

Phase 8 : Data Management and Deployment

Problem Statement:

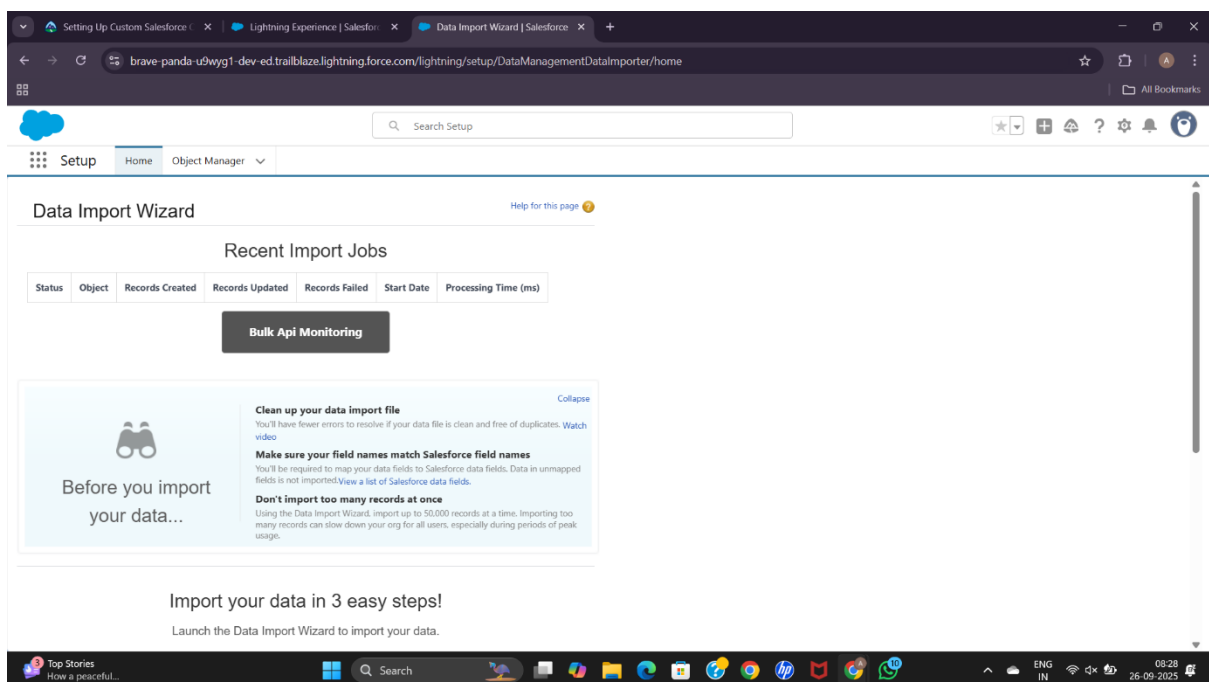
Banks and financial institutions handle sensitive customer, loan, and transaction data. In a Salesforce-based CRM, this data must be accurate, consistent, secure, and available across multiple environments (Sandbox, UAT, Production).

- . **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).

