Phase 8: Data Management & Deployment

■ Goal: Manage data and move changes for the Membership & Subscription Manager project.

This phase ensures smooth handling of membership records, subscriptions, and invoices.

It also covers methods to migrate project changes between environments.

1. Data Import Wizard

• Used for small demo data imports (up to 50,000 records).
• Example: Import 20 demo Members with Name, Email, Phone, Membership Type.

2. Data Loader (Bulk Data)

• Handles large imports, updates, deletes.
• Example: Import 50 Subscriptions linked to Members.
• Supports Insert, Update, Upsert, Delete.

3. Duplicate Rules

• Prevent duplicate Members.
• Example: Block record if Email__c already exists.

4. Data Export & Backup

• Schedule weekly backup of Members, Subscriptions, Invoices.
• Path: Setup → Data Export → Schedule Weekly Export.
• Ensures recovery during data loss.

5. Change Sets
• Move configurations (objects, fields, flows, triggers) from Sandbox → Production.
• Outbound Change Set → Add Components → Upload → Deploy in Production.
6. Managed vs Unmanaged Packages
• Unmanaged: Share editable project (best for learning/demo).
• Managed: Locked components, used for AppExchange.
7. ANT Migration Tool
• Command-line deployment tool.
• Deploy metadata via XML package files.
• Ideal for automated CI/CD pipelines.
8. VS Code & Salesforce DX (SFDX)
• Developer-friendly for version control & deployments.
• Common commands:
- sfdx force:source:pull → Pull changes
- sfdx force:source:push → Push changes
- sfdx force:apex:test:run → Run test classes
■ Conclusion:
For Membership & Subscription Manager:
- Import Wizard for demo Members.
- Data Loader for bulk Subscriptions.
- Duplicate Rules for clean data.
- Weekly Exports for backup.
- Change Sets / Packages / SFDX for deployments.
This ensures data is secure, consistent, and easily migrated between environments.