

Phase 8: Data Management & Deployment (CLMS Project)

In this phase, data management and deployment practices were implemented in the Corporate Loan Management System (CLMS).

The focus was on importing and exporting data, preventing duplicates, ensuring secure backups, and deploying metadata from development → production using Salesforce-native tools.

1. Data Import Wizard

- What I did:
 - Used Data Import Wizard in Salesforce Setup.
 - Imported Customer__c and Loan_Application__c records from CSV files.
 - Mapped fields such as Loan_Amount__c, Loan_Tenure_Months__c, and Interest_Rate__c.
- Why:
 - To bulk load customer master data and initial loan applications into the system.
- Screenshot to include:
 - Data Import Wizard page showing field mapping.

The screenshot displays the 'Data Import Wizard' interface in Salesforce. At the top, there is a 'Help for this page' link. Below the title, a section titled 'Recent Import Jobs' contains a table with the following data:

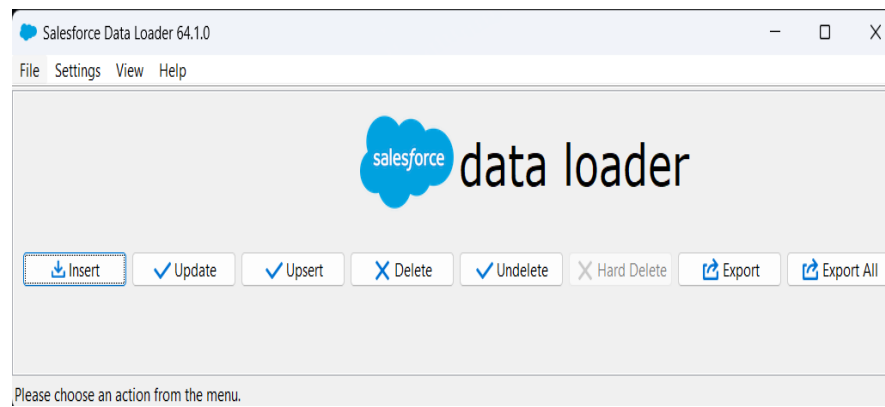
Status	Object	Records Created	Records Updated	Records Failed	Start Date	Processing Time (ms)
Closed	Loan Application	5	0	0	09-26-2025 11:05	304

Below the table is a 'Bulk Api Monitoring' button. At the bottom, there is a light blue bar with the text 'Clean up your data import file' and a 'Collapse' link.

2. Data Loader

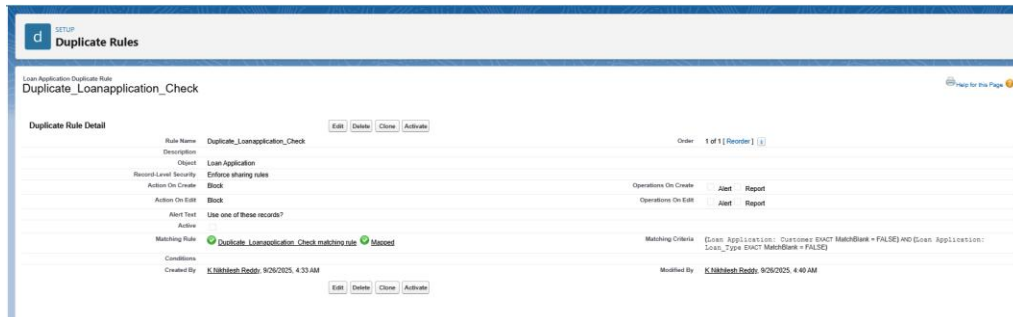
- What I did:

- Installed and logged in with Salesforce username + password + security token.
- Performed insert and update operations on EMI_Schedule__c and Loan_Application__c.
- Used export feature to back up EMI schedules for validation.
- Why:
 - To handle bulk data operations not possible through Import Wizard.

