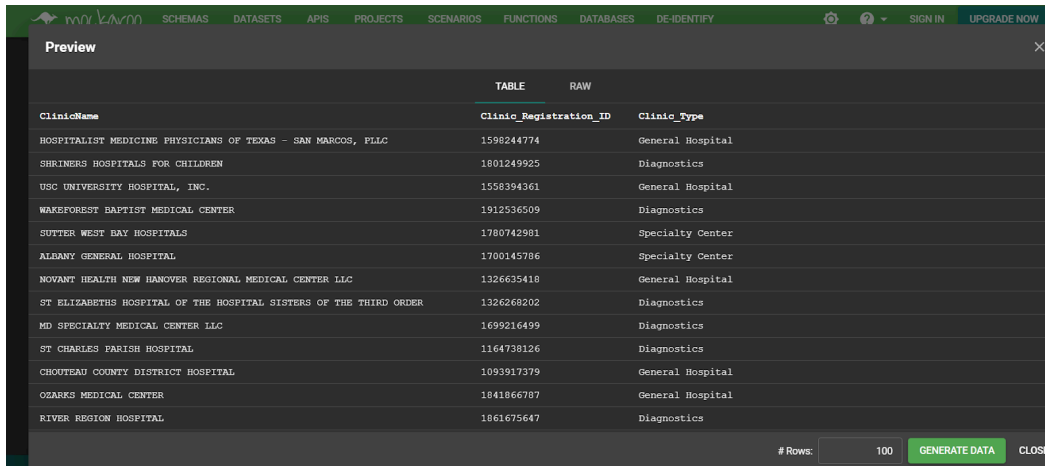


# PHASE-8

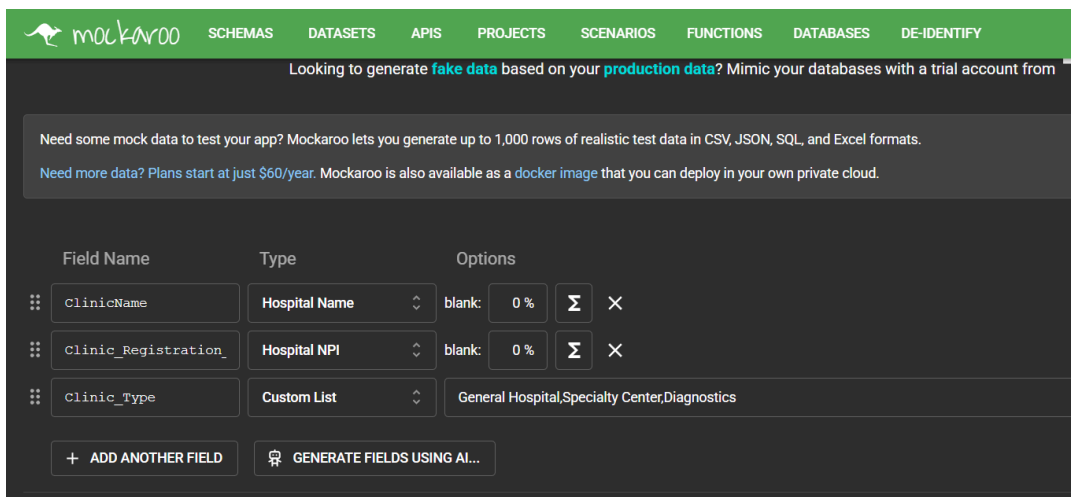
## Date Import Wizard

First I created dummy dataset by using Mockaroo that generated 100 clinic records. With all required fields so that import do not fail due to validation rule.



The image shows a 'Preview' window from the Mockaroo application. It displays a table of generated data with three columns: ClinicName, Clinic\_Registration\_ID, and Clinic\_Type. The data includes various hospital names and their corresponding registration IDs and types. At the bottom, there is a control bar showing '# Rows: 100' and buttons for 'GENERATE DATA' and 'CLOSE'.

