Digital Banking CRM - Phase 8: Data Management & Deployment
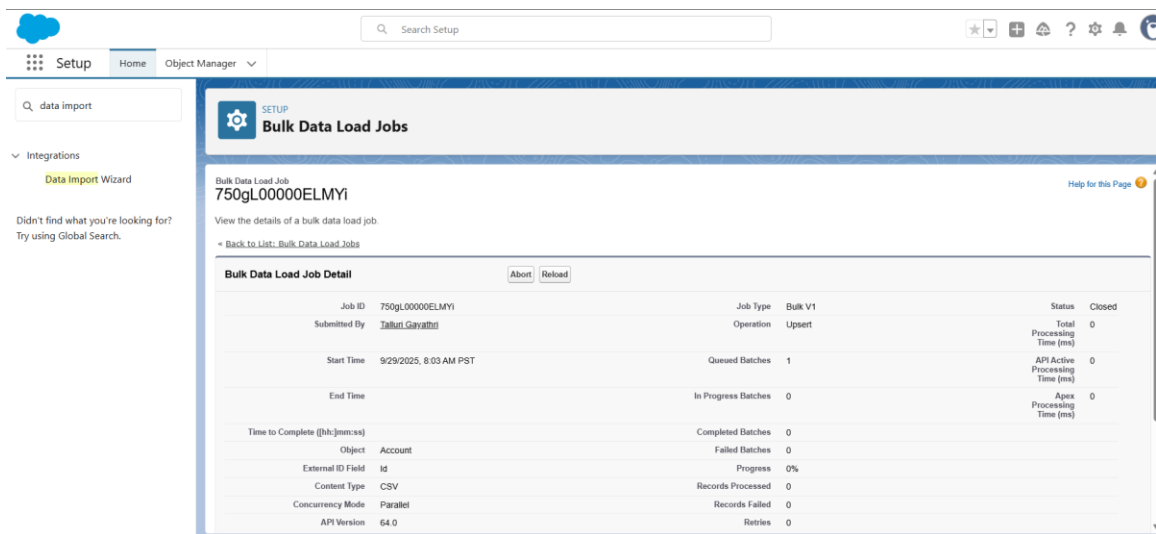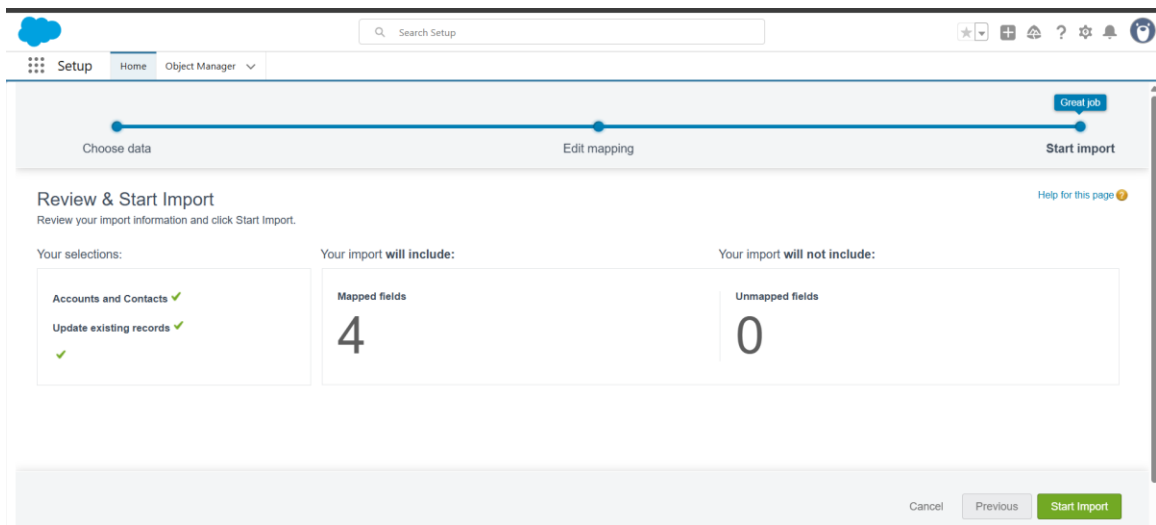
Overview

Phase 8 focuses on data management, backup, and deployment strategies for the Digital Banking CRM. This ensures secure handling of customer and transactional data, smooth migration of changes from sandbox to production, and adherence to compliance standards in banking operations.

