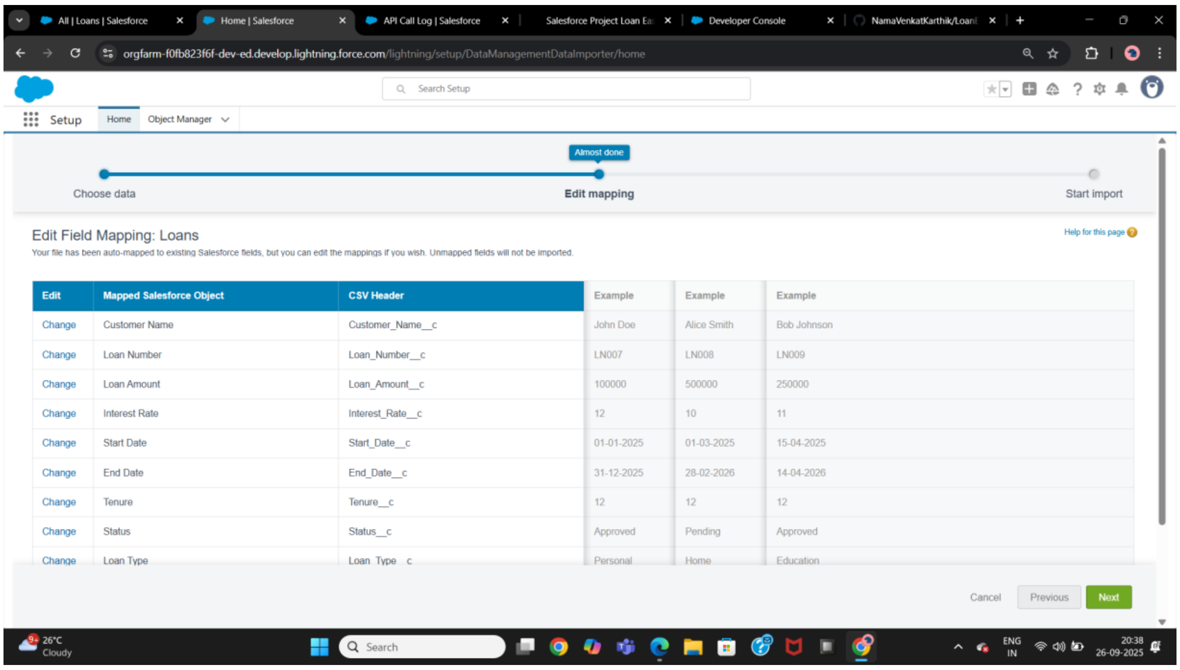
LoanEase: Salesforce Loan Management CRM

