

Phase 8 — Data Management & Deployment

Project: Revolutionizing Agriculture with AgriEdge Or-Mange Ltd — Salesforce OMS
Prepared for: Sai Teja Kotipalli
Status: Completed

1. Executive Summary

This document lists everything related to **Phase 8: Data Management & Deployment**. It includes creation/import of Product and Customer records, duplicate prevention measures, data backup, and deployment steps. Due to demo constraints, sample records were created manually instead of using Data Loader, which is suitable for small-scale demonstration.

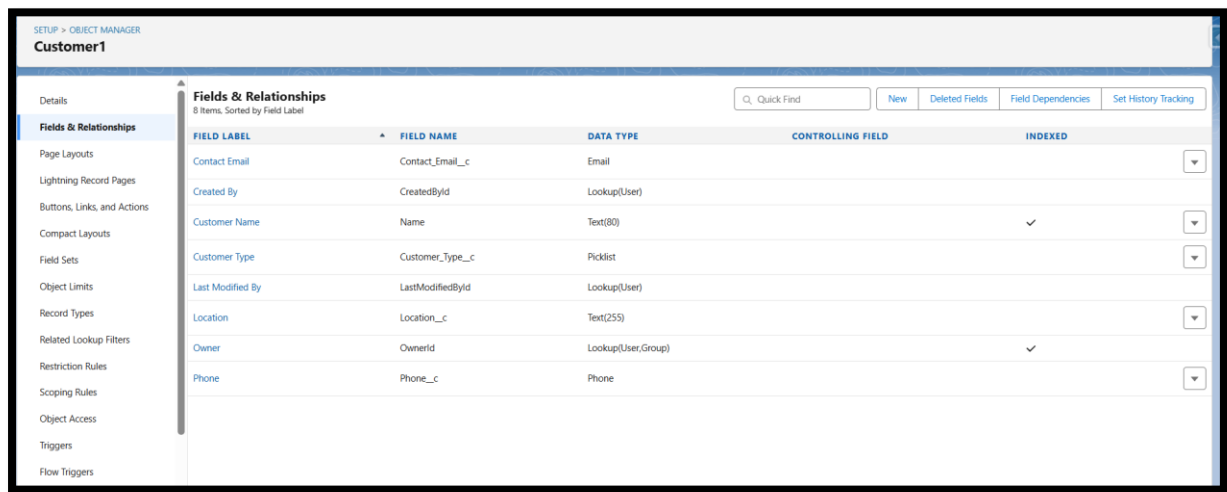
2. Data Management

2.1 Customer Records

Object: Customer__c (custom object created for Phase 3)

Fields Created:

| Field Name | API Name | Type | Description |
|----------------|-------------------|----------|-------------------------|
| Name | Name | Text | Customer Name |
| Contact Number | Contact_Number__c | Phone | Customer Contact Number |
| Location | Location__c | Text | City/State of customer |
| Customer Type | Type__c | Picklist | Farmer / Distributor |



Sample Records (Manually Created):

| Name | Contact Number | Location | Type |
|--------------|----------------|------------|-------------|
| Ramesh Kumar | 9876543210 | Hyderabad | Farmer |
| Priya Verma | 9123456780 | Vijayawada | Distributor |

Verification: Setup → Object Manager → Customer__c → Records → confirm entries.

| | A | B | C | D | E |
|----|--------|--|----------|-------------|---|
| 1 | Name | Contact Email | Location | Type | |
| 2 | sai | kotipallisaiteja@gmail.com | mmd | Farmer | |
| 3 | Teja | saitejakotipalli2005@gmail.com | mmd | Distributor | |
| 4 | harsha | kotipallisaiteja2005@gmail.com | mmd | Farmer | |
| 5 | yash | yaswanthtadiparthi123@gmail.com | rjy | Distributor | |
| 6 | pavan | gpavan9334@gmail.com | rcpm | Distributor | |
| 7 | | | | | |
| 8 | | | | | |
| 9 | | | | | |
| 10 | | | | | |
| 11 | | | | | |

Salesforce import of "Book1.csv" has finished. 5 rows were processed.

noreply@salesforce.com

to me

Fri 26 Sept, 23:52 (27 minutes ago)

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Your Accounts and Contacts imports are complete. Here are your results:

Accounts Created: 0

Accounts Updated: 0

Accounts Ignored: 0 (We ignored updates that we couldn't match to an existing record.)

Accounts Failed: 5 (We couldn't import these due to errors.)

Processed job information for imported Accounts: <https://orgfarm-4c5183c8d1-dev-ed.develop.my.salesforce.com/750gK00000DtVJQAV?fromEmail=1>

Contacts Created: 4

Contacts Updated: 0

Contacts Ignored: 0 (We ignored updates that we couldn't match to an existing record.)

Contacts Failed: 1 (We couldn't import these due to errors.)

Accounts/Contacts Rejected: 0 (We rejected duplicate rows.)

