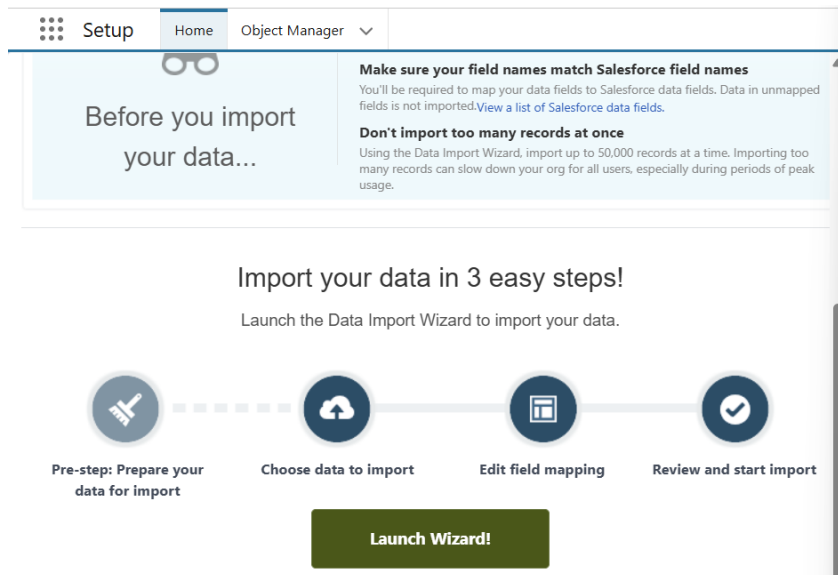


## Phase 8: Data Management & Deployment

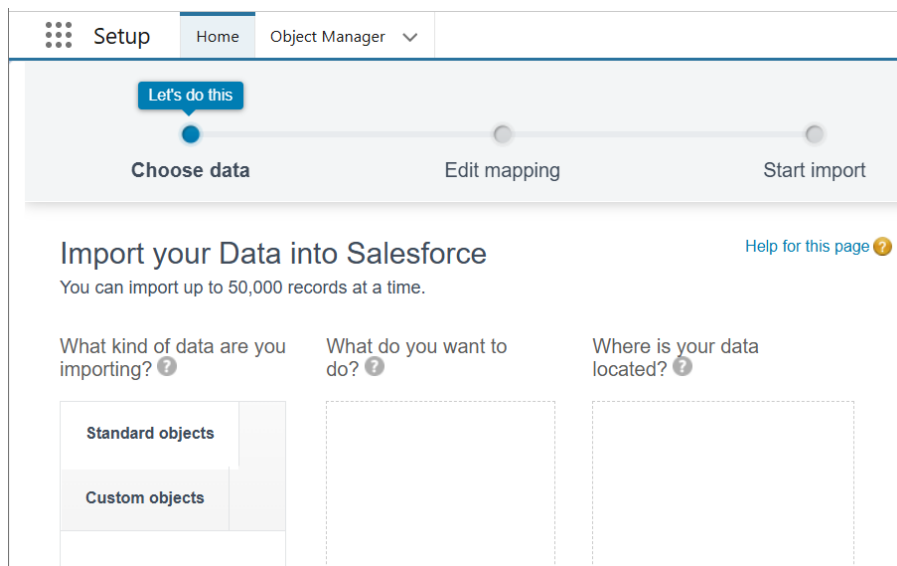
### 1. Data Import Wizard

#### Step-wise Process (Explored):

1. Navigate to **Data Import Wizard** → Setup → Data Import Wizard → Launch Wizard.



2. Select Object → **Complaint**.



3. Upload CSV File → Choose the file containing records.

Complaint Number, Customer Name, Contact, Complaint Type, Status, Priority, Description										
A	B	C	D	E	F	G	H	I	J	K
1	Complaint	Number, Customer Name, Contact, Complaint Type, Status, Priority, Description								
2	CMP-0021	John Doe, 1234567890, Product Issue, Open, High, Order #101 delivered late								
3	CMP-0020	Jane Smith, 9876543210, Billing Issue, Open, Medium, Incorrect billing amount on invoice #12								
4	CMP-0019	Mark Lee, 5556667777, Service Issue, In Progress, Medium, Late response from customer support								
5	CMP-0018	Alice Brown, 4445556666, Product Issue, Open, High, Damaged product received								
6	CMP-0017	Bob White, 2223334444, Service Issue, Closed, Low, Poor customer service experience								
7	CMP-0016	Sarah Khan, 1112223333, Billing Issue, Open, High, Double charge on order #55								
8	CMP-0015	Tom Harris, 7778889999, Product Issue, In Progress, Medium, Wrong product delivered								
9	CMP-0014	Lisa Ray, 8889990000, Service Issue, Open, High, Installation service delayed								
10	CMP-0013	David Clark, 3334445555, Product Issue, Closed, Low, Missing parts in product package								
11	CMP-0004	Emily Scott, 6667778888, Billing Issue, In Progress, Medium, Refund not processed for canceled order								
12	CMP-0009	Mary Johnson, 9998887777, Product Issue, Open, Medium, Product missing accessories								
13	CMP-0005	Kevin Brown, 5554443333, Service Issue, Closed, Low, Delayed follow-up from support								

4. Map Fields → Match CSV columns with Salesforce fields (e.g., Complaint Number → Complaint Number).
5. Select Import Options → Trigger workflow rules or set record owner if needed.
6. Start Import → Salesforce validates and imports records.
7. Review Results → Check for success or errors.

