

# Phase 8: Data Management & Deployment

In this phase, the focus was on **managing data efficiently**, ensuring **data integrity**, and deploying changes across environments. The following tools and functionalities were used:

## 1. Data Import Wizard

- **Purpose:** To import records such as Patient\_\_c, Treatment\_Plan\_\_c, and Visit\_\_c into Salesforce.
- **Steps Taken:**
  1. Accessed **Setup** → **Data** → **Data Import Wizard**.
  2. Selected the object to import (e.g., Patient, Treatment Plan, Visit).
  3. Uploaded the prepared CSV file containing patient, treatment plan, and visit data.
  4. Mapped CSV fields to Salesforce fields carefully to ensure accuracy.
  5. Reviewed and started the import process.
- **Outcome:** Successfully imported the initial dataset for patients, treatment plans, and visits, creating a foundation for testing and further operations.

The screenshot displays the Salesforce Data Import Wizard interface. At the top, there's a navigation bar with 'Setup', 'Home', and 'Object Manager'. Below this, a progress bar shows three steps: 'Choose data', 'Edit mapping', and 'Start import'. The main content area is titled 'Import your Data into Salesforce' and includes a note: 'You can import up to 50,000 records at a time.' The interface is divided into three columns. The first column, 'What kind of data are you importing?', shows a list of objects: 'Doctors', 'Patients' (selected with a green checkmark), 'Treatment Plans', and 'Visits'. The second column, 'What do you want to do?', has three sections: 'Add new records' (selected with a green checkmark), 'Match by:' (set to '-None-'), 'Which User field in your file designates record owners?' (set to '-None-'), 'Which Doctor field in your file do you want to match against to set the Primary Care Physician lookup field?' (set to '-None-'), and 'Trigger workflow rules and processes?' (unchecked). The third column, 'Where is your data located?', shows 'Drag CSV file here to upload' and a 'CSV' section with 'File' (set to 'Choose File'), 'Character Code' (set to 'ISO-8859-1 (General US & Western European, ISO-LATIN-1)'), and 'Values Separated By' (set to 'Comma'). At the bottom right, there are 'Cancel', 'Previous', and 'Next' buttons. The bottom of the screen shows a Windows taskbar with various application icons and a system clock indicating 21:29 on 27-09-2025.

SETUP

Bulk Data Load Jobs

Bulk Data Load Job

750gL00000EETj4

View the details of a bulk data load job.

