

## CG Sales s Service : Salesforce Implementation for Retail s Supply Chain Optimization

### Phase 8: Data Management s Deployment

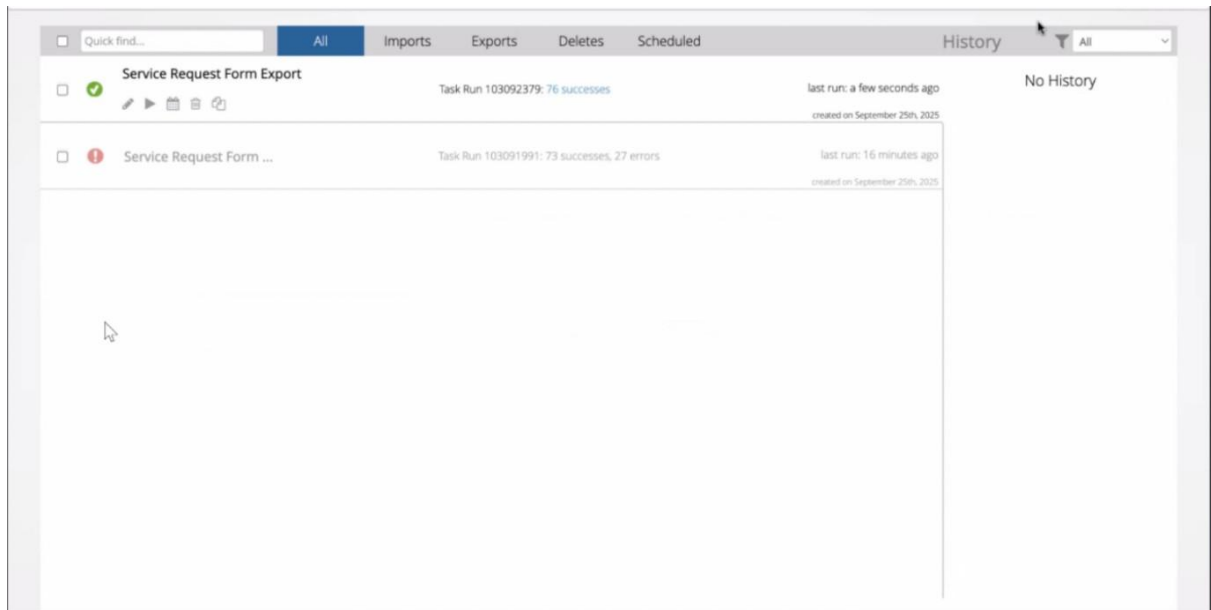
#### 1. Data Import Wizard

- I used **Data Import Wizard** to import data into standard and custom objects like **Service Request Form**, **Transaction**, and **Transaction Line Item**.
- Uploaded CSV files to quickly create multiple records during the initial setup of the project.

The screenshot shows the Salesforce Data Import Wizard interface. At the top, there's a navigation bar with 'Setup', 'Home', and 'Object Manager'. Below this, a progress bar indicates the current step is 'Choose data', with 'Edit mapping' and 'Start import' as subsequent steps. The main heading is 'Import your Data into Salesforce', with a note that up to 50,000 records can be imported at a time. The interface is divided into three columns. The first column, 'What kind of data are you importing?', shows a list of objects: 'Service Request Forms' (selected with a green checkmark), 'Transaction Line Items', and 'Transactions'. The second column, 'What do you want to do?', has a 'Add new records' option selected. It includes several dropdown menus for matching records: 'Match by' (set to '--None--'), 'Which User field in your file designates record owners?' (set to '--None--'), 'Which Account field in your file do you want to match against to set the Account lookup field?' (set to '--None--'), and 'Which Transaction field in your file do you want to match against to set the Transaction lookup field?' (set to '--None--'). There's also a checkbox for 'Trigger workflow rules and processes?'. The third column, 'Where is your data located?', shows a 'Drag CSV file here to upload' area with a 'CSV' file icon.

