

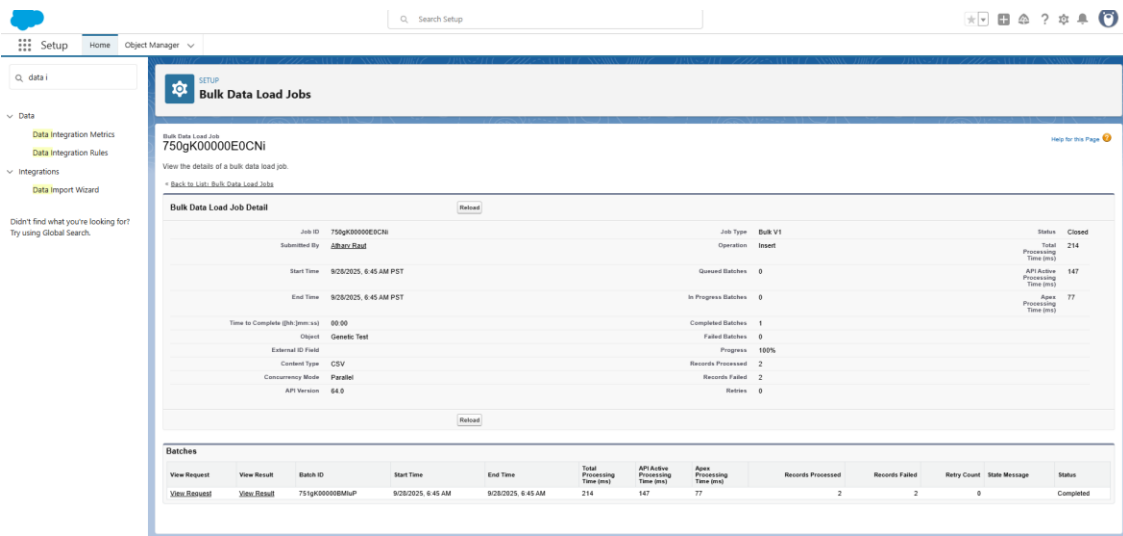
Phase 8: Data Management & Deployment

Introduction

Phase 8 focused on handling data import, backup, and deployment activities for the Smart BioTech Lab application. This ensures that the system can efficiently migrate records, maintain data integrity, and move changes across environments.

Step 1 — Data Import Wizard

The Data Import Wizard was used to insert initial records for Smart BioTech Lab custom objects.



These CSV files were uploaded step by step through the Import Wizard, mapping fields accordingly.

Step 2 — Matching Rules and Duplicate Rules

A. Matching Rules

- Define the criteria to identify duplicates.
- Steps:
 1. Go to Setup → Matching Rules → New.
 2. Define criteria (e.g., exact match, case-insensitive) → Save → Activate.

The screenshot shows the 'Matching Rules' configuration page for a rule named 'Patient Email NID MR'. The page has a sidebar with 'Setup', 'Home', and 'Object Manager' tabs. The 'Matching Rules' section is active. The rule details are as follows:

Matching Rule Detail	
Object	Patient
Rule Name	Patient Email NID MR
Unique Name	Patient_Email_NID_MR
Description	
Matching Criteria	(Patient: Name EXACT MatchBlank = FALSE) AND (Patient: Email EXACT MatchBlank = FALSE)
Status	Inactive
Created By	Athay Raut, 9/25/2025, 11:27 PM
Modified By	Athay Raut, 9/25/2025, 11:27 PM

The screenshot shows the 'Matching Rules' configuration page for a rule named 'GeneticTest BlockOnTestID'. The page has a sidebar with 'Setup', 'Home', and 'Object Manager' tabs. The 'Matching Rules' section is active. The rule details are as follows:

Matching Rule Detail	
Object	Genetic Test
Rule Name	GeneticTest BlockOnTestID
Unique Name	GeneticTest_BlockOnTestID
Description	
Matching Criteria	((Genetic Test: Name EXACT MatchBlank = FALSE) AND ((Genetic Test: Test_ID EXACT MatchBlank = FALSE)
Status	Inactive
Created By	Athay Raut, 9/25/2025, 11:32 PM
Modified By	Athay Raut, 9/25/2025, 11:32 PM

B. Duplicate Rules

Duplicate Rules were considered to prevent duplicate records during imports. In the Smart BioTech Lab project, this was documented as an enhancement but not configured due to time constraints.

