

Phase 8: Data Management & Deployment

Data Import Wizard

The **Data Import Wizard** in Salesforce allows users to quickly import records for standard and custom objects, including Contacts, Accounts, and Cases.

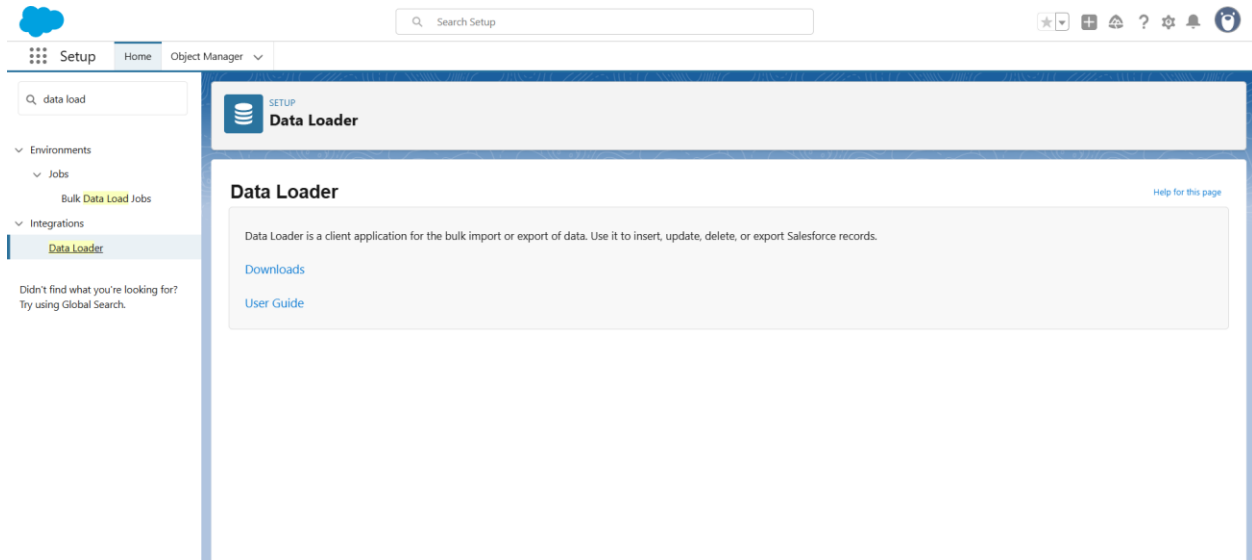
For this project, patient data can be imported using this wizard to populate the Contact object with necessary fields such as *Patient ID*, *Age*, *Gender*, and *Preferred Doctor*.

The screenshot shows the Salesforce Data Import Wizard interface. At the top, there's a navigation bar with 'Setup', 'Home', and 'Object Manager' tabs. A search bar labeled 'Search Setup' is on the right. Below the navigation bar, the page title is 'Data Import Wizard' with a 'Help for this page' link. The main content area is titled 'Recent Import Jobs' and contains a table with columns: Status, Object, Records Created, Records Updated, Records Failed, Start Date, and Processing Time (ms). Below the table is a 'Bulk Api Monitoring' button. A large light blue box contains a binoculars icon and the text 'Before you import your data...'. To the right of this box, there are three sections of advice: 'Clean up your data import file' (with a 'watch video' link), 'Make sure your field names match Salesforce field names' (with a 'view a list of Salesforce data fields' link), and 'Don't import too many records at once' (with a note about 50,000 records). At the bottom, a section titled 'Import your data in 3 easy steps!' shows a progress bar with four steps: 1. Launch the Data Import Wizard to import your data. (active), 2. Upload your data file, 3. Map your data fields to Salesforce fields, and 4. Review and import your data.

Data Loader

Data Loader is a more advanced tool for bulk import, export, update, and deletion of Salesforce records. It is particularly useful for large volumes of data exceeding the wizard limits.

For this project, since the number of records is minimal, **Data Loader was not used**, and all testing data was added manually.



Duplicate Rules

Duplicate rules prevent the creation of duplicate patient records. A **Duplicate Rule** was created on the Contact object to ensure no duplicate Patient ID is allowed.

- **Action on Create:** Alert
- **Action on Edit:** Alert
- **Matching Criteria:** Patient ID field checked to prevent duplication.

Setup

Home

Object Manager

Search Setup

Star

Plus

Cloud

Help

Settings

Notifications

User

dupl

Data

Duplicate Management

Duplicate Error Logs

Duplicate Rules

Matching Rules

Didn't find what you're looking for?
Try using Global Search.

SETUP

Duplicate Rules

Contact Duplicate Rule

Prevent_Duplicate_Patients

Help for this Page

Duplicate Rule Detail

Edit

Delete

Clone

Activate

Rule Name

Prevent_Duplicate_Patients

Order

3 of 3

Reorder

Description

Prevents creating duplicate patient records based on Patient ID or Email

Object

Contact

Record-Level Security

Enforce sharing rules

Action On Create

Allow

Operations On Create

Alert

Report

Action On Edit

Allow

Operations On Edit

Alert

Report

Alert Text

"A patient with the same Patient ID or Email already exists. Please check before creating a new record."