Phase 8: Data Management & Deployment

Data Import Wizard

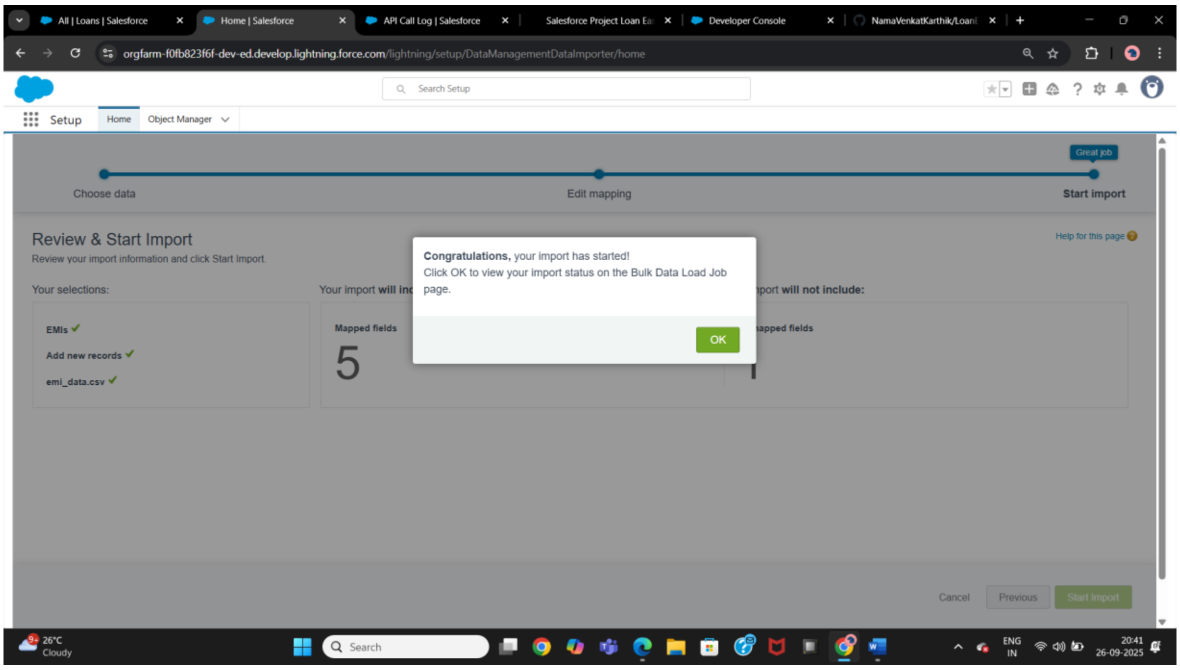
- Used **Data Loader** to insert records into Salesforce for **Loan**, **EMI**, and **Payment** custom objects.
- Successfully imported **Loan data** with correct field mappings, Owner IDs, and Record Types.
- Mapped restricted picklist fields like **Loan Type** and **Status** correctly to avoid errors.
- For **EMI** and **Payment** objects, ensured relationships with Loan records using **Lookup fields**.
- Verified import success using **Success/Failure CSV files** generated by Data Loader.



Edit Field Mapping: Loans

Your file has been auto-mapped to existing Salesforce fields, but you can edit the mappings if you wish. Unmapped fields will not be imported.

Edit	Mapped Salesforce Object	CSV Header	Example	Example	Example
Change	Customer Name	Customer_Name__c	John Doe	Alice Smith	Bob Johnson
Change	Loan Number	Loan_Number__c	LN007	LN008	LN009
Change	Loan Amount	Loan_Amount__c	100000	500000	250000
Change	Interest Rate	Interest_Rate__c	12	10	11
Change	Start Date	Start_Date__c	01-01-2025	01-03-2025	15-04-2025
Change	End Date	End_Date__c	31-12-2025	28-02-2026	14-04-2026
Change	Tenure	Tenure__c	12	12	12
Change	Status	Status__c	Approved	Pending	Approved
Change	Loan Type	Loan_Type__c	Personal	Home	Education



Review & Start Import

Review your import information and click Start Import.

Your selections:

EMIs ✓

Add new records ✓

emi_data.csv ✓

Your import will inc

Mapped fields

5

port will not include:

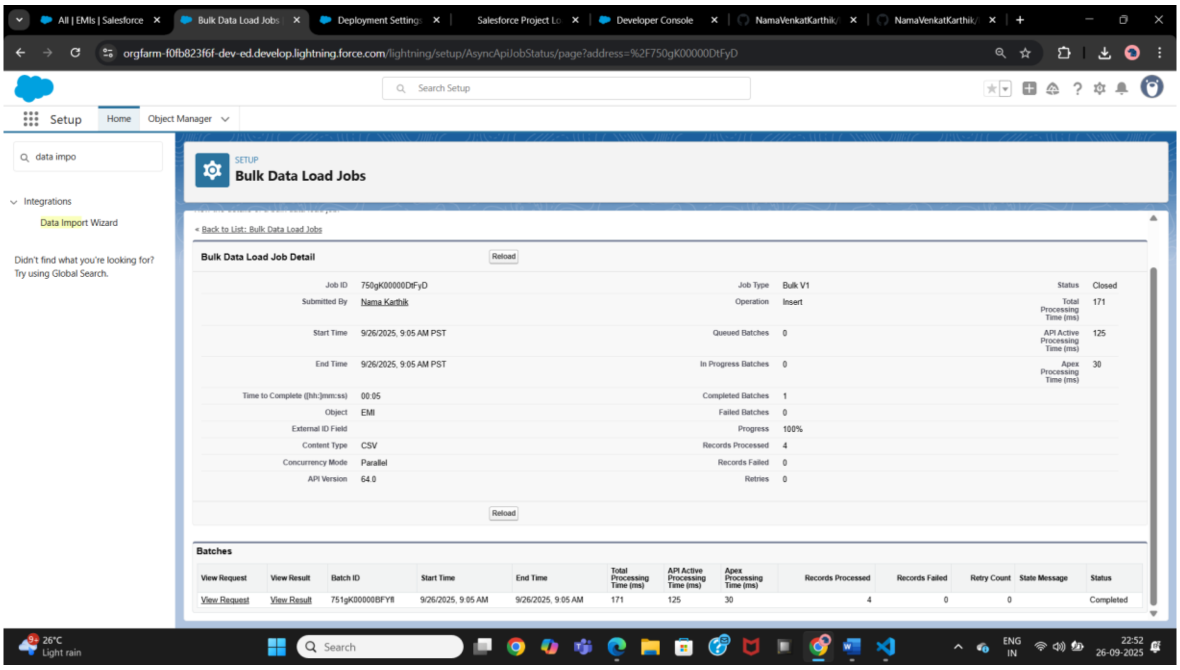
apped fields

1

Congratulations, your import has started!
Click OK to view your import status on the Bulk Data Load Job page.

Data Loader

- Data Loader was installed and configured to connect with Salesforce org using credentials.
- Successfully logged in and selected operation type: Insert, Update, Upsert, Export, or Delete.
- Performed Insert operations for Loan, EMI, and Payment objects.
  Mapped CSV columns to Salesforce fields carefully, including:
  - Lookup/Relationship fields (e.g., Loan → EMI, Loan → Payment)
  - Picklist fields (e.g., Loan Type, Status)
  - Date fields formatted as YYYY-MM-DD to prevent deserialization errors..
- Verified Success and Error CSV files after each operation to confirm records were imported correctly



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Setup
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SETUP
Bulk Data Load Jobs

« Back to List: Bulk Data Load Jobs

Bulk Data Load Job Detail

Job ID	750gK00000DtFyD	Job Type	Bulk V1	Status	Closed
Submitted By	Nama Karthik	Operation	Insert	Total Processing Time (ms)	171
Start Time	9/26/2025, 9:05 AM PST	Queued Batches	0	API Active Processing Time (ms)	125
End Time	9/26/2025, 9:05 AM PST	In Progress Batches	0	Apex Processing Time (ms)	30
Time to Complete ([hh:]mm:ss)	00:05	Completed Batches	1		
Object	EMI	Failed Batches	0		
External ID Field		Progress	100%		
Content Type	CSV	Records Processed	4		
Concurrency Mode	Parallel	Records Failed	0		
API Version	64.0	Retries	0		