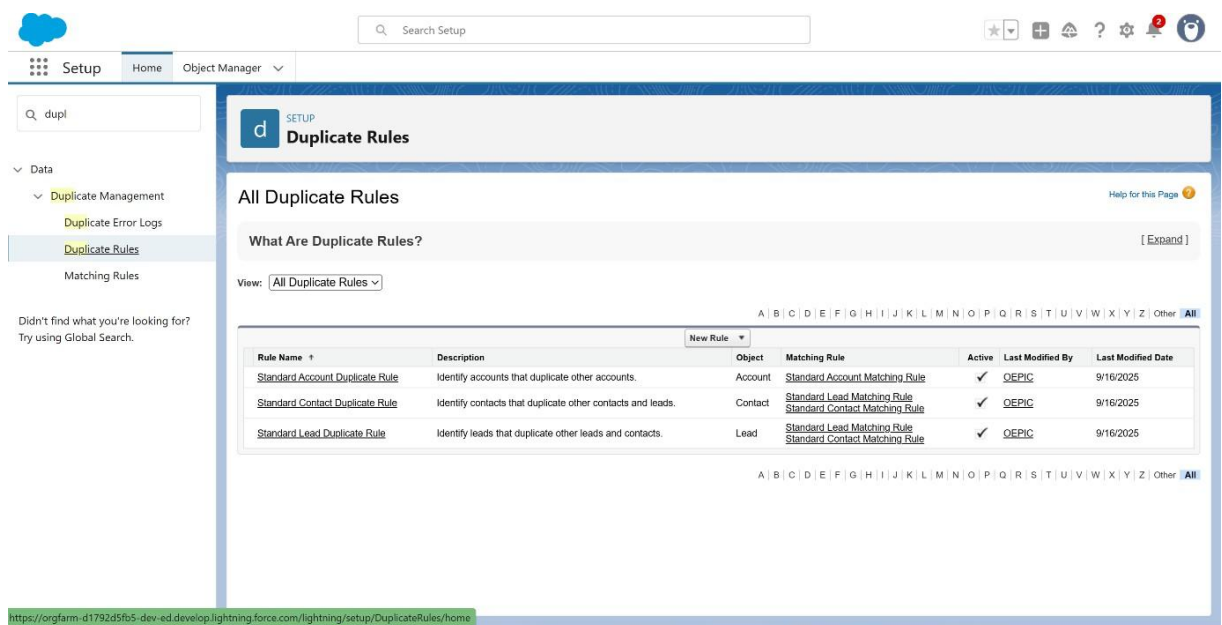
#### 2. Data Loader

- I used **Data Loader** to handle bulk operations such as importing, updating, and deleting large datasets.
- Example: Updated **Transaction Line Items** after migrating data from legacy systems efficiently.



### 3. Duplicate Rules

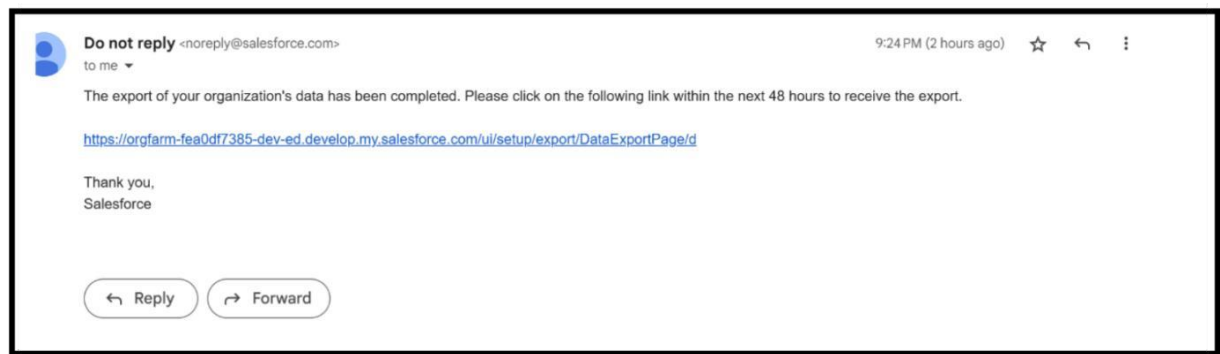
- I configured **Duplicate Rules** to prevent duplicate entries in Salesforce.
- Example: Ensured that the same **Service Request Form** or **Account** was not created multiple times.



### 4. Data Exports Backup

- I performed **scheduled and manual data exports** for backup purposes.
- Example: Exported **Service Request Form** and **Transaction** data monthly to maintain offline backups and ensure data security.

