

Digital Banking CRM - Phase 8: Data Management & Deployment

Overview

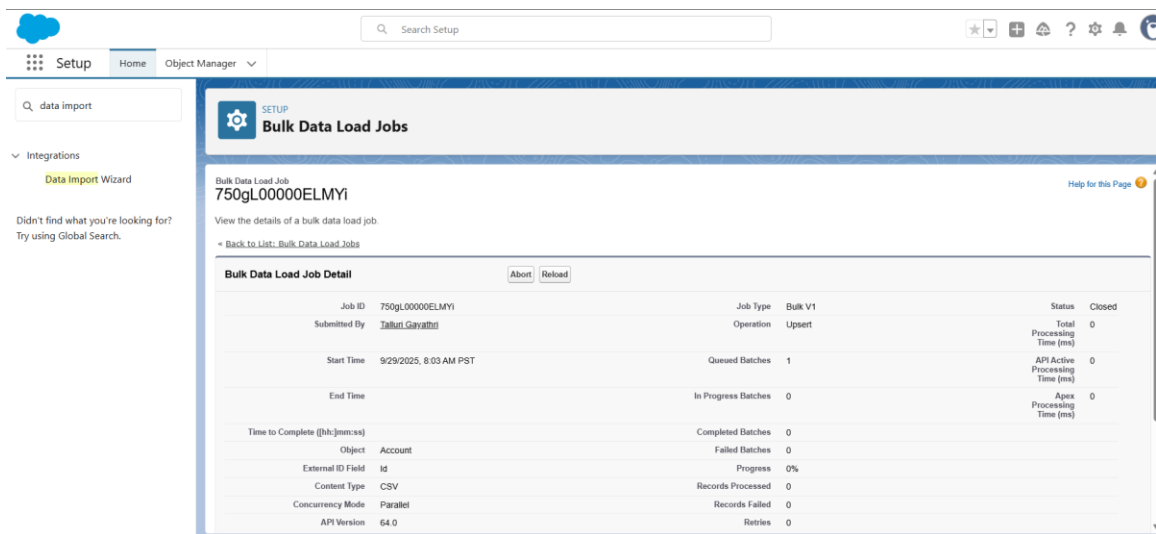
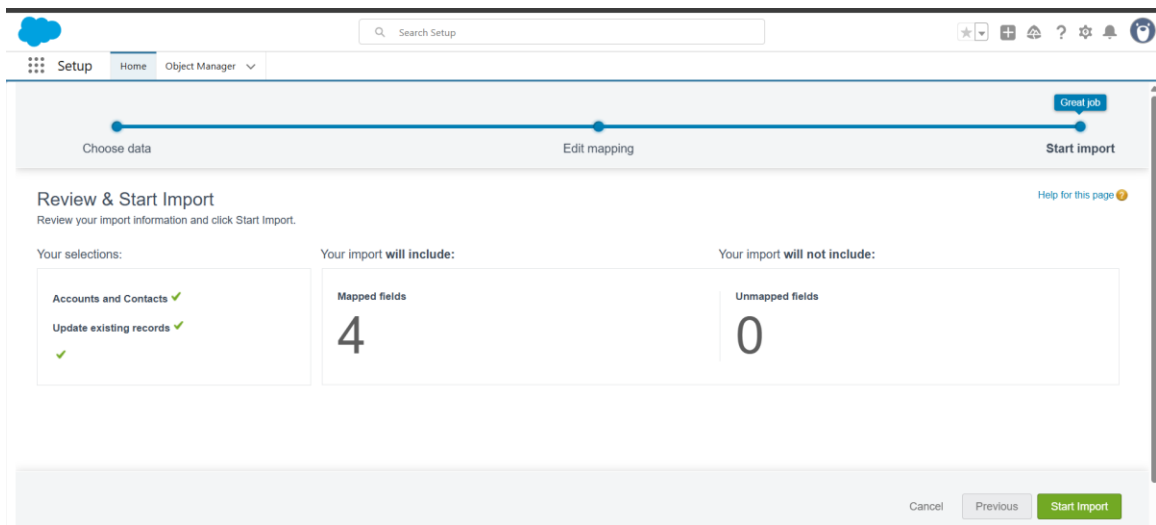
Phase 8 focuses on data management, backup, and deployment strategies for the Digital Banking CRM. This ensures secure handling of customer and transactional data, smooth migration of changes from sandbox to production, and adherence to compliance standards in banking operations.

