Phase 8 : Data Management and Deployment
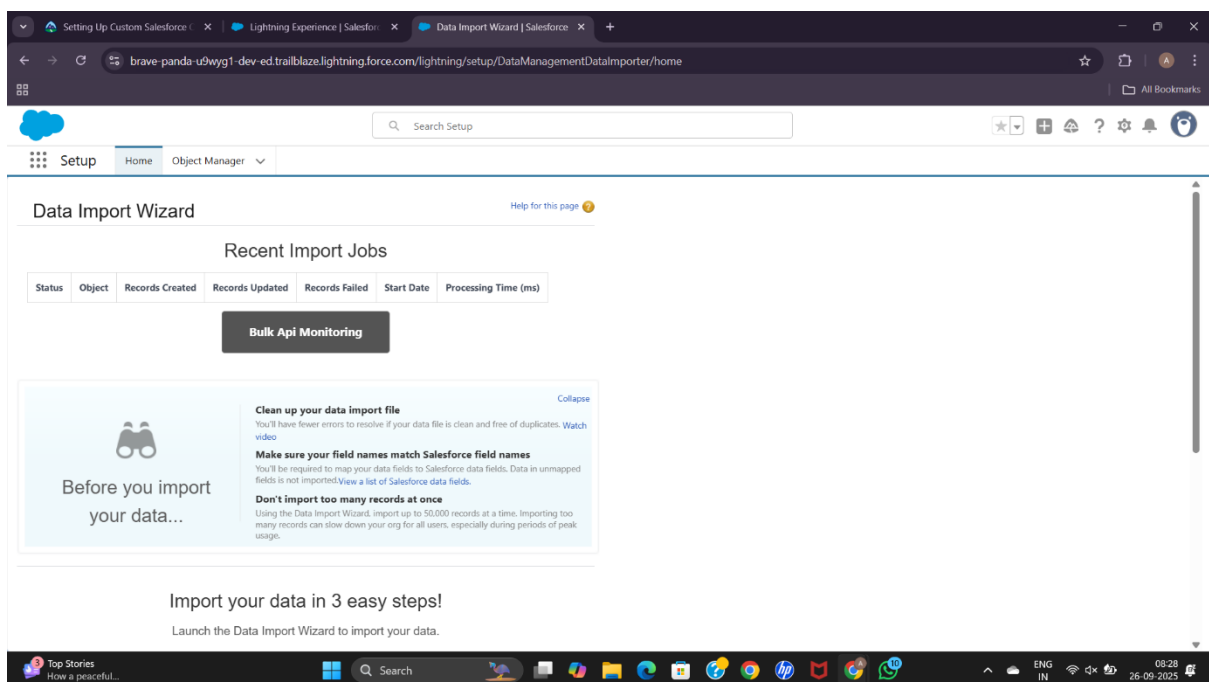
Problem Statement:

Banks and financial institutions handle sensitive customer, loan, and transaction data. In a Salesforce-based CRM, this data must be accurate, consistent, secure, and available across multiple environments (Sandbox, UAT, Production).

. **Backup & Recovery**: Banks require secure and frequent backups for regulatory compliance.

. **Bulk Data Operations**: Uploading customer onboarding data, migrating loan applications, or exporting financial transactions needs reliable tools.

1.Data Import Wizard:

