

Project Title: Smart Customer Retention & Loyalty Management System

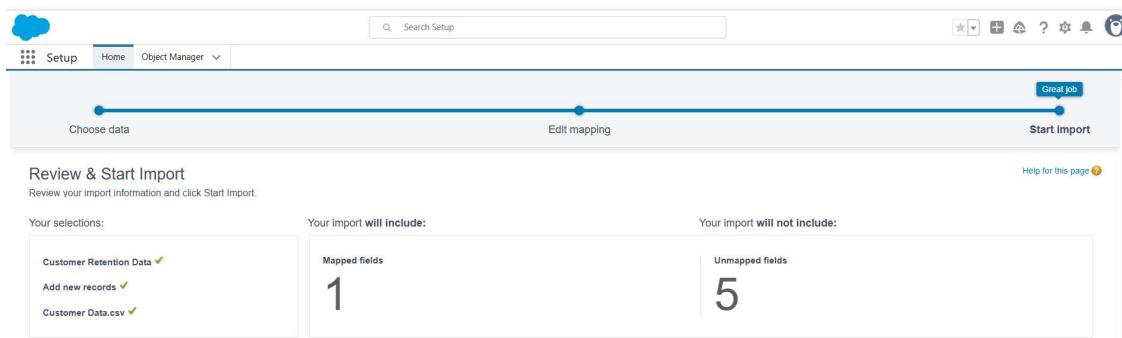
Phase 8: Data Management & Deployment

Got it! Let's break **Phase 8: Data Management & Deployment** into super clear, step-by-step instructions so you can finish it quickly within 30 minutes. I'll keep it easy and practical.

Phase 8: Data Management & Deployment

1 Data Import Wizard

1. Go to **Setup** → **Quick Find** → **Data Import Wizard**.
2. Click **Launch Wizard**.
3. Scroll down → **Select Standard or Custom Object** → choose **Customer Retention Data**.
4. Click **Add New Records** (or choose Update if updating existing records).
5. Click **Choose CSV File** → **Select your file**.
6. Click **Next** → **Map Fields**:
 - o Salesforce will try to auto-map fields
 - o Double-check mapping (e.g., Name → Name, Email → Email, Total Purchases → Total_Purchases__c)
7. Click **Start Import**.
8. Wait until import completes → check **import status** and ensure no errors.

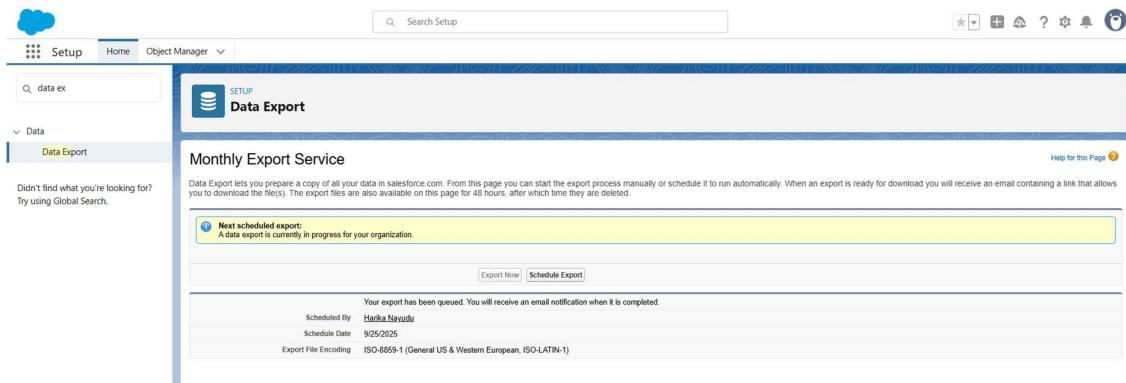


2 Duplicate Rules

1. Go to **Setup** → **Quick Find** → **Duplicate Rules** → **New Rule**.
2. Select **Object**: Customer Retention Data.
3. **Rule Name**: Block Duplicate Emails (or any name you want).
4. **Matching Rule**: Match on **Email** (or any unique field) Action: **Block** → prevents saving duplicate records
5. Click **Save** → **Activate**.

3 Data Backup (Export)

1. Go to **Setup** → **Quick Find** → **Data Export** → **Export Now**.
2. **Select Objects:**
 - Tick **Customer Retention Data** (and any other objects you want)
3. Choose **Include all data / Include attachments** if needed.
4. Click **Start Export**.
5. Wait for Salesforce to prepare the export → download ZIP file.



4 Deployment with VS Code (SFDX)

1. Open **VS Code** → **Make sure Salesforce Extension Pack is installed**.
2. Open your Salesforce project folder.
3. Right-click on the **file or folder** you want to deploy.
4. Select **SFDX: Deploy Source to Org**.
5. Wait → check the **Output panel** for success message.

```
23:37:37.923 Starting SFDX: Deploy This Source to Org
== Deployed Source
STATE    FULL NAME          TYPE           PROJECT PATH
Created   customerRetentionCard  LightningComponentBundle  force-app\main\default\lwc\customerRetentionCard\customerRetentionCard.html
Created   customerRetentionCard  LightningComponentBundle  force-app\main\default\lwc\customerRetentionCard\customerRetentionCard.js
Created   customerRetentionCard  LightningComponentBundle  force-app\main\default\lwc\customerRetentionCard\customerRetentionCard.js-meta.xml

23:37:41.726 Ended SFDX: Deploy This Source to Org
```