Processed job information for imported Contacts: <https://orgfarm-4c5183c8d1-dev-ed.develop.my.salesforce.com/750gK00000DtZTuQAN?fromEmail=1>

The details of the first 1,000 errors can be found in the attachments for this email:

2.2 Product Records

Object: Product__c

Fields Created:

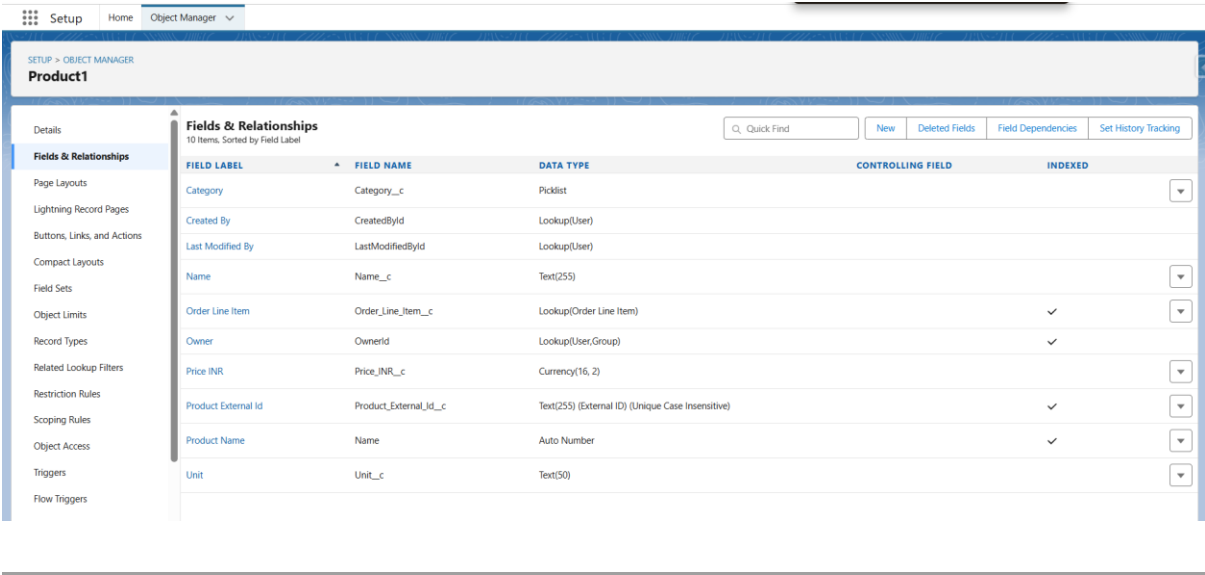
| Field Name | API Name | Type | Description |
|-------------|----------------|----------|---------------------------|
| Name | Name | Text | Product Name |
| Category | Category__c | Picklist | Seeds, Fertilizer, Others |
| Price | Price__c | Number | Price per unit |
| Stock | Stock__c | Number | Current available stock |
| Expiry Date | Expiry_Date__c | Date | Expiry of product |

Sample Records (Manually Created):

| Name | Category | Price | Stock | Expiry Date |
|--------------|------------|-------|-------|-------------|
| Wheat Seeds | Seeds | 200 | 100 | 2025-12-31 |
| Fertilizer A | Fertilizer | 500 | 50 | 2025-06-30 |

Verification: Products tab → confirm records exist.

Note: For real-world deployment, **Data Loader** or **Data Import Wizard** can be used to import large datasets. For demo purposes, manual creation is sufficient.



2.3 Duplicate Rules

- **Object:** Customer__c
- **Rule:** Prevent creation of duplicate customers based on Name + Contact Number.
- **Setup Path:** Setup → Duplicate Management → Duplicate Rules → New → Configure as above.
- **Purpose:** Maintain data quality and avoid redundant customer entries.

The screenshot shows the 'Duplicate Rules' configuration page in Salesforce. The rule is named 'Block Duplicate Customer Emails' and is set for the 'Customer' object. The matching criteria is 'Customer1: Contact_Email EXACT MatchBlank = FALSE'. The rule is currently active and has been created by Kotipalli Sai Teja on 9/26/2025 at 11:38 AM. The page includes a 'Duplicate Rule Detail' section with various configuration options like 'Action On Create', 'Action On Edit', 'Alert Text', 'Matching Rule', and 'Matching Criteria'. There are also buttons for 'Edit', 'Delete', 'Clone', and 'Deactivate'.

2.4 Backup

- Weekly **Data Export** scheduled:
 - Setup → Data → Data Export → Select Objects: Customer__c, Product__c, Order__c, Order_Item__c, Delivery__c
 - Export stored as CSV for backup purposes.

The screenshot shows the 'Data Export' page in Salesforce. It features a 'Monthly Export Service' section with a yellow banner indicating the 'Next scheduled export: 10/5/2025, 12:00 AM'. The page includes a brief description of the Data Export service and a 'Help for this Page' link.