- Can download the when we wanted and after downloading we get a mail like below.

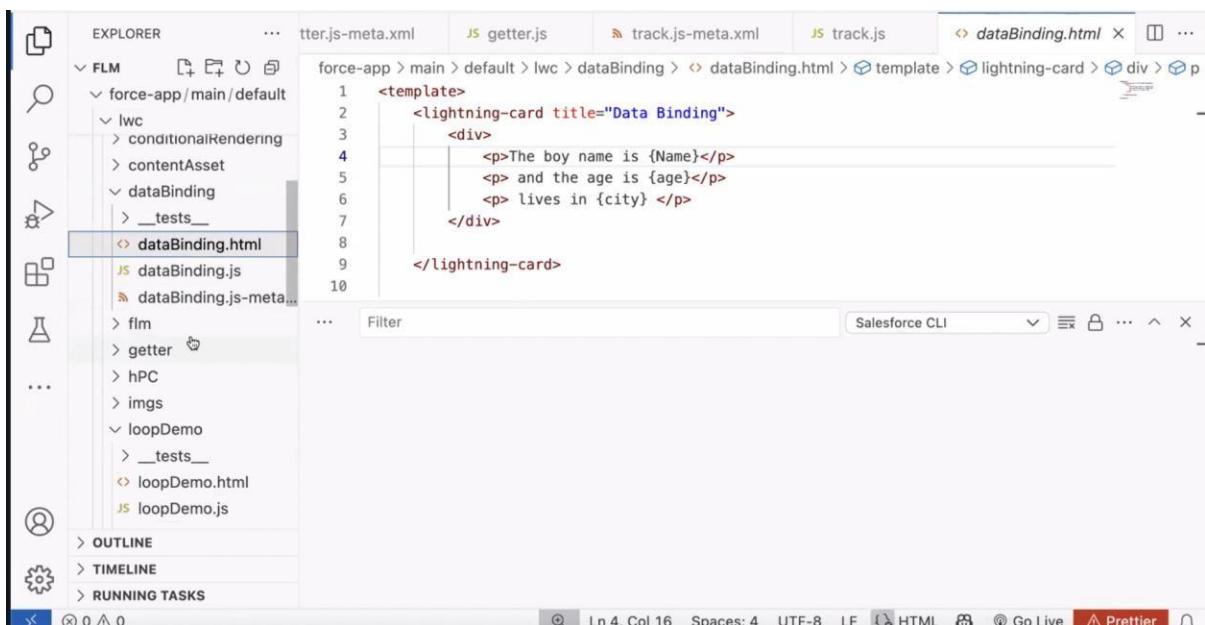


## 5. Change Sets

- I used **Change Sets** to deploy configurations, custom objects, fields, triggers, and Flows from the sandbox to the production org.
- Example: Deployed all **Service Request Form** related automation and metadata to production.

## 6. VS Code s SFDX

- I used **Visual Studio Code (VS Code)** with **Salesforce DX (SFDX)** to develop and manage Apex classes, triggers, LWCs, and metadata.
- Example: Retrieved and deployed metadata changes efficiently between sandbox and production environments.



## 7.Reports

Reports in Salesforce were created to capture detailed insights into orders, service requests, warranties, and technician activities. They provide structured data that helps track performance, identify trends, and support decision-making.

The screenshot shows the Salesforce Reports interface. The top navigation bar includes the Salesforce logo, a search bar, and various utility icons. The main header displays the current page as 'CG SMB Sales Clou...' and lists navigation tabs: Home, Accounts, Contacts, Opportunities, Cases, Leads, Service Request Forms, Transactions, Reports (active), and More. The 'Reports' section is titled 'Recent' and shows '4 items'. A search bar for recent reports is present, along with 'New Report' and 'New Folder' buttons. The reports are listed in a table with columns: Report Name, Description, Folder, Created By, Created On, and Subscribed. The reports include 'Service Request Forms Matrix', 'New Service Request Forms Tabular Report', 'Sample Flow Report: Screen Flows', and 'Service Request Forms Summary'. The left sidebar contains navigation links for Reports, Folders, and Favorites.