The Data Import Wizard is a Salesforce tool that helps you easily import data (up to 50,000 records) into standard objects (Leads, Accounts, Contacts, etc.) and custom objects (like Loan__c, Customer__c, Bank_Account__c).
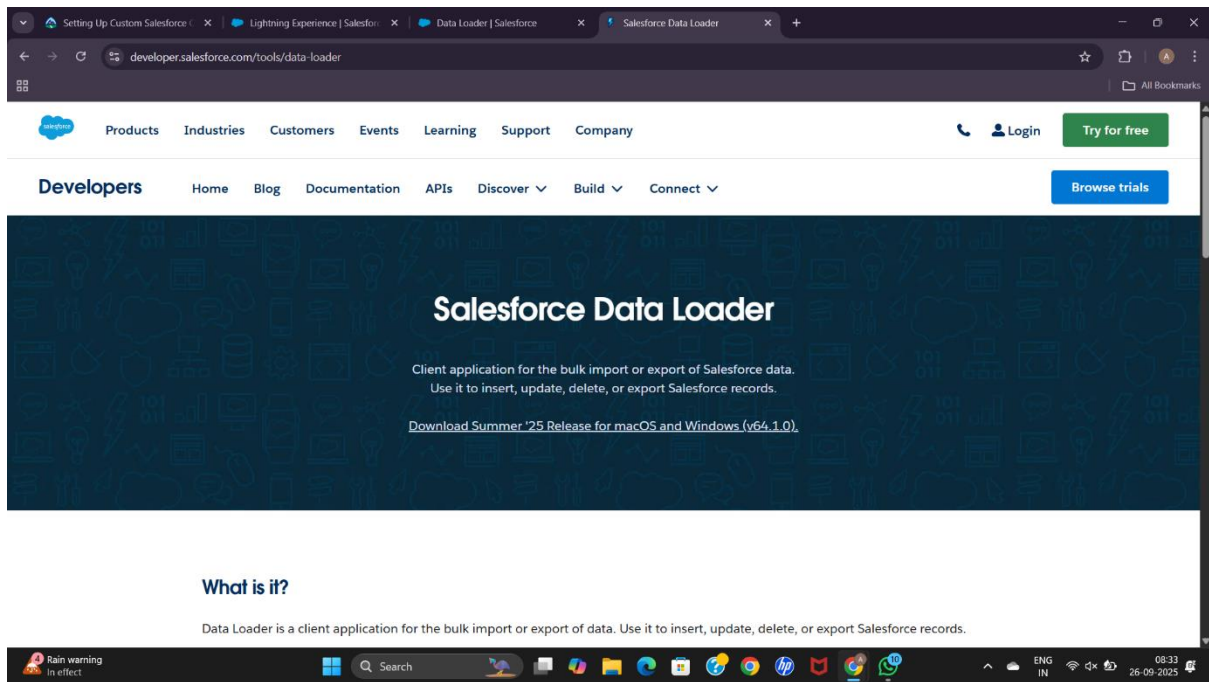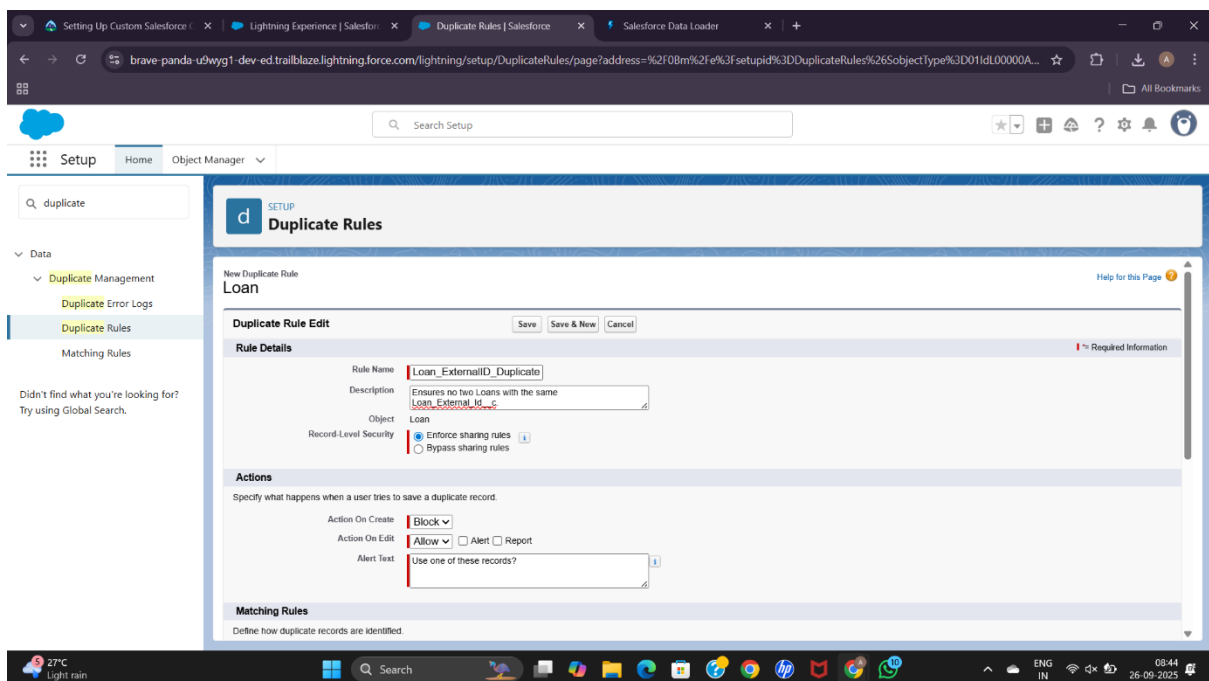
2.Data Loader:

Client application for bulk data operations.

- Check **Error file** for failed rows.

- Export data for **compliance & audits**.

