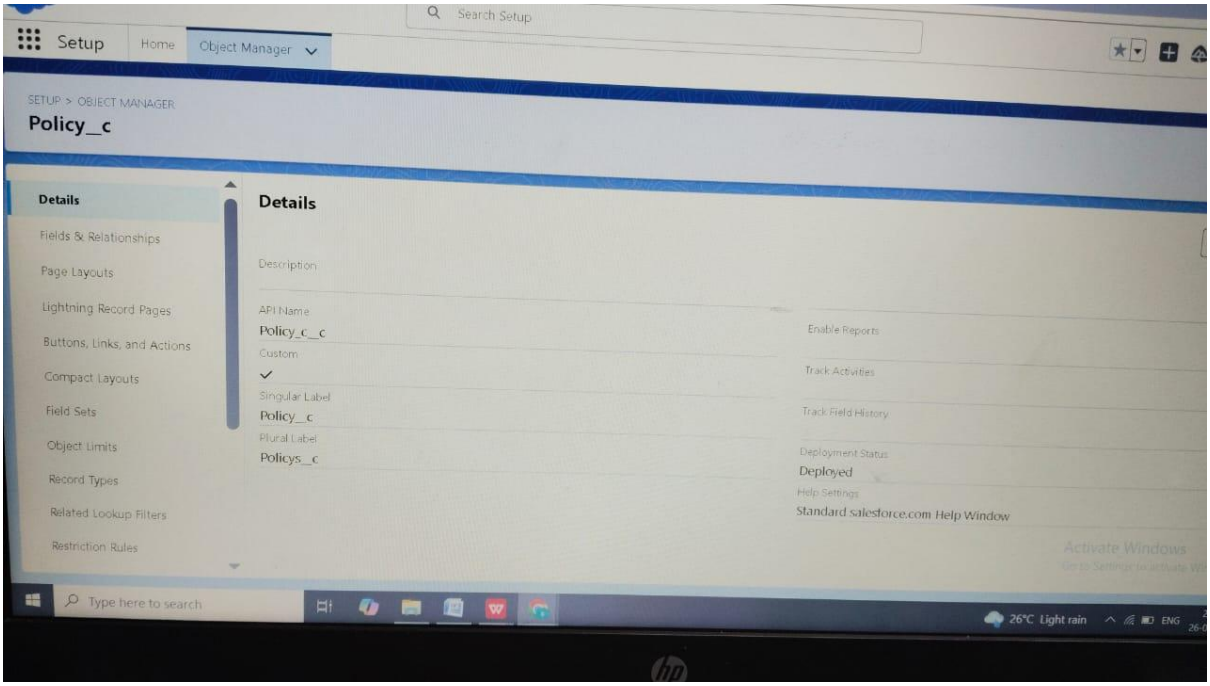
Medicare Cloud — Phase 8: Data Management & Deployment

1. Data Import Wizard

Description:
A point-and-click tool within Salesforce that allows users to import data for standard objects (like Leads, Accounts, Contacts) and custom objects without any coding. It supports up to 50,000 records at a time.

Use in Medicare Cloud:

- Import a list of new patients or providers from a CSV file.
- Upload treatment catalog or insurance policies during initial setup.



Advantages:

- User-friendly interface
- No installation required
- Basic duplicate prevention options

---

2. Data Loader

Description:
A client application for bulk data operations such as insert, update, upsert, delete, and export. Supports up to 5 million records and allows use of CSV files or direct database connection.

Use in Medicare Cloud:

- Perform mass update of claim statuses after bulk processing by a third-party system.
- Export patient data for analytics or compliance audits.

Advantages:

- Handles large volumes of data
- Supports complex operations (hard delete, upsert)
- Can be run via command line for automation

