

Phase 8: Data Management

Project Title: SmartCare CRM – Salesforce-Powered Healthcare Management & Patient Engagement Suite

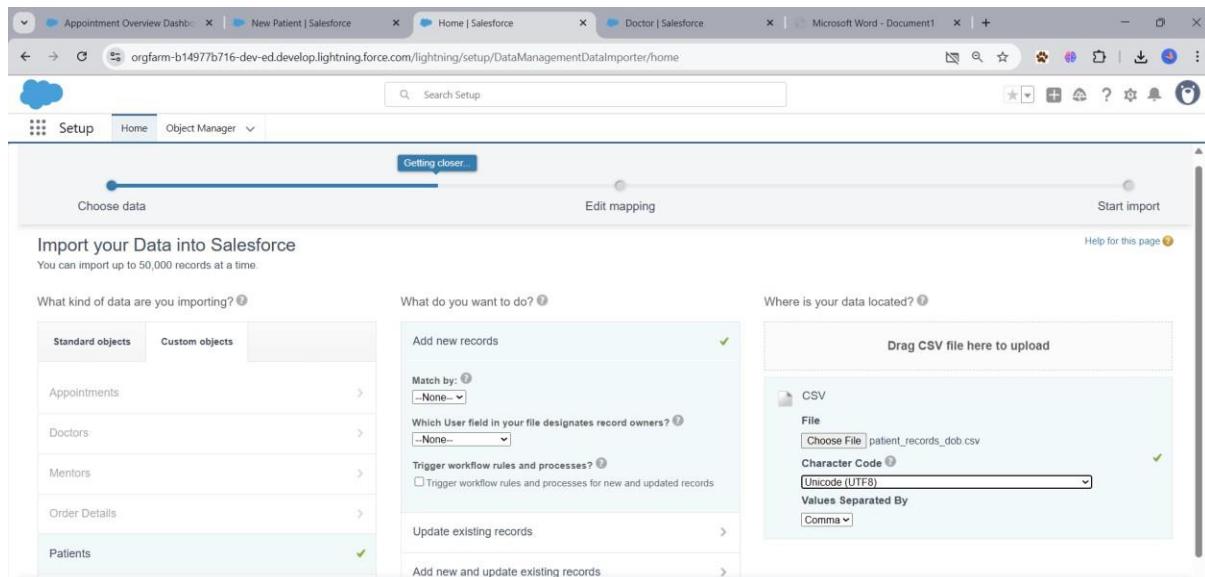
Purpose:

This phase focuses on ensuring data quality and security within the healthcare system. Key administrative tasks were performed to import patient records in bulk, prevent duplicate entries, and secure the data through regular backups.

Data Import using the Data Import Wizard

Goal: To efficiently add multiple new Patient records into the application from an external CSV file, demonstrating how the system can be populated with data in bulk.

Implementation: A CSV file containing 500 patient records was prepared, with fields including Name, Date of Birth, Gender, Email, Contact Number, Blood Group, Emergency Contact, and Medical History. The Data Import Wizard was launched, and the Patient custom object was selected for the import.



Bulk Data Load Jobs

After uploading the file and completing the mapping process, the import job was submitted. Once completed, its status was verified under the “Bulk Data Load Jobs” page, confirming that all new records had been successfully inserted. The new patients were then visible under the Patients tab in the SmartCare CRM app.

The screenshot shows the Bulk Data Load Jobs page in the Salesforce Setup. A single job has been completed:

- Job ID:** 750g000000Dsc8r
- Submitted By:** Hospital Admin
- Start Time:** 9/26/2025, 5:07 AM PST
- End Time:** 9/26/2025, 5:07 AM PST
- Time to Complete (hh:mm:ss):** 00:05
- Object:** Patient
- External ID Field:**
- Content Type:** CSV
- Concurrency Mode:** Parallel
- API Version:** 64.0

Status: Closed
Total Processing Time (ms): 756
API Active Processing Time (ms): 428
Apex Processing Time (ms): 0

Batches:

View Request	View Result	Batch ID	Start Time	End Time	Total Processing Time (ms)	API Active Processing Time (ms)	Apex Processing Time (ms)	Records Processed	Records Failed	Retry Count	State Message	Status
View Request	View Result	751g000000BeJxk	9/26/2025, 5:07 AM	9/26/2025, 5:07 AM	756	428	0	500	49	0	Completed	

Data Backup using the Data Export Service

Goal: To establish a regular data backup strategy, ensuring that patient data is always protected and recoverable.

Implementation: The Salesforce Data Export service was used to schedule a weekly export of all healthcare data, including Patients, Appointments, and Doctors. This provides administrators with downloadable backup files for offline storage and recovery purposes.

The screenshot shows the Schedule Data Export page in the Salesforce Setup. The configuration includes:

- Export File Encoding:** Unicode (UTF-8)
- Include Images, documents, and attachments:** Unchecked
- Include Salesforce Files and Salesforce CRM Content document versions:** Unchecked
- Replace carriage returns with spaces:** Checked
- Schedule Data Export:**
 - Frequency:** On day 1 of every month
 - Start:** 9/26/2025
 - End:** 10/26/2025
 - Preferred Start Time:** 1:00 AM

Conclusion:

Through this phase, essential data management processes were successfully implemented. The Patient object was populated with bulk data using the Import Wizard, duplicate records were prevented with validation rules, and a reliable data export strategy was established. This strengthens the overall reliability and security of the healthcare management application.