3.Duplicate Rules:

. **Matching Rule** → defines how duplicates are detected (e.g., Email, PAN__c, Phone).
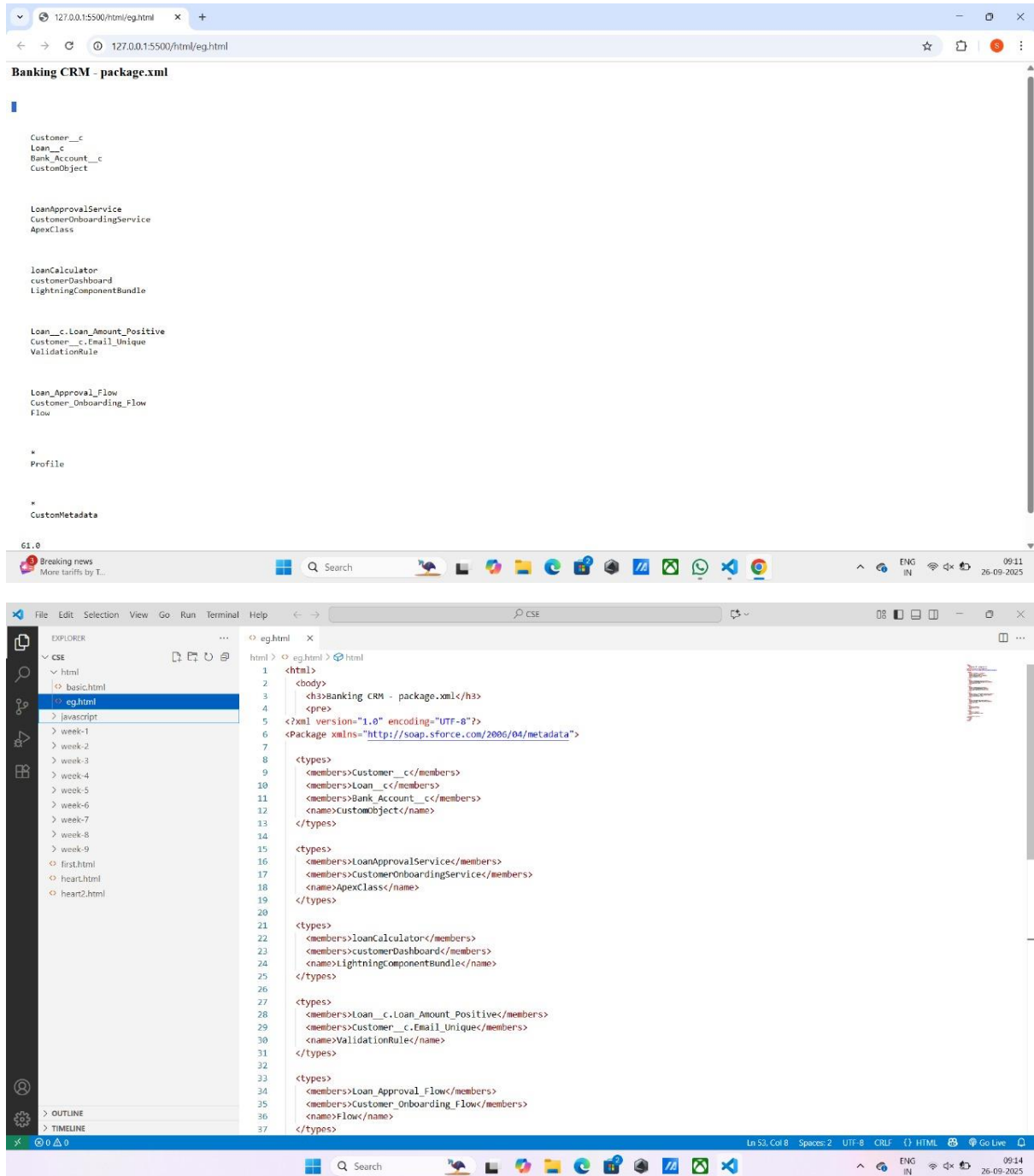
. **Duplicate Rule** → action taken when a match is found.

4.Change Sets:

. Deploy **Loan__c object** with fields (Loan_Amount__c, Interest_Rate__c).

. Deploy **Apex Trigger** for validating loan applications.

5.VS Code & SFDX:

. Recommended IDE for Salesforce development.

. Supports Apex, LWC, Aura, SOQL, Metadata.

. Uses Salesforce Extensions Pack (Apex, LWC, SFDX).

6.ANT Migration Tool:

. Deploys/retrieves metadata using package.xml.

. Used for scripted deployments (not GUI-based).

. Good for **CI/CD pipelines**.