

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

Phase 8: Data Management & Deployment

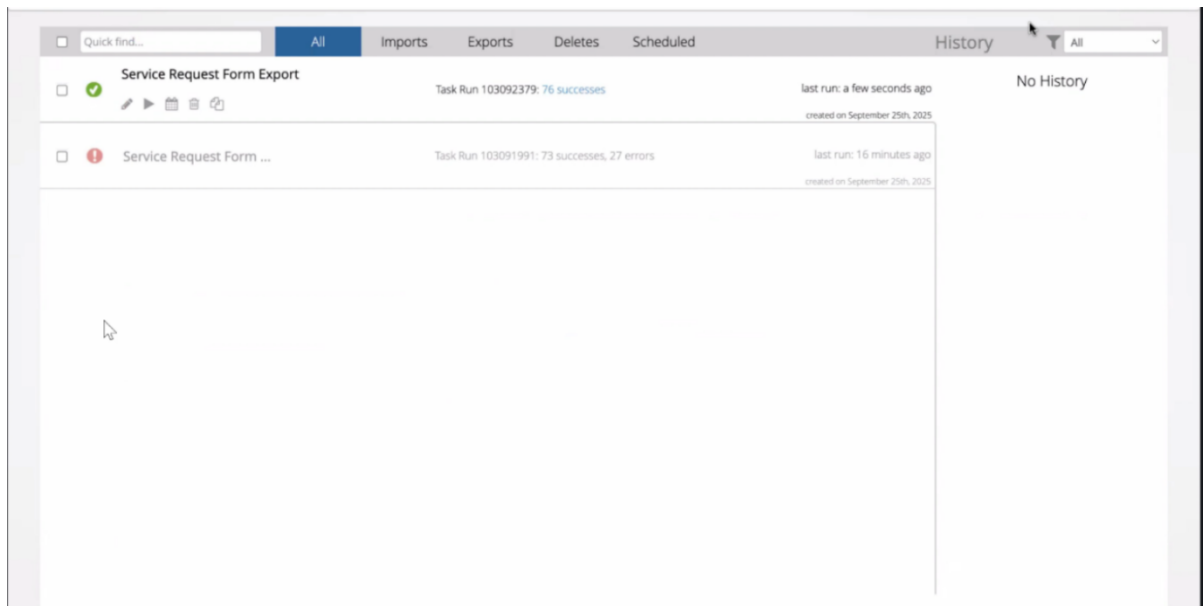
1. Data Import Wizard

- 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 is 'Choose data', with 'Edit mapping' and 'Start import' as subsequent steps. The main heading is 'Import your Data into Salesforce', with a sub-note: 'You can import up to 50,000 records at a time.' Below this, there are three columns. The first column, 'What kind of data are you importing?', has tabs for 'Standard objects' and 'Custom objects'. Under 'Standard objects', 'Service Request Forms' is selected with a green checkmark, while 'Transaction Line Items' and 'Transactions' are listed with right-pointing arrows. The second column, 'What do you want to do?', has a 'Add new records' button with a green checkmark. Below it are four dropdown menus, all set to '--None--', for matching fields: 'Match by:', 'Which User field in your file designates record owners?', 'Which Account field in your file do you want to match against to set the Account lookup field?', and 'Which Transaction field in your file do you want to match against to set the Transaction lookup field?'. The third column, 'Where is your data located?', has a 'Drag CSV file here to upload' area with a 'CSV' file icon.

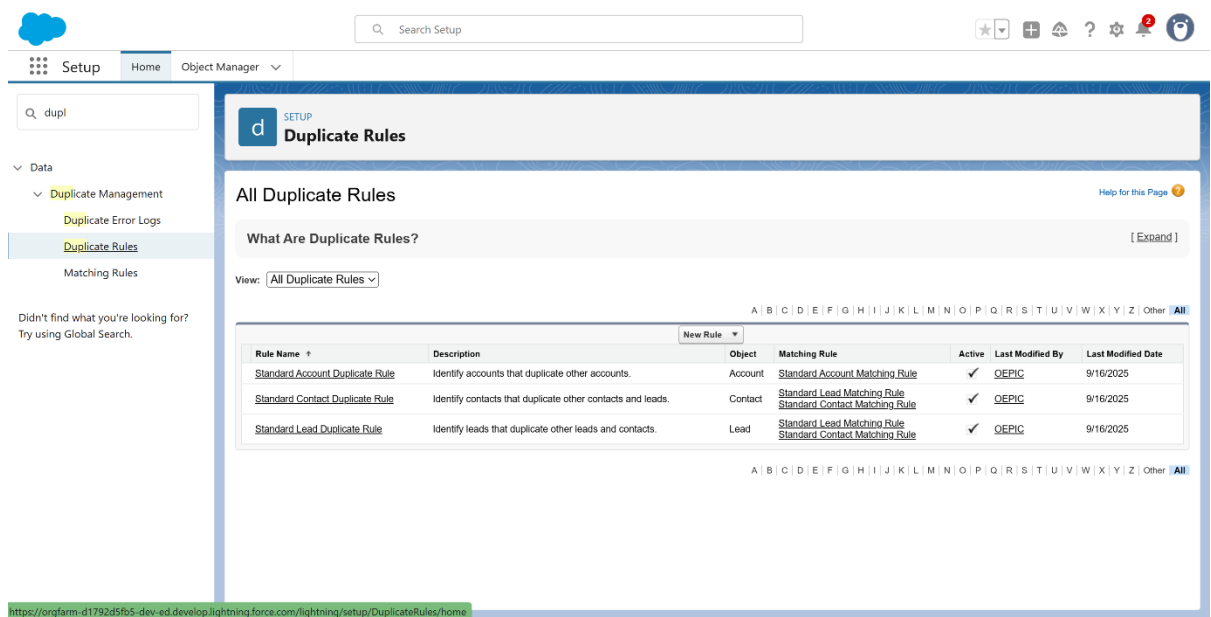
2. Data Loader

- 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

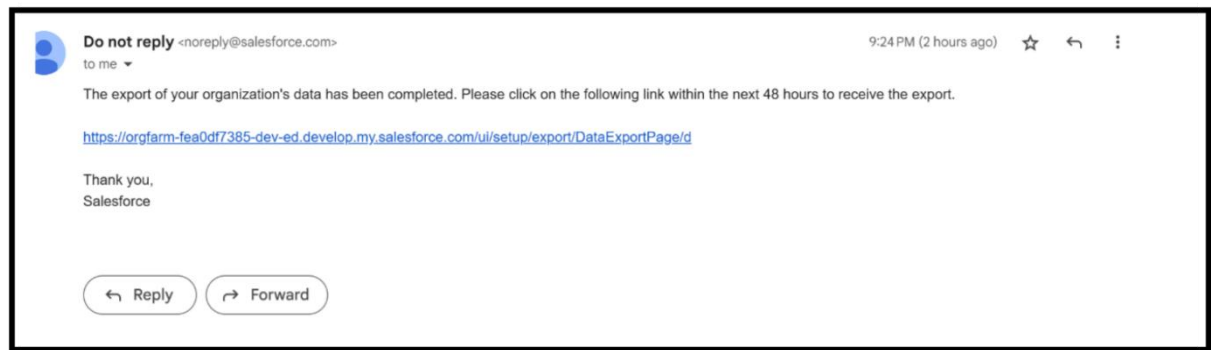
- I configured **Duplicate Rules** to prevent duplicate entries in Salesforce.
- Example: Ensured that the same **Service Request Form** or **Account** was not created multiple times.



4. Data 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.