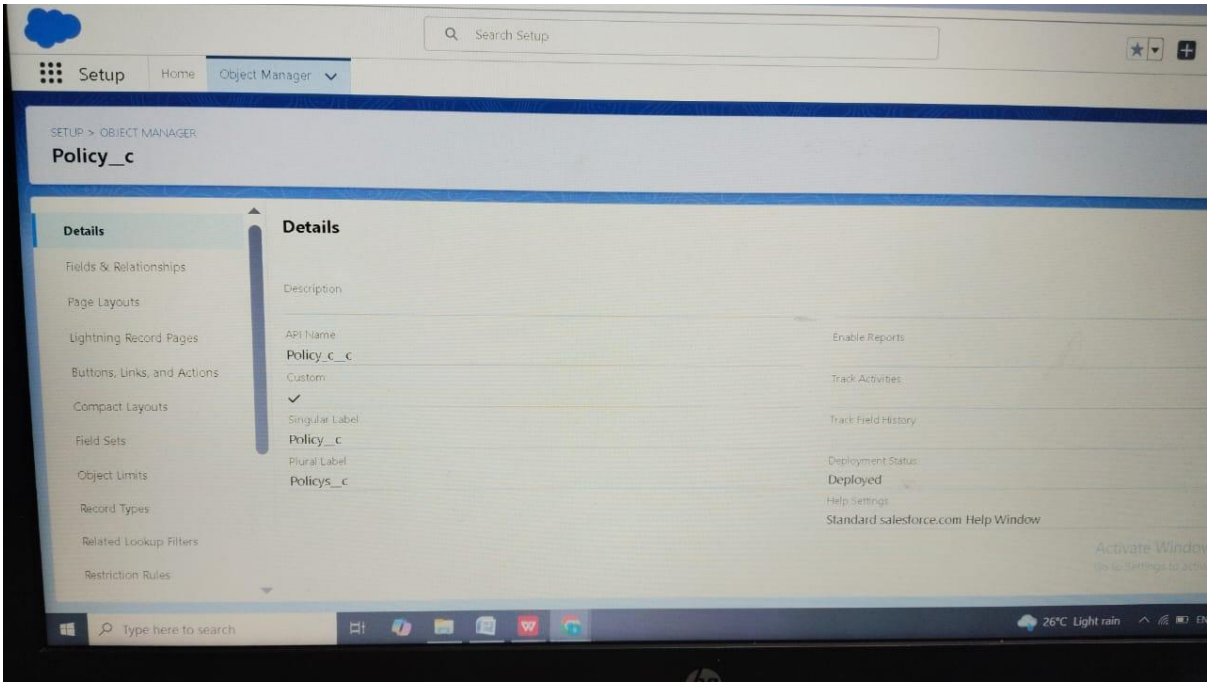
---

3. Duplicate Rules

Description:
Rules that prevent or warn users when duplicate records are created. They work with Matching Rules to define what fields should be compared.

Use in Medicare Cloud:

- Avoid duplicate patient records by matching Name + Date of Birth + Policy Number.
- Prevent duplicate provider accounts.



Benefits:

- Improves data quality
- Reduces confusion for staff
- Ensures accurate reporting

