## Phase 8: Data Management & Deployment

### Data Import Wizard

Use the Data Import Wizard to initially import legacy customer and account data from an existing system.

### Duplicate Rules

Set up duplicate rules on the Account and Contact objects to prevent the creation of duplicate customer records.

### Change Sets & VS Code

Use change sets to deploy configuration changes from the sandbox to the production environment. For developer-focused changes like Apex code and LWCs, use VS Code with the SFDX CLI.

## Phase 9: Reporting, Dashboards & Security Review

### Reports & Dashboards

Report: Create a Case report to show the number of cases closed per agent each week.

Dashboard: Build a "Service Manager Dashboard" with charts showing case resolution time, case volume by type, and agent leaderboards. Use dynamic dashboards to allow each manager to see data only for their team.

### Security Review

Profiles & Permission Sets: Create a Service Agent profile with restricted access and use permission sets to grant additional access, such as read-only access to certain financial reports.

Sharing Rules: Define sharing rules to ensure that a team lead can see all cases handled by their team members, even if the cases are owned by different users.

## Phase 10: Quality Assurance Testing

### Test Cases

**1.Use Case: New Case Creation**

1.Test Steps: Create a new case with the Sub-Category "Loan Application."

2.Expected Result: A ServiceRequest record is automatically created and linked to the case.

3.Actual Result: The record is successfully created.

**2.Use Case: Case Escalation**

1.Test Steps: Change the status of a case to "Escalated."

2.Expected Result: The case is sent to the team lead for approval via an automated approval process.

3.Actual Result: The approval request appears in the team lead's approval queue.