ClinicName	Clinic_Registration_ID	Clinic_Type
HOSPITALIST MEDICINE PHYSICIANS OF TEXAS - SAN MARCOS, PLLC	1598244774	General Hospital
SHRINERS HOSPITALS FOR CHILDREN	1801249925	Diagnostics
USC UNIVERSITY HOSPITAL, INC.	1558394361	General Hospital
WAKEFOREST BAPTIST MEDICAL CENTER	1912536509	Diagnostics
SUTTER WEST BAY HOSPITALS	1780742981	Specialty Center
ALBANY GENERAL HOSPITAL	1700145786	Specialty Center
NOVANT HEALTH NEW HANOVER REGIONAL MEDICAL CENTER LLC	1326635418	General Hospital
ST ELIZABETHS HOSPITAL OF THE HOSPITAL SISTERS OF THE THIRD ORDER	1326268202	Diagnostics
MD SPECIALTY MEDICAL CENTER LLC	1699216499	Diagnostics
ST CHARLES PARISH HOSPITAL	1164738126	Diagnostics
CHOUTEAU COUNTY DISTRICT HOSPITAL	1093917379	General Hospital
OZARKS MEDICAL CENTER	1841866787	General Hospital
RIVER REGION HOSPITAL	1861675647	Diagnostics



The image shows the Mockaroo configuration interface. It includes a header with navigation tabs and a main area with instructions and a field configuration table. The instructions state that Mockaroo can generate up to 1,000 rows of realistic test data in CSV, JSON, SQL, and Excel formats. The field configuration table has three columns: Field Name, Type, and Options. It lists three fields: ClinicName (Hospital Name), Clinic\_Registration\_ (Hospital NPI), and Clinic\_Type (Custom List). At the bottom, there are buttons for '+ ADD ANOTHER FIELD' and 'GENERATE FIELDS USING AI...'.

Looking to generate **fake data** based on your **production data**? Mimic your databases with a trial account from

Need some mock data to test your app? Mockaroo lets you generate up to 1,000 rows of realistic test data in CSV, JSON, SQL, and Excel formats.

Need more data? Plans start at just \$60/year. Mockaroo is also available as a [docker image](#) that you can deploy in your own private cloud.

Field Name	Type	Options
ClinicName	Hospital Name	blank: 0 %
Clinic_Registration_	Hospital NPI	blank: 0 %
Clinic_Type	Custom List	General Hospital, Specialty Center, Diagnostics

+ ADD ANOTHER FIELD    GENERATE FIELDS USING AI...

SetupHomeObject Manager

Getting close

Choose dataEdit mappingStart import

Import your Data into Salesforce

You can import up to 50,000 records at a time.

Help for this page

What kind of data are you importing?

Standard objectsCustom objects

Clinics and Patients

Leads

Solutions

What do you want to do?

Add new records

Match Contact by:

None

Match Account by:

None

Trigger workflow rules and processes?

☐ Trigger workflow rules and processes for new and updated records

Record type:

General Hospital

Update existing records

Add new and update existing records

Where is your data located?

Drag CSV file here to upload

CSV

File

Choose File

MOCK\_DATA (4).csv

Character Code:

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

Values Separated By:

Comma

Outlook CSV

ACT! CSV

Choose dataEdit mappingStart import

Great job

Review & Start Import

Review your import information and click Start Import.

Help for this page

Your selections:

Clinics and Patients

Add new records

MOCK\_DATA (4).csv

Your import will include:

Mapped fields

3

Congratulations, your import has started!

Click OK to view your import status on the Bulk Data Load Job page.

OK

Your import will not include:

Unmapped fields

0

SETUP

Bulk Data Load Jobs

Bulk Data Load Job  
750gL00000E5TRC

View the details of a bulk data load job.

