PetCare CRM

A Salesforce-Based Pet Shop Management System for Customer Engagement and Service Automation

Goal: Efficiently manage data within Salesforce and deploy changes from one environment to another while ensuring data integrity and security.

1. Data Import Wizard – Import Demo Pet Records

Purpose: Quickly add a small number of records to Salesforce for testing or demo purposes.

Steps:

1. Go to **Setup → Data → Data Import Wizard**.

2. Click **Launch Wizard**.

3. Select the object to import, e.g., Pet__c.

4. Choose **Add New Records**.

5. Upload a **CSV file** containing the data. Example fields:

    o   Name (Pet Name)

    o   Breed__c (Pet Breed)

    o   DOB__c (Date of Birth)

    o   Last_Vaccination_Date__c (Last Vaccination Date)

    o   OwnerId (Owner lookup, optional for demo)

6. Map the CSV columns to the Salesforce fields.

7. Click **Start Import**.

8. Review the import results to ensure all records were created successfully.

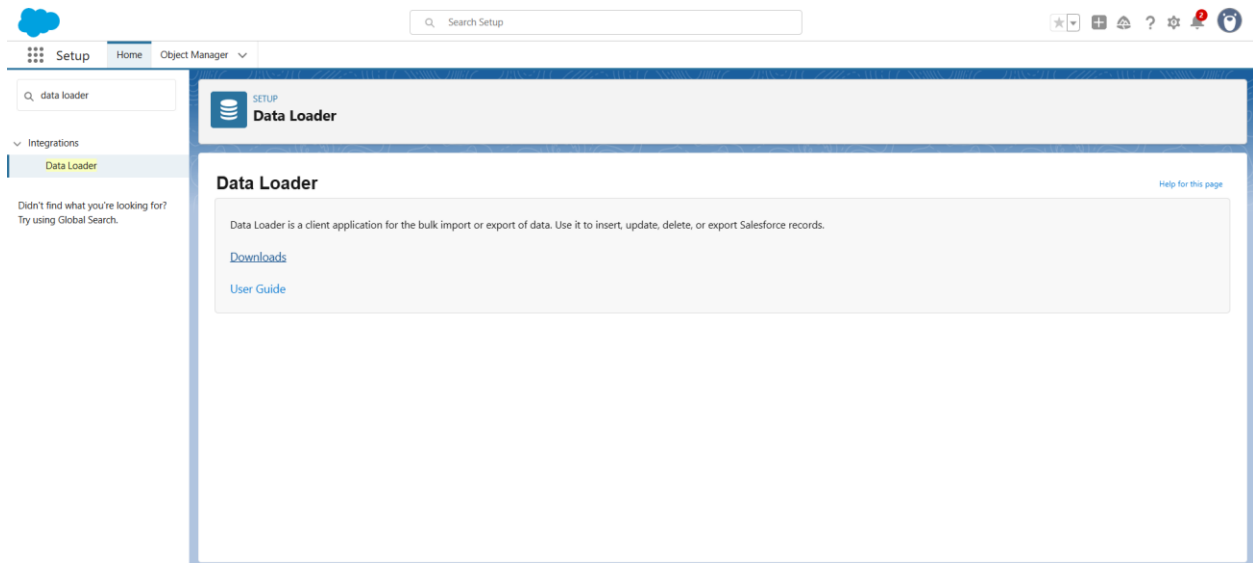This method is suitable for importing around 50 demo pets for testing purposes.

2. Data Loader – Import Bulk Bookings

Purpose: Efficiently import a large number of records or update existing records.

Steps:

1. Download and install **Salesforce Data Loader**.

2. Open Data Loader and log in with your Salesforce credentials.

3. Click **Insert** and select the object, e.g., Service_Booking__c.

4. Upload a CSV file containing booking data. Example fields:

    o Pet__c (lookup to pet record)

    o Service_Type__c

    o Booking_Date__c

    o Status__c

5. Map CSV columns to Salesforce fields.

6. Click **Next → Finish** to import records.

7. Review success and error files to confirm all records were imported correctly.

Data Loader can also export, update, or delete records in bulk.

