

Phase 8: Data Management & Deployment – Customer Complaint CRM

In Phase 8, I focused on **data management** for the Customer Complaint CRM. This includes importing initial data, preventing duplicates, and backing up CRM data. These steps ensure that the CRM can be tested and demonstrated effectively, and the data remains safe.

1) Data Import Wizard

What I did:

I imported initial data for the **Customers** and **Complaints** objects. This allowed me to populate the CRM with test records for demonstration purposes.

How I did it:

1. Navigated to **Setup** → **Data Import Wizard** → **Launch Wizard**.
2. Selected the object to import:
 - **Customers** → Added new records
 - **Complaints** → Added new records
3. Prepared CSV files containing **10 rows of data** for each object. For example:
 - Customer: Name, Email, Customer ID
 - Complaint: Complaint Number, Status, Priority, Assigned To, Complaint Description, Complaint Date, Resolution Notes
4. Mapped the CSV columns to Salesforce fields (e.g., Customer Name → Name, Complaint Description → Complaint_Description__c).
5. Clicked **Start Import** and waited for the records to be imported.
6. Verified the imported records by checking the **Customers** and **Complaints** objects in Salesforce.

Result:

The CRM now has initial data, allowing me to test **flows, approval processes, and reports**.

The screenshot shows the Salesforce Setup interface for Bulk Data Load Jobs. The left sidebar contains a search bar with 'bul' and a navigation menu with 'Environments', 'Jobs', and 'Bulk Data Load Jobs'. The main content area is titled 'Bulk Data Load Jobs' and includes a 'Monitor Bulk Data Load Jobs' section. This section contains a 'Quota' card showing 0 batches processed in the last 24 hours and a resource usage summary. Below this is an 'In Progress' table with no records, and a 'Completed last 7 days' table with one record.

Job ID	Submitted By	Start Time	End Time	Status	Job Type	Operation	Object	Records Processed
750gLO0000EU2Vm	Subrahmanya Venkata Lakshmi Nulu	10/1/2025, 1:40 AM	10/1/2025, 1:40 AM	Closed	Bulk V1	Insert	Complaint	10

2) Duplicate Rules

What I did:

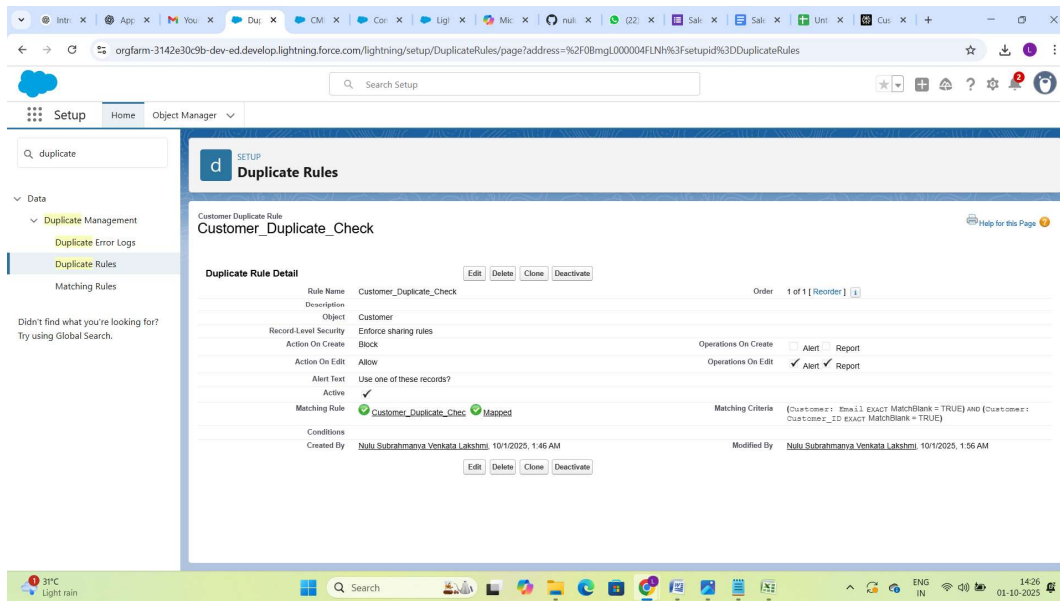
I created a duplicate rule for **Customer records** to prevent duplicate entries and maintain data integrity.

How I did it:

1. Navigated to **Setup** → **Duplicate Rules** → **New Rule**.
2. Selected the object: **Customer**.
3. Named the rule: **Customer_Duplicate_Check**.
4. Defined the matching criteria: match **Email** or **Customer ID**.
5. Set the action for create/edit: **Block** (to prevent duplicates).
6. Saved and activated the rule.

Result:

The system now prevents users from creating duplicate Customer records, ensuring the CRM data is clean and reliable.



3) Data Export & Backup

What I did:

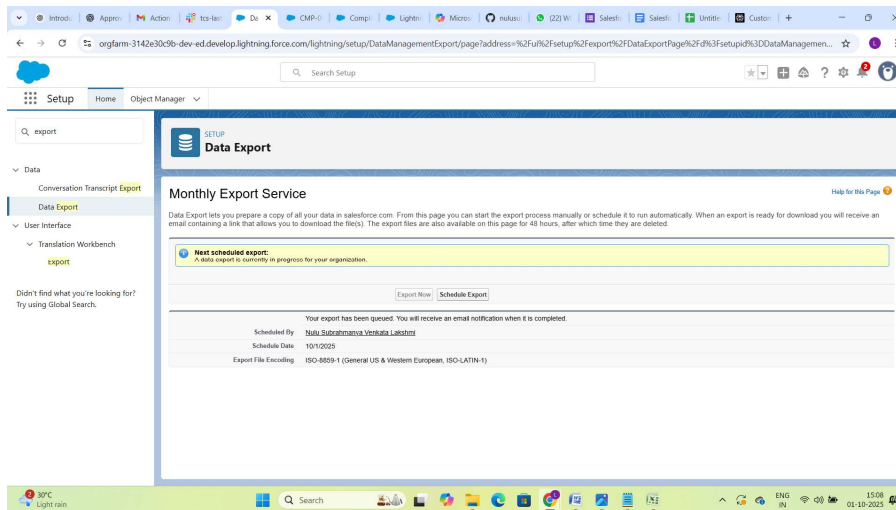
I exported CRM data to create a backup for safety and record-keeping.

How I did it:

1. Navigated to **Setup** → **Data Export** → **Export Now**.
2. Selected the objects to export:
 - Customer
 - Complaint
 - Tasks (optional)
3. Clicked **Start Export**.
4. Downloaded the generated **ZIP files**, which contained CSV files for each object.

Result:

I now have a safe backup of the CRM data that can be used for recovery or future reference.



Summary of Phase 8 Implementation

Step	Action	Outcome
Data Import Wizard	Imported initial test data for Customers and Complaints using CSV files	CRM populated for testing and demonstration
Duplicate Rules	Created rule for Customer object to block duplicate entries	Data integrity maintained; no duplicate customers allowed
Data Export & Backup	Exported Customer, Complaint, and Task data to ZIP files	Safe backup created for recovery or reference