

Phase 8: Data Management & Deployment

1.Data Import Wizard

The Data Import Wizard in Salesforce allows importing records for standard and custom objects.

For this project, loan-related data such as **Loan Products, Loan Applications, EMI Schedules, and Payments** can be imported into their respective custom objects with the defined fields:

- **Loan Products:** Loan Code, Loan Type, Interest Rate, Tenure, Max Amount, Active
- **Loan Applications:** Application Number, Applicant Name, Applicant Email, Contact, Loan Product, Requested Amount, Approved Amount, Application Date, Status
- **EMI Schedules:** EMI Name, Installment Amount, Due Date, Status, Linked Loan Application
- **Payments:** Payment Name, Amount, Payment Date, Payment Status, Linked EMI

This helps in populating sample/test data during development.


Data Import Wizard

Help for this page

Recent Import Jobs

Status	Object	Records Created	Records Updated	Records Failed	Start Date	Processing Time (ms)
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Bulk Api Monitoring



Before you import your data...

Clean up your data import file
You'll have fewer errors to resolve if your data file is clean and free of duplicates. [Watch video](#)


Make sure your field names match Salesforce field names
You'll be required to map your data fields to Salesforce data fields. Data in unmapped fields is not imported. [View a list of Salesforce data fields.](#)

Don't import too many records at once
Using the Data Import Wizard, import up to 50,000 records at a time. Importing too many records can slow down your org for all users, especially during periods of peak usage.


Collapse

Import your data in 3 easy steps!


Launch the Data Import Wizard to import your data.




Pre-step: Prepare your data for import



Choose data to import



Edit field mapping



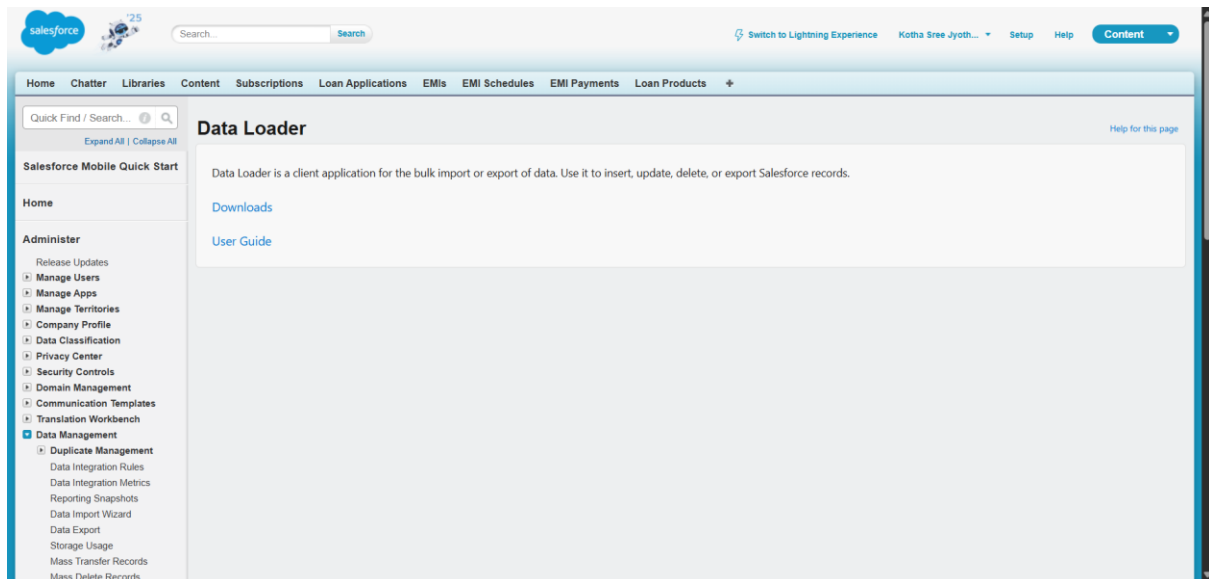
Review and start import

Launch Wizard!

