

Phase 8: Data Management & Deployment

1. Sample Data (CSV Files)

Campaign Name	Start Date	End Date	Discount	Product	Status
Promotion Campaign 14/01/20 01/02/20 Percenta	14/01/20	01/02/20	62.38	Planned	Product D
Promotion Campaign 12/01/20 31/01/20 Percenta	12/01/20	31/01/20	77.99	Planned	Product D
Promotion Campaign 09/01/20 24/01/20 Flat	09/01/20	24/01/20	93.58	Planned	Product A
Promotion Campaign 17/01/20 02/02/20 Percenta	17/01/20	02/02/20	68.11	Active	Product A
Promotion Campaign 22/01/20 11/02/20 BOGO	22/01/20	11/02/20	32.53	Expired	Product D
Promotion Campaign 12/01/20 28/01/20 Percenta	12/01/20	28/01/20	36.53	Active	Product C
Promotion Campaign 13/01/20 18/01/20 BOGO	13/01/20	18/01/20	25.57	Active	Product A
Promotion Campaign 26/01/20 17/02/20 Percenta	26/01/20	17/02/20	25.48	Active	Product C
Promotion Campaign 19/01/20 02/02/20 Flat	19/01/20	02/02/20	82.02	Planned	Product C
Promotion Campaign 23/01/20 05/02/20 Percenta	23/01/20	05/02/20	34.24	Expired	Product C
Promotion Campaign 12/01/20 22/01/20 Flat	12/01/20	22/01/20	54.14	Expired	Product B
Promotion Campaign 15/01/20 11/02/20 BOGO	15/01/20	11/02/20	61.84	Active	Product B
Promotion Campaign 15/01/20 19/01/20 Percenta	15/01/20	19/01/20	79.87	Expired	Product B
Promotion Campaign 18/01/20 28/01/20 Flat	18/01/20	28/01/20	48.8	Planned	Product C
Promotion Campaign 07/01/20 18/01/20 Percenta	07/01/20	18/01/20	45.51	Active	Product A
Promotion Campaign 28/01/20 13/02/20 Flat	28/01/20	13/02/20	65.13	Planned	Product B
Promotion Campaign 09/01/20 11/01/20 Percenta	09/01/20	11/01/20	61.65	Expired	Product B
Promotion Campaign 14/01/20 21/01/20 Percenta	14/01/20	21/01/20	27.48	Active	Product B
Promotion Campaign 18/01/20 05/02/20 BOGO	18/01/20	05/02/20	23.1	Expired	Product C
Promotion Campaign 25/01/20 28/01/20 Flat	25/01/20	28/01/20	70.47	Expired	Product A
Promotion Campaign 24/01/20 06/02/20 Flat	24/01/20	06/02/20	82.9	Expired	Product C
Promotion Campaign 25/01/20 23/01/20 Percenta	25/01/20	23/01/20	60.39	Active	Product A
Promotion Campaign 07/01/20 25/01/20 Flat	07/01/20	25/01/20	87.55	Active	Product A
Promotion Campaign 18/01/20 30/01/20 Percenta	18/01/20	30/01/20	46.17	Expired	Product D
Promotion Campaign 18/01/20 30/01/20 Percenta	18/01/20	30/01/20	27.39	Expired	Product C
Promotion Campaign 18/01/20 23/01/20 BOGO	18/01/20	23/01/20	98.15	Planned	Product C
Promotion Campaign 18/01/20 21/02/20 Percenta	18/01/20	21/02/20	60.59	Active	Product C
Promotion Campaign 24/01/20 02/02/20 BOGO	24/01/20	02/02/20	99.72	Active	Product A
Promotion Campaign 05/01/20 10/01/20 Percenta	05/01/20	10/01/20	23.2	Active	Product A
Promotion Campaign 22/01/20 07/02/20 Percenta	22/01/20	07/02/20	25.61	Active	Product C
Promotion Campaign 29/01/20 15/01/20 Flat	29/01/20	15/01/20	52.55	Expired	Product B
Promotion Campaign 18/01/20 27/01/20 Percenta	18/01/20	27/01/20	62.57	Planned	Product B
Promotion Campaign 05/01/20 20/01/20 Percenta	05/01/20	20/01/20	28.18	Active	Product D
Promotion Campaign 20/01/20 27/01/20 Percenta	20/01/20	27/01/20	54.45	Active	Product A
Promotion Campaign 08/01/20 22/01/20 BOGO	08/01/20	22/01/20	51.55	Expired	Product A
Promotion Campaign 01/01/20 18/01/20 Flat	01/01/20	18/01/20	35.18	Expired	Product C
Promotion Campaign 09/01/20 11/01/20 BOGO	09/01/20	11/01/20	35.29	Active	Product A
Promotion Campaign 08/01/20 18/01/20 Flat	08/01/20	18/01/20	67.8	Expired	Product A
Promotion Campaign 04/01/20 21/01/20 BOGO	04/01/20	21/01/20	23.01	Planned	Product B
Promotion Campaign 08/01/20 21/01/20 Percenta	08/01/20	21/01/20	92.3	Expired	Product C
Promotion Campaign 17/01/20 01/02/20 Percenta	17/01/20	01/02/20	79.84	Expired	Product B
Promotion Campaign 18/01/20 27/01/20 BOGO	18/01/20	27/01/20	13.58	Expired	Product B
Promotion Campaign 05/01/20 14/01/20 Percenta	05/01/20	14/01/20	45.18	Expired	Product B