Key Tasks and Enhancements

1. Data Import Wizard

• Imported 50 demo Customer and Account records to simulate real-world banking data.
• Used Data Import Wizard for small datasets like Customers and Car Loan demo records.
• Verified data mapping for Account__c, Transaction__c, and Loan__c objects.

Choose data ———————————— **Edit mapping** ———————————— **Start import**   Great job

Review & Start Import
Review your import information and click Start Import.

Help for this page ⓘ

Your selections:

Accounts and Contacts ✓

Update existing records ✓

✓

Your import **will include:**	Your import **will not include:**
Mapped fields	Unmapped fields
4	0

Cancel   Previous   Start Import

Q data import

∨ Integrations

Data Import Wizard

Didn't find what you're looking for?
Try using Global Search.

SETUP
Bulk Data Load Jobs

Bulk Data Load Job
750gL00000ELMYi

View the details of a bulk data load job.

« Back to List: Bulk Data Load Jobs

Help for this Page ⓘ

Bulk Data Load Job Detail   Abort   Reload

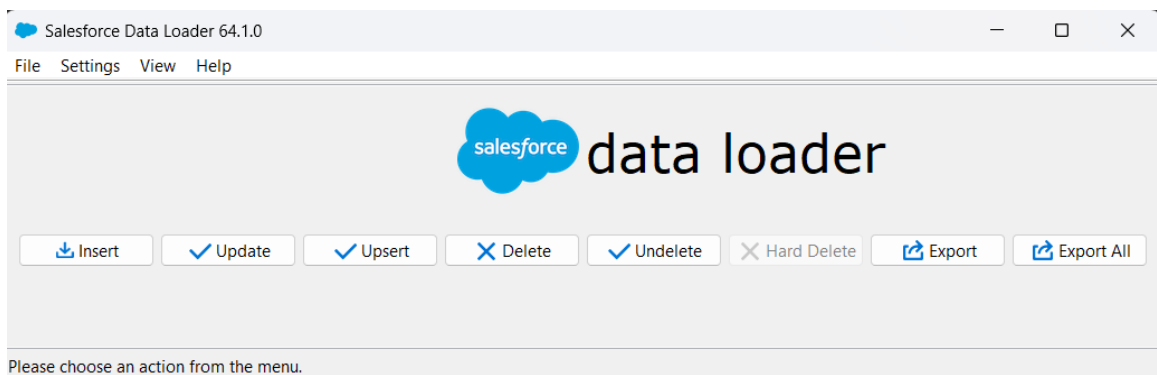|					
Job ID	750gL00000ELMYi	Job Type	Bulk V1	Status	Closed
Submitted By	Talluri Gayathri	Operation	Upsert	Total Processing Time (ms)	0
Start Time	9/29/2025, 8:03 AM PST	Queued Batches	1	API Active Processing Time (ms)	0
End Time		In Progress Batches	0	Apex Processing Time (ms)	0
Time to Complete ([hh:]mm:ss)		Completed Batches	0		
Object	Account	Failed Batches	0		
External ID Field	Id	Progress	0%		
Content Type	CSV	Records Processed	0		
Concurrency Mode	Parallel	Records Failed	0		
API Version	64.0	Retries	0		

2. Data Loader

• Used Data Loader to import bulk Bookings and Transactions into Salesforce.
• Ensured proper handling of large volumes of financial transaction records.
• Scheduled automated batch imports for high-frequency transaction updates.

C:\Windows\system32\cmd.e: ☐ ✕   + ⌄   — ☐

Data Loader requires Java JRE 17 or later. Checking if it is installed...