2.Data Loader

Data Loader is used for bulk data import, export, update, and deletion.

In this project, bulk **Loan Applications, EMI Schedules, and Payments** can be uploaded through Data Loader using CSV files mapped to the above fields.



3. Duplicate Management

Duplicate rules in Salesforce are designed to **prevent or alert users** when duplicate records are created. Each rule is tied to a **matching rule** (the logic that defines what “duplicate” means).

Here’s a breakdown of your rules:

1. Prevent_Duplicate_Contacts

- **Object:** Contact
- **Matching Rule:** Based on **PAN + Email** (unique identifiers).
- **Purpose:** Stops users from creating multiple Contact records for the same person. In Loan CRM, this ensures you don’t have duplicate borrowers in your system.

2. Prevent_Duplicate_Loan_Applications

- **Object:** Loan Application (your custom object Loan_Application__c)
- **Matching Rule:** Custom rule (probably based on **Contact + Loan Product**).
- **Purpose:** Ensures a customer cannot submit the **same loan application twice** for the same product.

This prevents redundant applications, keeps CRM clean, and helps loan officers manage valid cases only.

3. Standard Account Duplicate Rule

- **Object:** Account (standard object in Salesforce)

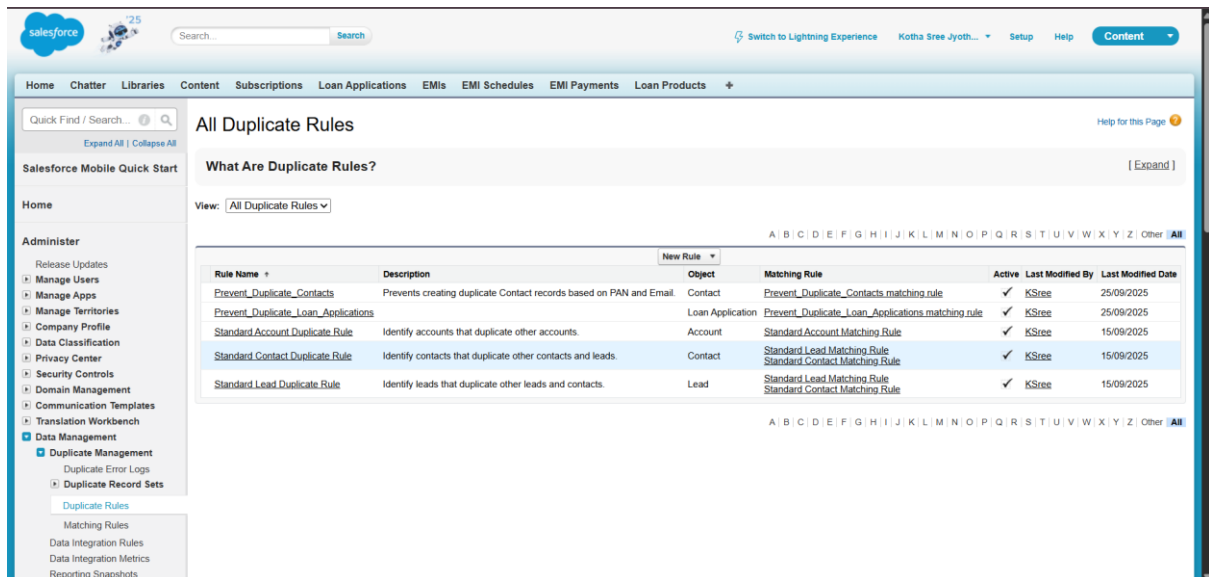
- **Matching Rule:** Standard Account Matching Rule (e.g., based on **Account Name + Phone**).
- **Purpose:** Identifies duplicate businesses/organizations.
May not be core to your Loan CRM unless you're managing corporate loans.

4. Standard Contact Duplicate Rule

- **Object:** Contact
- **Matching Rule:** Standard Contact + Standard Lead Matching Rules (e.g., **Name + Email**).
- **Purpose:** Finds duplicate contacts (or overlaps between Contacts and Leads).
Acts as a safety net if your custom **PAN + Email** rule misses anything.

