

SMART SLA TRACKER: INTELLIGENT CUSTOMER COMPLAINT & ESCALATION MANAGEMENT

Phase 8: Data Management & Deployment

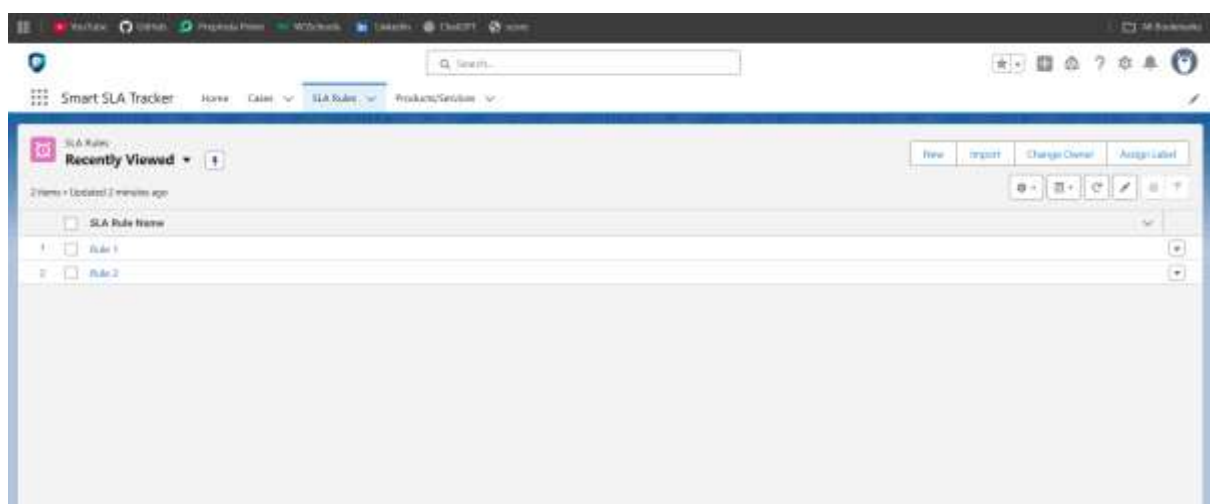
8.1: Data Management:

create the Product/Service and SLA Rule records

1) SLA Rule

Rule 1: Product/Service: Laptop Support; Priority: High ; Resolution Time: 2

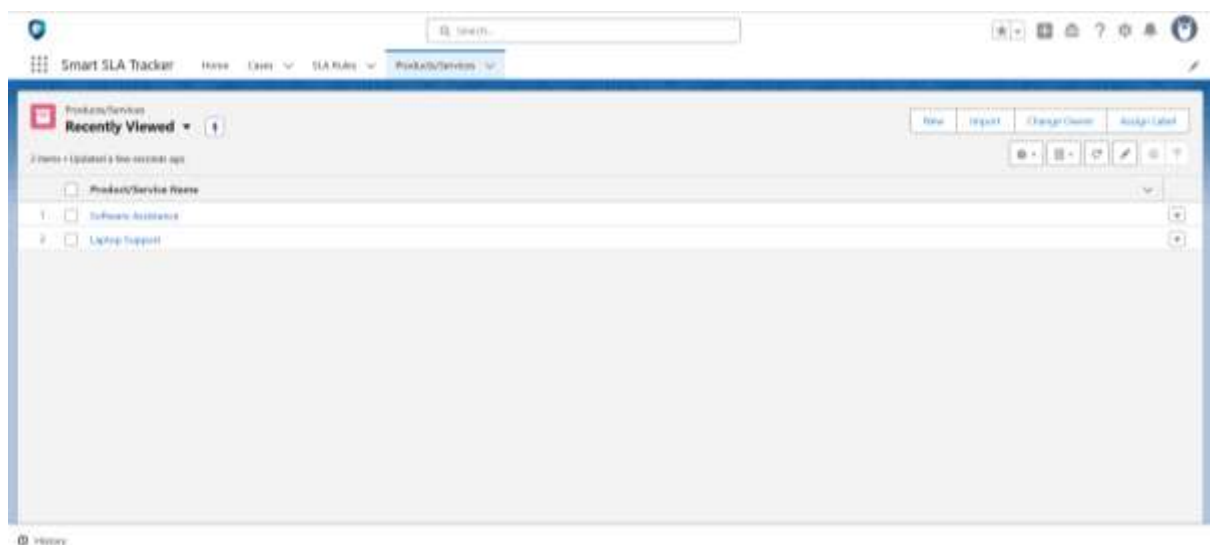
Rule 2: Product/Service: Software Assistance; Priority: Medium; Resolution Time: 8



2) Products/Services

Laptop Support : Category: Hardware; Status: Active

Software Assistance : Category: Software; Status: Active





- **Use the Data Import Wizard:**
 1. Prepare a Sample .csv File (SampleCases.csv)
 2. Install Data Loader
 3. Login to data loader
 4. Select the Object
 5. Choose the CSV File
 6. Map the Fields
 7. save