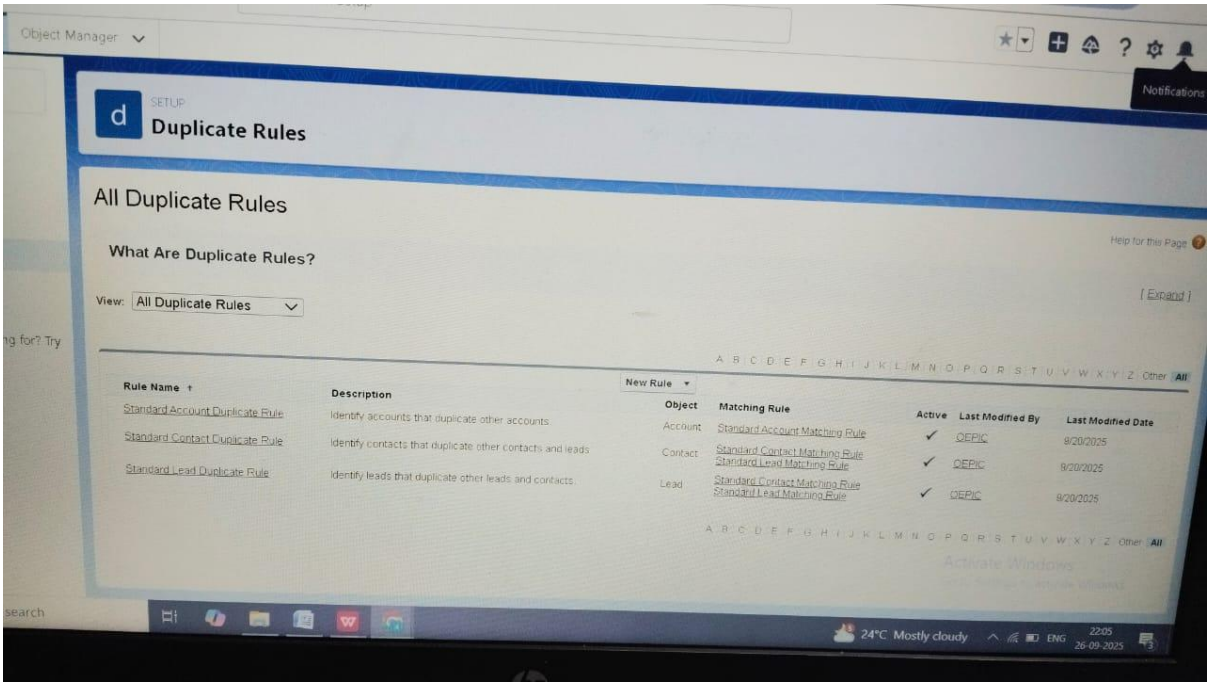
---

4. Data Export & Backup

Description:
Salesforce provides Data Export Service (manual or scheduled) and tools like Data Loader for backup purposes. Exports produce CSV files of all objects that can be downloaded and stored securely.

Use in Medicare Cloud:

- Schedule weekly exports of Patients, Claims, and Authorizations for compliance and recovery purposes.
- Keep an off-platform backup for disaster recovery.



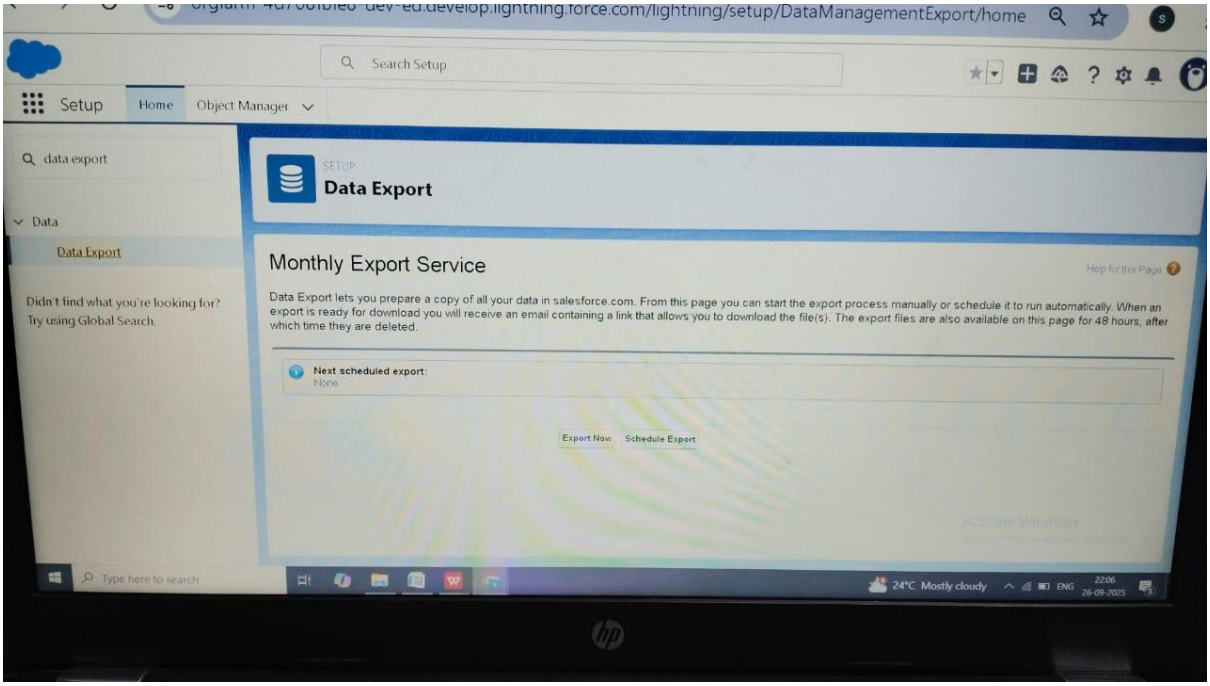
---

5. Change Sets

Description:
A point-and-click deployment tool for moving customizations (metadata) between related Salesforce orgs (e.g., sandbox → production).

Use in Medicare Cloud:

- Deploy newly created flows, validation rules, and objects after testing.
- Move approval processes and email templates from UAT sandbox to production.