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Service Request Forms Matrix		Service Request Form	DUPAKUNTLA SAI PRANEETHA	9/25/2025, 9:14 AM	
Created by Me	New Service Request Forms Tabular Report		Service Request Form	DUPAKUNTLA SAI PRANEETHA	9/25/2025, 9:10 AM	
Private Reports	Sample Flow Report: Screen Flows	Which flows run, what's the status of each interview, and how long do users take to complete the screens?	Public Reports	Automated Process	9/9/2025, 12:58 AM	
All Reports	Service Request Forms Summary		Service Request Form	DUPAKUNTLA SAI PRANEETHA	9/25/2025, 9:12 AM	

Fig:-7.1 types of records

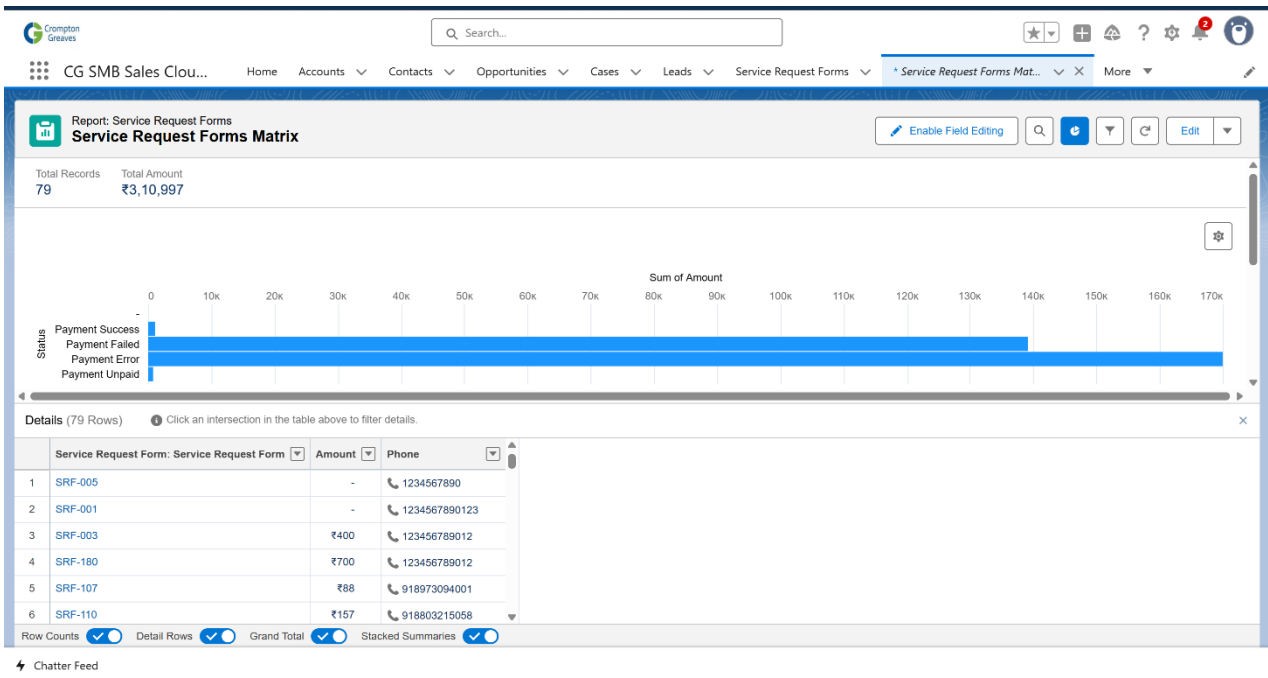


Fig:-7.2 Matrix record

**Report: Service Request Forms**  
**New Service Request Forms Tabular Report**

Total Records: 79    Total Amount: ₹3,10,997

	Service Request Form: Service Request Form	Amount	Phone	Status
1	SRF-005	-	1234567890	-
2	SRF-001	-	1234567890123	-
3	SRF-002	-	1234567890	Payment Error
4	SRF-003	₹400	123456789012	Payment Success
5	SRF-006	₹760	1234567890	Payment Unpaid
6	SRF-107	₹88	918973094001	Payment Failed
7	SRF-108	₹980	917146537010	Payment Error
8	SRF-109	₹34	918327363936	Payment Failed
9	SRF-110	₹157	918803215058	Payment Failed
10	SRF-111	₹280	916517173491	Payment Failed
11	SRF-112	₹403	917870021731	Payment Failed
12	SRF-113	₹526	919865353231	Payment Failed
13	SRF-114	₹649	916482297854	Payment Error
14	SRF-115	₹772	918872617365	Payment Error
15	SRF-116	₹895	918053187253	Payment Failed
16	SRF-117	₹100	918053187253	Payment Failed

Fig:-7.3 Tabular report

## 8. Dashboards

Dashboards offer a visual representation of key metrics from reports, enabling management to quickly monitor sales performance, service efficiency, and customer satisfaction in real time.

