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

Phase 8: Data Management s Deployment

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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.

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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.

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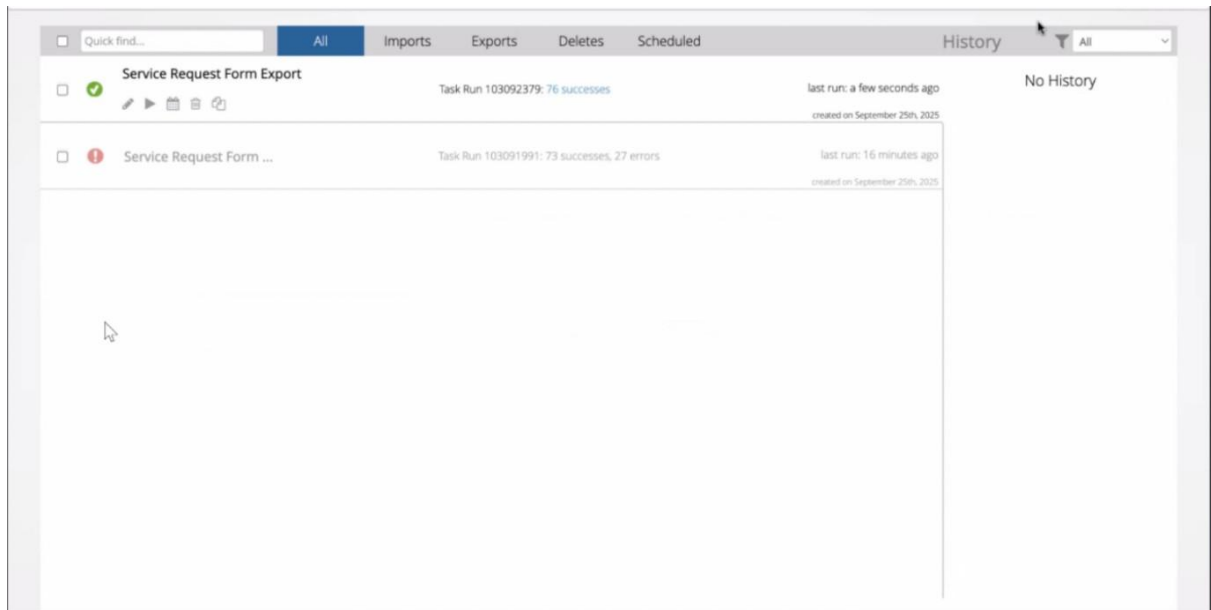
3. Duplicate Rules

- 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.

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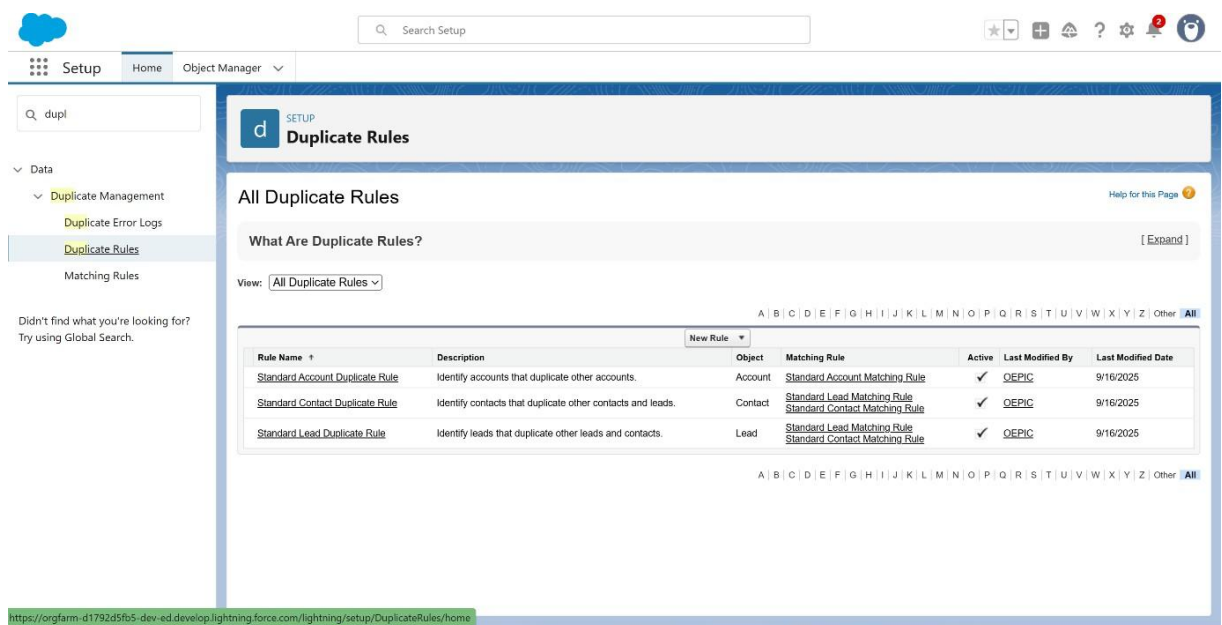
4. Data Export s Backup