1. SampleCases.csv

	A	B	C	D	E
1	Subject	Status	Priority	Product/Service	
2	Laptop screen is broken	New	High	Laptop Support	
3	Can't log in to my email account	New	High	Email Services	
4	Printer isn't working	In Progress	Medium	Printer Support	
5	Requesting a new software license	New	Low	Software Licensing	
6	My phone has a cracked screen	New	High	Mobile Device Support	
7	Network connection is slow	In Progress	High	Network Connectivity	
8	Need help installing a new program	New	Medium	Software Installation	
9	My headset is defective	Resolved	Low	Accessory Support	
10	Keyboard is missing a key	New	Medium	Laptop Support	
11	Forgot my password	New	High	Account Management	
12	The projector won't connect	New	Medium	AV Support	
13	Need to set up a new user account	In Progress	Low	User Management	
14	My monitor has a weird line on it	New	High	Monitor Support	
15	Looking for a software update	Resolved	Low	Software Updates	
16	My mouse isn't clicking properly	New	Medium	Accessory Support	
17	Need a new power adapter	New	Low	Accessory Support	
18	My webcam isn't recognized	New	Medium	AV Support	
19	Requesting a change to my email sig	Resolved	Low	Email Services	
20	The file server is unreachable	New	High	Server Support	
21	My laptop is overheating	In Progress	High	Laptop Support	
22					
23					
24					
25					
26					
27					
28					

Select the object > Case :

 Load Inserts ×

Step 2: Select Salesforce object 

Import batch size: 200 Start at row: 0
Current API usage for the org: 146
API Limit for the org: 15,000

Select Salesforce object to import:

Account (Account)

Case (Case)

Contact (Contact)

Event (Event)

Lead (Lead)


Mentor (Mentor__c)


Opportunity (Opportunity)

Price Book (Pricebook2)

☐ Show all Salesforce objects

Import from (CSV file):

 Load Inserts ×

Step 2b: (Optional) relate using lookup field 

Relationships of Case are listed below.
Select a related object and its lookup field if the CSV refers to the related object using the selected lookup field.

Relationship	Related Object	Lookup Field of Related Obj
Account :	<input type="text" value="Account"/>	<input type="text" value="<Not selected>"/>
Asset :	<input type="text" value="Asset"/>	<input type="text" value="<Not selected>"/>
Contact :	<input type="text" value="Contact"/>	<input type="text" value="<Not selected>"/>
Owner :	<input type="text" value="Group"/>	<input type="text" value="<Not selected>"/>
Parent :	<input type="text" value="Case"/>	<input type="text" value="<Not selected>"/>
Product_Service__r :	<input type="text" value="Product_Service__c"/>	<input type="text" value="<Not selected>"/>
RecordType :	<input type="text" value="RecordType"/>	<input type="text" value="<Not selected>"/>
SLA_Rule__r :	<input type="text" value="SLA_Rule__c"/>	<input type="text" value="<Not selected>"/>
Source :	<input type="text" value="EmailMessage"/>	<input type="text" value="<Not selected>"/>

Data Imported Successfully:

Load Inserts

step 4: Finish

import batch size: 200 Start at row: 0

Progress Information

loading: insert

ed 18 of 18 records in 0 minutes, 1 seconds with 18 successes and 0 errors.
,800 records per hour. Estimated remaining time to complete: 0 minutes and 0 seconds

Cancel

Operation Finished

The operation has fully completed. There were 18 successful inserts and 0 errors.