Back to List: Bulk Data Load Jobs

Bulk Data Load Job Detail

Reload

Job ID	750gL00000E5TRC	Job Type	Bulk V1	Status	Closed
Submitted By	anushka.bhatt	Operation	Insert	Total Processing Time (ms)	587
Start Time	9/25/2025, 1:18 PM IST	Queued Batches	0	API Active Processing Time (ms)	364
End Time	9/25/2025, 1:18 PM IST	In Progress Batches	0	Apex Processing Time (ms)	141
Time to Complete (hh:mm:ss)	00:00	Completed Batches	1		
Object	Clinic	Failed Batches	0		
External ID Field		Progress	100%		
Content Type	CSV	Records Processed	100		
Concurrency Mode	Parallel	Records Failed	0		
API Version	64.0	Retries	0		

Reload

Batches

View Request	View Result	Batch ID	Start Time	End Time	Total Processing Time (ms)	API Active Processing Time (ms)	Apex Processing Time (ms)	Records Processed	Records Failed	Retry Count	State Message	Status
View Request	View Result	751gl.000000becMn	9/25/2025, 1:18 PM	9/25/2025, 1:18 PM	587	364	141	100	0	0		Completed

Clinics

All Clinics

NewImportPrintable ViewAssign Labels

50+ Items • Sorted by Clinic Name • Updated a few seconds ago

Q Search this list...

<input type="checkbox"/>	Clinic Name ↑	A...	Billing State/Province	Phone	Type	Account Own...
1	<input type="checkbox"/> ADAIR COUNTY HOSPITAL DISTRICT					anu
2	<input type="checkbox"/> ADVANCED MEDICAL CENTER, INC.					anu
3	<input type="checkbox"/> ADVOCATE HEALTH AND HOSPITALS CORPORATION					anu
4	<input type="checkbox"/> ADVOCATE ILLINOIS MASONIC MEDICAL CENTER					anu
5	<input type="checkbox"/> AKAASH HOSPITALISTS PLLC					anu
6	<input type="checkbox"/> AKRON GENERAL MEDICAL CENTER					anu
7	<input type="checkbox"/> ALBANY GENERAL HOSPITAL					anu
8	<input type="checkbox"/> ALTERNATIVE MEDICAL CENTER					anu
9	<input type="checkbox"/> ANN AND ROBERT H. LURIE CHILDREN'S HOSPITAL					anu
10	<input type="checkbox"/> ARMSTRONG COUNTY MEMORIAL HOSPITAL					anu
11	<input type="checkbox"/> ASPIRE MEDICAL CENTERS, LLC					anu
12	<input type="checkbox"/> ATLANTA MEDICAL CENTER PHYSICIAN GROUP, LLC					anu
13	<input type="checkbox"/> BAKERSFIELD MEMORIAL HOSPITAL					anu
14	<input type="checkbox"/> BARNES-JEWISH HOSPITAL					anu
15	<input type="checkbox"/> BAYHEALTH MEDICAL CENTER, INC.					anu
16	<input type="checkbox"/> BEST CHOICE MEDICAL CENTER INC					anu
17	<input type="checkbox"/> BOSTON MEDICAL CENTER CORPORATION					anu
18	<input type="checkbox"/> BRADLEY COUNTY MEDICAL CENTER					anu
19	<input type="checkbox"/> BROOKVILLE HOSPITAL					anu

Inserted 100 records successfully.  
 Similarly, added 50 patient records.

Choose data

Edit mapping

Start import

Review & Start Import

Review your import information and click Start Import.

Help for this page

Your selections:

Clinics and Patients ✓  
Add new records ✓  
MOCK\_DATA.csv ✓

Your import will include:

Mapped fields  
7

Your import will not include:

Unmapped fields  
0

SETUP

Bulk Data Load Jobs

Bulk Data Load Job

750gl00000E5dNH

View the details of a bulk data load job.

