

Data Management & Deployment -- Phase 8

Data Import Wizard

A user-friendly tool in Salesforce for importing data from CSV files into specific objects. Ideal for non-technical users to add batch data quickly. Requires prepared CSV files matching Salesforce fields. Since you enter sample records manually, it can be optionally skipped.

Data Loader

A powerful external client app to perform bulk import, update, upsert, and export of Salesforce data. Suitable for large datasets and complex data management. Supports CSV files and command-line operations. Mostly used in data-heavy integrations or migrations.

Duplicate Rules

Declarative rules to identify and prevent duplicate records in Salesforce automatically. Matches records on configurable field criteria and blocks or alerts users. Critical for maintaining data quality and consistent CRM operations. Supports custom matching rules combining multiple fields.

Data Export & Backup

Salesforce's built-in feature to export entire org data or specific objects for archival and restore. Helps protect against accidental data loss and supports external analysis. Exports can be manual or scheduled. Useful mainly for admins and not a daily development activity.

Change Sets

Declarative deployment tools to move metadata components and configurations between Salesforce orgs. Useful for sandbox-to-production releases and controlled change management. Supports a UI for selecting and deploying components. Essential for smooth CRM rollout.

Unmanaged vs Managed Packages

Salesforce packaging options: unmanaged for open-source or in-house use, managed for commercial distribution with licensing and versioning. Managed packages offer upgrade paths, unmanaged are simpler but lack control. Relevant if you plan to distribute your app beyond your org.

ANT Migration Tool

An older, XML-driven command-line tool for metadata deployment. Allows scripted bulk deployments. Mostly replaced by Salesforce CLI and SFDX for modern development. Useful in legacy processes or automated build pipelines still on ANT.

VS Code & SFDX

Modern, source-driven Salesforce development tools. VS Code offers rich editing with Salesforce extensions; SFDX CLI manages scratch orgs, metadata push/pull, and deployments. Vital for efficient Apex, LWC, and metadata lifecycle management in your CRM project.