Phase 8: Data Management & Deployment

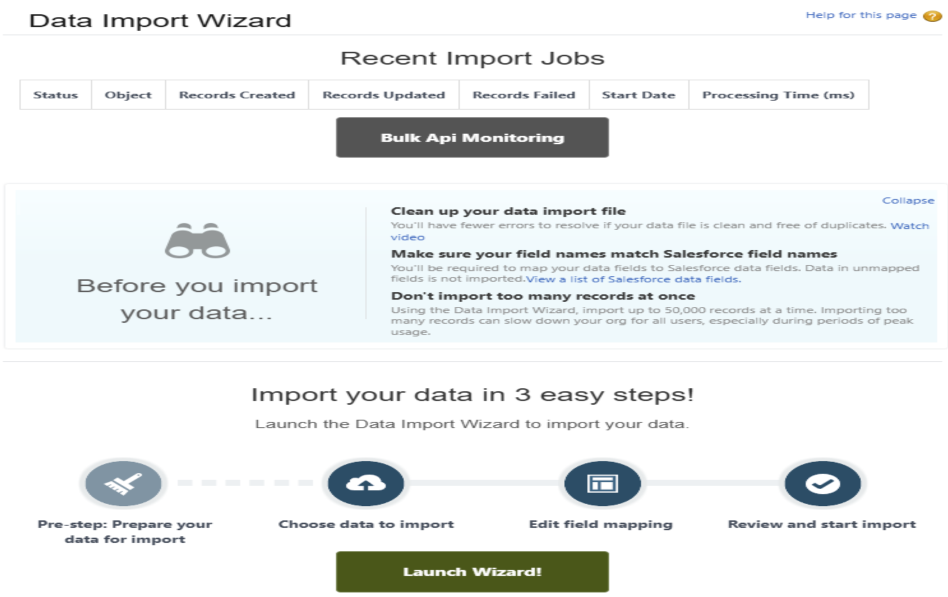
1.Data Import Wizard

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

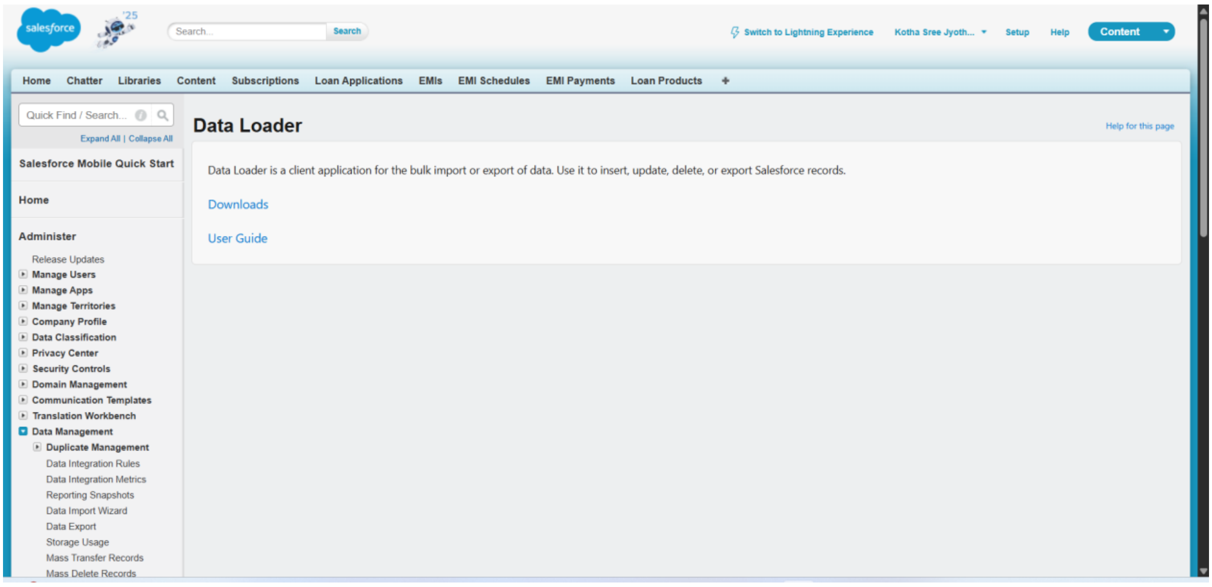
This helps in populating sample/test data during development.