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.

The screenshot displays the Salesforce Data Import Wizard interface. At the top, there is a navigation bar with 'Setup', 'Home', and 'Object Manager' tabs. Below this is a progress bar with three stages: 'Choose data', 'Edit mapping', and 'Start import'. The 'Choose data' stage is currently active, indicated by a blue dot and the text 'Getting closer...'. Below the progress bar, there are three main sections: 'What kind of data are you importing?', 'What do you want to do?', and 'Where is your data located?'. The 'What kind of data are you importing?' section has two tabs: 'Standard objects' and 'Custom objects'. Under 'Standard objects', 'Accounts and Contacts' is selected with a green checkmark. The 'What do you want to do?' section has two options: 'Add new records' and 'Update existing records', with 'Update existing records' selected and marked with a green checkmark. Below this, there are dropdown menus for 'Match Contact by:' (set to 'Name') and 'Match Account by:' (set to 'Name & Site'). There is also a checkbox for 'Update existing Account information?' which is unchecked. The 'Where is your data located?' section has two options: 'File' and 'Outlook CSV'. The 'File' option is selected, showing 'Demo_Accounts.csv' as the file name, 'ISO-8859-1 (General US & Western European, ISO-LATIN-1)' as the character code, and 'Comma' as the values separated by. At the bottom right, there are three buttons: 'Cancel', 'Previous', and 'Next'.



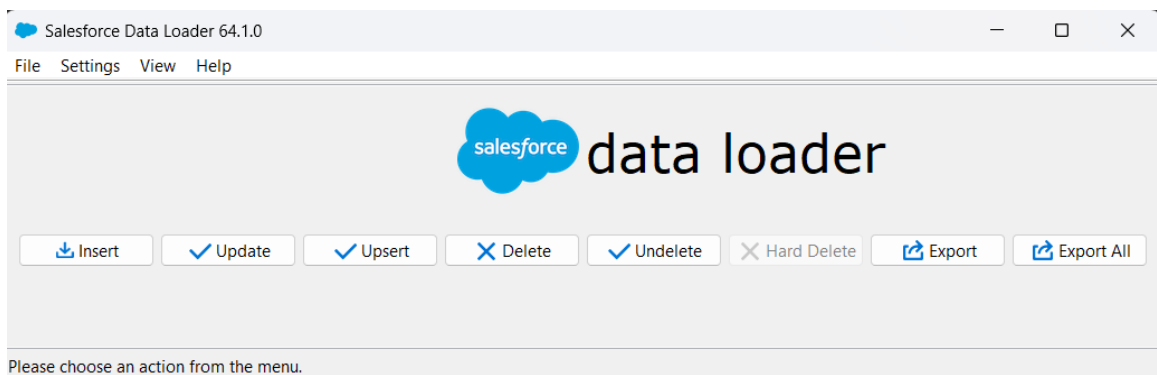
2. Data Loader

- 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:  X  +  v
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    **
**                               **
*****