**Dashboards**

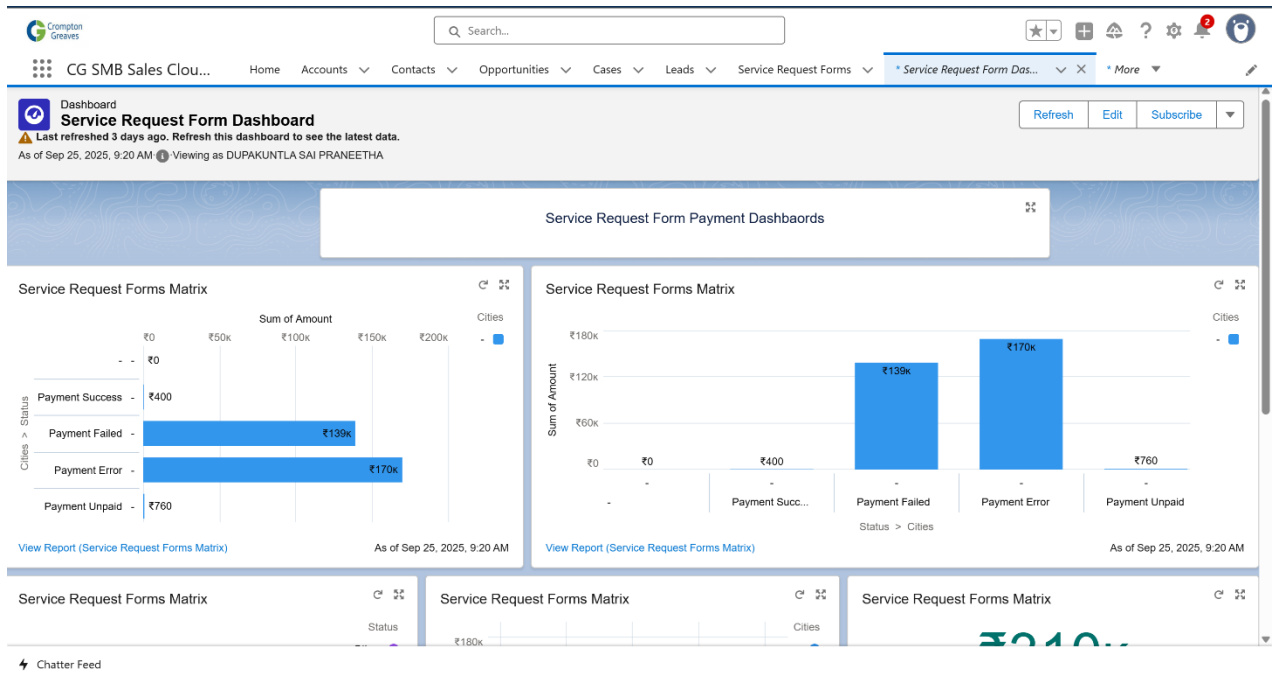
Recent  
2 items

DASHBOARD	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	Dynamic Service Request Form Dashboard		SRF Dashboards	DUPAKUNTALA SAI PRANEETHA	9/25/2025, 9:20 AM	
Created by Me	Service Request Form Dashboard		SRF Dashboards	DUPAKUNTALA SAI PRANEETHA	9/25/2025, 9:15 AM	

Fig:-8.1 Types of dashboards

## 8.1 Dashboard

A dashboard is a visual display of multiple reports in Salesforce, showing key metrics and trends at a glance.



## 8.2 Dynamic Dashboard

A dynamic dashboard allows users to see data according to their own security settings, giving personalized real-time insights without creating separate dashboards for each user.