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)

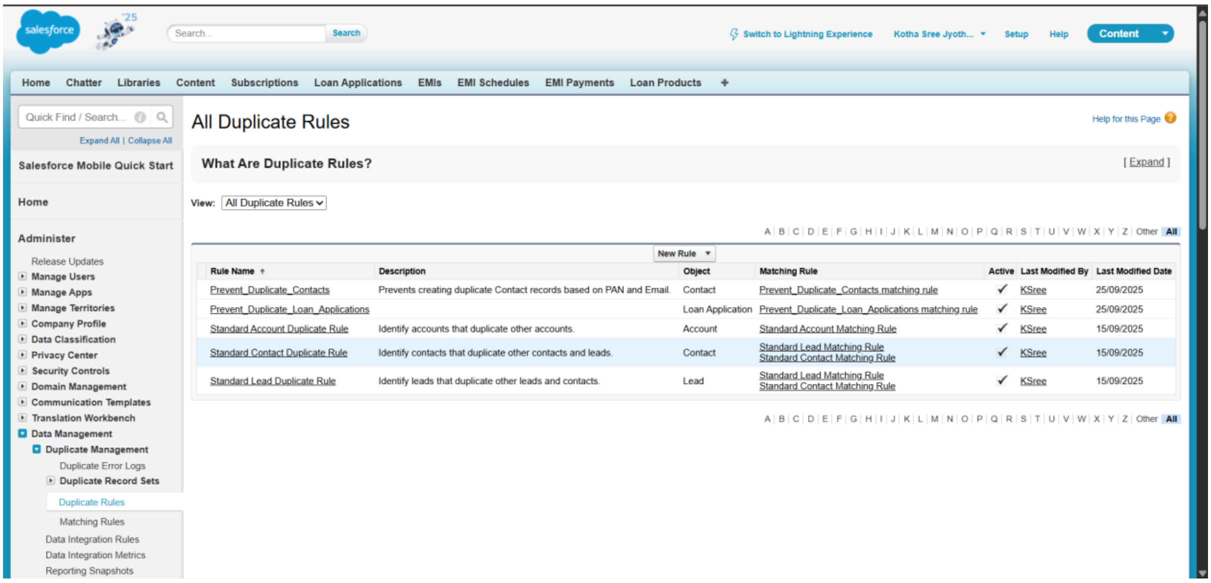
- **Matching Rule:** Standard Account Matching Rule (e.g., based on **Account Name + Phone**).
- **Purpose:** Identifies duplicate businesses/organizations.
  May not be core to your Loan CRM unless you're managing corporate loans.

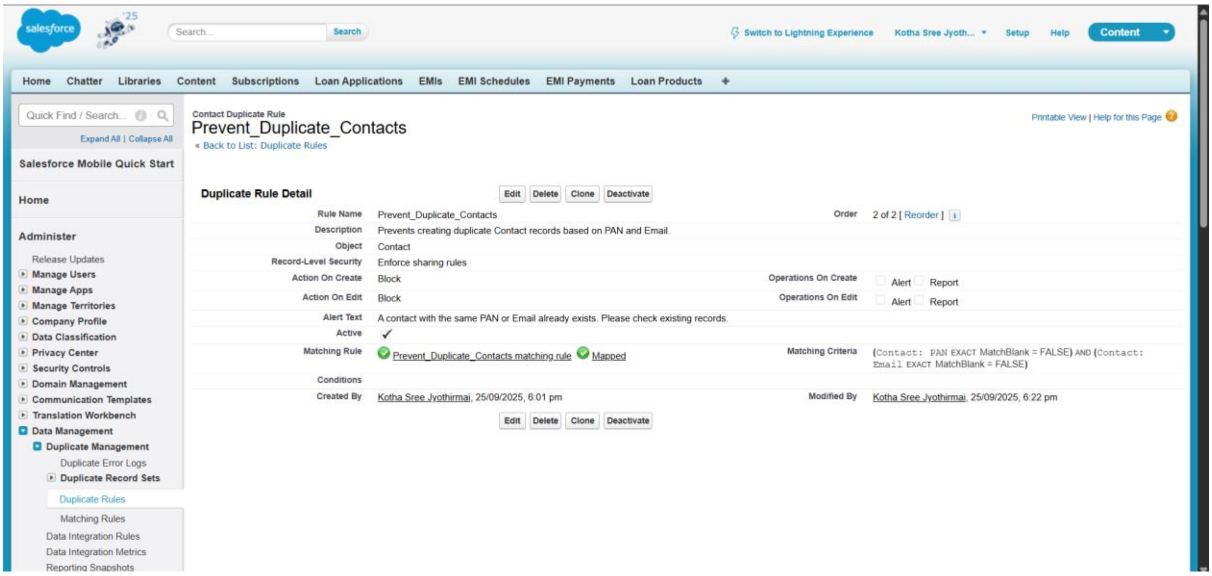
4. Standard Contact Duplicate Rule

- **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.

