

Phase 8 – Data Management & Deployment

Project: Retail CRM – Customer, Order, and Service Management System

Objective:

This phase focuses on managing, importing, and backing up data in Salesforce, ensuring data integrity, preventing duplicates, and preparing the system for deployment or further testing.

1. Data Import

Salesforce allows importing of large datasets (up to 50,000 records at a time for standard tools). The following objects were imported into the Retail CRM org:

- **Accounts** – Includes Account Name, Primary Contact Name, Primary Contact Email, Phone, and City.
- **Products / Product__c** – Includes Product Name, SKU, Category, Price, and Unit Price.
- **Orders / Order__c** – Includes order details linked to Accounts.
- **Order Line Items / Order_Line_Item__c** – Includes product, quantity, and line item totals.

Procedure:

1. Prepare CSV files for each object with proper column headers.
2. Go to **Setup** → **Data** → **Data Import Wizard**.
3. Select the object (standard or custom).
4. Map CSV headers to Salesforce fields carefully, ensuring required fields (like Account Name or Product Price) are mapped.
5. Start the import and verify imported records in the respective tabs.

Outcome:

All imported data is visible in Salesforce, correctly mapped, and ready for automation and reporting.

Setup

Home

Object Manager

Search Setup

Star

Plus

Help

Settings

Notifications

User

Data Import Wizard

Integrations

Data Import Wizard

Didn't find what you're looking for?

Try using Global Search.

SETUP

Bulk Data Load Jobs

Job ID	750gL00000EZEpq	Job Type	Bulk V1	Status	Closed
Submitted By	Sathwik Manikam	Operation	Insert	Total Processing Time (ms)	133
Start Time	02/10/2025, 11:59 am IST	Queued Batches	0	API Active Processing Time (ms)	94
End Time	02/10/2025, 11:59 am IST	In Progress Batches	0	Apex Processing Time (ms)	0
Time to Complete (hh:mm:ss)	00:03	Completed Batches	1		
Object	Product	Failed Batches	0		
External ID Field		Progress	100%		
Content Type	CSV	Records Processed	4		
Concurrency Mode	Parallel	Records Failed	2		
API Version	64.0	Retries	0		

Reload

Batches

View Request	View Result	Batch ID	Start Time	End Time	Total Processing Time (ms)	API Active Processing Time (ms)	Apex Processing Time (ms)	Records Processed	Records Failed	Retry Count	State Message	Status
View Request	View Result	751gL00000C2Q5y	02/10/2025, 11:59 am	02/10/2025, 11:59 am	133	94	0	4	2	0		Completed

2. Duplicate Rules Configuration

To prevent duplicate accounts and maintain data integrity, a **Duplicate Rule** was created for the Account object.

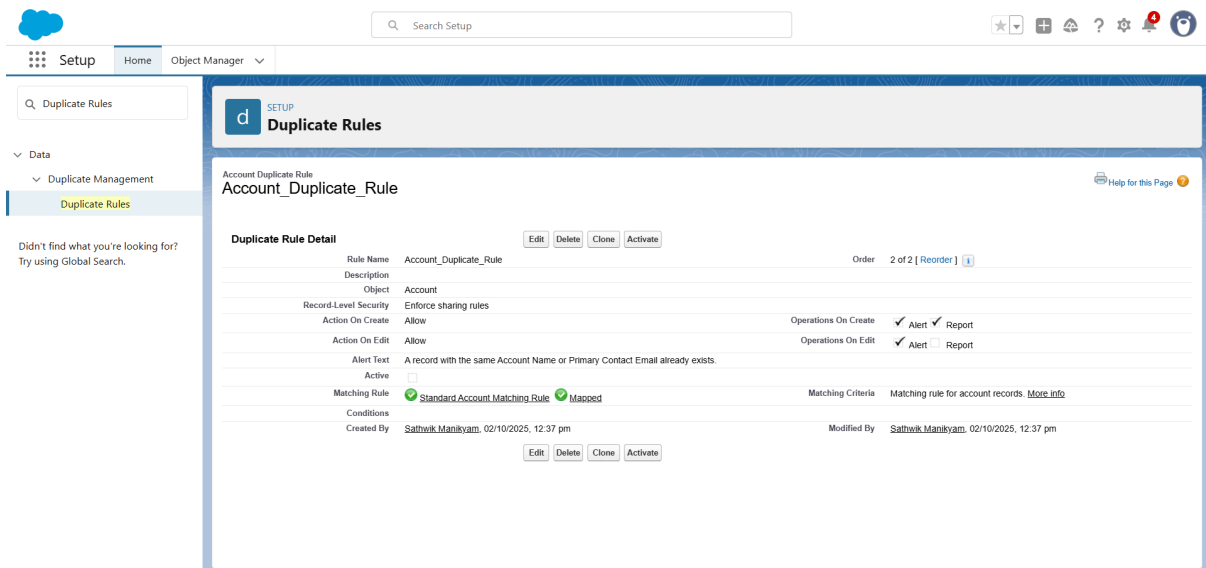
Key Settings:

- **Rule Name:** Account_Duplicate_Rule
- **Matching Rule:** Standard Account Matching Rule
- **Matching Criteria:**
 - Account Name (Fuzzy)
 - Primary Contact Email (Exact)
- **Actions:**
 - Alert users when attempting to create or edit duplicates
 - Alert text: "Use one of these records?"

- **Record-Level Security:** Enforce sharing rules and optionally bypass sharing rules.
- **Conditions:** Optional filters can be applied but none were needed in this implementation.

Outcome:

Duplicate accounts are flagged, maintaining clean and accurate CRM data.



3. Data Backup (Export)

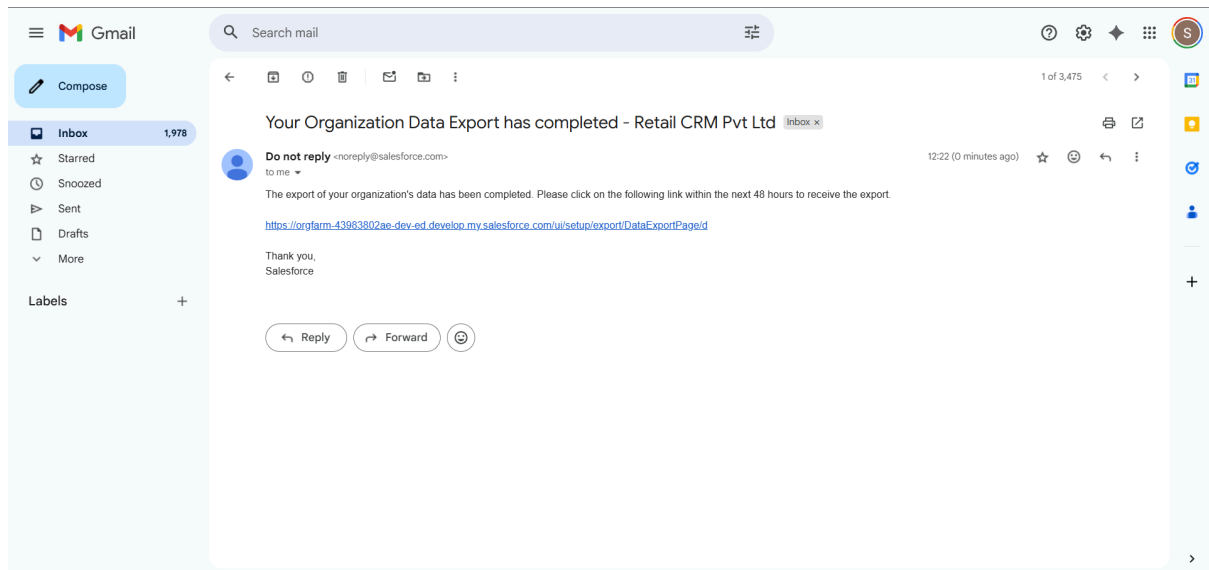
Creating backups ensures data safety and allows recovery in case of errors or corruption.

Procedure:

1. Go to **Setup** → **Data** → **Data Export**.
2. Select **Export Now** to immediately create backups.
3. Select objects to export: Accounts, Contacts, Products, Orders, and Order Line Items.
4. Optional: Include all fields, attachments, and documents.
5. Start the export and download the resulting ZIP file containing CSVs for all objects.

Outcome:

All critical CRM data is backed up securely and can be restored or referenced later.



4. Final Verification

After import, duplicate rules, and backup:

1. Verified **Accounts, Products, Orders, and Order Line Items** are correctly imported.
2. Tested **Duplicate Rules** by attempting to create duplicate accounts and confirming alert messages.
3. Checked **High-Value Order Approvals**: Orders with a Total Value greater than ₹50,000 are automatically locked and submitted for approval. Approval History confirms the process works as expected.

Outcome:

- Data integrity is maintained.
- CRM system is ready for operational use.
- High-value order approvals function correctly.