View Successes

View Errors

OK

< Back

Next >

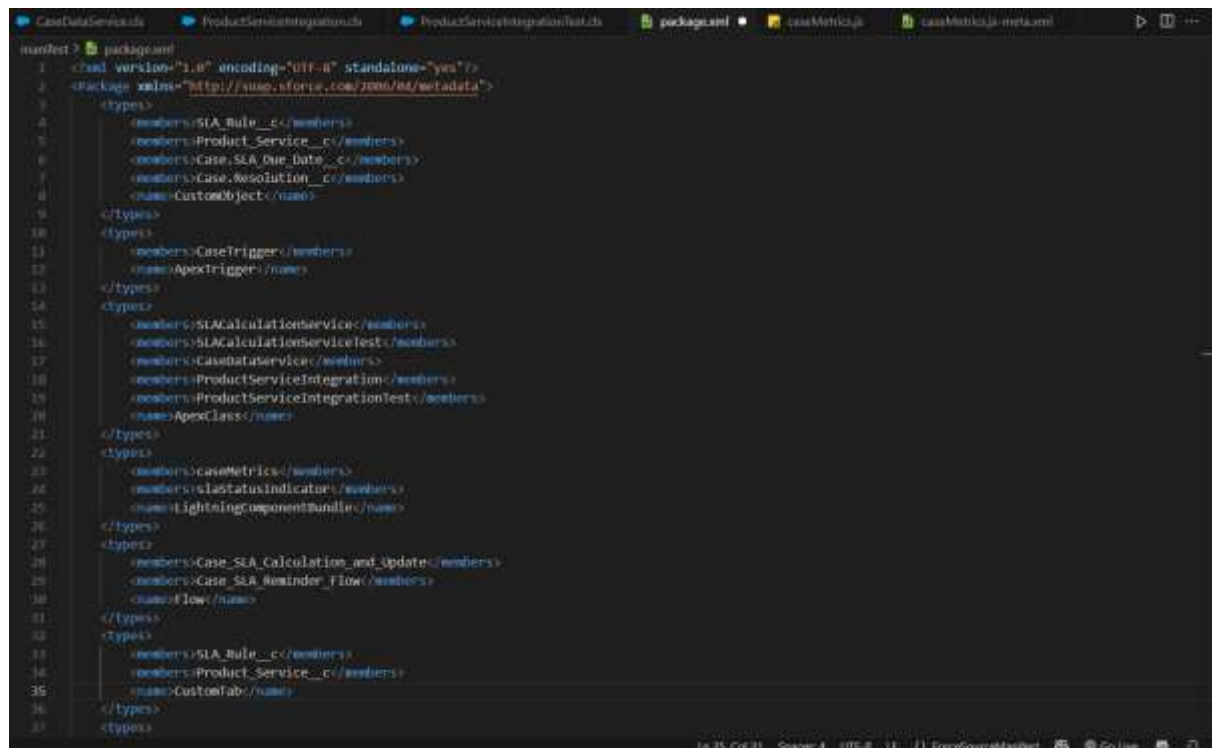
Finish

Cancel

8.3 Deployment Strategy:

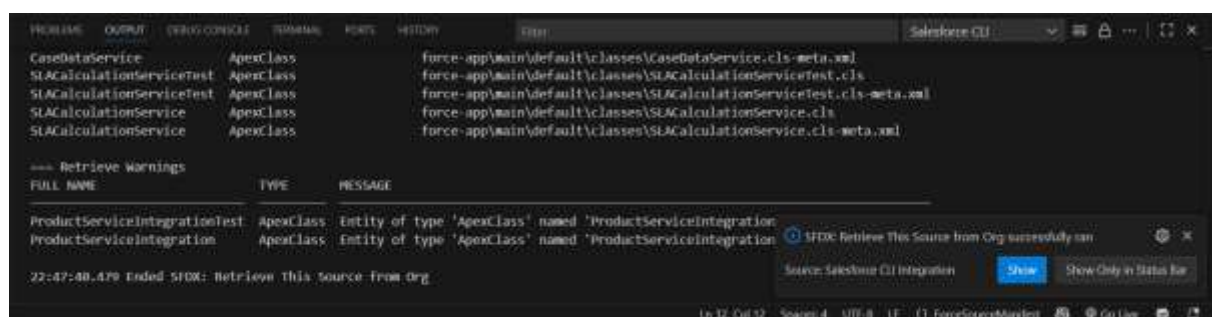
1. Update package.xml File
2. Perform a Final Retrieve
Vs code > SFDX: Retrieve Source in Manifest from Org > press Enter
3. Perform the Final Deployment
Vs code > right click on force app > SFDX: Deploy Source to Org

package.xml:



```
manifest > package.xml
1 <?xml version="1.0" encoding="UTF-8" standalone="yes"?>
2 <package xmlns="http://soap.sforce.com/2006/04/metadata">
3   <types>
4     <members>SLA_Rule__c</members>
5     <members>Product_Service__c</members>
6     <members>Case_SLA_Due_Date__c</members>
7     <members>Case_Resolution__c</members>
8     <name>CustomObject</name>
9   </types>
10  <types>
11    <members>CaseTriggers</members>
12    <name>ApexTriggers</name>
13  </types>
14  <types>
15    <members>SLACalculationService</members>
16    <members>SLACalculationServiceTest</members>
17    <members>CaseDataService</members>
18    <members>ProductServiceIntegration</members>
19    <members>ProductServiceIntegrationTest</members>
20    <name>ApexClass</name>
21  </types>
22  <types>
23    <members>CaseMetrics</members>
24    <members>SLAStatusIndicator</members>
25    <name>LightningComponentBundle</name>
26  </types>
27  <types>
28    <members>Case_SLA_Calculation_and_Update</members>
29    <members>Case_SLA_Reminder_Flow</members>
30    <name>Flow</name>
31  </types>
32  <types>
33    <members>SLA_Rule__c</members>
34    <members>Product_Service__c</members>
35    <name>CustomTab</name>
36  </types>
37  </types>
```

2. Retrieve Source in Manifest from Org



Full Name	Type	Message
CaseDataService	ApexClass	force-app/main/default/classes/CaseDataService.cls-meta.xml
SLACalculationServiceTest	ApexClass	force-app/main/default/classes/SLACalculationServiceTest.cls
SLACalculationServiceTest	ApexClass	force-app/main/default/classes/SLACalculationServiceTest.cls-meta.xml
SLACalculationService	ApexClass	force-app/main/default/classes/SLACalculationService.cls
SLACalculationService	ApexClass	force-app/main/default/classes/SLACalculationService.cls-meta.xml

22:47:40.479 Ended SFDX: Retrieve This Source from Org

SFDX: Retrieve This Source from Org successfully ran

Source: Salesforce CLI Integration

Show Show Only in Status Bar