

Phase 8: Data Management & Deployment

Data Import Wizard

- Used Data Import Wizard to insert sample data into Loan, Payment, and Recovery objects.

This screenshot shows the 'Loan' record page in Salesforce. The browser address bar indicates the URL is `resilient-raccoon-nqvtn-dev-ed.trailblaze.lightning.force.com/lightning/r/Loan_c/a00Qy00001HPgzT1AT/view`. The page title is 'Loan001 | Loan | Salesforce'. The navigation bar includes 'Payment Tracking A...', 'Dashboards', 'Reports', 'Loans', 'Payments', and 'Recoveries'. The record details are organized into three sections: 'Basic Information', 'Financials', and 'Dates & Status'. The 'Basic Information' section contains fields for Name (Loan001), Customer (Ravindra Babu), Owner (Bharath Jonnadula), Customer Email (ravindrababujonnadula@gmail.com), and Customer Code (CUST001). The 'Financials' section contains fields for Principal Amount (₹2,00,000), Interest Rate (7.5%), and Term Months (24). The 'Dates & Status' section is currently empty. A 'History' link is visible at the bottom left of the record details.

Section	Field	Value
Basic Information	Name	Loan001
	Customer	Ravindra Babu
	Owner	Bharath Jonnadula
	Customer Email	ravindrababujonnadula@gmail.com
	Customer Code	CUST001
Financials	Principal Amount	₹2,00,000
	Interest Rate	7.5%
	Term Months	24
Dates & Status		

This screenshot shows the 'Payment' record page in Salesforce. The browser address bar indicates the URL is `resilient-raccoon-nqvtn-dev-ed.trailblaze.lightning.force.com/lightning/r/Payment_c/a01Qy00001OsQqT1AV/view`. The page title is 'LN-25-0001 | Payment | Salesf...'. The navigation bar includes 'Payment Tracking A...', 'Dashboards', 'Reports', 'Loans', 'Payments', and 'Recoveries'. The record details are organized into a single section with fields for Name (LN-25-0001), Payment Date (24/09/2025), Amount (₹10,000.00), Payment Method (Bank Transfer), Status (Pending), Loan (Loan001), Customer Email (ravindrababujonnadula@gmail.com), Created By (Bharath Jonnadula, 22/09/2025, 12:19 pm), and Last Modified By (Bharath Jonnadula, 22/09/2025, 12:19 pm). A message 'No related lists to display' is shown at the bottom of the record details. A 'Sample Flow Report: Screen Flows' link is visible at the bottom of the page. A 'History' link is visible at the bottom left of the record details.

Field	Value
Name	LN-25-0001
Payment Date	24/09/2025
Amount	₹10,000.00
Payment Method	Bank Transfer
Status	Pending
Loan	Loan001
Customer Email	ravindrababujonnadula@gmail.com
Created By	Bharath Jonnadula, 22/09/2025, 12:19 pm
Last Modified By	Bharath Jonnadula, 22/09/2025, 12:19 pm

VS Code & SFDX

- Used VS Code with SFDX CLI for writing and deploying Apex Classes, Triggers, and LWC.
- Successfully pushed/pulled metadata between local project and Salesforce Org.



The image shows a screenshot of the Visual Studio Code (VS Code) interface, specifically the TERMINAL pane. The terminal window displays the following text:

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

D:\PaymentTrackinginBanking>
* History restored

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

D:\PaymentTrackinginBanking>sf project deploy start --source-dir force-app/main/default/classes --target-org
DevOrg
```

On the right side of the terminal pane, there is a dropdown menu showing the selected shell type, which is 'cmd'. Below it, 'powershell' is also visible as an option.