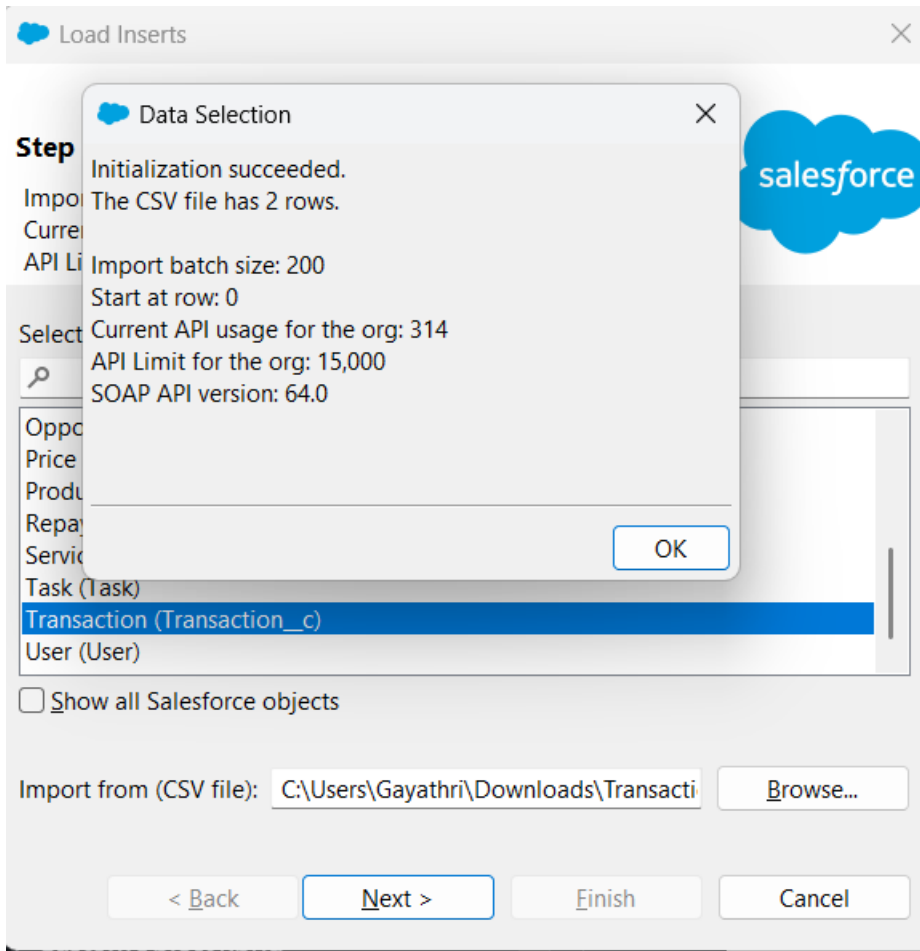
Do you want to install Data Loader in the current folder (C:\Users\Gayathri\Downloads\dataloader_v64.1.0)? [Yes/No] |
```



```
C:\Windows\System32\cmd.e  X  +  v
Microsoft Windows [Version 10.0.26100.6584]
(c) Microsoft Corporation. All rights reserved.

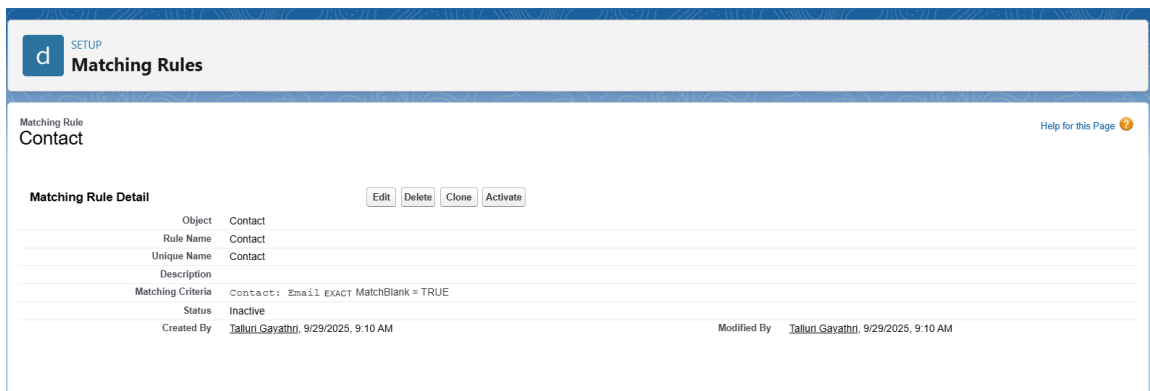
C:\Users\Gayathri\Downloads\dataloader_v64.1.0>dataloader.bat transactionImport
Data Loader requires Java JRE 17 or later. Checking if it is installed...

