

Subscription / Personal Services Tracker CRM

Phase 8: Data Management & Deployment

Objective:

To manage CRM data efficiently through importing, exporting, and deploying components.

This phase ensures:

- All data is backed up
 - Sample data is loaded into the system
 - The CRM setup is ready for deployment or migration between orgs
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Key Tasks:

Task	Tool Used	Purpose
Import sample data	Data Import Wizard	Load Contact and Subscription data in bulk
Export CRM data	Data Loader	Backup data in CSV format
Deploy objects/flows	Change Set (optional)	Move setup from Dev to another org
Backup complete org	Data Export Service	Backup all data and metadata

Steps Performed:

Step 1: Importing Data Using Data Import Wizard

Navigation:

App Launcher → Data Import Wizard → Launch Wizard

Files Used:

- Contacts.csv

First Name,Last Name,Email

Akshay,Kumar,akshay@gmail.com

Ritu,Sharma,ritu@gmail.com

- Subscriptions.csv

Subscription Name,Start Date,End Date,Renewal Status,Amount,Contact (Email)

S-001,01/09/2025,30/09/2025,Active,499,akshay@gmail.com

S-002,01/09/2025,15/10/2025,Active,799,ritu@gmail.com

Mapped fields and uploaded successfully.

Step 2: Exporting Data Using Data Loader

Steps:

1. Open Data Loader
2. Log in using Salesforce credentials + security token
3. Choose: Export

4. Select: Subscription__c
5. Select fields (e.g. Name, Start_Date__c, Contact__c)
6. Save file as SubscriptionExport.csv

Data exported for backup and audit.

◆ Step 3: Deploying Using Change Sets (Optional)

Only required if moving CRM from one org to another.

Navigation:

- Setup → Outbound Change Sets → New Change Set

Added Components:

- Custom Objects: Subscription, Payment, Service Type
- Flows, Triggers, Apex Classes

Uploaded to Target Org → Deployed via Inbound Change Set

Step 4: Backup Full Org (Optional)

Navigation:

- Setup → Data Export → Schedule Export

Selected all custom objects

Backup ZIP file downloaded for safety

Output Summary:

Task	Status
Imported Contacts & Subscriptions	Done
Exported data via Data Loader	Done
Created & deployed Change Set (optional)	Done
Full org backup via export (optional)	Done