Back to List: Bulk Data Load Jobs

Bulk Data Load Job Detail

Refresh

Job ID

750gl00000E5dNH

Submitted By

anushka.khatri

Start Time

9/25/2025, 2:52 PM IST

End Time

9/25/2025, 2:52 PM IST

Time to Complete (hh:mm:ss)

00:07

Object

Patient

External ID Field

Content Type

CSV

Concurrency Mode

Parallel

API Version

64.0

Job Type

Bulk V1

Operation

Insert

Queued Batches

0

In Progress Batches

0

Completed Batches

1

Failed Batches

0

Progress

100 %

Records Processed

50

Records Failed

0

Retries

0

Refresh

Batches

View Request	View Result	Batch ID	Start Time	End Time	Total Processing Time (ms)	API Action Processing Time (ms)	App Processing Time (ms)	Records Processed	Records Failed
<a href="#">View Request</a>	<a href="#">View Result</a>	751gl000008epAM	9/25/2025, 2:52 PM	9/25/2025, 2:52 PM	626	354	151	50	0

I also made emailID as an externalID in setup →object →patient→fields and relationships.  
 Since csv files we upload don't have a system-generated ID so to identify a record uniquely in the whole org, externalID is used.

# Duplicate Rules

This is an important concept used to prevent duplicate records from being created in the system, Alert the user, or block them when a duplicate is detected. This maintains data quality.

## Patient

Before duplicate rule , I need to craete matching rule.

Setup > Matching rule > Create Marching rule > Activate it

Step1 : Object Contact which is actually Contact in our system.

New Matching Rule  
Contact

Help for this Page

Step 2: Configure Matching Rule Step 2 of 2

Previous Save Cancel

Rule Details

Object Contact

Rule Name PatientMatchingRule

Unique Name PatientMatchingRule

Description Alert when duplicate patient detected

Matching Criteria

Tell the rule which fields to compare and how.

Field	Matching Method	Match Blank Fields	AND
Email	Exact	<input type="checkbox"/>	AND
--None--	Exact	<input type="checkbox"/>	AND
--None--	Exact	<input type="checkbox"/>	AND
--None--	Exact	<input type="checkbox"/>	AND
--None--	Exact	<input type="checkbox"/>	AND

Add Filter Logic...

Previous Save Cancel

This is the matching rule that fills get exact match for email field

SETUP Duplicate Rules

Edit Duplicate Rule PatientDuplicateRule

Save Save & New

Duplicate Rule Edit

Rule Details

Rule Name PatientDuplicateRule

Description

Object Contact

Record-Level Security

☒ Enforce sharing rules ☐ Bypass sharing rules

Actions

Specify what happens when a user tries to save a duplicate record.

Action On Create Block

Action On Edit Allow ☒ Alert ☐ Report

Alert Text Similar record found

Matching Rules

Define how duplicate records are identified.

Compare Patients With Contacts

Matching Rule PatientMatchingRule

Matching Criteria Contact: Email EXACT MatchBlank = FALSE

Field Mapping Mapping Selected

Add Rule Remove Rule

If duplicate record found will alert the creator and if making a new record will block them from doing so.

Contact Duplicate Rule PatientDuplicateRule

Duplicate Rule Detail

Edit Delete Clone Deactivate

Rule Name	PatientDuplicateRule	Order	2 of 2 [Reorder]
Description			
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	Allow	Operations On Edit	<input checked="" type="checkbox"/> Alert <input type="checkbox"/> Report
Alert Text	Similar record found		
Active	<input checked="" type="checkbox"/>		
Matching Rule	<input checked="" type="checkbox"/> PatientMatchingRule <input checked="" type="checkbox"/> Mapped	Matching Criteria	Contact: Email EXACT MatchBlank = FALSE
Conditions			
Created By	anushka bhatt 9/25/2025, 6:21 PM	Modified By	anushka bhatt 9/25/2025, 6:35 PM

Edit Delete Clone Deactivate

## New Patient

\* = Required Information

### Patient Information

PatientID

Phone

\* Name

Salutation

Mr.

First Name

First Name

\* Last Name

Lowrence

Email

akachk@soup.io

\* Date\_of\_Birth

Clinic Name

Search Clinics...

\* Blood\_Group

--None--

\* Gender

--None--

Marital Status

--None--

PatientHealthIssue

EmergencyContact

⊗ We hit a snag.

