**Phase 10: Deployment & Go-Live**

**1. Objective**

* Move all validated **metadata** (Objects, Flows, Triggers, Approval Processes, Reports, Dashboards, Validation Rules, Profiles, etc.) from **Sandbox** to **Production**.
* Ensure system is **ready for end users**.
* Monitor first usage to quickly catch issues.

**2. Deployment Strategy**

We used a **staged deployment strategy**:

1. **Sandbox Development → Sandbox Testing**
   * All features developed in **Developer Sandbox**.
   * Full functional & integration testing completed (Phase 9).
2. **Change Set / SFDX Deployment to Production**
   * Metadata deployed using **SFDX CLI** (sf project deploy start).
   * Manifest (package.xml) defined with required metadata.
3. **Smoke Testing in Production**
   * Verify Orders → Loyalty Points flow.
   * Validate Reward Redemption approval process.
   * Run sample reports and dashboards.

**3. Deployment Checklist**

**3.1 Pre-Deployment**

* Finalize **package.xml** with:
  + Apex Classes & Triggers
  + Custom Objects (Loyalty\_Member\_\_c, Reward\_Redemption\_\_c, etc.)
  + Flows (Claim Reward, Add Points, Sync Tier, Reengagement, Error Handling)
  + Validation Rules
  + Approval Processes
  + Reports & Dashboards
  + Profiles & Permission Sets
* Ensure **all test classes** in Sandbox pass with **>75% coverage** (as per Salesforce deployment requirement).
* Verify email deliverability settings in **Setup → Deliverability** (set to “All Emails”).

**3.2 Deployment Execution**

* **Using Salesforce CLI (SFDX):**
* sf project deploy start -x manifest/package.xml --target-org Production
* Or **Change Sets** (for Admins not using CLI):
  1. Setup → Outbound Change Sets → New.
  2. Add components (Objects, Flows, Reports, etc.).
  3. Upload to Production.
  4. In Production, deploy the Change Set.

**3.3 Post-Deployment Validation**

* Run quick **sanity checks**:
  + Create a test Order → Verify Loyalty Points update.
  + Redeem Reward → Approval triggered correctly.
  + Sync Loyalty Tier → Updates Contact.
  + Dashboard loads with real Production data.
* Assign correct **Profiles & Permission Sets** to:
  + Support Agent (day-to-day order & case handling).
  + Support Manager (approval of redemptions & VIP contacts).
  + Customer Community User (for portal redemption).

**3.4 Go-Live Checklist**

* Announce to users that system is live.
* Provide **training docs** to Agents and Managers.
* Monitor first **24–48 hours** for issues:
  + Flows failing?
  + Emails not sending?
  + Incorrect loyalty point calculations?
* Setup **Error\_Log\_\_c monitoring report** to track failures.

**4. Business Value**

* Ensures **seamless transition** from Sandbox to Production.
* Prevents disruptions for Support Agents & Managers.
* Builds trust with customers through accurate points, rewards, and re-engagement.

**5. Deliverables**

1. **Deployment Plan Document**
   * Step-by-step deployment steps.
   * Rollback strategy (revert Change Set or restore backup).
2. **Training Docs**
   * How Agents use Console (Orders, Loyalty Members, Cases).
   * How Managers approve rewards.
   * How Customers redeem rewards.
3. **Monitoring Setup**
   * Error Log dashboard.
   * Scheduled jobs (Reengagement).