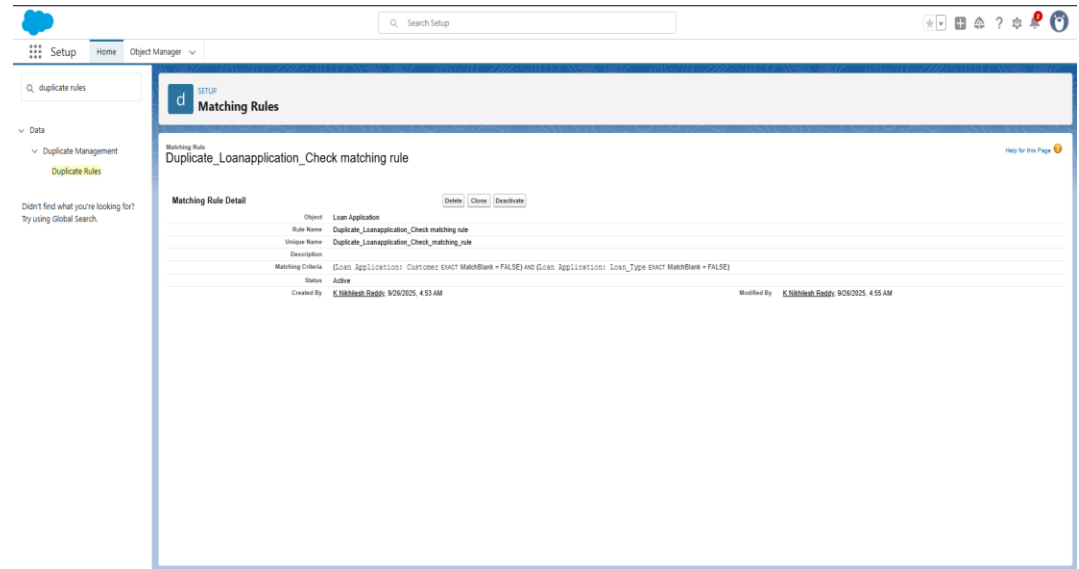


3. Duplicate Rules

- What I did:
 - Created a Duplicate Rule for LoanApplication__c.
 - Matching Criteria → Customer and Loan Type.
 - Action → Block duplicate creation.
- Why:




To ensure no customer is added twice with the same contact details.



4. Data Export & Backup

- What I did:
 - Scheduled weekly data exports in Salesforce Setup.
 - Selected objects: Loan_Application__c, Customer__c, EMI_Schedule__c.
 - Configured export to email ZIP backups.
- Why:

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
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:

None

Export Now

Schedule Export

Scheduled By

Kishlesh Reddy

Schedule Date

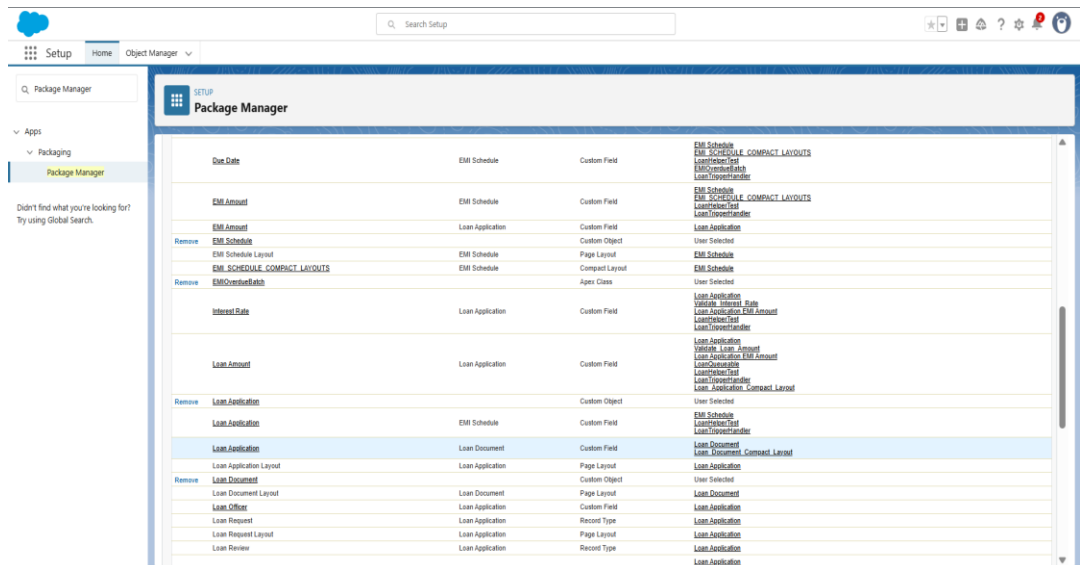
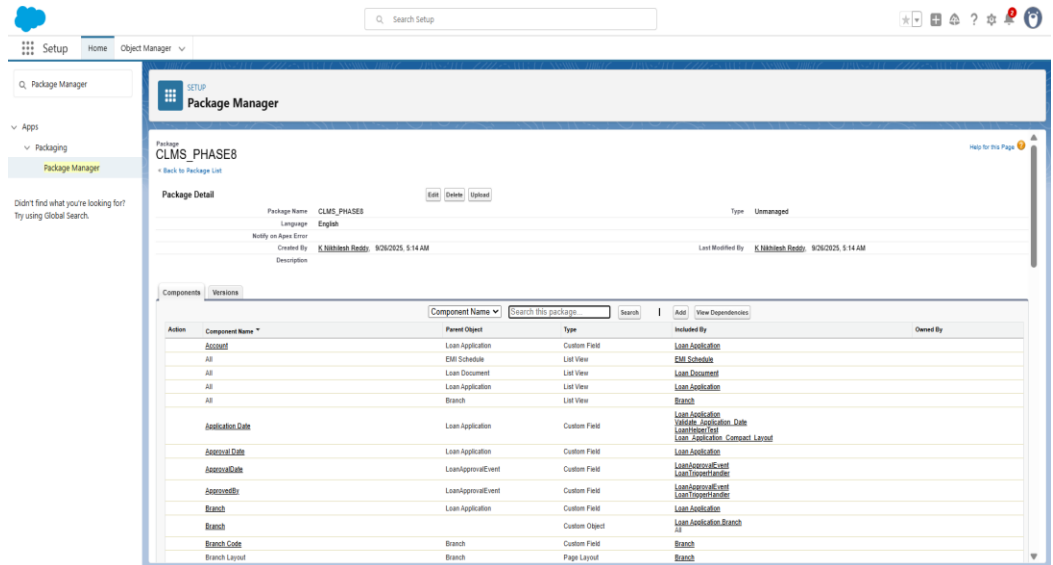
9/26/2025