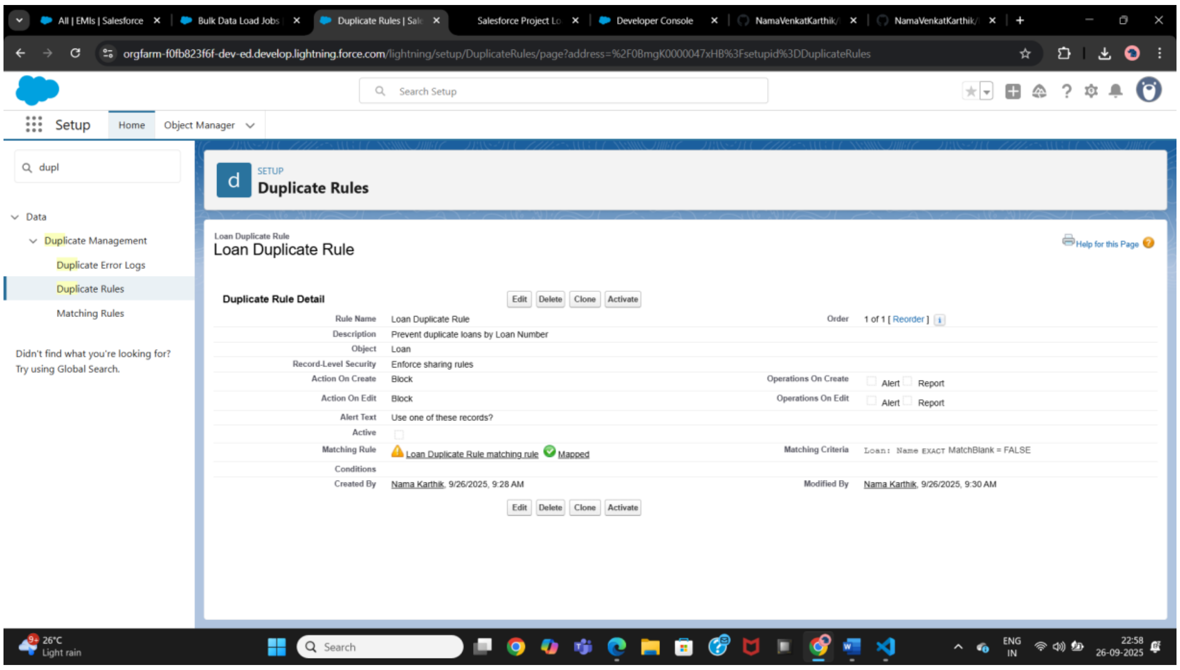
Batches

View Request	View Result	Batch ID	Start Time	End Time	Total Processing Time (ms)	API Active Processing Time (ms)	Apex Processing Time (ms)	Records Processed	Records Failed	Retry Count	State Message	Status
View Request	View Result	751gK00000BFYfI	9/26/2025, 9:05 AM	9/26/2025, 9:05 AM	171	125	30	4	0	0		Completed

.

Duplicates Rules

- **Duplicate Rules** were configured to maintain **data integrity** in Salesforce.
- Rules were applied to the **Loan, EMI, and Payment** objects to prevent duplicate records.
- **Matching Criteria** set using key fields such as:
- Loan: Loan Number
- EMI: EMI Name / EMI Number
- Payment: Payment Reference / Payment Date
- Configured **Actions** for duplicates:
- **Alert Users** when trying to create duplicate records.
- **Block Creation** of duplicates if necessary.