- 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.


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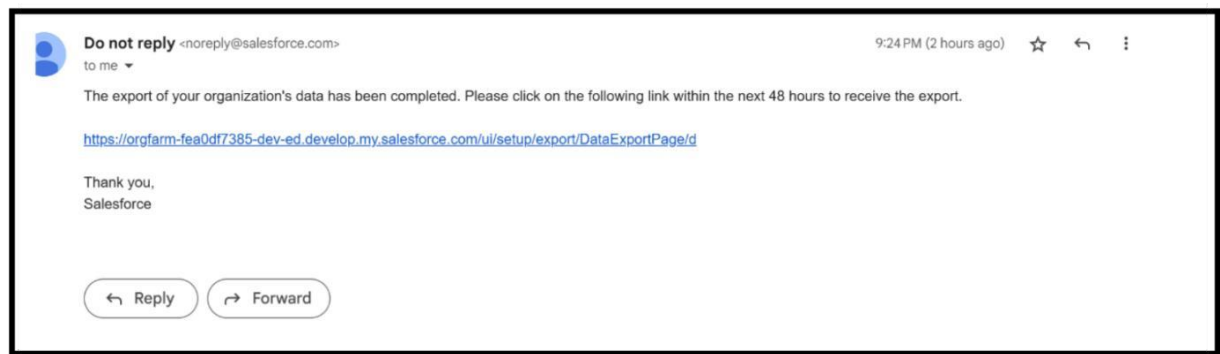
5. Change Sets

- 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.

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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.
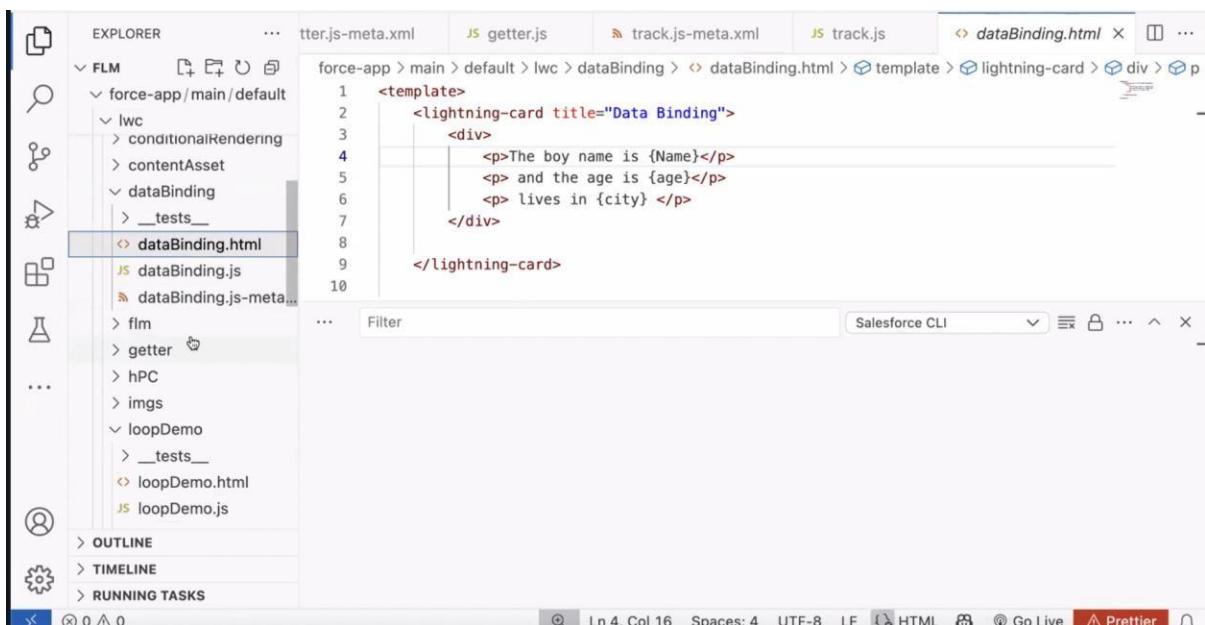
7.Reports