Decide what happens when duplicates are detected.

- Steps: 1. Go to Setup → Duplicate Rules → New.

2. Apply your Matching Rule to the object (e.g., Patient__c).
3. Choose Action:
 - Block → Prevents user from creating duplicates.
 - Alert → Warns the user but allows creation.
4. Activate the rule.

The screenshot shows the Salesforce Setup interface for Duplicate Rules. The left sidebar contains a search bar with 'dup' and a navigation menu with 'Data' expanded, showing 'Duplicate Management', 'Duplicate Error Logs', 'Duplicate Rules' (selected), and 'Matching Rules'. Below the menu is a message: 'Didn't find what you're looking for? Try using Global Search.' The main content area is titled 'Duplicate Rules' and shows details for the rule 'GeneticTest_BlockOnTestID'. The rule is active and mapped. The 'Duplicate Rule Detail' section includes fields for Rule Name, Description, Object, Record-Level Security, Action On Create, Action On Edit, Alert Text, Active, Matching Rule, Conditions, and Created By. The 'Matching Criteria' section shows the criteria: '(Genetic Test: Test_ID EXACT MATCHBANK = FALSE) AND (Genetic Test: Patient EXACT MATCHBANK = FALSE)'. The 'Operations On Create' and 'Operations On Edit' sections show 'Alert' and 'Report' options.

Step 3 — Data Export & Backup

The Data Export service was used to back up records. Export jobs were scheduled to generate a ZIP file containing CSV files for each object. This ensures data recovery in case of accidental deletion.

The screenshot shows the Salesforce Setup interface for Data Export. The left sidebar contains a search bar with 'Search Setup' and a navigation menu with 'Data' expanded, showing 'Big Objects', 'Conversation Transcript Export', 'Data Export' (selected), 'Data Integration Metrics', 'Data Integration Rules', 'Duplicate Management', 'Duplicate Error Logs', 'Duplicate Rules', 'Matching Rules', 'Mass Delete Records', 'Mass Transfer Approval Requests', 'Mass Transfer Records', 'Mass Update Addresses', 'Picklist Settings', and 'Schema Settings'. The main content area is titled 'Data Export' and shows the 'Monthly Export Service' page. The page includes a 'Next scheduled export: None' status, 'Export Now' and 'Schedule Export' buttons, and a table showing the export details: Scheduled By (Albany Saul), Schedule Date (9/25/2025), Export File Encoding (ISO-8859-1 (General US & Western European, ISO-LATIN-1)), Action (download), File Name (WE_00DgK000007ZGCMU4_1.ZIP), and File Size (2.0K).

Data Backup

Always back up before importing or deploying, in case something goes wrong.

- Steps:
1. Go to Setup → Data Export → Export Now.
 2. Choose objects to backup (e.g., Patient__c, Genetic_Test__c, Doctor__c, Report__c).
 3. Download the zip files.

The screenshot shows the Microsoft Excel interface. The ribbon at the top includes tabs for File, Home, Insert, Draw, Page Layout, Formulas, Data, Review, View, Automate, and Help. The Home tab is active, displaying options for Paste, Font, Paragraph, Alignment, Number, Styles, Cells, Editing, and Comments. Below the ribbon, a data table is visible with columns A through W. The table contains patient information, including names, IDs, addresses, and insurance details. The first two rows of data are highlighted in blue.

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W
Id	OwnerId	IsDeleted	Name	CreatedDate	CreatedBy	LastModified	SystemMod	LastActive	Patient_ID	Address_c	First_Nam	Last_Nam	DOB_c	Phone_c	Insurance	Gender_c	Primary_D	Email_c				
a01g000005gk000c		0	Patient#1	01/01/2020	005gk000c	005gk000c	005gk000c		PAT-0001	1	Rathi	Naga Arnav	Joshi	09/19/97	INS-12345	Male		DR. KUMAR				
a01g000005gk000c		0	Rahul Shar	01/01/2020	005gk000c	005gk000c	005gk000c		PAT-0002	5	LBS Mar	Rahul	Sharma	09/09/99	INS-65432	Male						

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