3. Duplicate Rules – Prevent Duplicate Records

Purpose: Maintain clean and accurate data by preventing duplicates in critical objects such as Pet__c.

Steps:

1. Go to **Setup → Duplicate Rules → New Rule**.

2. Select **Object:** Pet__c.

3. Enter rule details:

   o Label: Prevent Duplicate Pets

   o Matching criteria: Name and Owner must be unique

4. Create or select a **Matching Rule** if required.

5. Set **Action:** Block duplicate entries or alert the user.

6. Save and activate the rule.

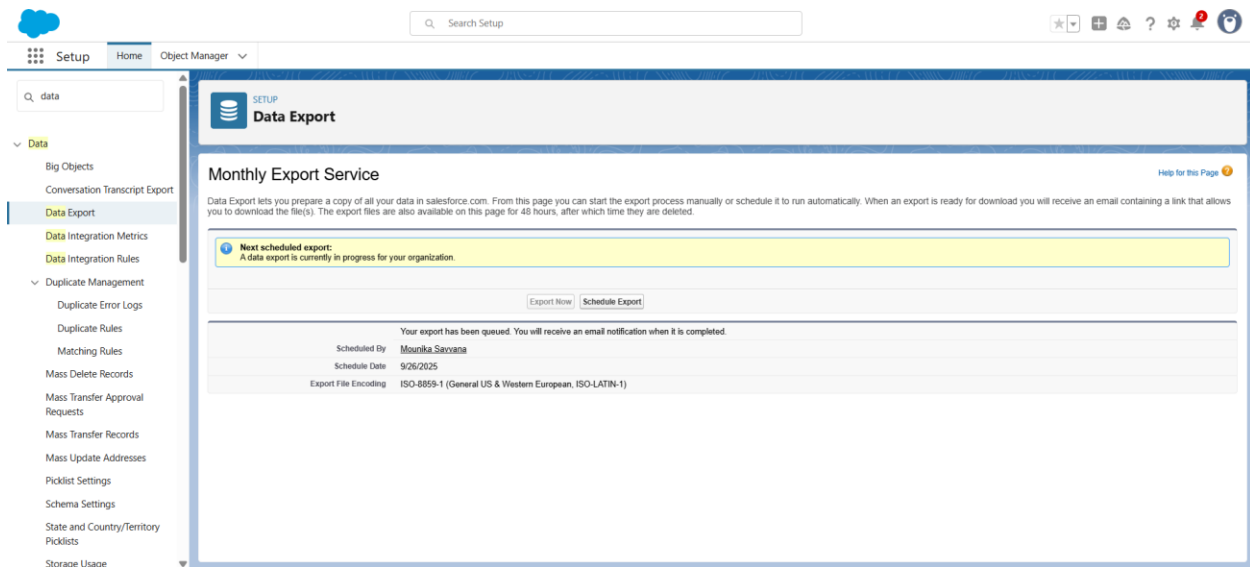This ensures that two pets with the same name and owner cannot be added.

4. Data Export & Backup

Purpose: Regularly backup Salesforce data to prevent data loss.

Steps:

1. Go to **Setup → Data → Data Export**.

2. Choose **Export Now** or schedule weekly exports.

3. Select objects to export: Pet__c, Service_Booking__c, User, etc.

4. Salesforce generates a ZIP file containing CSV files for each object.

5. Download and securely store the backups.

Weekly backups protect against accidental deletion or data corruption.

5. Change Sets – Move Configurations Between Orgs

Purpose: Deploy configurations (objects, fields, flows) from Sandbox to Production.

Steps:

1. In **Sandbox → Setup → Outbound Change Sets → New**.

2. Add components: objects, fields, flows, external services, etc.

3. Upload the Change Set to Production.

4. In **Production → Setup → Inbound Change Sets**, validate and deploy.

Change Sets are ideal for non-developer-friendly deployments.

6. Unmanaged vs Managed Packages

Purpose: Decide how your app is distributed.

- **Unmanaged Package:** For internal use; editable after installation.

- **Managed Package:** For publishing on AppExchange; versioned and protected.

