

## DEPLOYMENT

<b>Date</b>	05 November 2025
<b>Team Id</b>	NM2025TMID04354
<b>Project Name</b>	CRM Application for Jewel Management

### Deployment

Once testing was successfully completed, the CRM was deployed to the Salesforce Production environment.

Deployment followed Salesforce's Change Set methodology to ensure safe, traceable migration of metadata and configurations.

### Deployment Steps:

- Prepared Outbound Change Set in Developer Sandbox containing:
  - Custom Objects, Fields, and Relationships
  - Flows and Validation Rules
  - Apex Classes and Triggers
  - Reports and Dashboards
- Uploaded Change Set to the Production Org.
- Validated the deployment to detect configuration conflicts.
- Executed deployment post-validation and performed smoke testing.

For large projects, Salesforce DX (SFDX) and GitHub were also used for version control and continuous integration, ensuring smooth updates and rollback options if necessary.

## **Maintenance and Monitoring**

After deployment, a structured maintenance plan ensures continuous system reliability and performance.

### **Key Maintenance Tasks:**

- **Data Backup:** Scheduled Salesforce data exports for critical objects (Customer, Order, Payment).
- **Performance Monitoring:** Use of Debug Logs and Health Check reports to identify bottlenecks.
- **User Feedback Collection:** Regular feedback sessions with store users to enhance usability.
- **Periodic Enhancements:** Adding new fields, automation, or reports based on evolving business needs.
- **Security Review:** Monthly verification of profile permissions and access levels to maintain compliance.

This maintenance strategy ensures that the CRM remains efficient, secure, and adaptable to business growth.

## **Documentation and Future Enhancements**

All configurations, code, and workflows were documented for long-term maintenance.

### **Documentation Includes:**

- Data Model Diagram
- List of Custom Objects and Fields
- Apex Triggers and Flow Descriptions
- Deployment Checklist
- User Guide and Troubleshooting FAQs

### **Planned Future Enhancements:**

- Integration with SMS gateways for customer notifications.
- AI-powered sales forecasting using Salesforce Einstein Analytics.
- Enhanced Report for branching level performance.