Limitations:

- Works only between related orgs
- Cannot move data, only metadata

---

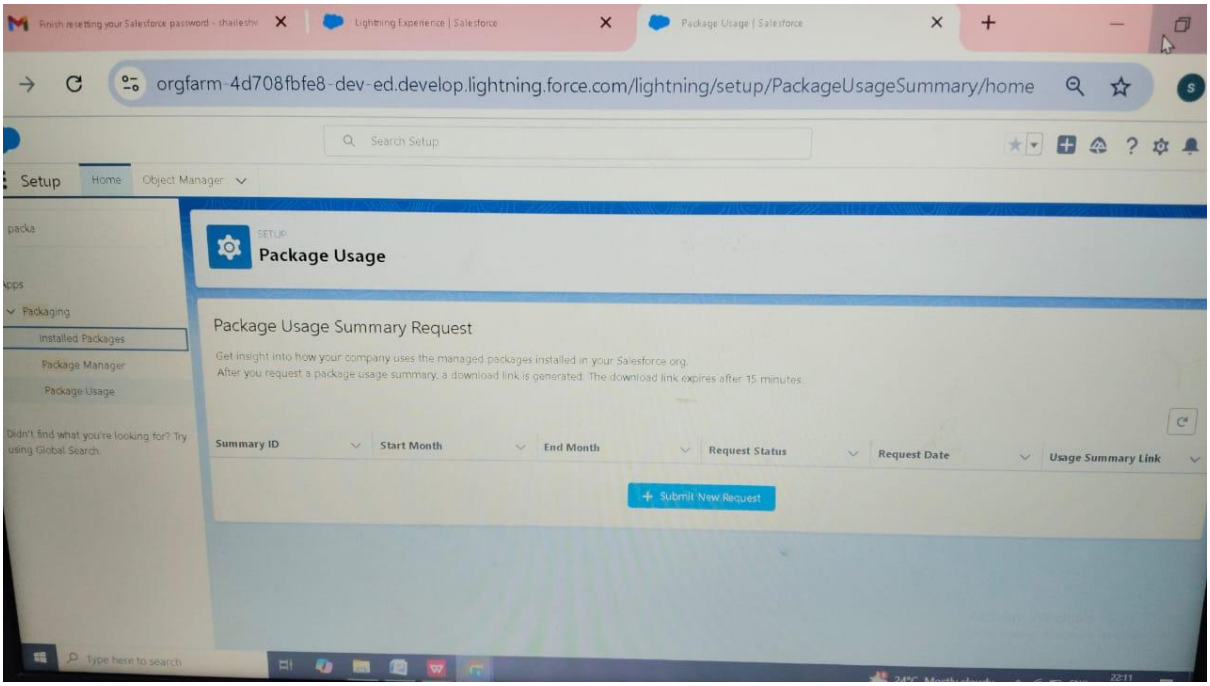
6. Unmanaged vs Managed Packages

Description:
Salesforce packages are containers for metadata distribution.

- **Managed Packages:** Locked packages typically used by ISVs (AppExchange apps). They allow version upgrades but you cannot directly edit most components.
- **Unmanaged Packages:** Open packages for sharing source code/components. Editable after installation but no version upgrades.

Use in Medicare Cloud:

- Use unmanaged packages to move reusable components (flows, objects) across sandboxes.
- If distributing Medicare Cloud as a commercial app, use a managed package for controlled releases.



---

7. ANT Migration Tool

Description:
A Java/command-line-based deployment tool that uses the Metadata API. Ideal for scripted, repeatable deployments and CI/CD pipelines.

Use in Medicare Cloud:

- Automate deployment of metadata for multiple sandboxes.
- Keep XML files of metadata under version control (Git).

Benefits:

- Automates deployments
- Supports rollback via source control
- Works across unrelated orgs (unlike Change Sets)

---

8. VS Code & SFDX

Description:
Salesforce DX (Developer Experience) + VS Code extension allow modern development workflows:

- Source-driven development
- Scratch orgs for isolated development/testing
- CLI (sfdx) commands for pushing/pulling metadata
- Integration with Git for version control

Use in Medicare Cloud:

- Maintain Medicare Cloud project as source code (metadata + configuration).
- Use Scratch Orgs for testing new automation features without affecting other work.
- Deploy directly to production via sfdx force:source:deploy.

Advantages:

- Modern DevOps approach
- Easier collaboration for teams
- Enables CI/CD pipelines