

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.

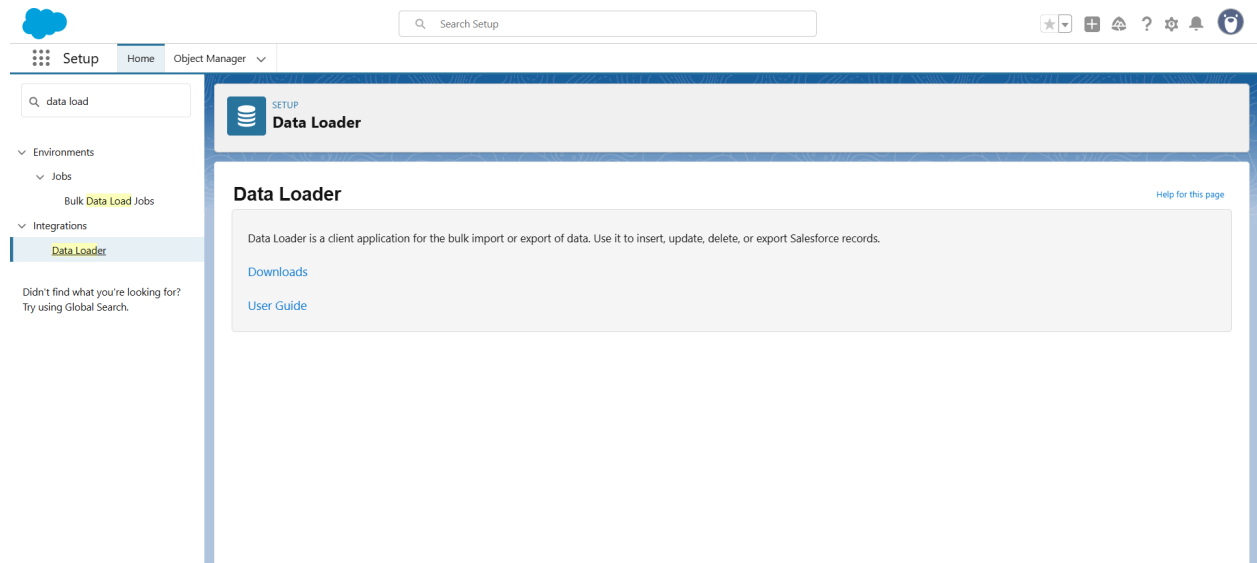
For this project, patient data can be imported using this wizard to populate the Contact object with necessary fields such as *Patient ID*, *Age*, *Gender*, and *Preferred Doctor*.

The screenshot displays the Salesforce Data Import Wizard interface. At the top, there is a navigation bar with the Salesforce logo, a search bar labeled "Search Setup", and several utility icons. Below the navigation bar, the main content area is titled "Data Import Wizard" with a "Help for this page" link. Underneath, there is a section for "Recent Import Jobs" which includes a table with columns: Status, Object, Records Created, Records Updated, Records Failed, Start Date, and Processing Time (ms). A "Bulk Api Monitoring" button is positioned below the table. A large informational box titled "Before you import your data..." contains three key points: "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" (explaining the 50,000 record limit). At the bottom, a section titled "Import your data in 3 easy steps!" shows a progress bar with four steps: 1. Prepare your data (active), 2. Upload your data, 3. Map your data, and 4. 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

Q dupl

Data

- Duplicate Management
 - Duplicate Error Logs
 - Duplicate Rules**
 - Matching Rules

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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 X |
| 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 | <input checked="" type="checkbox"/> Alert <input checked="" type="checkbox"/> Report |
| Action On Edit | Allow | Operations On Edit | <input checked="" type="checkbox"/> Alert <input checked="" type="checkbox"/> Report |
| Alert Text | *A patient with the same Patient ID or Email already exists. Please check before creating a new record.* | | |
| Active | <input type="checkbox"/> | | |
| Matching Rule | <input checked="" type="checkbox"/> Standard Contact Matching Rule <input checked="" type="checkbox"/> 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

Q 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

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

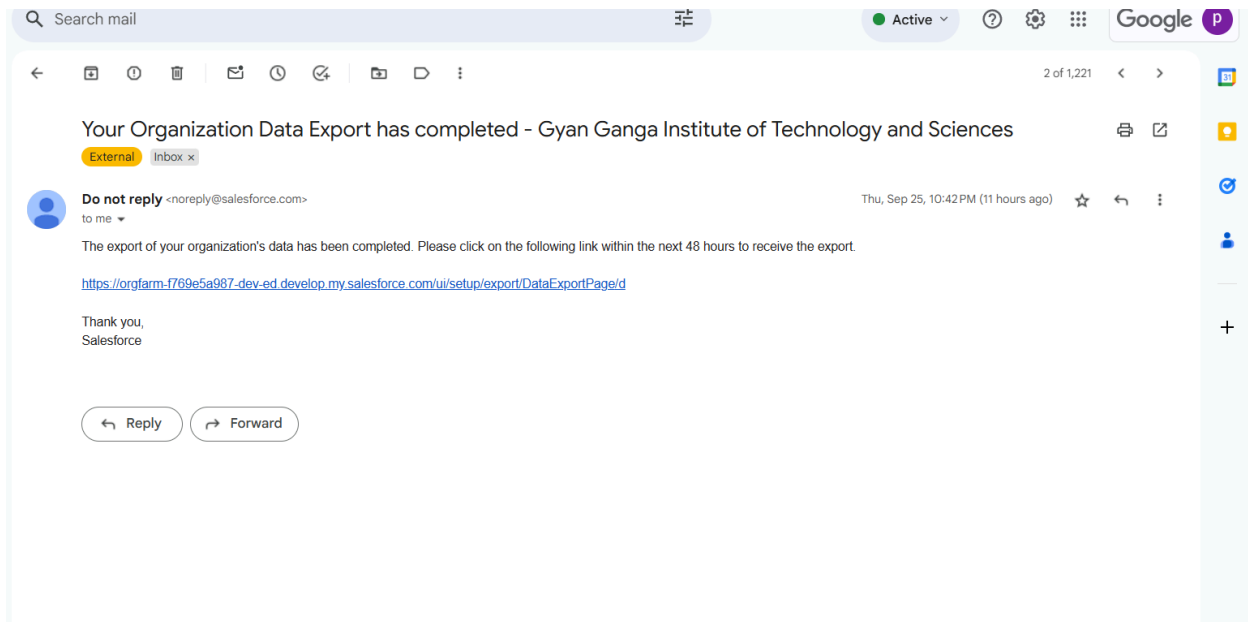
[Export Now](#) [Schedule Export](#)

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_00DgL000007VXDNUA4_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.