

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.

Setup Home Object Manager

Getting closer...

Choose data Edit mapping Start import

What kind of data are you importing?

Standard objects Custom objects

Customers Products Purchases

What do you want to do?

Add new records

Match by: --None--

Which User field in your file designates record owners? --None--

Trigger workflow rules and processes?

Where is your data located?

Drag CSV file here to upload

CSV

File

Choose file Customers_Clean.csv

Character Code ISO-8859-1 (General US & Western European, ISO-LATIN-1)

Cancel Previous Next

Setup Home Object Manager

Almost done

Choose data Edit mapping Start import

Your file has been auto-mapped to existing Salesforce fields, but you can edit the mappings if you wish. Unmapped fields will not be imported.

Edit	Mapped Salesforce Object	CSV Header	Example	Example	Example
Change	Customer Name	Name	Ananya Sharm	Rohit Verma	Meera Nair
Change	Email	Email	ananya.sharm	rohit.verma@	meera.nair@example.com
Change	Phone	Phone	9876543210	9123456780	9988776655
Change	Tier	Tier	Silver	Gold	Bronze

Cancel Previous Next

Smart Retail Tracker Customers Products Purchases Reports Dashboards *GoldCustomerEmailFlow *Loyalty Points & Tier Auto...

Customers All

9 Items • Sorted by Customer Name • Updated a few seconds ago

Search this list...

<input type="checkbox"/>	Customer Name ↑	
1	<input type="checkbox"/> Ananya Sharma	
2	<input type="checkbox"/> cust 2	
3	<input type="checkbox"/> customer 1	
4	<input type="checkbox"/> customer 11	
5	<input type="checkbox"/> Gold Tier Customer	
6	<input type="checkbox"/> Meera Nair	
7	<input type="checkbox"/> Rohit Verma	
8	<input type="checkbox"/> Sneha Reddy	
9	<input type="checkbox"/> Vikram Singh	

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.

Setup Home Object Manager

Getting closer...

Choose data Edit mapping Start import

What kind of data are you importing?

Standard objects	Custom objects
Customers	
Products	✓
Purchases	

What do you want to do?

Add new records ✓

Match by: --None--

Which User field in your file designates record owners? --None--

Trigger workflow rules and processes?

Where is your data located?

Drag CSV file here to upload

CSV

File

Choose file Products_Clean.csv

Character Code ISO-8859-1 (General US & Western European, ISO-LATIN-1) ✓

Cancel Previous Next

Almost done

Choose data Edit mapping Start import

Edit Field Mapping: Products

Your file has been auto-mapped to existing Salesforce fields, but you can edit the mappings if you wish. Unmapped fields will not be imported. [Help for this page](#)

Edit	Mapped Salesforce Object	CSV Header	Example	Example	Example
Change	Product Name	Name	Laptop	Smartphone	Headphones
Change	Category	Category	Electronics	Electronics	Accessories
Change	Price	Price	60000	30000	2000

[Cancel](#) [Previous](#) [Next](#)

Products

All Products

17 items • Sorted by Product Name • Updated a few seconds ago

[New](#) [Add to Category](#) [Printable View](#)

Search this list...

	Product Name	Product Class	Product Code	Product De...	Product Fa...
1	GenWatt Diesel 1000kW	Simple	GC1060		
2	GenWatt Diesel 10kW	Simple	GC1020		
3	GenWatt Diesel 200kW	Simple	GC1040		
4	GenWatt Gasoline 2000kW	Simple	GC5060		
5	GenWatt Gasoline 300kW	Simple	GC5020		
6	GenWatt Gasoline 750kW	Simple	GC5040		
7	GenWatt Propane 100kW	Simple	GC3020		
8	GenWatt Propane 1500kW	Simple	GC3060		
9	GenWatt Propane 500kW	Simple	GC3040		
10	Installation: Industrial - High	Simple	IN7080		
11	Installation: Industrial - Low	Simple	IN7040		
12	Installation: Industrial - Medium	Simple	IN7060		
13	Installation: Portable	Simple	IN7020		

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.

Purchases		Recently Viewed				New	Import	Change Owner	Assign Label
12 Items • Updated a few seconds ago		Q Search this list...							
<input type="checkbox"/>	Purchase Number								
1	<input type="checkbox"/> PUR-0015								
2	<input type="checkbox"/> PUR-0019								
3	<input type="checkbox"/> PUR-0018								
4	<input type="checkbox"/> PUR-0017								
5	<input type="checkbox"/> PUR-0016								
6	<input type="checkbox"/> PUR-0014								
7	<input type="checkbox"/> PUR-0013								
8	<input type="checkbox"/> PUR-0012								
9	<input type="checkbox"/> PUR-0011								
10	<input type="checkbox"/> PUR-0010								
11	<input type="checkbox"/> PUR-0009								
12	<input type="checkbox"/> PUR-0005								

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.

Purchase PUR-0015		New Contact Edit New Opportunity	
Related	Details	Activity	
Purchase Number	PUR-0015	Filters: All time • All activities • All types	
Purchase Date		Refresh Expand All View All	
Quantity		Upcoming & Overdue	
Products		No activities to show.	
Total Amount	\$0.00	Get started by sending an email, scheduling a task, and more.	
Customers	Gold Tier Customer	No past activity. Past meetings and tasks marked as done show up here.	
Created By	Pusarla Manaswini, 9/30/2025, 6:47 AM		
	Last Modified By Pusarla Manaswini, 9/30/2025, 6:47 AM		

Step 5: Data Validation & Error Handling

- Checked for errors during import:

- Quantity and Price are numeric.
- 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)
 - 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.