Phase 8: Data Management & Deployment

Step 1: Customers Record Creation / Import

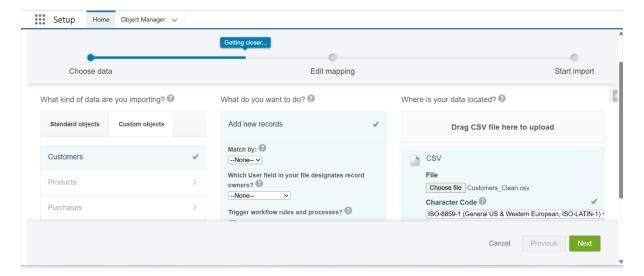
Imported Customers c records using data import wizard.

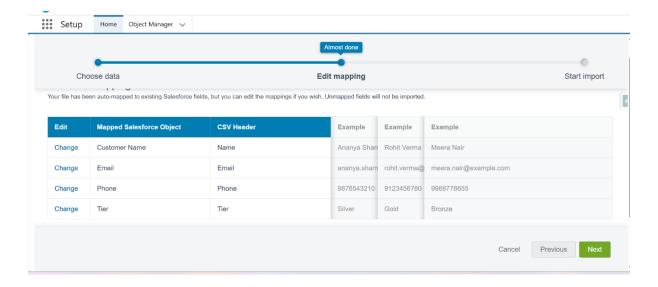
Fields included: Name, Email, Phone, Tier.

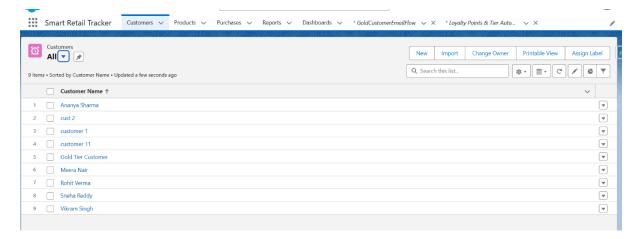
Ensured data quality:

- Emails are valid and unique.
- Phone numbers follow proper format.
- Tier values correctly match Gold/Silver/Bronze categories.

Avoided duplicates by checking before import.



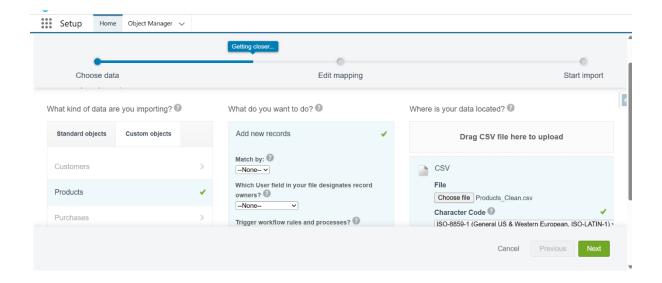


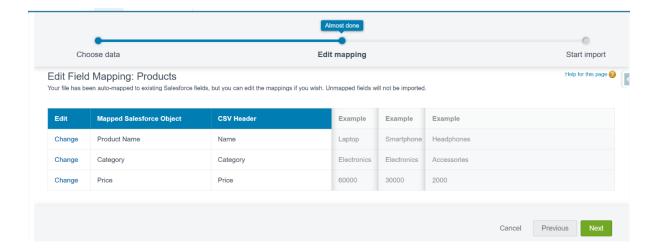


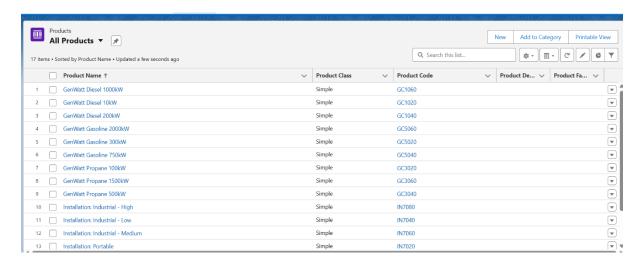
Inserted multiple records in customer

Step 2: Products Record Creation / Import

- Imported Products__c records using data import wizard
- Fields included: Name, Category, Price.
- Verified Price field is numeric and category values are consistent.
- Ensured no duplicate product names and correct field mapping during import.







Inserted multiple records in products

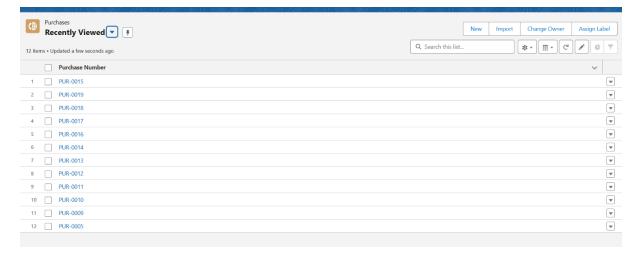
Step 3: Purchases Record Creation

Purchases__c records were created manually due to Total Amount being a formula field.

Fields populated: Customer (lookup), Product (lookup), Quantity, Purchase Date.

Salesforce automatically calculated Total Amount = Quantity × Product Price.

Ensured each Purchase links to valid Customer and Product records.



Inserted multiple records in purchases

Step 4: Data Relationships & Integrity

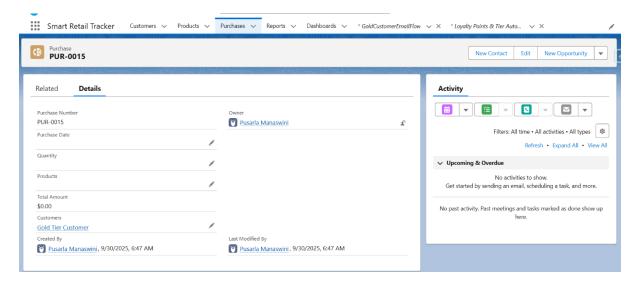
Lookup relationships established:

- Purchase → Customer
- Purchase → Product

Ensured data integrity: all Purchases have valid Customer and Product links.

Formula field guarantees automatic calculation, reducing manual errors.

All data validated before deployment.



Step 5: Data Validation & Error Handling

• Checked for errors during import:

- Quantity and Price are numeric.
- o Purchase Date is in YYYY-MM-DD format.
- Identified formula field restrictions (Total Amount cannot be imported manually).
- Ensured **required fields** (Customer, Product, Quantity) are populated.

Step 6: Test Automation & Flows

- 1. Test **record-triggered flows** by creating/updating sample records.
- 2. Check if:
 - Tier updates correctly
 - Email notifications are sent (if configured)
 - Buttons on Lightning pages function properly

Step 7: Deployment Notes

- Objects and fields created in Developer Org.
- Ready for production deployment using:
 - Change Sets (metadata: objects, fields, layouts)
 - o Data Loader or Data Import Wizard (bulk record migration)
- Documented formula fields and lookup relationships to maintain data integrity in production.
- Manual creation of small datasets is acceptable for testing and demo purposes.
- Ensure **all components** (flows, validation rules, record pages, email templates) are working.

Outcome of Phase 8

- Sample data uploaded and validated successfully.
- Flows, automation, and buttons tested and working.