Phase 8 – Data Management & Deployment
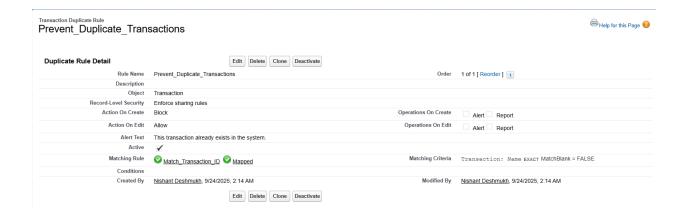
1. Data Import Wizard

- Imported 20 sample financial transaction records using CSV.

- Used for testing fraud detection logic on realistic data.

2. Data Loader

- Bulk inserted booking-related records to simulate high-volume financial activity.

- Prepared the system for fraud correlation logic testing.

3. Duplicate Rules

- Configured duplicate detection rules for `Financial_Transaction__c`.

- Prevented or alerted on duplicate suspicious transactions based on key fields like Transaction ID and Amount.

Transaction Duplicate Rule
Prevent_Duplicate_Transactions

Duplicate Rule Detail	Edit Delete Clone Deactivate		
Rule Name	Prevent_Duplicate_Transactions	Order	1 of 1 [Reorder]
Description			
Object	Transaction		
Record-Level Security	Enforce sharing rules		
Action On Create	Block	Operations On Create	☐ Alert ☐ Report
Action On Edit	Allow	Operations On Edit	☐ Alert ☐ Report
Alert Text	This transaction already exists in the system.		
Active	✓		
Matching Rule	✅ Match_Transaction_ID ✅ Mapped	Matching Criteria	Transaction: Name EXACT MatchBlank = FALSE
Conditions			
Created By	Nishant Deshmukh, 9/24/2025, 2:14 AM	Modified By	Nishant Deshmukh, 9/24/2025, 2:14 AM

Edit Delete Clone Deactivate

4. Data Export & Backup

- Scheduled weekly backups of:

    - `Financial_Transaction__c`

    - `Fraud_Case__c`

    - `Customer__c`

- Ensured data compliance, security, and recovery readiness.

5. Managed vs Unmanaged Packages

- Chose **Unmanaged Package** since the project is internal and for learning purposes.

- Packaged key metadata for easier deployment and versioning.

6. VS Code & SFDX Integration

- Set up Visual Studio Code with Salesforce CLI.

- Retrieved and deployed metadata using source control commands.

- Improved developer productivity and collaboration.