5. Standard Lead Duplicate Rule

- **Object:** Lead
- **Matching Rule:** Standard Contact + Standard Lead Matching Rules.
- **Purpose:** Ensures no duplicate leads are created.
In Loan CRM, this avoids multiple “potential borrowers” being logged twice in the system.



The screenshot displays the Salesforce 'All Duplicate Rules' page. The left sidebar shows the 'Administer' menu with 'Duplicate Management' expanded. The main content area lists the following rules:

Rule Name	Description	Object	Matching Rule	Active	Last Modified By	Last Modified Date
Prevent_Duplicate_Contacts	Prevents creating duplicate Contact records based on PAN and Email.	Contact	Prevent_Duplicate_Contacts matching rule	✓	KSree	25/09/2025
Prevent_Duplicate_Loan_Applications		Loan Application	Prevent_Duplicate_Loan_Applications matching rule	✓	KSree	25/09/2025
Standard Account Duplicate Rule	Identify accounts that duplicate other accounts.	Account	Standard Account Matching Rule	✓	KSree	15/09/2025
Standard Contact Duplicate Rule	Identify contacts that duplicate other contacts and leads.	Contact	Standard Lead Matching Rule Standard Contact Matching Rule	✓	KSree	15/09/2025
Standard Lead Duplicate Rule	Identify leads that duplicate other leads and contacts.	Lead	Standard Lead Matching Rule Standard Contact Matching Rule	✓	KSree	15/09/2025

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Salesforce Mobile Quick Start

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Contact Duplicate Rule

Prevent_Duplicate_Contacts

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Duplicate Rule Detail

Edit Delete Clone Deactivate

Rule Name	Prevent_Duplicate_Contacts	Order	2 of 2 [Reorder]
Description	Prevents creating duplicate Contact records based on PAN and Email.		
Object	Contact		
Record-Level Security	Enforce sharing rules		
Action On Create	Block	Operations On Create	<input type="checkbox"/> Alert <input type="checkbox"/> Report
Action On Edit	Block	Operations On Edit	<input type="checkbox"/> Alert <input type="checkbox"/> Report
Alert Text	A contact with the same PAN or Email already exists. Please check existing records.		
Active	<input checked="" type="checkbox"/>		
Matching Rule	<input checked="" type="checkbox"/> Prevent_Duplicate_Contacts matching rule <input checked="" type="checkbox"/> Mapped	Matching Criteria	(Contact: PAN EXACT MatchBlank = FALSE) AND (Contact: Email EXACT MatchBlank = FALSE)
Conditions			
Created By	Kotla Sree Jyothirmai, 25/09/2025, 6:01 pm	Modified By	Kotla Sree Jyothirmai, 25/09/2025, 6:22 pm

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Loan Application Duplicate Rule

Prevent_Duplicate_Loan_Applications

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Duplicate Rule Detail

Edit Delete Clone Deactivate

Rule Name	Prevent_Duplicate_Loan_Applications	Order	1 of 1 [Reorder]
Description	Prevents creating duplicate Loan Application records based on Contact and Loan Type.		
Object	Loan Application		
Record-Level Security	Enforce sharing rules		
Action On Create	Block	Operations On Create	<input type="checkbox"/> Alert <input type="checkbox"/> Report
Action On Edit	Allow	Operations On Edit	<input checked="" type="checkbox"/> Alert <input type="checkbox"/> Report
Alert Text	This contact already has an active loan of this type.		
Active	<input checked="" type="checkbox"/>		
Matching Rule	<input checked="" type="checkbox"/> Prevent_Duplicate_Loan_Applications matching rule <input checked="" type="checkbox"/> Mapped	Matching Criteria	(Loan Application: Contact EXACT MatchBlank = FALSE) AND (Loan Application: Loan_Type EXACT MatchBlank = FALSE)
Conditions			
Created By	Kotla Sree Jyothirmai, 25/09/2025, 6:18 pm	Modified By	Kotla Sree Jyothirmai, 25/09/2025, 6:22 pm

