

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

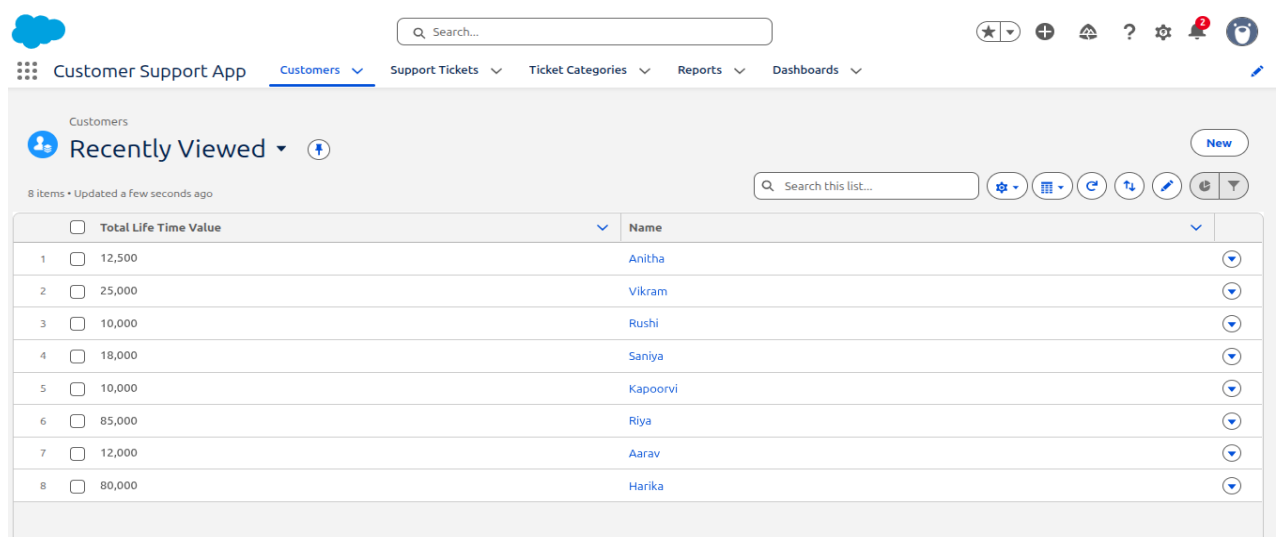
1. Deployment Methodology

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 displays the Salesforce Customer Support App interface. At the top, there's a navigation bar with the Salesforce logo, a search bar, and various utility icons. Below this, the 'Customers' tab is selected, showing a list of recently viewed customers. The list includes columns for 'Total Life Time Value' and 'Name'. The data is as follows:

	Total Life Time Value	Name
1	12,500	Anitha
2	25,000	Vikram
3	10,000	Rushi
4	18,000	Saniya
5	10,000	Kapoorvi
6	85,000	Riya
7	12,000	Aarav
8	80,000	Harika



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Customer Support App

Customers

Support Tickets

Ticket Categories

Reports

Dashboards


Support Tickets

Recently Viewed

NewImportChange OwnerAssign Label

8 items • Updated a few seconds ago

	<input type="checkbox"/> Support Ticket Name	
1	<input type="checkbox"/> Report Download Issue	
2	<input type="checkbox"/> Slow Application Performance	
3	<input type="checkbox"/> Incorrect Billing Amount	
4	<input type="checkbox"/> Email Notifications Not Received	
5	<input type="checkbox"/> Unable to Update Profile	
6	<input type="checkbox"/> Application Crash on Launch	
7	<input type="checkbox"/> Payment Gateway Error	
8	<input type="checkbox"/> Login Issue – Password Reset	



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Customer Support App

Customers

Support Tickets

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Reports

Dashboards

Ticket Categories

Recently Viewed

NewImportChange OwnerAssign Label

9 items • Updated a few seconds ago

	<input type="checkbox"/> Ticket Category Name	
1	<input type="checkbox"/> General Support Query	
2	<input type="checkbox"/> Report & Dashboard Issues	
3	<input type="checkbox"/> Security & Access Issues	
4	<input type="checkbox"/> Data Sync & Integration Issues	
5	<input type="checkbox"/> Email & Notification Issues	
6	<input type="checkbox"/> Account Management Issues	
7	<input type="checkbox"/> Application Performance Issues	
8	<input type="checkbox"/> Payment & Billing Issues	
9	<input type="checkbox"/> Login & Authentication Issues	