk import/export (up to millions of records), update, delete.



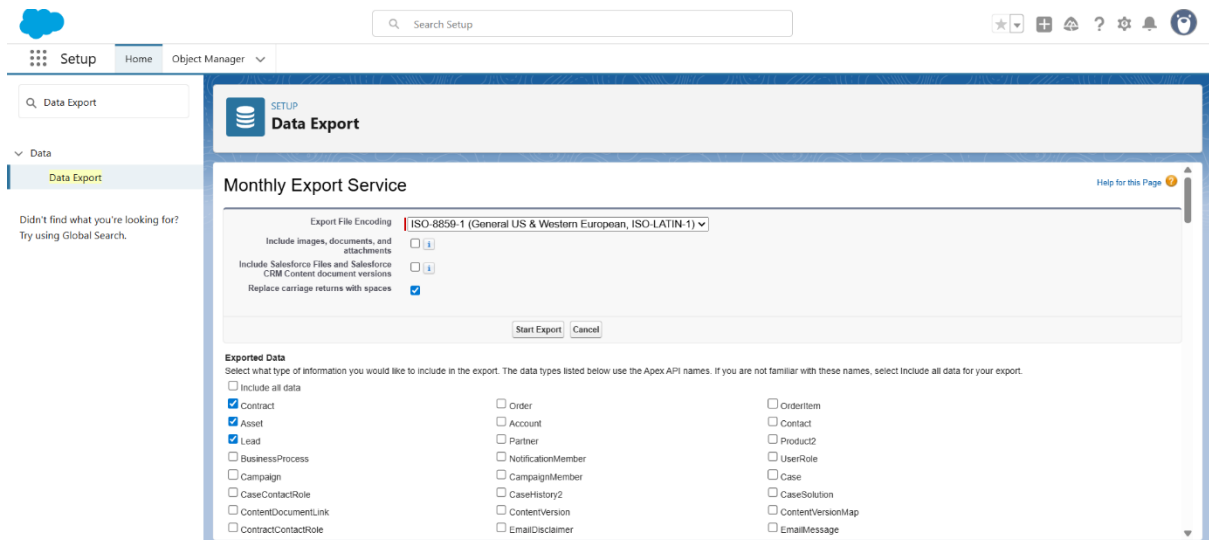
C. Duplicate Rules

Purpose: Maintain data quality by preventing duplicate Clients, Properties, or Deals.



D. Data Export & Backup

- **Scheduled Export:**
 - Setup → Data Export → Weekly / Monthly
 - Includes all custom and standard objects
 - Download CSV / ZIP files for backup



E. Change Sets

Purpose: Move metadata (custom objects, fields, flows, LWCs) from Sandbox → Production

- ☐ Add Components (Objects, Fields, Flows, Record Types, Profiles, Permission Sets)
- ☐ Upload → Production
- ☐ In Production → Validate → Deploy

F. Unmanaged vs Managed Packages

Package Type Use Case

Unmanaged Sharing project or demo metadata (Portfolio, LWC)

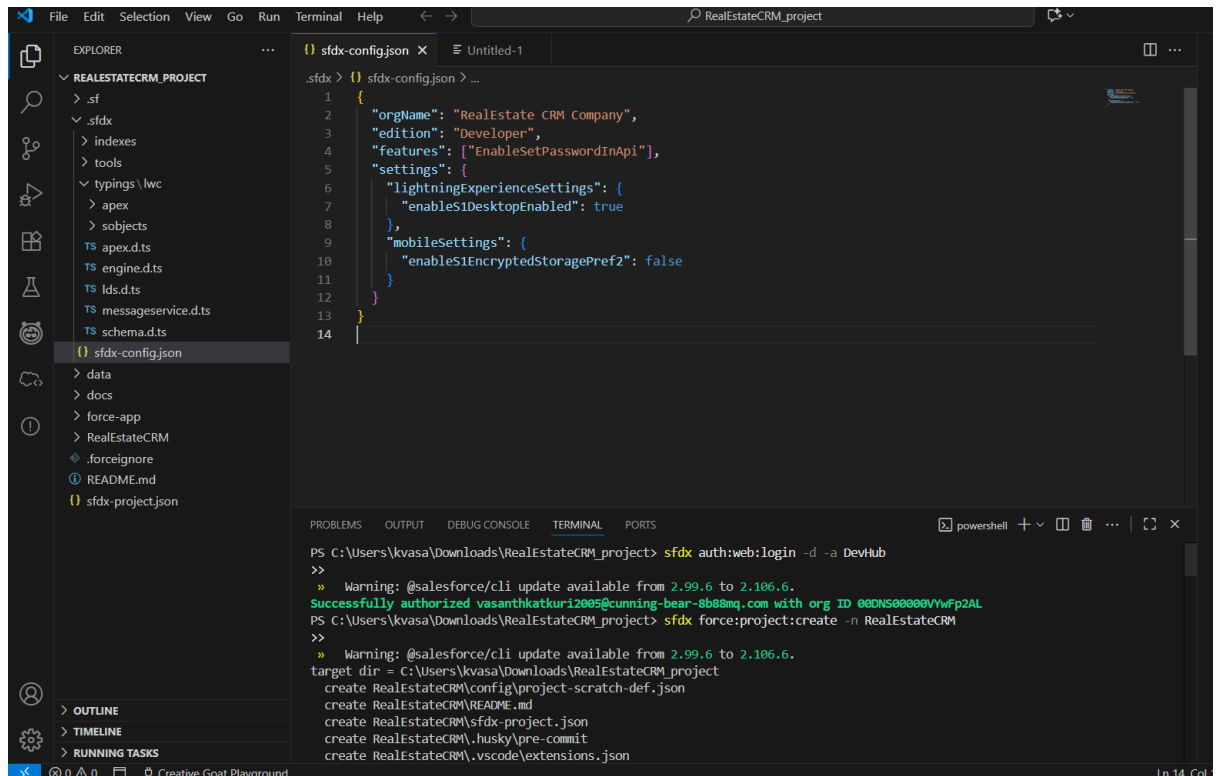
Managed AppExchange apps, installable with upgrades and licensing

- For this project, **Unmanaged Package** is enough to showcase CRM components.

H. VS Code & SFDX

Purpose: Modern development & deployment workflow

1. **VS Code + Salesforce Extensions**
 - Connect to Sandbox/Dev Hub
 - Pull / Push metadata
2. **SFDX Commands**
 - Create scratch org:



.Deploy metadata: `sfdx force:source:deploy -p force-app`

.Retrieve metadata: `sfdx force:source:retrieve -m CustomObject`