SETUP
Duplicate Rules

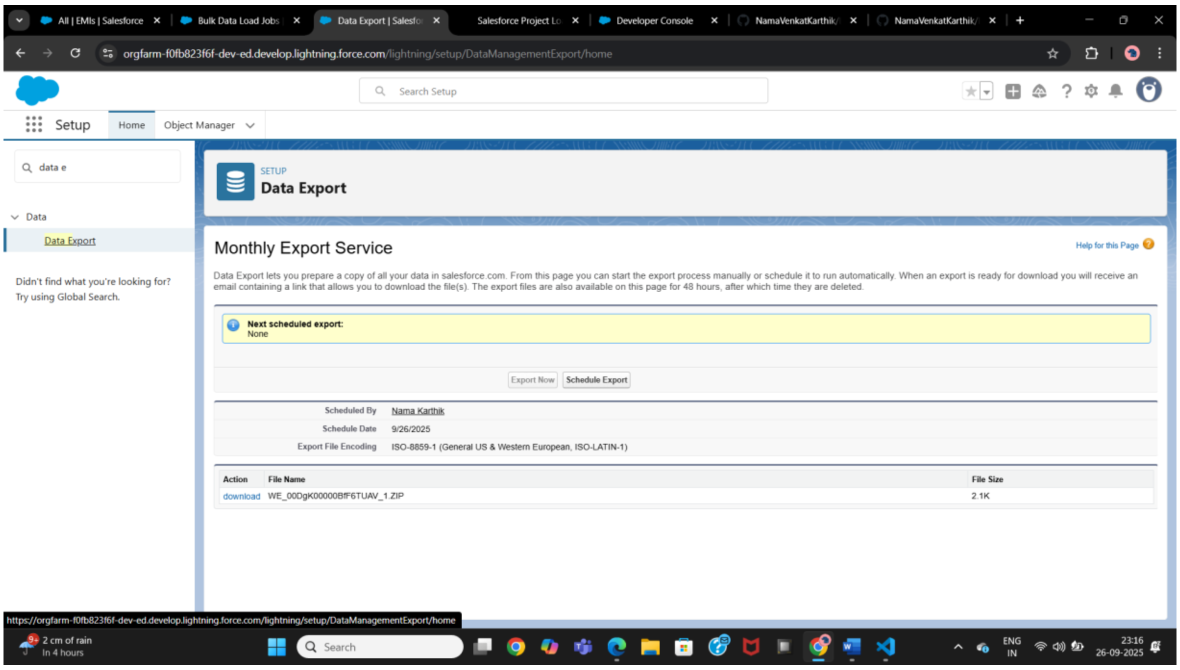
Loan Duplicate Rule
Loan Duplicate Rule

Duplicate Rule Detail

Rule Name	Loan Duplicate Rule	Order	1 of 1 [Reorder]
Description	Prevent duplicate loans by Loan Number		
Object	Loan		
Record-Level Security	Enforce sharing rules		
Action On Create	Block	Operations On Create	☐ Alert ☐ Report
Action On Edit	Block	Operations On Edit	☐ Alert ☐ Report
Alert Text	Use one of these records?		
Active	☐		
Matching Rule	Loan Duplicate Rule matching rule ✓ Mapped	Matching Criteria	Loan: Name EXACT MatchBlank = FALSE
Conditions			
Created By	Nama Karthik, 9/26/2025, 9:28 AM	Modified By	Nama Karthik, 9/26/2025, 9:30 AM

Data Export & Backup

- Data Export was performed for Loan, EMI, and Payment custom objects to maintain a backup of Salesforce data.
- Steps followed:
  - Navigated to Setup → Data → Data Export.
  - Selected Loan, EMI, and Payment objects for export.
  - Scheduled manual export to immediately receive the data.
  - Exported data was sent to registered email as a ZIP file containing CSVs of each object.
- Exported data included all fields, ensuring a full backup of key information.
- This process helps in data recovery and migration if required.


SETUP
Data Export

Monthly Export Service

Data Export lets you prepare a copy of all your data in salesforce.com. From this page you can start the export process manually or schedule it to run automatically. When an export is ready for download you will receive an email containing a link that allows you to download the file(s). The export files are also available on this page for 48 hours, after which time they are deleted.

