

DEPLOYMENT

Date	05 November 2025
Team Id	NM2025TMID04354
Project Name	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.