

Phase 8: Data Management & Deployment

Introduction

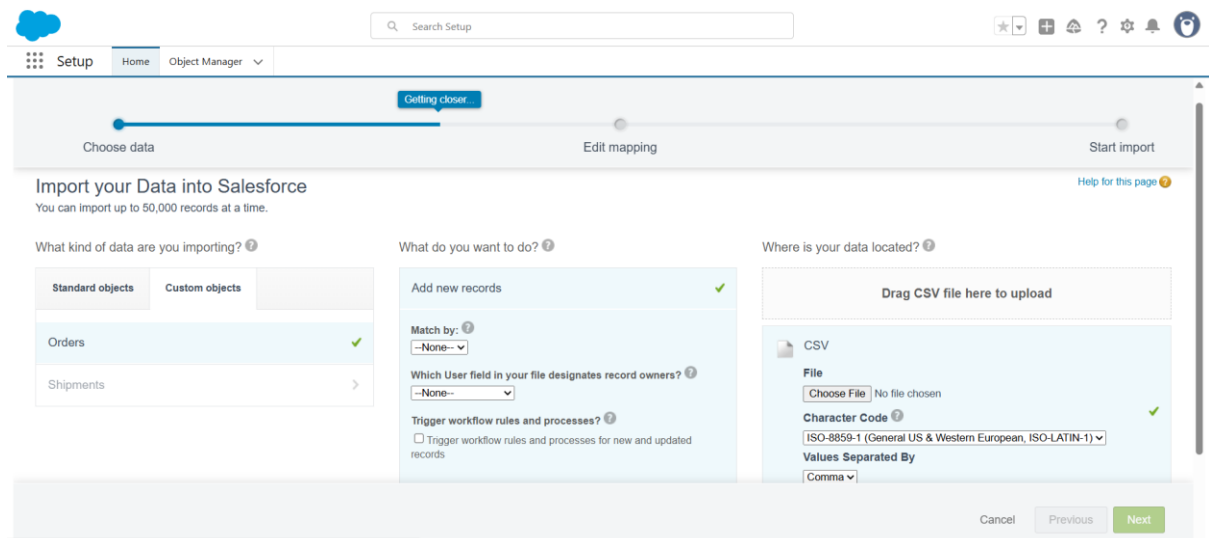
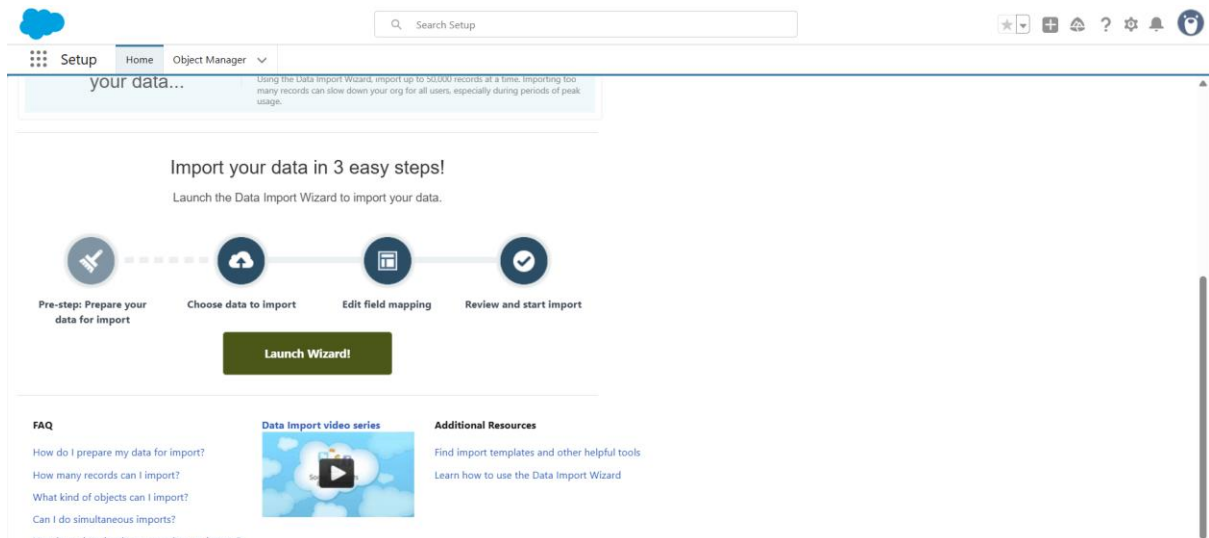
This phase ensures that EcoCart Logistics CRM is ready to handle **real-world data** and be smoothly deployed from the development environment to production. Data management includes importing demo data, preventing duplicates, scheduling backups, and ensuring smooth migration. Deployment ensures that configurations, customizations, and code move reliably from **sandbox (or dev org)** to **production**.