Active

☐

Matching Rule

Standard Contact Matching Rule

Mapped

Matching Criteria

Matching rule for contact records

More Info

Conditions

Contact: Patient ID NOT EQUAL TO null

Created By

Palak Lodhi, 9/25/2025, 10:07 AM

Modified By

Palak Lodhi, 9/25/2025, 10:07 AM

Edit

Delete

Clone

Activate

Data Export & Backup

Data export allows regular backups of Salesforce records. While a **backup export** was queued, it is optional for the project and not necessary for functionality.

Setup

Home

Object Manager

Search Setup

Star

Plus

Cloud

Help

Settings

Notifications

User

data

Data

Big Objects

Conversation Transcript Export

Data Export

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

Schema Settings

Data and Content Protection

SETUP

Data Export

Monthly Export Service

Help for this Page

Data Export lets you prepare a copy of all your data in salesforce.com. From this page you can start the export process manually or schedule it to run automatically. When an export is ready for download you will receive an email containing a link that allows you to download the file(s). The export files are also available on this page for 48 hours, after which time they are deleted.

Next scheduled export:

None

Export Now

Schedule Export

Scheduled By

Palak Lodhi

Schedule Date

9/25/2025

Export File Encoding

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

Action

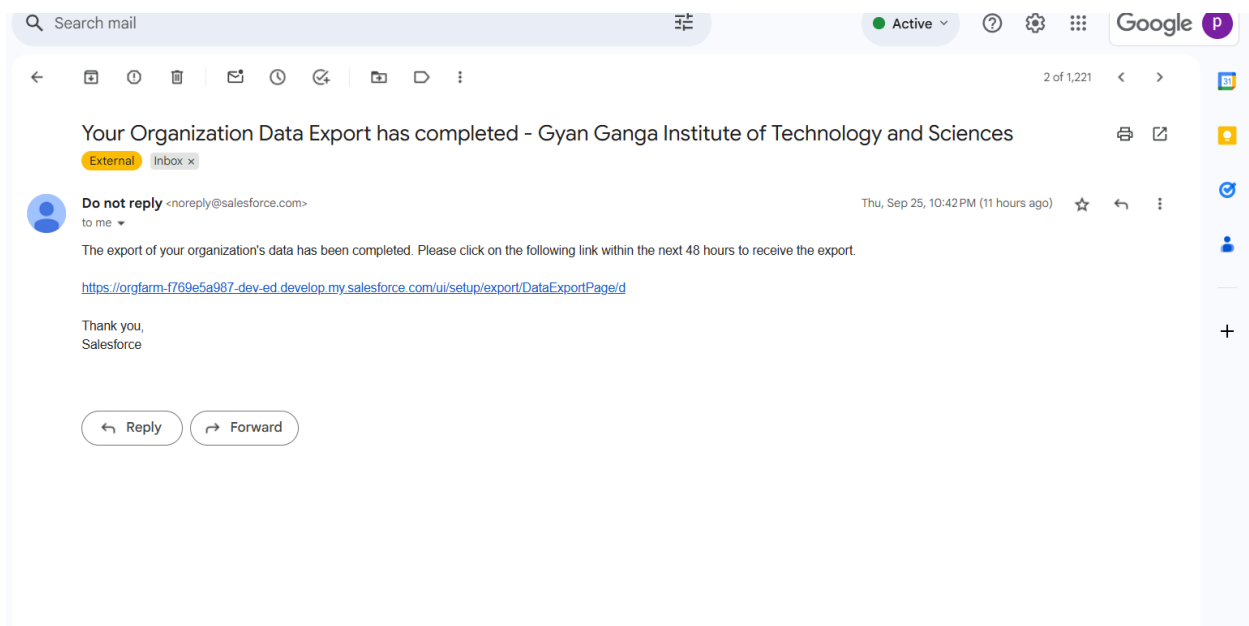
File Name

File Size

download

WE_000gl.000007VXDNJUA4_1.ZIP

240.5K



Change Sets

Change Sets are used to migrate metadata between Salesforce orgs (sandbox → production).

For this project, **Change Sets were not required** since all development was performed in a single org.

Unmanaged vs Managed Packages

- **Managed Packages:** Pre-built apps from Salesforce AppExchange with limited customization.
- **Unmanaged Packages:** Provide full access to code and configuration.
For this project, no packages were installed; all objects, flows, and layouts were custom-built.

ANT Migration Tool

The **ANT Migration Tool** is a command-line utility to deploy metadata.

For this project, **ANT was not used**, as deployment was performed within the same org.

VS Code & SFDX

Visual Studio Code with Salesforce DX allows advanced development using local files and scratch orgs.

For this project, **VS Code and SFDX were not used**, as development was done directly in the Salesforce web interface.