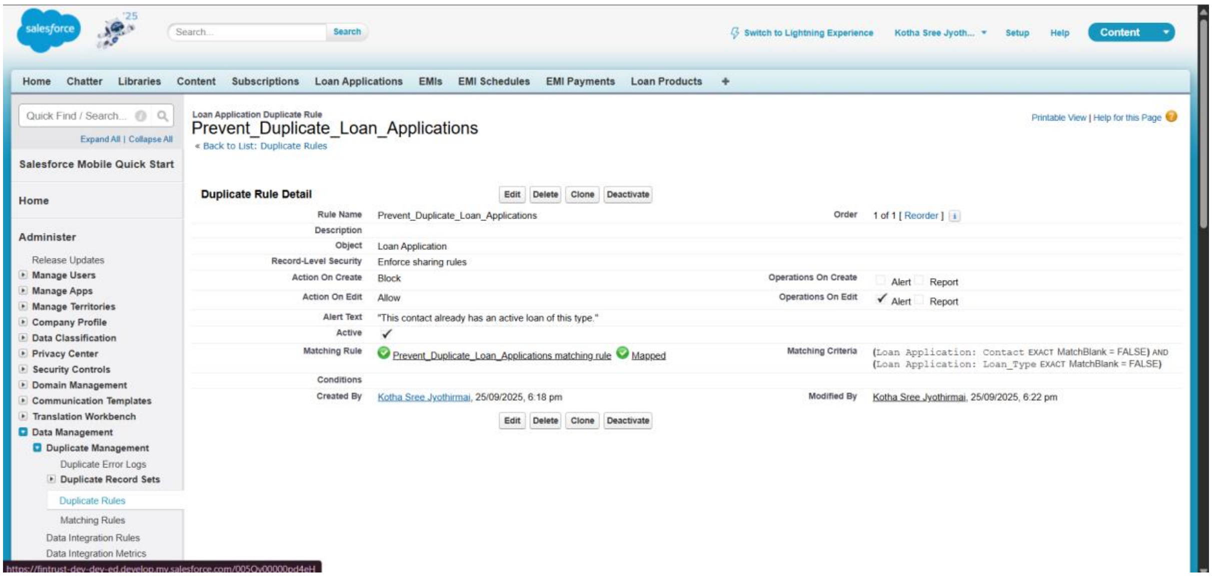
5. Standard Lead Duplicate Rule

- **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.

