

Phase 8: Data Management & Deployment

Objective

To ensure smooth handling of **case, account, and contact data** and deliver a **fully functional, tested, and secure Salesforce Case Management System** into the target environment.

Data Management

1. Sample Data Creation

- Created 15 Cases, 15 Accounts, and 15 Contacts for testing purposes.
- Test data covered Technical Issue vs Customer Inquiry, various priorities, and agent assignments.

2. Data Quality Rules

- Enforced through **Validation Rules & Field-Level Security (FLS)**:
 - Email must have a valid format (@)
 - Phone number must be exactly **10 digits**
 - Priority must be selected for all new Cases
 - Status cannot be set to Resolved unless required fields are filled

3. Test Cases Executed

- **Case Creation** → Automated acknowledgment email sent
- **Case Status Update** → “In Progress” and “Escalated” emails triggered correctly
- **Validation Rules** → Blocked invalid entries (e.g., missing email, phone, priority)
- **Escalation Check** → Overdue high-priority cases flagged
- **Bulk Notifications** → Batch email sent for multiple cases

Deployment Process

Step 1: Development in Salesforce Developer Org

- Created customized Case, Account, Contact objects, fields, and page layouts
- Configured profiles and permissions for Admin, Support Manager, and Support Agent
- Built Flows, Validation Rules, Email Templates, Lightning Pages, and Dashboards

Step 2: Component-Level Testing

- Verified objects, layouts, and related lists

- Tested record-triggered and scheduled flows
- Checked email templates with dynamic content

Step 3: Data Validation with Sample Records

- Created sample cases, accounts, and contacts to simulate real-world operations
- Validated dashboards, charts, and reports with test data

Step 4: Finalization

- Activated Flows and Validation Rules
- Enabled Email Alerts
- Set Tab Visibility & Profile Access according to role

Step 5: Documentation & Demo Preparation

- Prepared system architecture and project documentation for review

Deployment Notes

- Deployment done **directly in Developer Org** (no change sets used)
- Manual testing performed with sample data
- All flows, validation rules, and email alerts verified and working as expected
- Documentation finalized for presentation and future reference

Tabular Summary

Deployment Step	Action Taken
Org Setup	Developer Org created; objects, fields, and profiles configured
Data Preparation	Sample records (Cases, Accounts, Contacts) created for testing
Validation & Rules	Applied business rules (email, phone, priority, status)
Process Automation	Flows (acknowledgment, status updates, escalations) activated
Testing	Manual test cases executed for all flows, rules, and dashboards
Deployment Method	Direct deployment in Developer Org (no change sets used)
Final Documentation	Architecture, flows, profiles, and test results documented for demo

Benefits

- Ensures clean and validated data in Salesforce
- Provides a tested and stable system (v1.0) ready for presentation
- Role-based access ensures secure deployment
- Deployment documentation facilitates future scaling to sandbox or production