◀ Back to List: Bulk Data Load Jobs

Bulk Data Load Job Detail

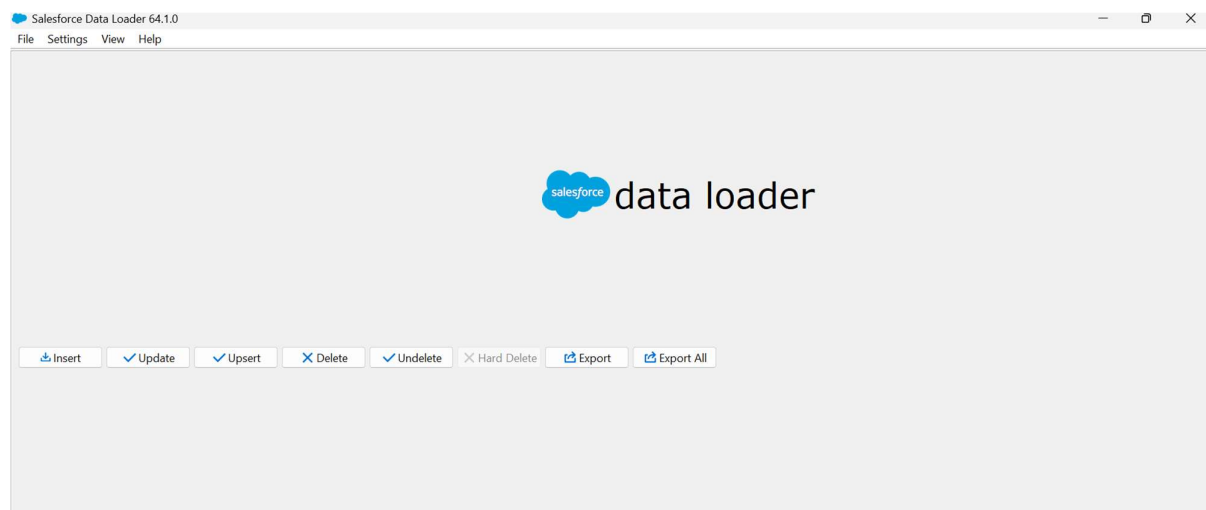
Reload

Job ID	750gL00000EETj4	Job Type	Bulk V1	Status	Closed
Submitted By	Mokshagna Sheshagari	Operation	Upsert	Total Processing Time (ms)	121
Start Time	9/27/2025, 10:09 AM PST	Queued Batches	0	API Active Processing Time (ms)	45
End Time	9/27/2025, 10:09 AM PST	In Progress Batches	0	Apex Processing Time (ms)	0
Time to Complete ([hh:mm:ss])	00:01	Completed Batches	1		
Object	Patient	Failed Batches	0		
External ID Field	Name	Progress	100%		
Content Type	CSV	Records Processed	10		
Concurrency Mode	Parallel	Records Failed	0		
API Version	64.0	Retries	0		

Reload

## 2. Data Loader

- **Purpose:** To perform **large-scale data operations** like insert, update, upsert, and delete.
- **Steps Taken:**
  1. Installed **Salesforce Data Loader** on the local machine.
  2. Logged in using Salesforce credentials.
  3. Selected the operation type (Insert, Update, Upsert).
  4. Chose the object (e.g., Patient\_\_c, Treatment\_Plan\_\_c, Visit\_\_c).
  5. Uploaded CSV file and mapped the fields.
  6. Executed the operation and reviewed success/failure files.
- **Outcome:** Efficiently handled bulk data operations, ensuring records were accurately updated and created.



### 3. Duplicate Rules

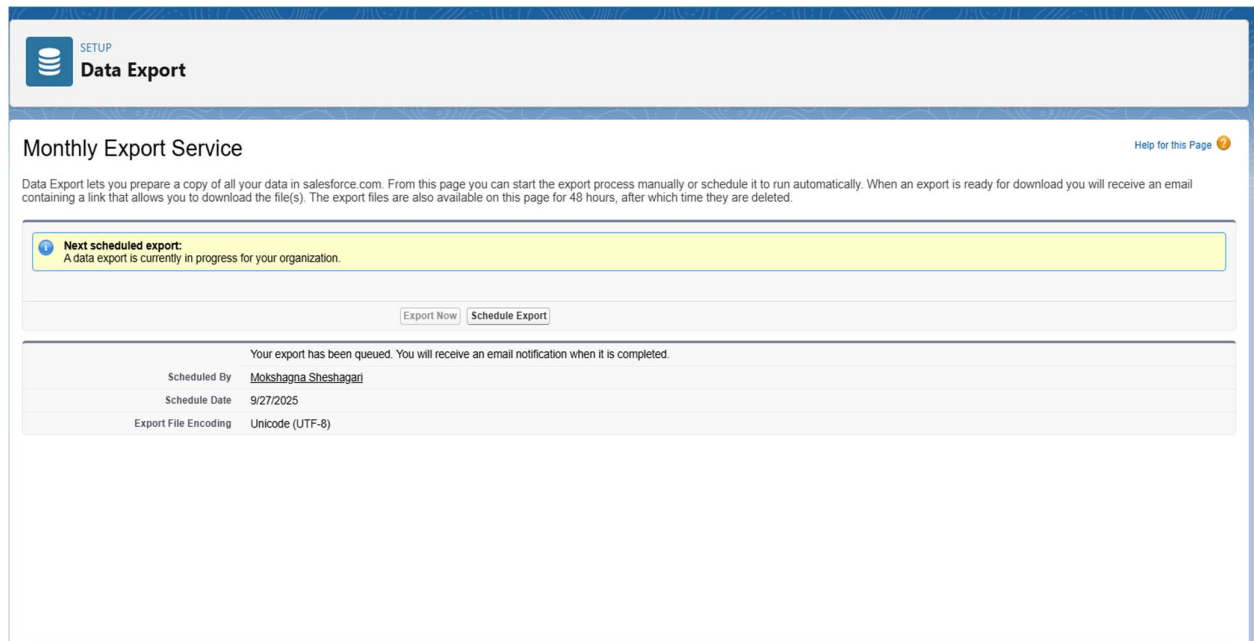
- **Purpose:** To prevent duplicate records from being created and maintain data integrity.
- **Steps Taken:**
  1. Accessed **Setup** → **Duplicate Management** → **Duplicate Rules**.
  2. Created rules for **Patient\_\_c**, **Treatment\_Plan\_\_c**, and **Visit\_\_c** objects.
  3. Configured matching rules based on unique identifiers like **Patient\_External\_Id\_\_c** and **TreatmentPlan\_External\_Id\_\_c**.
  4. Set actions to **Alert or Block** duplicates during record creation or updates.
- **Outcome:** Ensured that duplicate patients, treatment plans, and visits could not be created, maintaining **clean and accurate data**.