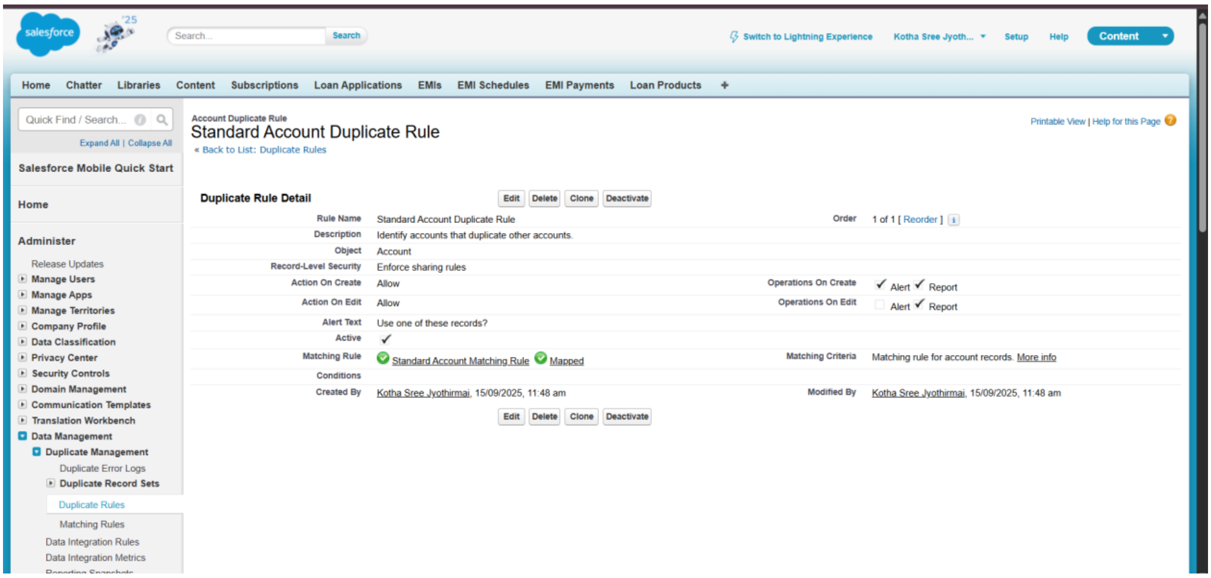




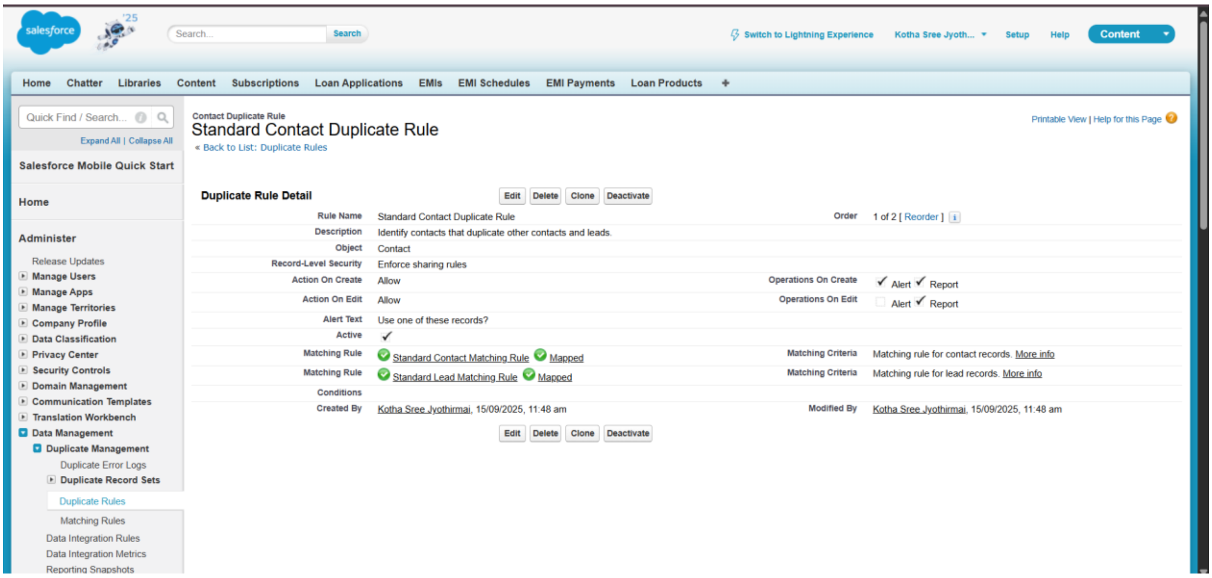
Search
Switch to Lightning Experience
Kotha Sree Jyoth...
Setup
Help
Content
Home
Chatter
Libraries
Content
Subscriptions
Loan Applications
EMIs
EMI Schedules
EMI Payments
Loan Products
Quick Find / Search...
Expand All | Collapse All
Salesforce Mobile Quick Start
Home
Administer
Release Updates
Manage Users
Manage Apps
Manage Territories
Company Profile
Data Classification
Privacy Center
Security Controls
Domain Management
Communication Templates
Translation Workbench
Data Management
Duplicate Management
Duplicate Error Logs
Duplicate Record Sets
Duplicate Rules
Matching Rules
Data Integration Rules
Data Integration Metrics
Reporting Snapshots
Contact Duplicate Rule
Prevent_Duplicate_Contacts
« Back to List: Duplicate Rules
Printable View | Help for this Page
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 Alert Report
Action On Edit Block
Operations On Edit Alert Report
Alert Text A contact with the same PAN or Email already exists. Please check existing records.
Active
Matching Rule Prevent_Duplicate_Contacts matching rule Mapped
Matching Criteria (Contact: PAN EXACT MatchBlank = FALSE) AND (Contact: Email EXACT MatchBlank = FALSE)
Conditions
Created By Kotha Sree Jyothirmai, 25/09/2025, 6:01 pm
Modified By Kotha Sree Jyothirmai, 25/09/2025, 6:22 pm