****
**   **
**   Salesforce Data Loader   **
**   =====================   **
**   **
** Data Loader v64 is a Salesforce supported Open Source project to **
** help you import data to and export data from your Salesforce org. **
** It requires Java JRE 17 or later to run.   **
**   **
** Github Project Url: **
**   https://github.com/forcedotcom/dataloader   **
** Salesforce Documentation: **
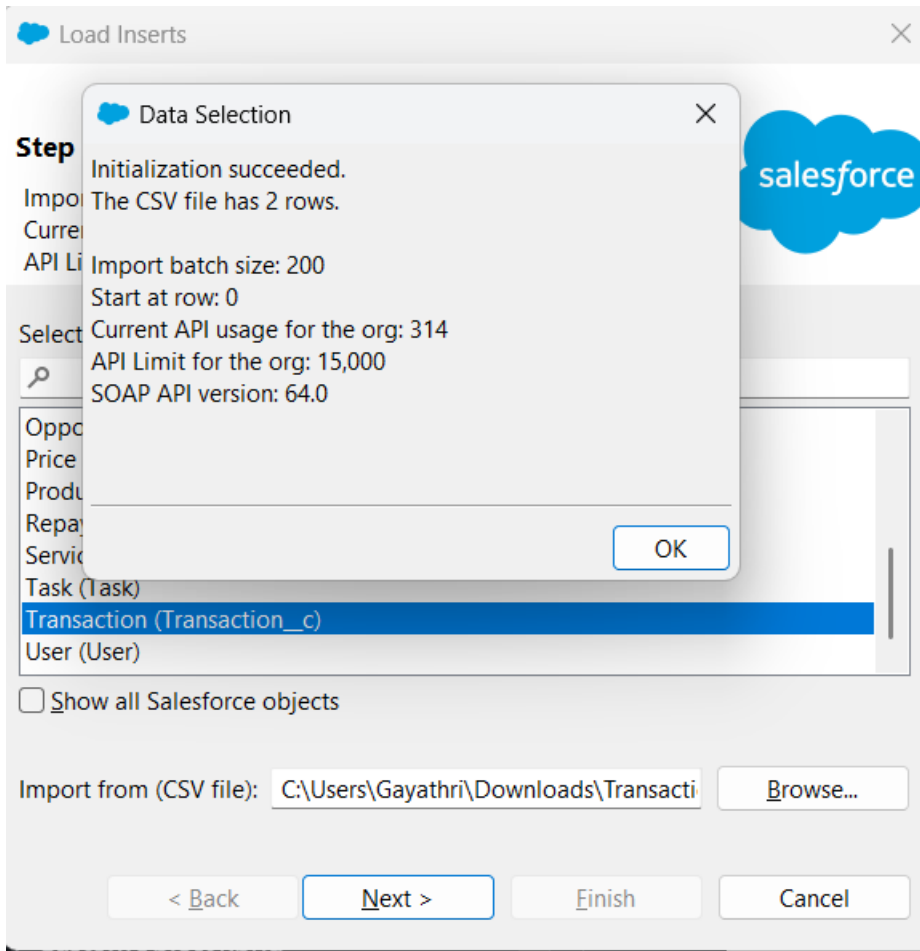**   https://help.salesforce.com/articleView?id=data_loader.htm **
**   **
****

Do you want to install Data Loader in the current folder (C:\Users\Gayathri\Downloads\dataloader_v64.1.0)? [Yes/No] |

☁ Salesforce Data Loader 64.1.0   —   ☐   ✕

File   Settings   View   Help

salesforce data loader

⬇ Insert   ✓ Update   ✓ Upsert   ✕ Delete   ✓ Undelete   ✕ Hard Delete   ⬈ Export   ⬈ Export All

Please choose an action from the menu.

C:\Windows\System32\cmd.e: ☐ ✕   + ⌄

Microsoft Windows [Version 10.0.26100.6584]
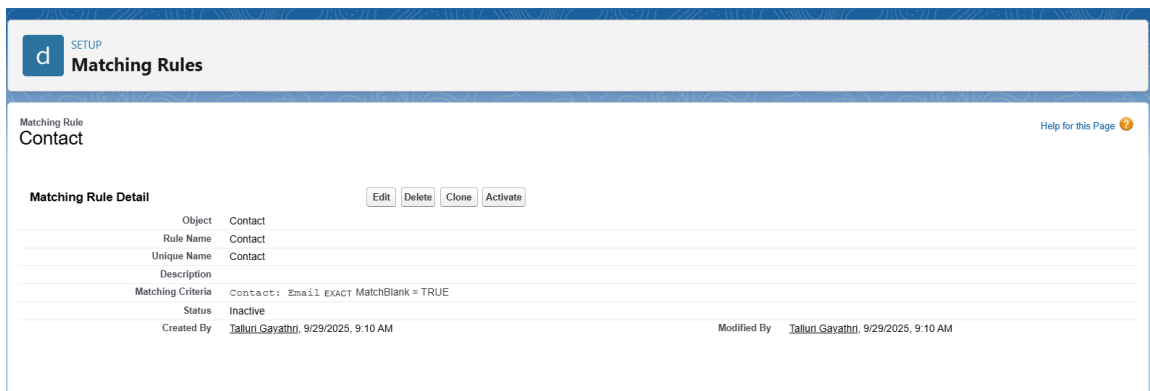(c) Microsoft Corporation. All rights reserved.