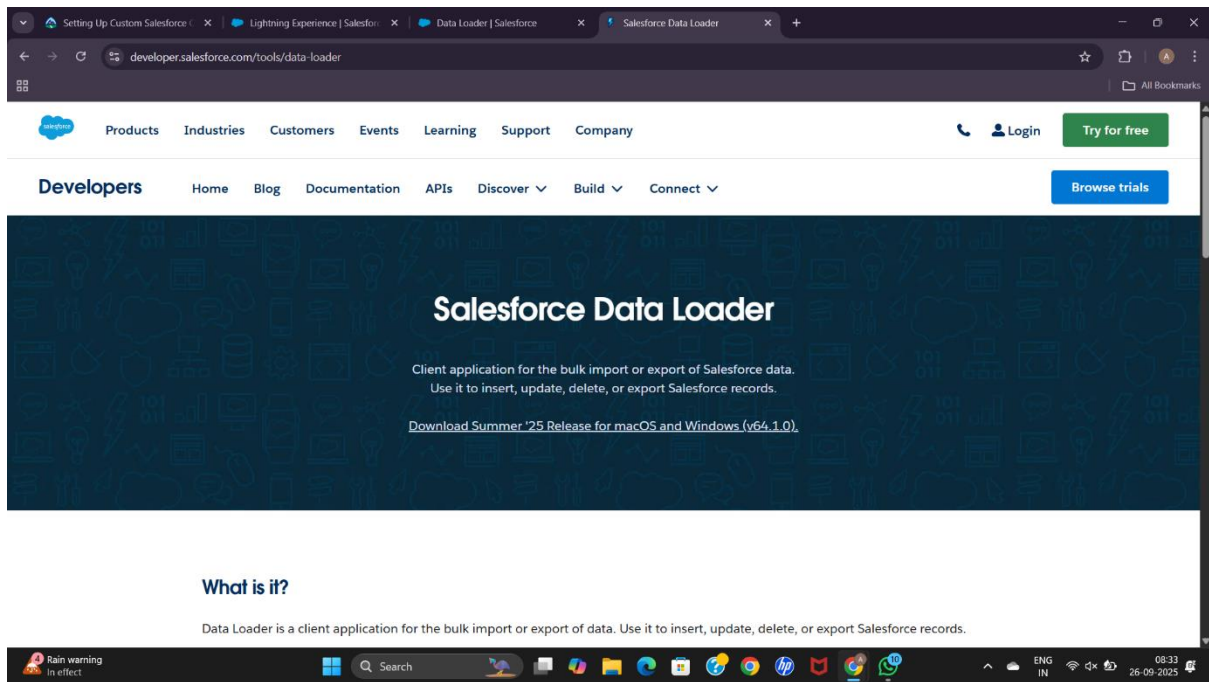


Bulk Data Load Job Detail				Status	Closed
Job ID	750dL00000Xse8n	Job Type	Operation	Total Processing Time (ms)	109
Submitted By	Aakumathi Keerthi	Bulk V1	Upsert	API Active Processing Time (ms)	38
Start Time	26/09/2025, 8:32 am IST	Queued Batches	0	Apex Processing Time (ms)	0
End Time	26/09/2025, 8:32 am IST	In Progress Batches	0		
Time to Complete (hh:mm:ss)	00:01	Completed Batches	1		
Object	Loan	Failed Batches	0		
External ID Field	Name	Progress	100%		
Content Type	CSV	Records Processed	3		
Concurrency Mode	Parallel	Records Failed	3		
API Version	64.0	Retries	0		

2.Data Loader:

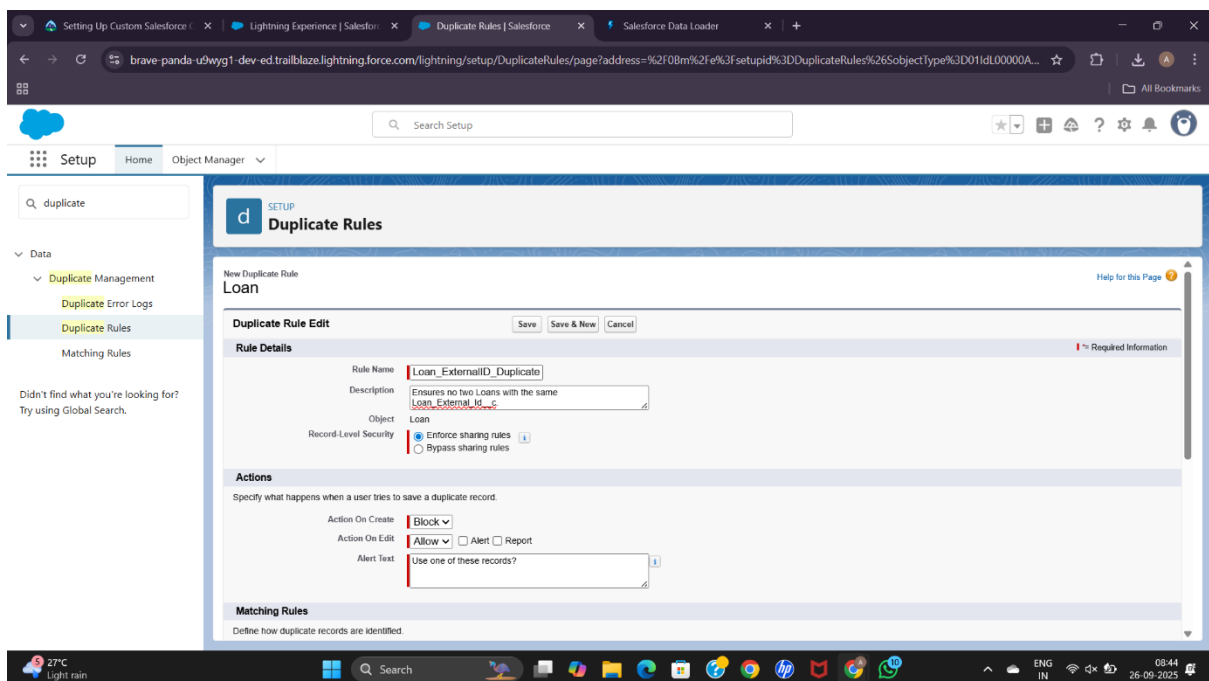
Client application for bulk data operations.