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.

Fig:-7.1 types of records

Fig:-7.2 Matrix record

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.
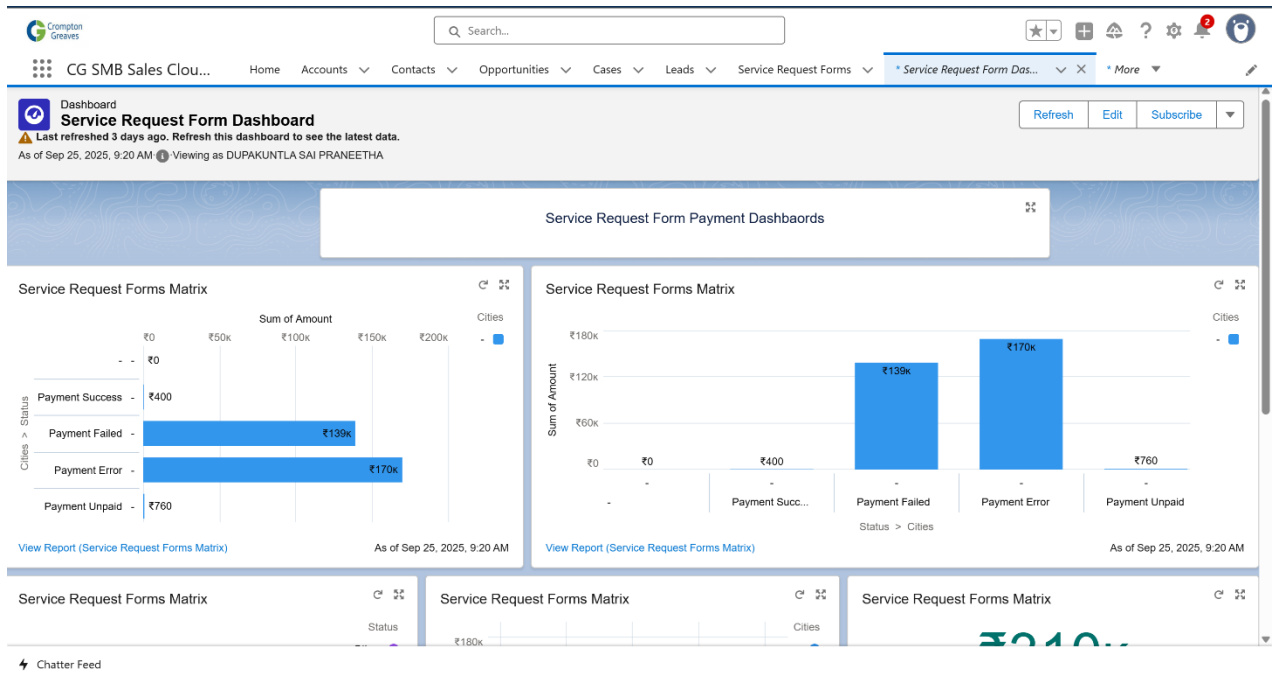

Fig:-8.1 Types of dashboards

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.