For your Pet Care CRM in a Developer Org, an **Unmanaged Package** is sufficient for testing or internal deployment.

7. ANT Migration Tool – Command-Line Deployment

Purpose: Deploy metadata between orgs using a command-line interface.

Steps:

1. Download and configure **Salesforce ANT Migration Tool**.

2. Edit build.xml and build.properties with org credentials.

3. Use commands:

   o ant retrieve → Retrieve metadata from source org.

   o ant deploy → Deploy metadata to target org.

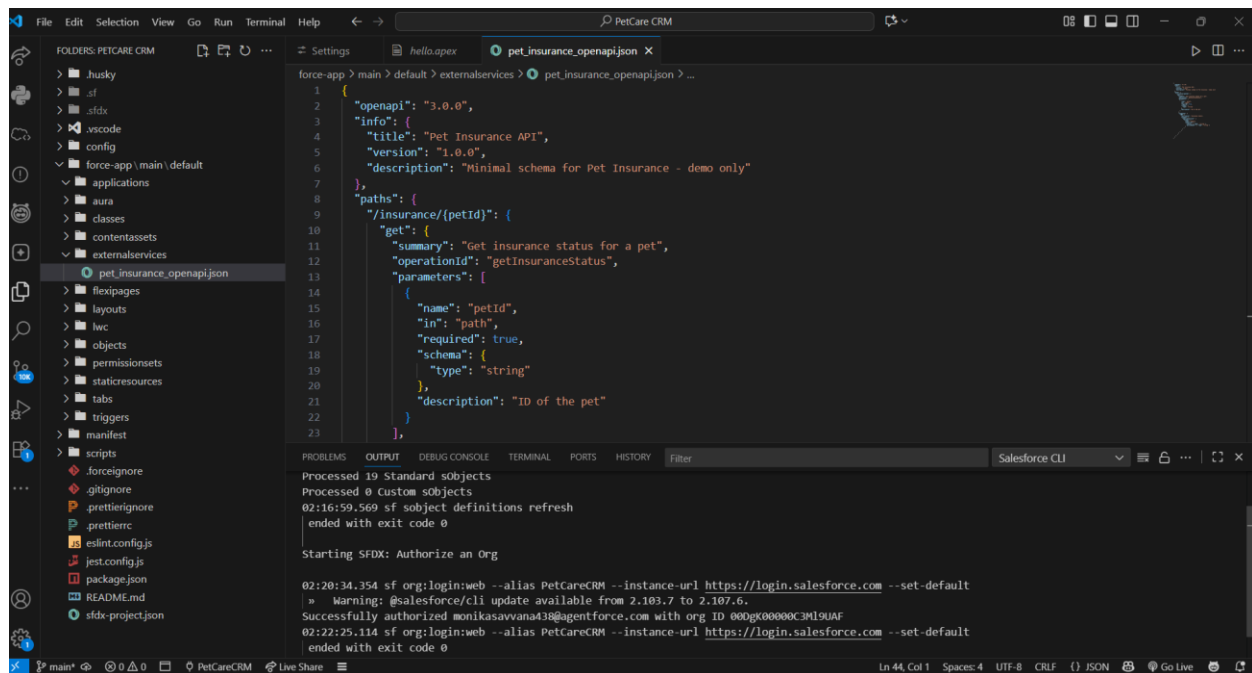4. Review logs for deployment success or errors.

Useful for automated or advanced deployments, especially for developers.

8. VS Code & SFDX – Dev-Friendly Deployments

Purpose: Use Salesforce DX to manage source code and metadata in a modern development workflow.

Steps:

1. Open your **SFDX project** in VS Code.

2. Authenticate with your org:

3. sfdx force:auth:web:login -d -a DevOrg

4. Retrieve metadata from org:

5. sfdx force:source:retrieve -m CustomObject,Flow

6. Make local changes to objects, Apex, LWC, or flows.

7. Deploy changes to org:

8. sfdx force:source:deploy -p force-app/main/default

9. Track changes using **Git** for version control and collaboration.

SFDX + VS Code provides a professional, developer-friendly way to manage and deploy Salesforce metadata.