C:\Users\Gayathri\Downloads\dataloader_v64.1.0>dataloader.bat transactionImport
Data Loader requires Java JRE 17 or later. Checking if it is installed...

****
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**   **
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3. Duplicate Rules

• Implemented Duplicate Rules to prevent duplicate Customer or Account entries.

• Added Matching Rules on key fields like National ID, Account Number, and Email.

• Alerts configured for bankers to review duplicate attempts.

Matching Rule
Bank Account

Matching Rule Detail

[Edit] [Delete] [Clone] [Activate]

Object	Account
Rule Name	Bank Account
Unique Name	Bank_Account
Description	
Matching Criteria	Account: AccountNumber EXACT MatchBlank = FALSE
Status	Inactive
Created By	Talluri Gayathri, 9/29/2025, 9:11 AM

Modified By   Talluri Gayathri, 9/29/2025, 9:11 AM

All Matching Rules

Help for th

What Are Matching Rules?

View: [All Matching Rules ▾]   Create New View

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Action	Rule Name ↑		Last Modified Date	Last Modified By
Del | Deactivate	Bank Account		9/29/2025	gay
Edit | Del | Activate	Contact		9/29/2025	gay
Deactivate	Standard Account Matching Rule		9/20/2025	OEPIC
Deactivate	Standard Contact Matching Rule		9/20/2025	OEPIC
Deactivate	Standard Lead Matching Rule		9/20/2025	OEPIC

Matching Rule Activation

✅ We're activating your matching rule. We'll send an email to gayathritalluri28@gmail.com when the activation process is complete.

[OK]

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

4. Data Export & Backup

• Configured weekly backup of all customer, account, and transaction data.

• Exported data in CSV format for archival and compliance.

• Ensured encrypted storage for backups as per banking security guidelines.

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 expo 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.

> ℹ️ **Next scheduled export:**
> 10/1/2025, 12:00 AM

Export Now   Schedule Export

Your export has been queued. You will receive an email notification when it is completed.

Scheduled By	Talluri Gayathri
Schedule Date	9/29/2025
Export File Encoding	ISO-8859-1 (General US & Western European, ISO-LATIN-1)

5. Change Sets

• Used Change Sets to move configurations and customizations from Sandbox → Production.
• Migrated objects like Transaction__c, Service_Request__c, and LWCs (customerProfile, transactionList).
• Verified successful deployment and performed UAT (User Acceptance Testing).

6. Unmanaged vs Managed Packages

• Created an Unmanaged Package for internal deployments and testing.

• Considered Managed Package setup for potential publication on AppExchange.

• Managed approach ensures version control, licensing, and upgradability.

SETUP
Package Manager

Namespace settings let you create and register a namespace for a first-generation or second-generation managed package, or an unlocked package.

After you create a namespace, you can associate a first-generation managed package with your registered namespace.
For unlocked and second-generation managed packages, use Salesforce CLI to associate your namespace with your package.

If the edit button on this page isn't visible, ensure you're using a Developer Edition org that isn't a Dev Hub org.

Language Settings   [Edit]

Create a language extension package that contains translations of components in one or more base packages.

Language extension package is   Disabled

First-Generation Packages

⚠ **REVIEW BEFORE CONTINUING**
We recommend that all new packages are created using second-generation managed packaging (2GP). By using 2GP, you'll be using the latest technology and the only packaging technology that Salesforce is investing in. In the future, all first-generation managed packages (1GP) will have to migrate to 2GP. To learn how to create a 2GP, see   https://sfdc.co/2GP_learn_more.

To create a new first-generation managed package or an unmanaged package, click New.

Packages   [New]

Action	Package Name	Description
Edit	DigitalBankingCRM	