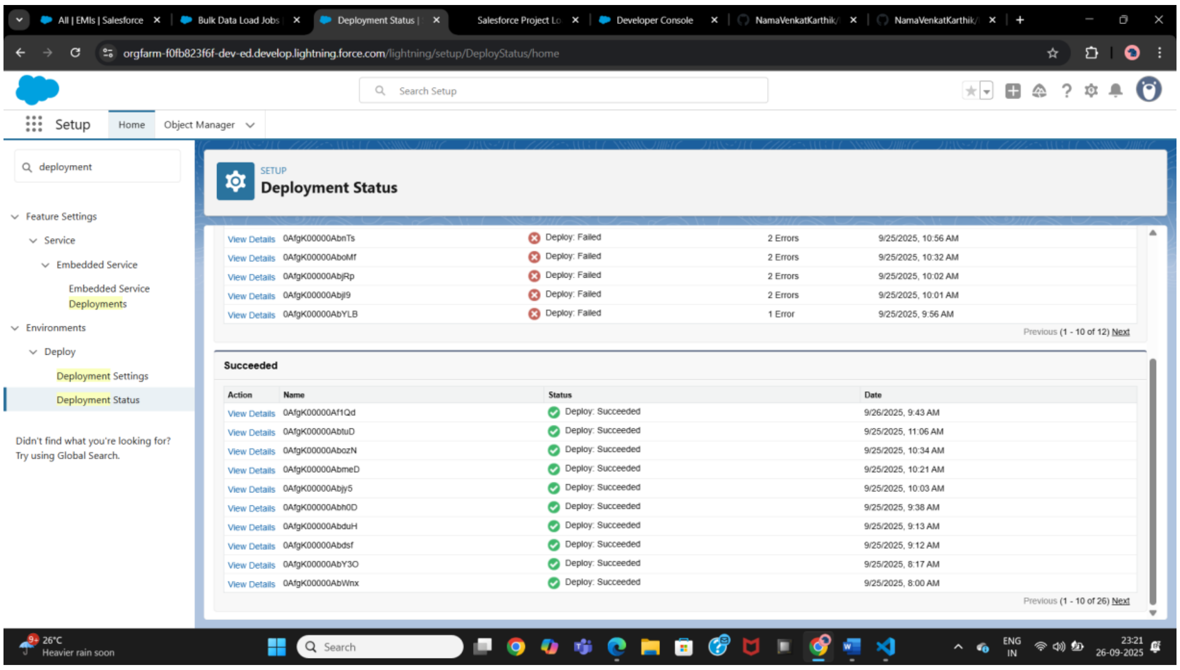
Next scheduled export:
None

Scheduled By	Nama Karthik
Schedule Date	9/26/2025
Export File Encoding	ISO-8859-1 (General US & Western European, ISO-LATIN-1)

Action	File Name	File Size
download	WE_00DgK00000BfF6TUAV_1.ZIP	2.1K

Change sets

- **Change Sets** were used to deploy metadata (like Apex classes, LWC components, and Permission Sets) from **sandbox to target org**.
- Steps followed:
    - Navigated to **Setup** → **Deployment** → **Outbound Change Sets**.
    - Created a **New Change Set** for the project.
    - Added components such as:
        - **Apex Classes**: LoanController, EMIHandler, LoanEaseAPIService, etc.
        - **LWC Components**: loanCard, emiDashboard, loanList, loanPublisher, etc.
        - **Permission Sets**: LoanEase_API_Permissions.
    - Uploaded the **Change Set** to the target org.
    - In the target org, **deployed** the Change Set successfully.



SETUP
Deployment Status

View Details	0AfgK00000AbnTs	Deploy: Failed	2 Errors	9/25/2025, 10:56 AM
View Details	0AfgK00000AboMf	Deploy: Failed	2 Errors	9/25/2025, 10:32 AM
View Details	0AfgK00000AbjRp	Deploy: Failed	2 Errors	9/25/2025, 10:02 AM
View Details	0AfgK00000Abjl9	Deploy: Failed	2 Errors	9/25/2025, 10:01 AM
View Details	0AfgK00000AbYLB	Deploy: Failed	1 Error	9/25/2025, 9:56 AM