Objectives

- Import sample data (Orders, Shipments, Customers) for testing.
- Prevent duplicate records with **Duplicate Rules**.
- Backup and export data for recovery purposes.
- Prepare deployment pipeline using **Change Sets, Packages, and SFDX**.
- Ensure production readiness with clean, validated data.

1. Data Import Wizard

- Path: **Setup** → **Data Import Wizard**.
- Used for small data loads (e.g., 50–100 records).
- Imported:
 - 50 demo **Orders**.
 - 20 demo **Customers** (Contacts).
 - 50 demo **Shipments**.



2. Data Loader (Bulk Import)

- Installed **Salesforce Data Loader (desktop tool)**.
- Used for larger imports (e.g., 500+ records).
- Imported:
 - 1000 Orders.
 - 1200 Shipments.
- Verified relationships (Orders ↔ Shipments ↔ Customers).

3. Duplicate Rules

- Path: **Setup → Duplicate Rules**.
- Created Rules:
 - **Customer Duplicate Rule:** Prevent duplicate Contact records (based on Email).
 - **Order Duplicate Rule:** Prevent duplicate Orders (based on Order ID).
- Enabled **Alert + Block** actions.

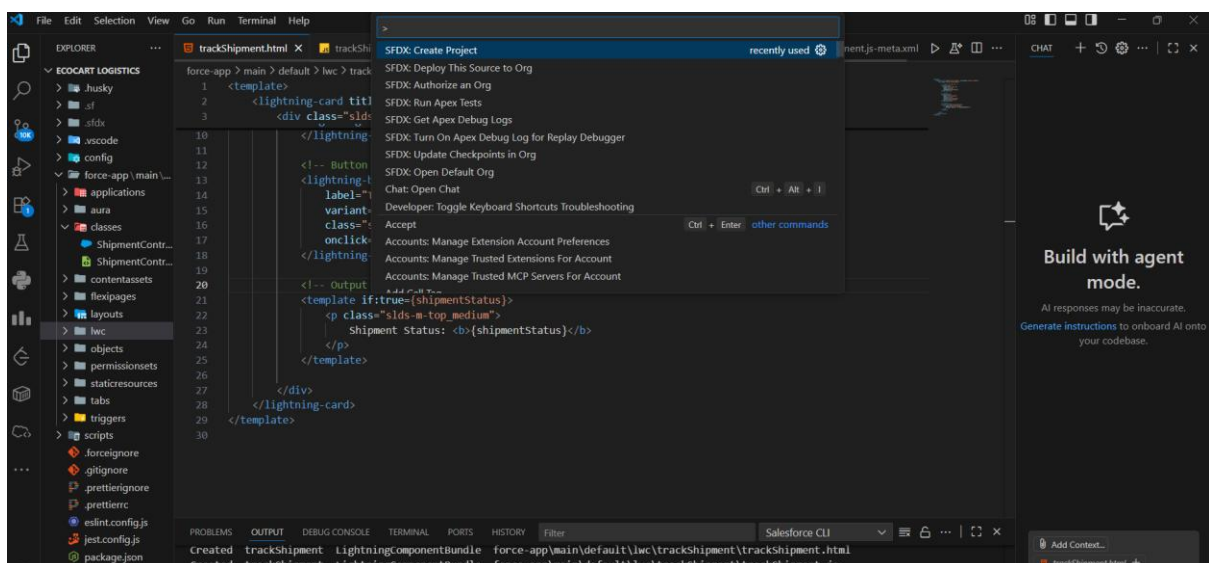
The screenshot shows the Salesforce 'Duplicate Rules' configuration page for the 'Order' object. The page is titled 'New Duplicate Rule' and 'Order'. It includes a search bar at the top with 'Search Setup' and a navigation menu on the left with 'Setup', 'Home', and 'Object Manager'. The left sidebar shows a search for 'duplicat' and a list of options: 'Data', 'Duplicate Management', 'Duplicate Error Logs', 'Duplicate Rules' (selected), and 'Matching Rules'. The main content area is titled 'Duplicate Rules' and 'Order'. It contains a 'Duplicate Rule Edit' section with 'Save', 'Save & New', and 'Cancel' buttons. The 'Rule Details' section includes fields for 'Rule Name' (set to 'Order Duplicate Rule'), 'Description', 'Object' (set to 'Order'), and 'Record-Level Security' (with options for 'Enforce sharing rules' and 'Bypass sharing rules'). The 'Actions' section specifies what happens when a user tries to save a duplicate record, with options for 'Action On Create' and 'Action On Edit' (both set to 'Allow'), and 'Alert' and 'Report' checkboxes. The 'Alert Text' field is set to 'Use one of these records?'. The 'Matching Rules' section is partially visible at the bottom.

