

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

### Phase 8: Data Management & Deployment

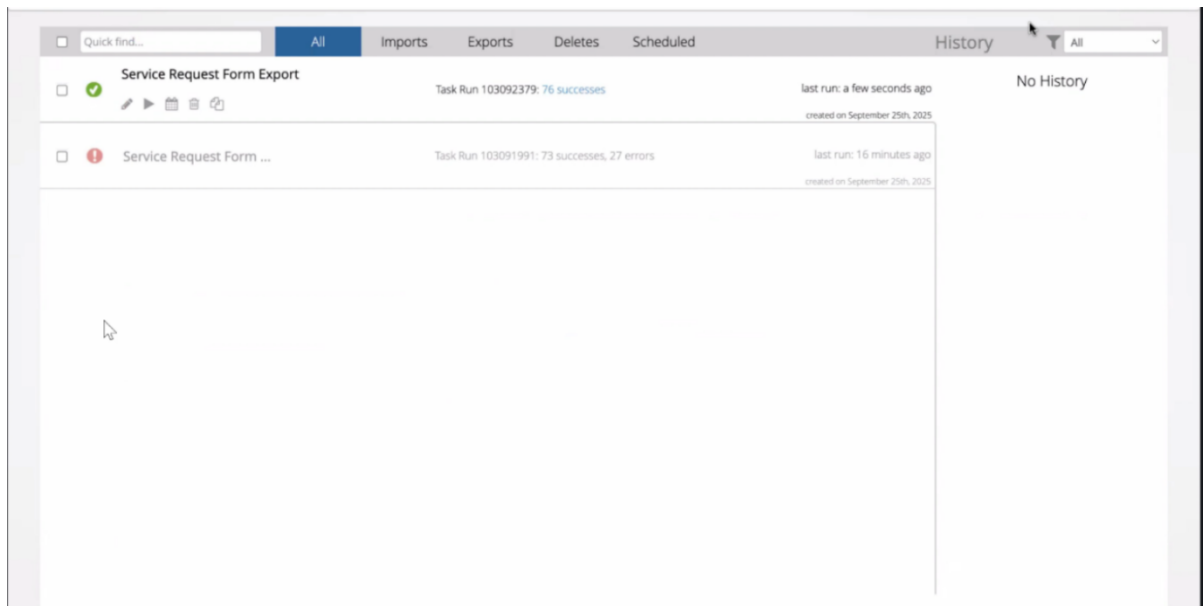
#### 1. Data Import Wizard

- 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: 'Choose data'. The main content area is titled 'Import your Data into Salesforce' and includes a sub-header 'You can import up to 50,000 records at a time.' Below this, there are three sections: 'What kind of data are you importing?', 'What do you want to do?', and 'Where is your data located?'. The 'What kind of data are you importing?' section has tabs for 'Standard objects' and 'Custom objects'. Under 'Standard objects', 'Service Request Forms' is selected with a green checkmark. The 'What do you want to do?' section has a 'Add new records' button and several dropdown menus for matching fields. The 'Where is your data located?' section has a 'Drag CSV file here to upload' area and a 'CSV' file icon.

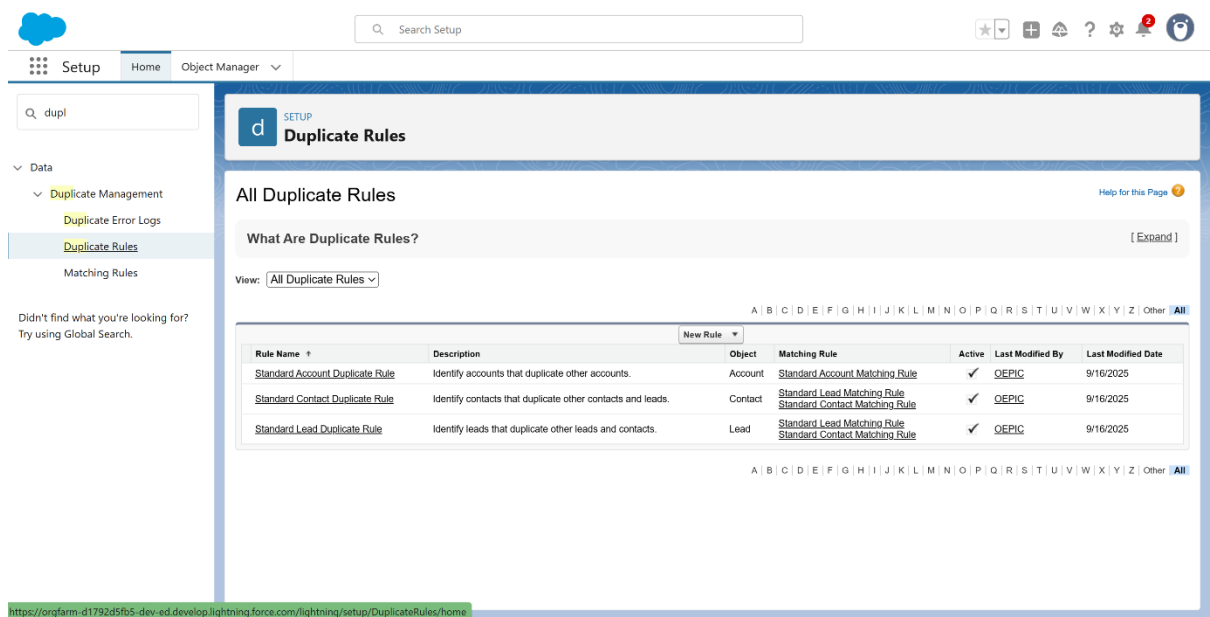
#### 2. Data Loader

- 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

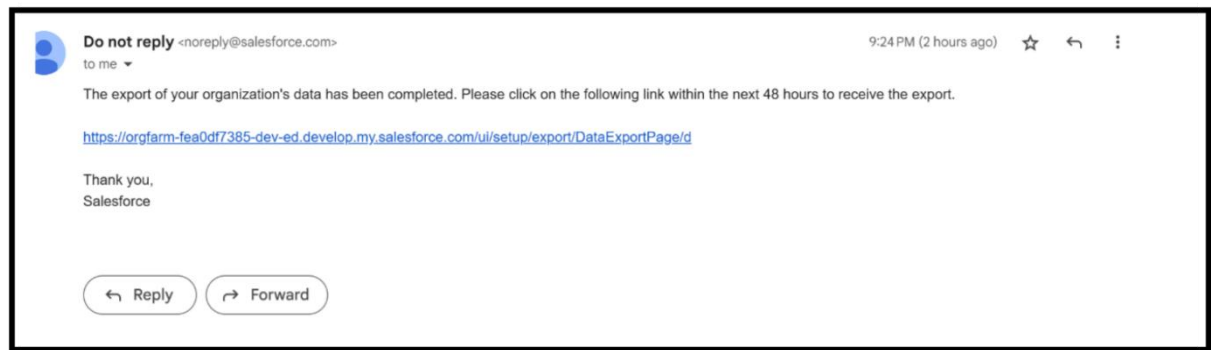
- I configured **Duplicate Rules** to prevent duplicate entries in Salesforce.
- Example: Ensured that the same **Service Request Form** or **Account** was not created multiple times.



### 4. Data Export & 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 & 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.

