

Phase 8: Data Management & Deployment

1. Data Import Wizard

- **Definition:** A Salesforce tool for importing data in bulk through a simple interface, without coding.
 - **Purpose in NeuroWell:** Helps import patient records, counselor lists, and session data quickly.
 - **Example Use:** Importing a CSV file containing initial patient wellness survey results into NeuroWell.
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2. Data Loader

- **Definition:** A Salesforce client application for bulk import, export, update, or delete of records.
 - **Purpose in NeuroWell:** Handles large volumes of data with more control than the Data Import Wizard.
 - **Example Use:** Bulk updating stress level records for thousands of patients from an external dataset.
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3. Duplicate Rules

- **Definition:** Rules to prevent duplicate records from being created in Salesforce.
 - **Purpose in NeuroWell:** Ensures clean data for accurate mental wellness tracking.
 - **Example Use:** Preventing duplicate patient records by checking name, email, and contact details.
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4. Data Export & Backup

- **Definition:** Salesforce features to export and back up org data for safety and recovery.
 - **Purpose in NeuroWell:** Protects critical patient and session data against loss or corruption.
 - **Example Use:** Scheduling a weekly export of patient wellness and session records to an external secure backup.
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5. Change Sets

- **Definition:** A Salesforce deployment tool to move metadata changes from one org to another (e.g., sandbox to production).
 - **Purpose in NeuroWell:** Facilitates deploying new features, updates, and configuration changes safely.
 - **Example Use:** Deploying new Lightning components for patient dashboards from sandbox to production.
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6. Unmanaged vs Managed Packages

- **Definition:**
 - *Unmanaged Packages:* Packages for distributing open or in-development metadata.
 - *Managed Packages:* Packages used for controlled distribution, with versioning and license management.
 - **Purpose in NeuroWell:** Choosing appropriate package type for app extensions or integrations.
 - **Example Use:** Using unmanaged packages for internal custom components and managed packages for third-party integrations.
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7. ANT Migration Tool

- **Definition:** A Java/command-line tool for moving metadata between Salesforce orgs.
 - **Purpose in NeuroWell:** Enables automated deployments and version control for NeuroWell configurations.
 - **Example Use:** Using ANT to deploy updated Apex classes and Lightning components from a development org to production.
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8. VS Code & SFDX

- **Definition:**
 - *VS Code:* Code editor for Salesforce development.

- *SFDX (Salesforce DX)*: Modern development experience for Salesforce with CLI-based workflows.
- **Purpose in NeuroWell**: Enhances development productivity and supports version control integration.
- **Example Use**: Developing Lightning Web Components in VS Code, pushing changes to Salesforce via SFDX commands.