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Account Duplicate Rule

Standard Account Duplicate Rule

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Duplicate Rule Detail

Edit Delete Clone Deactivate

Rule Name	Standard Account Duplicate Rule	Order	1 of 1 [Reorder]
Description	Identify accounts that duplicate other accounts.		
Object	Account		
Record-Level Security	Enforce sharing rules		
Action On Create	Allow	Operations On Create	<input checked="" type="checkbox"/> Alert <input checked="" type="checkbox"/> Report
Action On Edit	Allow	Operations On Edit	<input type="checkbox"/> Alert <input checked="" type="checkbox"/> Report
Alert Text	Use one of these records?		
Active	<input checked="" type="checkbox"/>		
Matching Rule	<input checked="" type="checkbox"/> Standard Account Matching Rule <input checked="" type="checkbox"/> Mapped	Matching Criteria	Matching rule for account records. More info
Conditions			
Created By	Kotla Sree Jyothirmai, 15/09/2025, 11:48 am	Modified By	Kotla Sree Jyothirmai, 15/09/2025, 11:48 am

Edit Delete Clone Deactivate

This screenshot shows the 'Standard Contact Duplicate Rule' configuration in Salesforce. The rule is active and has a matching criteria for contact records. The configuration includes fields for Rule Name, Description, Object, Record-Level Security, Action On Create, Action On Edit, Alert Text, Matching Rule, Matching Criteria, and Conditions. The rule is created by Kotha Sree Jyothirmai on 15/09/2025 at 11:48 am.

Field	Value
Rule Name	Standard Contact Duplicate Rule
Description	Identify contacts that duplicate other contacts and leads.
Object	Contact
Record-Level Security	Enforce sharing rules
Action On Create	Allow
Action On Edit	Allow
Alert Text	Use one of these records?
Matching Rule	Standard Contact Matching Rule
Matching Criteria	Matching rule for contact records. More info
Conditions	Kotha Sree Jyothirmai, 15/09/2025, 11:48 am

This screenshot shows the 'Standard Lead Duplicate Rule' configuration in Salesforce. The rule is active and has a matching criteria for lead records. The configuration includes fields for Rule Name, Description, Object, Record-Level Security, Action On Create, Action On Edit, Alert Text, Matching Rule, Matching Criteria, and Conditions. The rule is created by Kotha Sree Jyothirmai on 15/09/2025 at 11:48 am.

Field	Value
Rule Name	Standard Lead Duplicate Rule
Description	Identify leads that duplicate other leads and contacts.
Object	Lead
Record-Level Security	Enforce sharing rules
Action On Create	Allow
Action On Edit	Allow
Alert Text	Use one of these records?
Matching Rule	Standard Lead Matching Rule
Matching Criteria	Matching rule for lead records. More info
Conditions	Kotha Sree Jyothirmai, 15/09/2025, 11:48 am

Data Export & Backup

Regular data exports are required for backup.

For this project, **Loan Products, Loan Applications, EMI Schedules, and Payments** data can be exported periodically to maintain historical records and ensure data safety.

Change Sets

Change Sets are used to migrate metadata between orgs (Sandbox → Production).

For this project, Change Sets can be used to deploy:

- Custom objects (Loan Products, Loan Applications, EMI Schedules, Payments)
- Custom fields defined in each object
- Flows, email alerts, and other automation

Unmanaged vs Managed Packages

- **Managed Packages:** Pre-built solutions from Salesforce AppExchange with limited customization.
- **Unmanaged Packages:** Provide full access to configuration and code.

For this project, no external packages were used. All objects, fields, and automation were custom-built.

ANT Migration Tool

The ANT Migration Tool is a command-line utility for metadata deployment.

For this project, it was not required, as all development was done in a single Salesforce org.

VS Code & SFDX

VS Code with Salesforce DX allows advanced development and deployment.

In this project, all development was done directly in Salesforce UI, so VS Code and SFDX were not used.