#### Project Note:

- We explored using Data Import Wizard with external sources.
- Since our dataset is small (10–12 complaints), we created all records manually instead of importing.

Complaints		New	Import	Change Owner	Printable View	Assign Label
All						
12 items • Sorted by Complaint Number • Updated a few seconds ago						
<input type="checkbox"/>	Complaint Number ↑					
1	<input type="checkbox"/> CMP-0004					
2	<input type="checkbox"/> CMP-0005					
3	<input type="checkbox"/> CMP-0009					
4	<input type="checkbox"/> CMP-0013					
5	<input type="checkbox"/> CMP-0014					
6	<input type="checkbox"/> CMP-0015					

## 2. Duplicate Rules

#### Purpose:

Prevent duplicate complaints and maintain data integrity.

#### Step-wise Setup:

1. Create Matching Rule

- Setup → Matching Rules → New Rule → Object: Complaint
- Rule Name: *Complaint Number Match*
- Matching Criteria: Field: *Complaint Number*, Method: *Exact*, Match Blank Fields: *unchecked*
- Save and Activate.

Search: Matchi

▼ Data

▼ Duplicate Management

Matching Rules

Didn't find what you're looking for?  
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## Matching Rules

Matching Rule [Help for this Page](#)

### Complaint Number Match

**Matching Rule Detail**

Edit Delete Clone

Activate

Object	Complaint
Rule Name	Complaint Number Match
Unique Name	Complaint_Number_Match
Description	Complaint: Name EXACT MatchBlank = FALSE
Matching Criteria	Inactive
Created By	Jagarapu y, 26/09/2025, 10:38 pm
Modified By	Jagarapu y, 26/09/2025, 10:38 pm

## 2. Create Duplicate Rule

- Setup → Duplicate Rules → New Rule → Object: Complaint
- Rule Name: *Complaint Duplicate Rule*, Unique Name: *Complaint\_Duplicate\_Rule*
- Matching Rule: *Complaint Number Match*
- Actions on Create/Edit: *Block*, Alert Text: **"Duplicate complaint detected!"**
- Save and Activate.

The screenshot shows the Salesforce Setup interface with the 'Duplicate Rules' configuration page for 'Complaints'. The left sidebar shows the navigation menu with 'Duplicate Management', 'Duplicate Error Logs', 'Duplicate Rules' (selected), and 'Matching Rules'. The main content area is titled 'Duplicate Rule Edit' and includes sections for 'Rule Details', 'Actions', and 'Matching Rules'.

**Rule Details:**

- Rule Name: Complaint Duplicate Rule
- Description: (empty text area)
- Object: Complaint
- Record-Level Security: ☒ Enforce sharing rules, ☐ Bypass sharing rules

**Actions:**

Specify what happens when a user tries to save a duplicate record.

- Action On Create: ☒ Allow, ☒ Alert, ☒ Report
- Action On Edit: ☒ Allow, ☐ Alert, ☐ Report
- Alert Text: Use one of these records? (text area)

**Matching Rules:**

Define how duplicate records are identified.

- Compare Complaints With: Complaints
- Matching Rule: Complaint Number Match
- Matching Criteria: Complaint: Name EXACT MatchBlank = FALSE

### 3. Test the Duplicate Rule

- Try creating a complaint with an existing Complaint Number → Salesforce blocks it successfully.

The screenshot shows the Salesforce 'Complaints' record creation page. The 'Information' section contains the following fields:

- Complaint Number: CMP-0021
- Customer Name: Emily Scott
- Complaint Type: Delivery
- Status: Resolved
- Priority: Low
- Resolution: (empty text area)

A red error message is displayed at the bottom: 'We hit a snag. You can't save this record because a duplicate'.

#### Outcome:

- Duplicate complaints cannot be created.
- Maintains data quality and integrity in the system.

### 3. Data Loader

**Purpose:**

Client application for bulk data operations (insert, update, upsert, delete, export). Best for **large datasets (up to millions of records)**.

**Step-wise Process (Not Used):**

1. Install Data Loader (from Setup → Data Loader).
2. Login with Salesforce credentials + security token.
3. Choose operation (Insert/Update/Upsert/Delete/Export).
4. Select CSV file and map fields.
5. Run operation and check success/error logs.

**Project Note:**

- **Not used**, as our dataset is small.
  - Intended for future cases where bulk complaint data needs migration/import.
- 

**4. Data Export & Backup****Purpose:**

Take scheduled or manual backups of Salesforce data for recovery/migration.

**Step-wise Process (Optional):**

1. Setup → Quick Find → **Data Export**.
2. Choose objects (e.g., Complaint, Student, Consultant).
3. Schedule export (weekly/monthly) or export now.
4. Salesforce generates a ZIP with CSV files.

**Project Note:**

- Backup not performed in this project.
  - Will be useful for archiving complaints and student records in production.
1. In target org, go to **Inbound Change Sets**, validate, then deploy.
- 

**6. Unmanaged vs Managed Packages(not required)****Purpose:**

Package and distribute Salesforce apps/metadata.

- **Unmanaged Package**
  - Components are editable in target org.
  - Used for open-source, training, or one-time deployments.

- **Managed Package**
  - Components are namespace-protected and not editable.
  - Supports versioning and upgrades.
  - Used by ISVs to publish apps on AppExchange.

**Project Note:**

- For internal deployment, **Unmanaged Packages** would be sufficient.
- 

## **7. VS Code & SFDX (Salesforce DX)**

**Purpose:**

Modern source-driven development with **scratch orgs, CLI, CI/CD pipelines.**

**(not required for this crm application)**