Export File Encoding

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

Action	File Name	File Size
download	WE_00Gx00000BBxSUAT_1_ZIP	1.1K

- Explored Unmanaged Packages.
- Created a package for CLMS metadata to simplify deployments.
- Why:
 - To bundle components together for sharing and deployment.



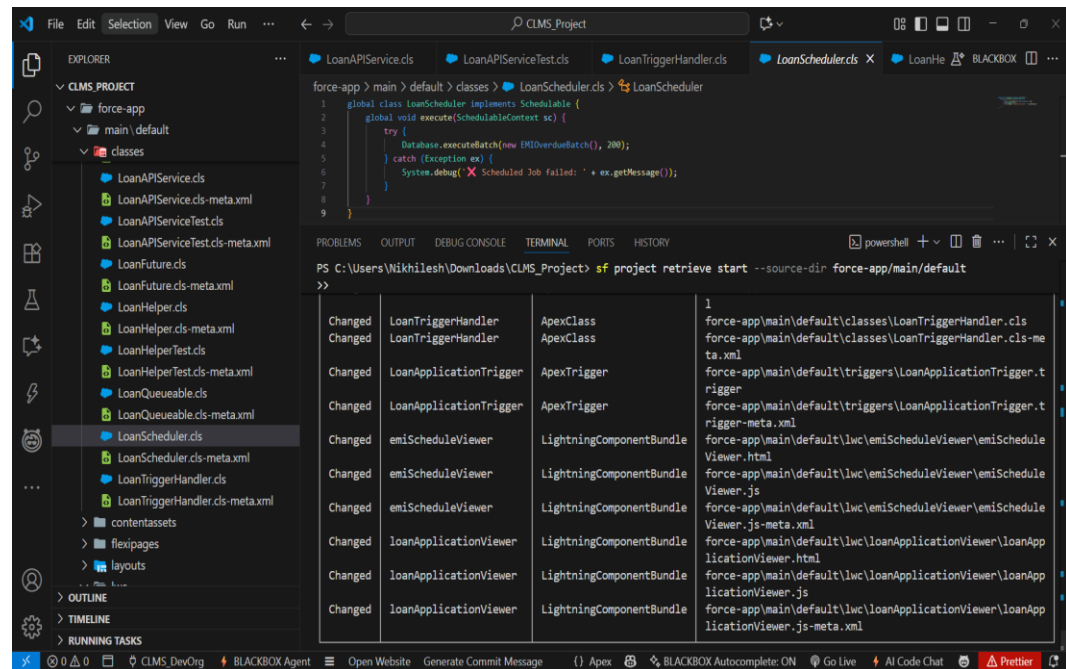
7. VS Code & SFDX (Modern Deployment)

- What I did:
 - Used VS Code + Salesforce CLI (SF) for deployments.
 - Commands executed:
 - # Deploy a single class
 - sf project deploy start --source-dir force-app/main/default/classes/LoanHelper.cls

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- # Deploy a trigger
- sf project deploy start --source-dir force-app/main/default/triggers/LoanApplicationTrigger.trigger
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- # Deploy all metadata

sf project deploy start --source-dir force-app/main/default

- Why:
 - This is the most modern and recommended approach for Salesforce deployments.



Phase 8 Outcomes

- Customer and Loan data successfully imported into Salesforce.
- Bulk EMI records managed via Data Loader.
- Duplicate prevention established for Customer records.

- Weekly data export/backup configured for Loan, EMI, and Customer data.
 - Metadata deployments done via Change Sets and VS Code/SFDX.
 - Packages explored for bundling CLMS components.
 - CLMS system is now data-ready, secure, and production-deployable.
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