Phase 8: Data Management & Deployment

1. Data Import Wizard

🔹 Use Case:

Used the **Data Import Wizard** to import initial loan application and applicant data from a CSV file into Salesforce.
This tool is suitable for small data volumes and supports simple mappings.

Example:

- Imported 50 sample *Loan_Application__c* records.
- Mapped fields: Applicant Name, Loan Type, Loan Amount, and Income.
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Data Loader

🔹 Use Case:

For bulk data operations like large imports, updates, and deletes, **Data Loader** was used.
Example:

- Imported 1,000+ EMI records into *EMI_Detail__c* object.
- Performed batch updates for loan status after approvals.

Steps:

1. Open Data Loader → Select “Insert.”
2. Log in with Salesforce credentials.
3. Choose object: *EMI_Detail__c.*
4. Map fields and start import.

VS Code & SFDX

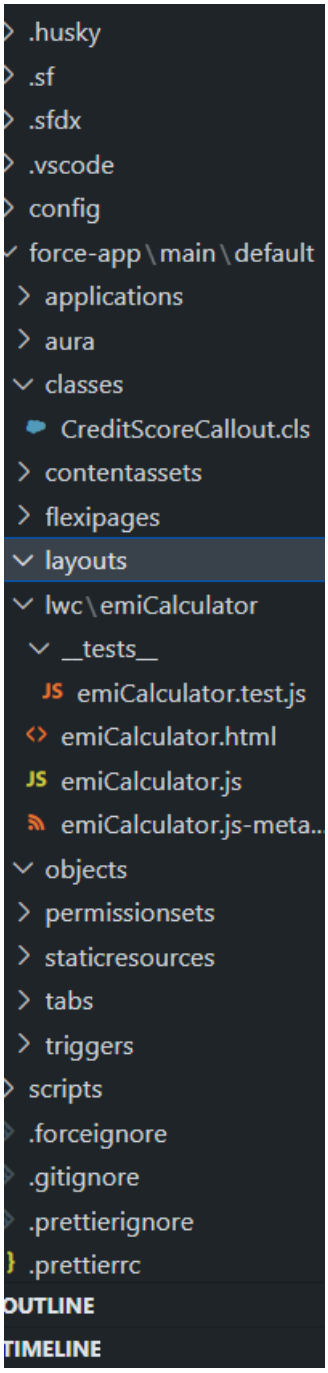
🔹 Use Case:

Used **Visual Studio Code (VS Code)** with **Salesforce DX (SFDX)** for source-driven development and deployment.
This provided version control, local editing, and seamless sync with Salesforce Org.

Steps:

1. Installed Salesforce CLI and VS Code Salesforce Extension.
2. Authorized Dev Hub using:
3. sfdx auth:web:login -d -a LoanProject
4. Retrieved and deployed metadata:
5. sfdx force:source:retrieve -m ApexClass

sfdx force:source:deploy -p force-app/main/default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