

Phase 8: Data Management and Deployment

Project: Employee Leave Management System

1. Data Management:

1.1 Data Sources

For this project, sample data was prepared using CSV files to represent the primary objects involved in the customer support process. These datasets help in testing system functionality and validating reports and dashboards.

- **customer_50.csv** – Contains sample customer records with the following fields:
 - Customer ID (Auto Number)
 - Name
 - Email
 - Phone Number
 - Account Type
- **support_ticket_50.csv** – Contains sample support ticket records with the following fields:
 - Ticket Number (Auto Number)
 - Customer (Lookup to Customer__c)
 - Ticket Category
 - Priority (Low, Medium, High)
 - Status (New, In Progress, Resolved, Closed)
 - Description

1.2 Data Loading Tools Used

- **Data Import Wizard:** Used for simpler CSV uploads. Supports mapping fields directly from CSV to Salesforce fields.

1.3 Data Upload Steps

Step 1: Prepare CSV files with clean and validated data.

Step 2: Navigate to *Setup* → *Data Import Wizard* (for basic import)

Step 3: Select the object:

- **Customer__c** → upload customer_50.csv
- **Support_Ticket__c** → upload support_ticket_50.csv

Step 4: Map fields between CSV headers and Salesforce object fields.

Step 5: Run the import process and verify the number of records loaded.

Step 6: Validate in Salesforce by running a report or list view to confirm the records were inserted successfully.

2. Deployment

1. Deployment Methodology

The Employee Leave Management System was deployed in Salesforce using the following approach:

- **Development Sandbox:** Initial configuration, object creation, Apex classes, triggers, and flows developed here.
- **Testing Sandbox (UAT):** All functionalities tested with sample data. Reports, dashboards, and email alerts verified.
- **Production Org Deployment:** Migration done using **Change Sets** for metadata and **Data Loader** for records.

2. Deployment Steps

1. **Prepare Change Set in Sandbox:** Add custom objects, fields, Apex classes, triggers, flows, validation rules, and reports.
2. **Upload to Production:** Use Outbound Change Set to push changes to Production org.
3. **Deploy Metadata:** Validate the change set before final deployment.
4. **Import Data:**
 - Use employee_50.csv to populate customer_c object.
 - Use leave_request_50.csv to populate support_ticket_c object.
 - Ensure lookup field in CSV matches Customer Id or Salesforce Record Id.
5. **Post-Deployment Validation:** Verify functionality in Production:
 - Customers can be created successfully.
 - Automated status updates function correctly.
 - Reports and dashboards reflect the uploaded data.

The screenshot shows the Salesforce Customer Support App interface. At the top, there's a navigation bar with a cloud icon, a search bar, and various links like 'Customer Support App', 'Customers', 'Support Tickets', 'Ticket Categories', 'Reports', and 'Dashboards'. Below the navigation is a header titled 'Customers' with a 'Recently Viewed' dropdown and a 'New' button. A message indicates '8 items • Updated a few seconds ago'. The main area is a table with columns for 'Total Life Time Value' (checkboxes) and 'Name'. The data in the table is as follows:

	Total Life Time Value	Name
1	<input type="checkbox"/> 12,500	Anitha
2	<input type="checkbox"/> 25,000	Vikram
3	<input type="checkbox"/> 10,000	Rushi
4	<input type="checkbox"/> 18,000	Saniya
5	<input type="checkbox"/> 10,000	Kapoovri
6	<input type="checkbox"/> 85,000	Riya
7	<input type="checkbox"/> 12,000	Aarav
8	<input type="checkbox"/> 80,000	Harika

Customer Support App

Support Tickets

Support Tickets

Recently Viewed

8 items • Updated a few seconds ago

	Support Ticket Name	
1	Report Download Issue	(dropdown)
2	Slow Application Performance	(dropdown)
3	Incorrect Billing Amount	(dropdown)
4	Email Notifications Not Received	(dropdown)
5	Unable to Update Profile	(dropdown)
6	Application Crash on Launch	(dropdown)
7	Payment Gateway Error	(dropdown)
8	Login Issue – Password Reset	(dropdown)

New Import Change Owner Assign Label

Filter, Sort, Refresh, Copy, Paste, Print, Edit, Delete

Customer Support App

Ticket Categories

Recently Viewed

9 items • Updated a few seconds ago

	Ticket Category Name	
1	General Support Query	(dropdown)
2	Report & Dashboard Issues	(dropdown)
3	Security & Access Issues	(dropdown)
4	Data Sync & Integration Issues	(dropdown)
5	Email & Notification Issues	(dropdown)
6	Account Management Issues	(dropdown)
7	Application Performance Issues	(dropdown)
8	Payment & Billing Issues	(dropdown)
9	Login & Authentication Issues	(dropdown)

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