You can't save this record because a duplicate record already exists. To save, use different information.

[View Duplicates](#)

### Address Information

Patient Address

Patient Country

Cancel

Save & New

Save

[View Duplicates](#)

You can't save this record because a duplicate record already exists. To save, use different information.

[PATIENT \(1\)](#)



Aggy Kach  
Patient

Name: Aggy Kach  
Clinic Name:  
Account Site:  
Phone: (552) 931-8749  
Email: [akachk@soup.io](mailto:akachk@soup.io)  
Patient Owner Alias: anu

[Open This Patient](#)

Did similarly for Clinic which is Account matching rule based on Name and Clinic\_Type .

SETUP

Matching Rules

Matching Rule ClinicMatchingRule [Help for this Page](#)

Matching Rule Detail

Delete Clone Deactivate

Object	Account
Rule Name	ClinicMatchingRule
Unique Name	ClinicMatchingRule
Description	
Matching Criteria	(Account: Clinic_Type EXACT MatchBlank = FALSE) AND (Account: Name EXACT MatchBlank = FALSE)
Status	Active
Created By	anushka.bhatt, 9/25/2025, 6:50 PM
Modified By	anushka.bhatt, 9/25/2025, 7:36 PM

SETUP

Duplicate Rules

Account Duplicate Rule ClinicDuplicateRule [Help for this Page](#)

Duplicate Rule Detail

Edit Delete Clone Deactivate

Rule Name ClinicDuplicateRule

Order 2 of 2 [Reorder]

Description			
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	Block	Operations On Edit	<input type="checkbox"/> Alert <input type="checkbox"/> Report
Alert Text	Matching record found! Review		
Active	<input checked="" type="checkbox"/>		
Matching Rule	<input checked="" type="checkbox"/> ClinicMatchingRule <input checked="" type="checkbox"/> Mapped	Matching Criteria	(Account: Clinic_Type EXACT MatchBlank = FALSE) AND (Account: Name EXACT MatchBlank = FALSE)
Conditions			
Created By	anushka.bhatt, 9/25/2025, 6:54 PM	Modified By	anushka.bhatt, 9/25/2025, 7:36 PM

Edit Delete Clone Deactivate

Clinic CLI-0001

Following

New

Clinic_Registration_ID	Clinic Name	Clinic_Type	ProvideEmergencyService
CLINIC4005214	MediBuddy	General Hospital	<input type="checkbox"/>

Related

Details

We found 1 potential duplicate of this Clinic.

[View Duplicates](#)

Activity

Chatt

to merge, dependencies should be up to a certain limit with that and should not have to keep

✓ Clinics (2)

Clinic Name	Account Site	Phone	Account Owner Alias
MediBuddy		(789) 654-7896	anu
MediBuddy			anu

Compare clinics

When you merge, the principal record is updated with the values you choose, and relationships to other items are shifted to the principal record.

PRINCIPAL RECORD	MediBuddy Select All	MediBuddy Select All
	<input checked="" type="radio"/> Use as principal	<input type="radio"/> Use as principal
CLINIC_REGISTRATION_ID	<input checked="" type="radio"/> CLINIC4005214	<input type="radio"/> CLINIC40052002
CLINIC NUMBER	<input checked="" type="radio"/> 48	<input type="radio"/> [empty]
PHONE	<input checked="" type="radio"/> (789) 654-7896	<input type="radio"/> [empty]
CREATED DATE	9/20/2025, 12:29 PM	9/25/2025, 7:41 PM
LAST MODIFIED DATE	9/20/2025, 12:29 PM	9/25/2025, 7:41 PM

Potential Duplicate Records

Confirm merge

We're ready to merge these records

You're about to merge these clinics. You can't undo merging.

Finally merged the record.

## Change Set

Change Sets are used in Salesforce to deploy metadata between related orgs (e.g., from Sandbox to Production). Since this project is implemented in a single Developer Org, deployment was managed directly using VS Code (SFDX). Change Sets were noted as an option for future Production deployment.