The screenshot shows the 'New Duplicate Rule' configuration page for the 'Patient' object. The page is titled 'Duplicate Rules' under the 'SETUP' tab. It includes a 'Duplicate Rule Edit' section with buttons for 'Save', 'Save & New', and 'Cancel'. The 'Rule Details' section contains fields for 'Rule Name' (Patient\_Duplicate\_Rule), 'Description', 'Object' (Patient), and 'Record-Level Security' (Enforce sharing rules). The 'Actions' section specifies what happens when a user tries to save a duplicate record, with options for 'Action On Create' and 'Action On Edit' (Allow, Alert, Report) and an 'Alert Text' field. The 'Matching Rules' section defines how duplicate records are identified, with a 'Compare Patients With' dropdown set to 'Patients' and a 'Matching Rule' dropdown set to 'Patient Match Rule'.

The screenshot shows the 'Matching Rule Detail' page for the 'Patient\_Match\_Rule'. The page is titled 'Matching Rules' under the 'SETUP' tab. It includes a 'Matching Rule Detail' section with buttons for 'Delete', 'Clone', and 'Deactivate'. The 'Object' is 'Patient'. The 'Rule Name' is 'Patient\_Match\_Rule'. The 'Unique Name' is 'Patient\_Match\_Rule'. The 'Description' is empty. The 'Matching Criteria' is '(Patient: Name EXACT MatchBlank = TRUE) AND (Patient: Email EXACT MatchBlank = FALSE)'. The 'Status' is 'Active'. The 'Created By' is 'Mokshagna Sheshagari' on '9/27/2025, 10:29 AM'. The 'Modified By' is 'Mokshagna Sheshagari' on '9/27/2025, 10:29 AM'.

## 4. Data Export & Backup

- **Purpose:** To back up Salesforce data for **security, audit, and recovery purposes**.
- **Steps Taken:**
  1. Accessed **Setup → Data → Data Export**.
  2. Selected objects to export (Patient\_\_c, Treatment\_Plan\_\_c, Visit\_\_c).
  3. Chose **manual or scheduled export** (weekly or monthly).
  4. Downloaded the exported **.zip files containing CSV files** of all selected records.
- **Outcome:** Maintained regular backups of all Salesforce data to prevent loss and support future recovery needs.



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## Result of Phase 8

This phase ensured **accurate data import, bulk data handling, prevention of duplicates, and reliable backup mechanisms** for the **Patient Records and Treatment Tracking system**. These processes enhanced **data integrity, security, and operational efficiency**.