# Phase 8: Data Management & Deployment

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.

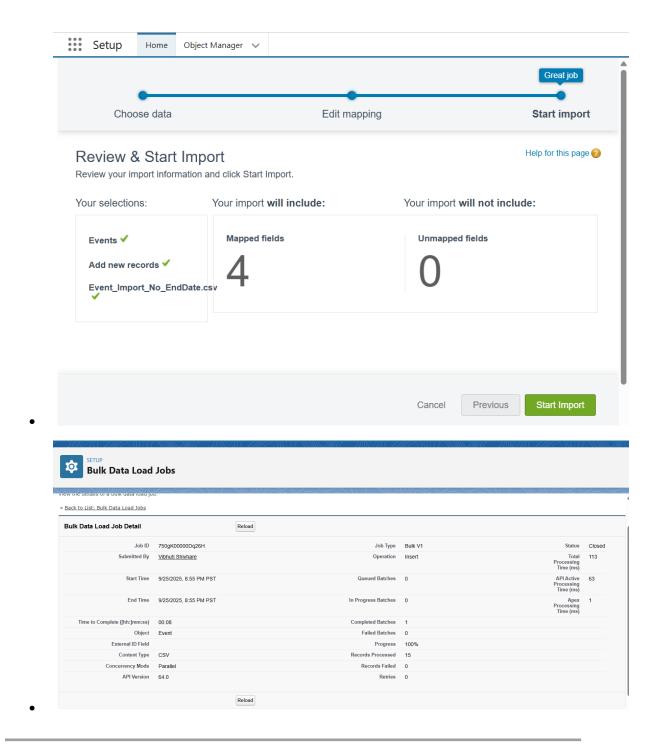
# **Steps:**

- 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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## **2**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.

# **Duplicate Rules**

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

## **Quick Points:**

- Create rules via **Setup**  $\rightarrow$  **Duplicate Management**  $\rightarrow$  **Duplicate Rules**.
- Define object, matching criteria, and actions (Alert, Block).
- Use **Matching Rules** for custom logic.
- Helps maintain clean, high-quality data.

# **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.

## **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).

## **©**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.

#### **ZANT 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.

#### **EVS** 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.

# I MAINLY CONCENTRATED ON DATA IMPORT WIZARD