

# Phase 8: Data Management & Deployment

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This phase covers Salesforce data management and deployment strategies. The primary focus is on using the Data Import Wizard, while other tools are briefly explained for awareness.

## **□ Data Import Wizard**

**Purpose:** Import data into Salesforce using a guided interface.

### **Steps:**

1. Go to **Setup → Data Import Wizard**.
2. Select the object (e.g., Accounts, Contacts).
3. Upload CSV file with proper headers.
4. Map CSV fields to Salesforce fields.
5. Click **Start Import** → Monitor progress.

### **Notes:**

- Supports standard and custom objects.
- Suitable for small to medium volume imports.
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Setup

Home

Object Manager

Great job

Choose data

Edit mapping

Start import

Review & Start Import

Review your import information and click Start Import.

Your selections:

Events

Add new records

Event\_Import\_No\_EndDate.csv

Your import will include:

Mapped fields

4

Unmapped fields

0

Your import will not include:

Cancel

Previous

Start Import

SETUP

Bulk Data Load Jobs

View the details of a bulk data load job.

Back to List: Bulk Data Load Jobs

Bulk Data Load Job Detail

Reload

Job ID	750gk00000Dq26H	Job Type	Bulk V1	Status	Closed
Submitted By	Vibhuti Shrivhare	Operation	Insert	Total Processing Time (ms)	113
Start Time	9/25/2025, 8:55 PM PST	Queued Batches	0	API Active Processing Time (ms)	63
End Time	9/25/2025, 8:55 PM PST	In Progress Batches	0	Apex Processing Time (ms)	1
Time to Complete ([hh:mm:ss])	00:08	Completed Batches	1		
Object	Event	Failed Batches	0		
External ID Field		Progress	100%		
Content Type	CSV	Records Processed	15		
Concurrency Mode	Parallel	Records Failed	0		
API Version	64.0	Retries	0		

Reload

## Data Loader

**Purpose:** Bulk data import/export tool for large volumes.

### Quick Points:

- Download, install, and login with Salesforce credentials.

- Operations: Insert, Update, Upsert, Delete, Export.
  - Supports large data volumes (millions of records).
  - Requires API access and CSV mapping.
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## 3 Duplicate Rules

**Purpose:** Prevent duplicate records in Salesforce.

**Quick Points:**

- Create rules via **Setup → Duplicate Management → Duplicate Rules**.
  - Define object, matching criteria, and actions (Alert, Block).
  - Use **Matching Rules** for custom logic.
  - Helps maintain clean, high-quality data.
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## 4 Data Export & Backup

**Purpose:** Backup Salesforce data regularly.

**Quick Points:**

- Go to **Setup → Data Export** and select objects.
  - Schedule exports weekly or monthly.
  - Download CSV ZIP files and store securely.
  - Automation possible via third-party tools.
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## 5 Change Sets

**Purpose:** Deploy metadata changes between orgs.

**Quick Points:**

- Use **Outbound Change Sets** to add components.
- Upload to target org → Deploy via **Inbound Change Sets**.
- Validate before activation.

- Works only between connected orgs (sandbox → production).
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## 📦 Unmanaged vs Managed Packages

**Purpose:** Package metadata for reuse or distribution.

**Quick Points:**

- **Unmanaged Package:** One-time deployment, code editable.
  - **Managed Package:** Controlled distribution, code protected.
  - Useful for deploying or sharing apps.
  - Managed packages needed for AppExchange distribution.
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## 🛠️ ANT Migration Tool

**Purpose:** Command-line tool for metadata deployment/retrieval.

**Quick Points:**

- Requires **build.xml** and **package.xml** for metadata selection.
  - Commands: retrieve, deploy.
  - Monitor logs for errors/success.
  - Useful in CI/CD pipelines.
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## 🔗 VS Code & SFDX

**Purpose:** Salesforce development and deployment using VS Code and CLI.

**Quick Points:**

- Install **VS Code + Salesforce Extension Pack**.
  - Authenticate orgs via SFDX CLI.
  - Retrieve/deploy metadata using SFDX commands.
  - Supports Lightning Web Components, Apex, and version control.
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I MAINLY CONCENTRATED ON DATA IMPORT WIZARD