- 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.

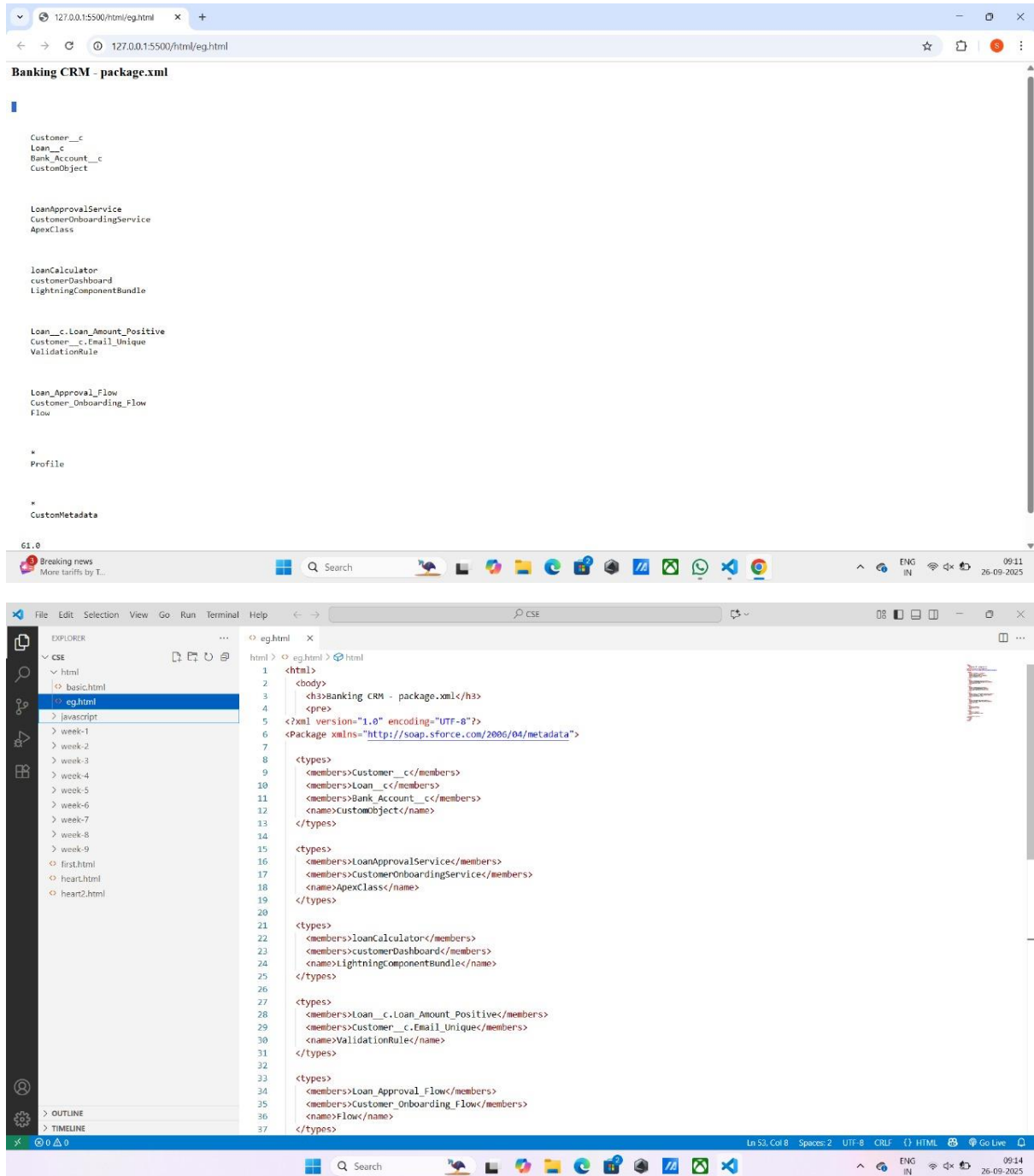


4. Change Sets:

- . 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**.