*****
**                               **
**      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    **
**                               **
*****
```



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.



d

SETUP

Matching Rules

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

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SETUP

Matching Rules

All Matching Rules

Help for th

What Are Matching Rules?

[]

View: All Matching Rules

Create New View

A

B

C

D

E

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H

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U

V

W

X

Y

Z

Action	Rule Name	Last Modified Date	Last Modified By
Del Deactivate	Bank Account	9/29/2025	gax
Edit Del Activate	Contact	9/29/2025	gax
Deactivate	Standard Account Matching Rule	9/20/2025	OEPIG
Deactivate	Standard Contact Matching Rule	9/20/2025	OEPIG
Deactivate	Standard Lead Matching Rule	9/20/2025	OEPIG

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

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



SETUP

Duplicate Rules

Contact Duplicate Rule

Account

Duplicate Rule Detail

Edit

Delete

Clone

Activate

Rule Name

Account

Order

3 of 3

Reorder

Description

Object

Contact

Record-Level Security

Enforce sharing rules

Action On Create

Allow

Operations On Create

✓ Alert

✓ Report

Action On Edit

Allow

Operations On Edit

✓ Alert

☐ Report

Alert Text

Use one of these records?

Active

☐

Matching Rule

✓ Bank Account

✓ Mapped

Matching Criteria

Account: AccountNumber EXACT MatchBlank

Conditions

Created By

Talluri Gayathri

9/29/2025, 9:16 AM

Modified By

Talluri Gayathri

9/29/2025, 9:16 AM

Edit

Delete

Clone

Activate

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.

Setup

Home

Object Manager

Data

Big Objects

Conversation Transcript Export

Data Export

Data Integration Metrics

Data Integration Rules

Duplicate Management

Duplicate Error Logs

Duplicate Rules

Matching Rules

Mass Delete Records

Mass Transfer Approval Requests

Mass Transfer Records

SETUP

Data Export

Monthly Export Service

[Help for this Page](#)

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:

10/1/2025, 12:00 AM

Export Now

Schedule 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 exp 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:
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 ByTalluri Gayathri

Schedule Date9/29/2025

Export File EncodingISO-8859-1 (General US & Western European, ISO-LATIN-1)

Monthly Export Service

Help for this Page

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:
10/1/2025, 12:00 AM

Export Now

Schedule Export

Scheduled ByTalluri Gayathri

Schedule Date9/29/2025

Export File EncodingISO-8859-1 (General US & Western European, ISO-LATIN-1)

Action	File Name	File Size
download	WE_00DgL00000C8ePcUAJ_1.ZIP	212.3K

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).

Setup

Home

Object Manager

Search Setup

Help for this Page

pack

Apps

Packaging

Installed Packages

Package Manager

Package Usage

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

Package Manager

DigitalBankingCRM

Back to Package List

Package Detail

Edit

Delete

Upload

Package NameDigitalBankingCRM

LanguageEnglish

TypeUnmanaged

Notify on Apex Error

Created ByTalluri Gayathri9/30/2025, 12:45 AM

Last Modified ByTalluri Gayathri9/30/2025, 12:45 AM

Description

Components

Versions

Component Nametransaction

Search


Add

View Dependencies

Action	Component Name	Parent Object	Type	Included By	Owned By
Remove	DailyTransactionSummary	Transaction	Apex Class	User Selected	
	Pending Transactions	Transaction	List View	Transaction	
	Transaction		Custom Object	Pending Transactions All BankingController TransactionTrigger CustomerDataController BankingService DailyTransactionSummary	
	TransactionField	Transaction	Custom Field	Transaction	

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.

 **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	