Previous (1 - 10 of 12) Next

Succeeded

Action	Name	Status	Date
View Details	0AfgK00000Af1Qd	Deploy: Succeeded	9/26/2025, 9:43 AM
View Details	0AfgK00000AbtuD	Deploy: Succeeded	9/25/2025, 11:06 AM
View Details	0AfgK00000AbozN	Deploy: Succeeded	9/25/2025, 10:34 AM
View Details	0AfgK00000AbmeD	Deploy: Succeeded	9/25/2025, 10:21 AM
View Details	0AfgK00000Abjy5	Deploy: Succeeded	9/25/2025, 10:03 AM
View Details	0AfgK00000Abh0D	Deploy: Succeeded	9/25/2025, 9:38 AM
View Details	0AfgK00000AbduH	Deploy: Succeeded	9/25/2025, 9:13 AM
View Details	0AfgK00000Abdsf	Deploy: Succeeded	9/25/2025, 9:12 AM
View Details	0AfgK00000AbY3O	Deploy: Succeeded	9/25/2025, 8:17 AM
View Details	0AfgK00000AbWnx	Deploy: Succeeded	9/25/2025, 8:00 AM

Previous (1 - 10 of 26) Next

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Setup
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Deployment Settings
Deployment Status
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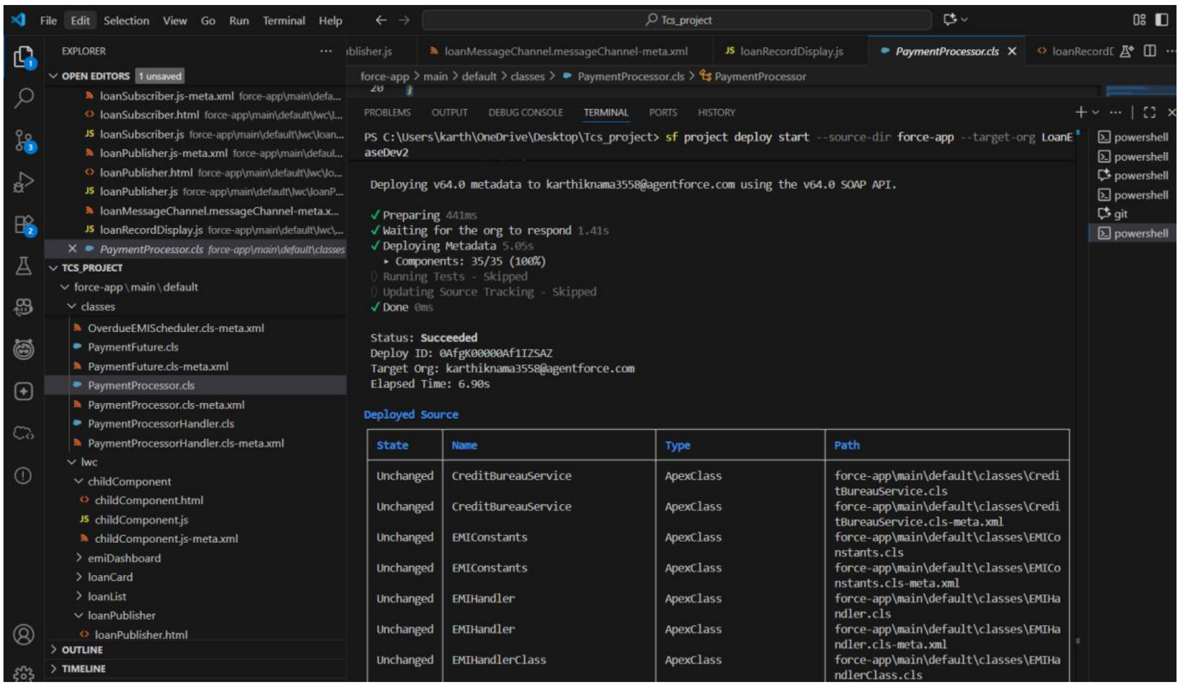
26°C Heavier rain soon
23:21 26-09-2025

Unmanaged vs Managed Packages

- Reviewed all Apex classes, LWC components, and custom objects in the org.
- Prepared components for packaging to allow deployment to another Salesforce sandbox.
- Verified component dependencies to ensure all required items are included in the package.
- Identified that **unmanaged packages** are suitable for internal sharing and testing.