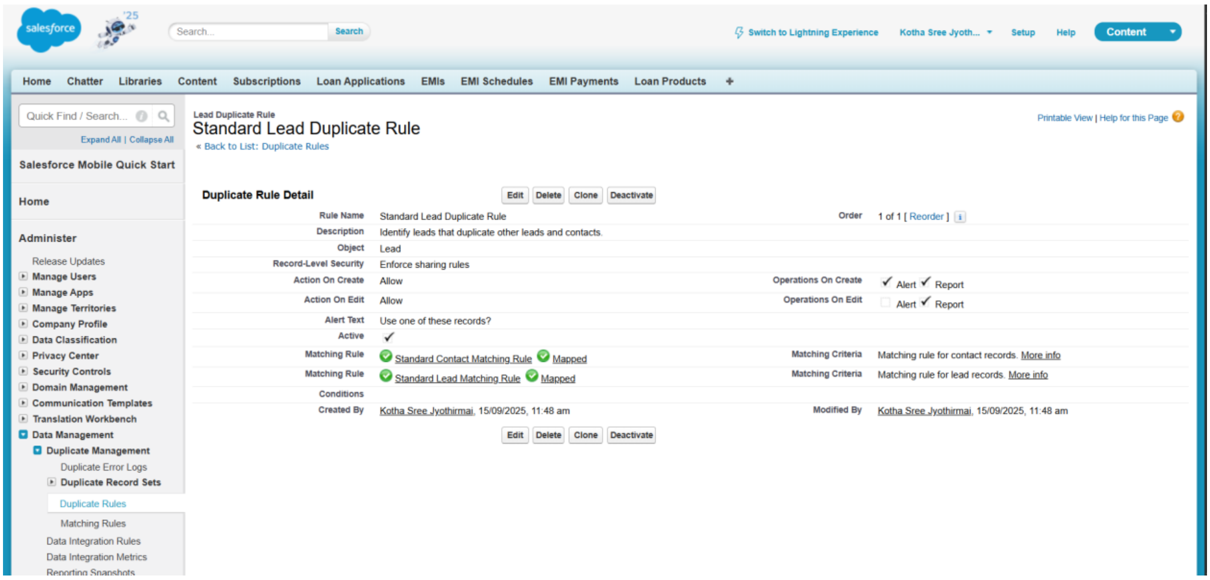


Search
Switch to Lightning Experience
Kotha Sree Jyoth...
Setup
Help
Content
Home
Chatter
Libraries
Content
Subscriptions
Loan Applications
EMIs
EMI Schedules
EMI Payments
Loan Products
Quick Find / Search...
Expand All | Collapse All
Salesforce Mobile Quick Start
Home
Administer
Release Updates
Manage Users
Manage Apps
Manage Territories
Company Profile
Data Classification
Privacy Center
Security Controls
Domain Management
Communication Templates
Translation Workbench
Data Management
Duplicate Management
Duplicate Error Logs
Duplicate Record Sets
Duplicate Rules
Matching Rules
Data Integration Rules
Data Integration Metrics
Loan Application Duplicate Rule
Prevent_Duplicate_Loan_Applications
« Back to List: Duplicate Rules
Printable View | Help for this Page
Duplicate Rule Detail
Edit
Delete
Clone
Deactivate
Rule Name Prevent_Duplicate_Loan_Applications
Order 1 of 1 [Reorder]
Description
Object Loan Application
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 contact already has an active loan of this type."
Active
Matching Rule Prevent_Duplicate_Loan_Applications matching rule Mapped
Matching Criteria (Loan Application: Contact EXACT MatchBlank = FALSE) AND (Loan Application: Loan_Type EXACT MatchBlank = FALSE)
Conditions
Created By Kotha Sree Jyothirmai, 25/09/2025, 6:18 pm
Modified By Kotha Sree Jyothirmai, 25/09/2025, 6:22 pm



Search
Switch to Lightning Experience
Kotha Sree Jyoth...
Setup
Help
Content
Home
Chatter
Libraries
Content
Subscriptions
Loan Applications
EMIs
EMI Schedules
EMI Payments
Loan Products
Quick Find / Search...
Expand All | Collapse All
Salesforce Mobile Quick Start
Home
Administer
Release Updates
Manage Users
Manage Apps
Manage Territories
Company Profile
Data Classification
Privacy Center
Security Controls
Domain Management
Communication Templates
Translation Workbench
Data Management
Duplicate Management
Duplicate Error Logs
Duplicate Record Sets
Duplicate Rules
Matching Rules
Data Integration Rules
Data Integration Metrics
Account Duplicate Rule
Standard Account Duplicate Rule
« Back to List: Duplicate Rules
Printable View | Help for this Page
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 Alert Report
Action On Edit Allow
Operations On Edit Alert Report
Alert Text Use one of these records?
Active
Matching Rule Standard Account Matching Rule Mapped
Matching Criteria Matching rule for account records. More info
Conditions
Created By Kotha Sree Jyothirmai, 15/09/2025, 11:48 am
Modified By 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.