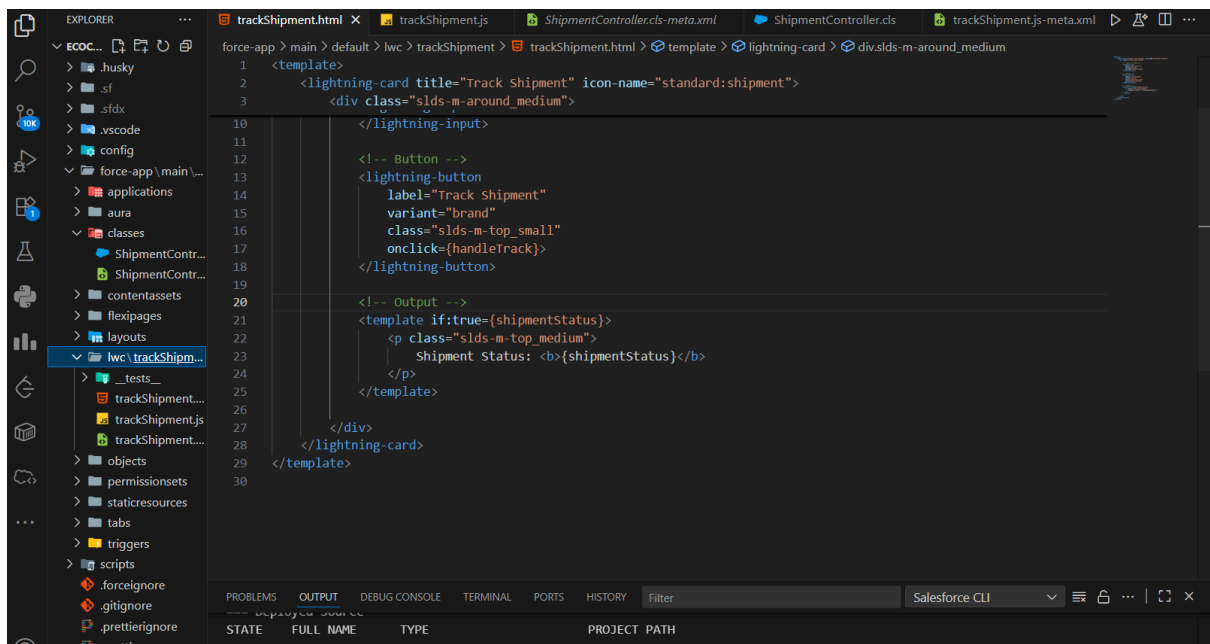
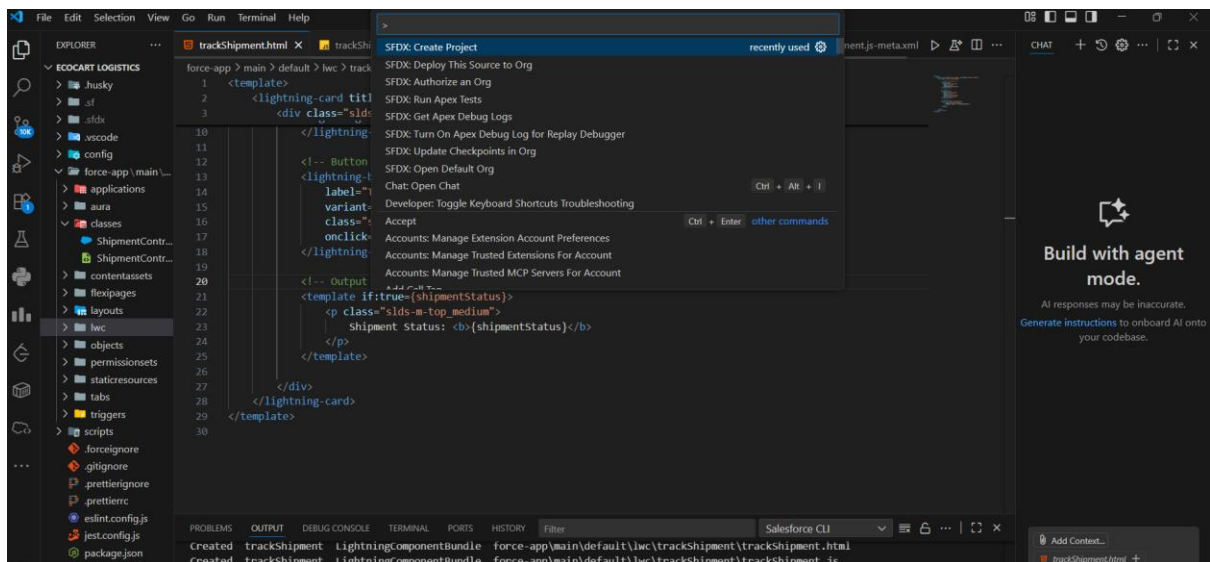
4. Change Sets (Deployment)

- Path: **Setup → Outbound Change Sets**.
- Created **EcoCart Deployment Change Set** including:
 - Custom Objects: Orders, Shipments.
 - Flows, Validation Rules, Approval Processes.
 - Apex Classes & Triggers.
 - LWCs.
- Uploaded to production org.

5. VS Code & SFDX

- Installed **Salesforce Extensions for VS Code**.
- Connected dev org with `sfdx auth:web:login`.
- Retrieved metadata, version-controlled it in GitHub.
- Used `sfdx force:deploy` for seamless deployment to another org.





Results Achieved

- Successfully imported **demo Orders, Shipments, and Customers**.
 - Duplicate Rules prevent redundant data entry.
 - Weekly backups ensure data safety.
 - Change Sets and SFDX provide reliable deployment pipelines.
 - Code, Flows, and Configurations are ready for production deployment.
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Next Steps

- Move to **Phase 9: Reporting, Dashboards & Security Review**.
- Build **Reports** (Order Performance, Delayed Shipments, Agent Productivity).
- Create **Dashboards** for managers (Revenue, Delivery Success Rate).
- Conduct a **Security Review** (Sharing Settings, Field-Level Security, Audit Trail).