VS Code & SFDX

- Opened the project in **VS Code** with Salesforce Extension Pack installed.
- Connected VS Code to the sandbox org using **SFDX CLI** (sf login org).
- Refreshed SObject definitions using sf sobject definitions refresh.
- Deployed all metadata (Apex classes, LWC components, permission sets, etc.) from local project to the sandbox using:
- sf project deploy start --source-dir force-app --target-org LoanEaseDev2
- Verified deployment status as **Succeeded** in the terminal output.
- Confirmed all components (Loan, EMI, Payment objects, Apex classes, LWC) are correctly deployed in the target org.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loanPublisher.js force-app\main\default\lwc\loanP...
loanMessageChannel.messageChannel-meta.x...
loanRecordDisplay.js force-app\main\default\lwc\...
PaymentProcessor.cls force-app\main\default\classes
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classes
OverdueEMIScheduler.cls-meta.xml
PaymentFuture.cls
PaymentFuture.cls-meta.xml
PaymentProcessor.cls
PaymentProcessor.cls-meta.xml
PaymentProcessorHandler.cls
PaymentProcessorHandler.cls-meta.xml
lwc
childComponent
childComponent.html
childComponent.js
childComponent.js-meta.xml
emiDashboard
loanCard
loanList
loanPublisher
loanPublisher.html
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loanMessageChannel.messageChannel-meta.xml
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force-app > main > default > classes > PaymentProcessor.cls > PaymentProcessor
PROBLEMS OUTPUT DEBUG CONSOLE TERMINAL PORTS HISTORY
powershell
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powershell
powershell
git
powershell

```
PS C:\Users\karth\OneDrive\Desktop\Tcs_project> sf project deploy start --source-dir force-app --target-org LoanE
aseDev2

 Deploying v64.0 metadata to karthiknama3558@agentforce.com using the v64.0 SOAP API.

 ✓ Preparing 441ms
 ✓ Waiting for the org to respond 1.41s
 ✓ Deploying Metadata 5.05s
   ▸ Components: 35/35 (100%)
 ◯ Running Tests - Skipped
 ◯ Updating Source Tracking - Skipped
 ✓ Done 0ms

 Status: Succeeded
 Deploy ID: 0AfgK00000Af1IZSAZ
 Target Org: karthiknama3558@agentforce.com
 Elapsed Time: 6.90s

Deployed Source
┌───────────┬─────────────────────────┬────────────┬────────────────────────────────────────┐
│ State     │ Name                    │ Type       │ Path                                   │
├───────────┼─────────────────────────┼────────────┼────────────────────────────────────────┤
│ Unchanged │ CreditBureauService     │ ApexClass  │ force-app\main\default\classes\Credi   │
│           │                         │            │ tBureauService.cls                     │
│ Unchanged │ CreditBureauService     │ ApexClass  │ force-app\main\default\classes\Credi   │
│           │                         │            │ tBureauService.cls-meta.xml            │
│ Unchanged │ EMIConstants            │ ApexClass  │ force-app\main\default\classes\EMICo   │
│           │                         │            │ nstants.cls                            │
│ Unchanged │ EMIConstants            │ ApexClass  │ force-app\main\default\classes\EMICo   │
│           │                         │            │ nstants.cls-meta.xml                   │
│ Unchanged │ EMIHandler              │ ApexClass  │ force-app\main\default\classes\EMIHa   │
│           │                         │            │ ndler.cls                              │
│ Unchanged │ EMIHandler              │ ApexClass  │ force-app\main\default\classes\EMIHa   │
│           │                         │            │ ndler.cls-meta.xml                     │
│ Unchanged │ EMIHandlerClass         │ ApexClass  │ force-app\main\default\classes\EMIHa   │
│           │                         │            │ ndlerClass.cls                         │
```