2. Data Import Wizard • Setup: Setup → Data → Data Import Wizard → Launch Wizard

- **Accounts** → Choose Accounts → Upload `Accounts.csv` → Map fields → Start Import.
- **Promotion Campaigns** → Custom Object → `Promotion_Campaign__c` → Upload `PromotionCampaigin.csv` → `Campaign_Name__c` → `Start_Date_c` → `Discount_value_c` → Start Import.
- **Promotion Responses** → Custom Object → `Promotion_Response_c` → Upload `PromotionResponses.csv` → `Response_Type__c` → `Customer_c` → `Promotion_campaigin_c` → Start Import.

Review & Start Import

Review your import information and click Start Import.

Your selections:

- Promotion Campaigns ✓
- Add new records ✓
- PromotionCampaigin1.csv ✓

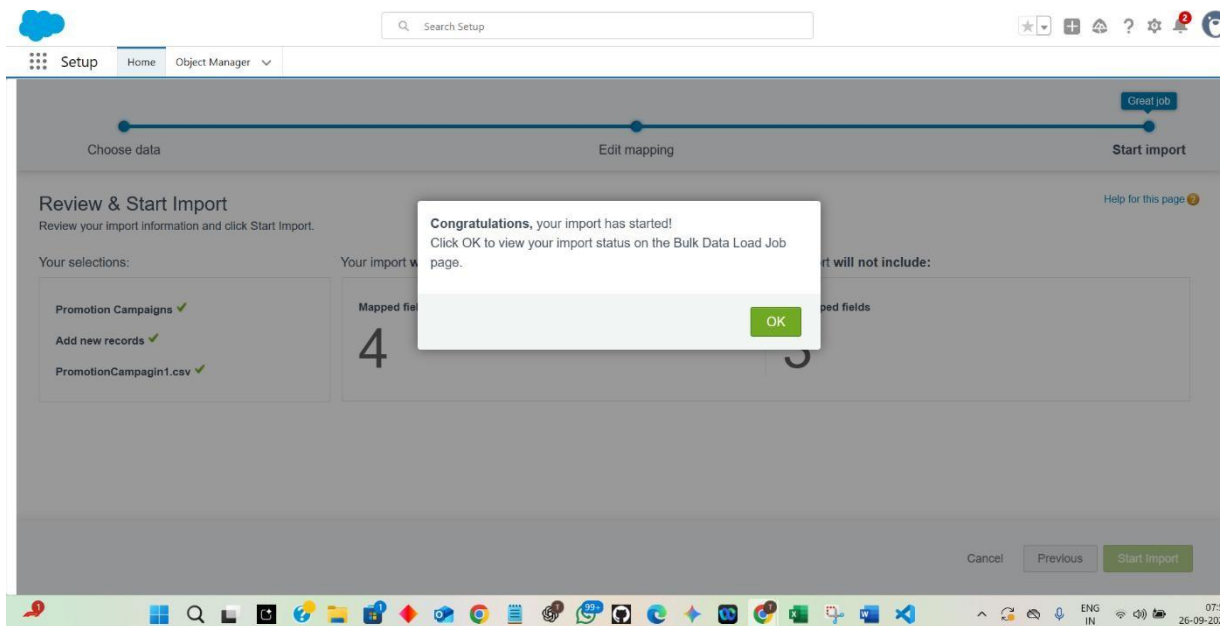
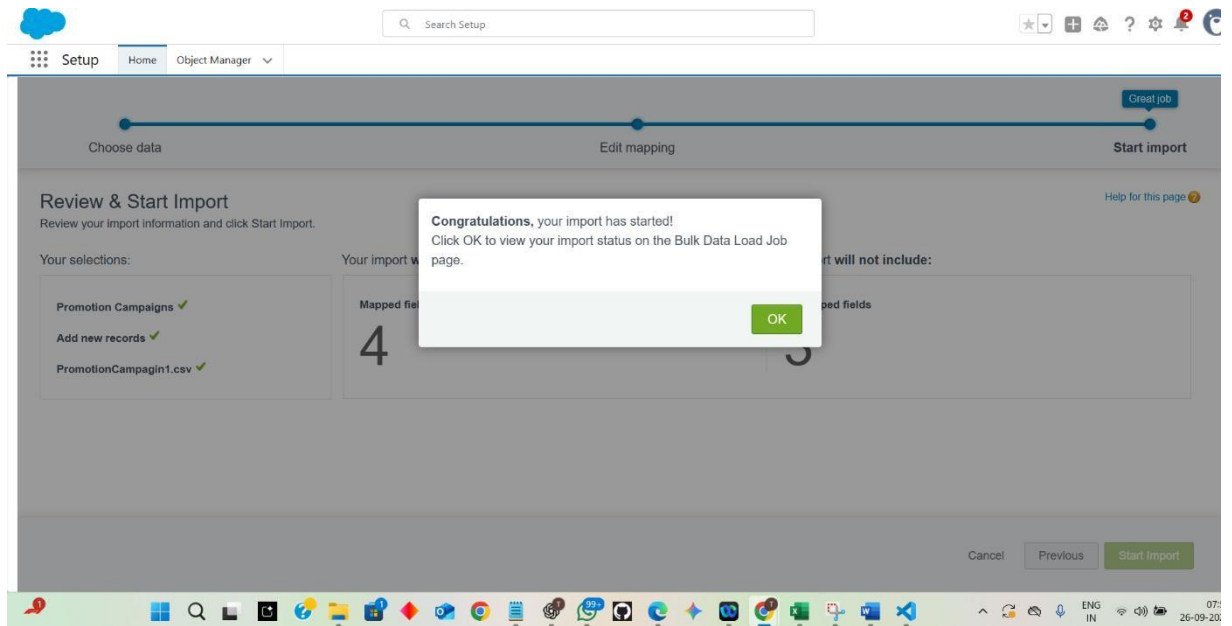
Your import will not include:

Mapped fields: 4

Unmapped fields: 3

OK

Start Import



3. Duplicate Rules

- **Setup: Setup → Duplicate Management → Matching Rules**

- Promotion matching rule
- Booking duplicate matching rule

The image displays two screenshots of the SAP Setup - Matching Rules interface. The top screenshot shows the 'Promotion matching rule' configuration, and the bottom screenshot shows the 'Booking_Duplicate_Match' configuration.

Top Screenshot: Promotion matching rule

Matching Rule
Promotion matching rule

Matching Rule Detail

Object	Promotion Campaign
Rule Name	Promotion matching rule
Unique Name	Promotion_matching_rule
Description	
Matching Criteria	Promotion Campaign: Name EXACT MatchBlank = FALSE
Status	Inactive
Created By	Tamvi Markad, 25/09/2025, 1:31 pm
Modified By	Tamvi Markad, 25/09/2025, 1:31 pm

Bottom Screenshot: Booking_Duplicate_Match

Matching Rule
Booking_Duplicate_Match

Matching Rule Detail

Object	Discount Booking
Rule Name	Booking_Duplicate_Match
Unique Name	Booking_Duplicate_Match
Description	Prevent duplicate bookings based on Customer and Redemption Date

4. Data Export

- Setup: Setup → Data → Data Export

The screenshot shows the Salesforce Setup interface for the Data Export feature. The left sidebar contains a search bar with 'data' and a list of navigation items under 'Data', with 'Data Export' highlighted. The main content area is titled 'Data Export' and 'Monthly Export Service'. It includes a description of the service, a status message about the next scheduled export, and buttons for 'Export Now' and 'Schedule Export'. Below this is a table showing export details.

Your export has been queued. You will receive an email notification when it is completed.	
Scheduled By	Tamvi Markad
Schedule Date	26/09/2025
Export File Encoding	ISO-8859-1 (General US & Western European, ISO-LATIN-1)

5. Unmanaged Packages

The screenshot shows the Salesforce Package Manager interface. The left sidebar has a search bar with 'package' and navigation items under 'Apps', with 'Package Manager' highlighted. The main content area is titled 'Package Manager' and 'Smart_Retail_Promotions'. It includes a 'Package Detail' section with fields for Package Name, Language, Notify on Apex Error, Created By, and Description. Below this is a 'Components' section with a 'Versions' tab and a message 'No package components defined'.

Package Detail	
Package Name	Smart_Retail_Promotions
Language	English
Notify on Apex Error	Tamvi Markad
Created By	Tamvi Markad 26/09/2025, 7:30 am
Description	Package for Smart Retail Promotions CRM – Includes Promotion__c, Promotion Campaign, Discount__c, Workflow Rules, Email Alerts.

6. Vscode & SFDX

The screenshot shows the VS Code interface with the Explorer sidebar on the left displaying the project structure. The main editor shows the `package.xml` file with the following content:

```
1 <?xml version="1.0" encoding="UTF-8"?>
2 <Package xmlns="http://soap.sforce.com/2006/04/metadata">
3   <types>
4     <members>dashboardChart</members>
5     <name>LightningComponentBundle</name>
6   </types>
7   <version>56.0</version>
8 </Package>
9
```

The bottom panel shows the TERMINAL output with the following status:

```
Status: Succeeded
Deploy ID: 0AfId00000QK4b5AH
Target Org: markadtarvii@gmail.com
Elapsed Time: 2.35s
```

Below the terminal output is a table titled "Deployed Source":

State	Name	Type	Path
Created	dashboardChart	LightningComponentBundle	force-app/main/default