Phase 8: Data Management & Deployment

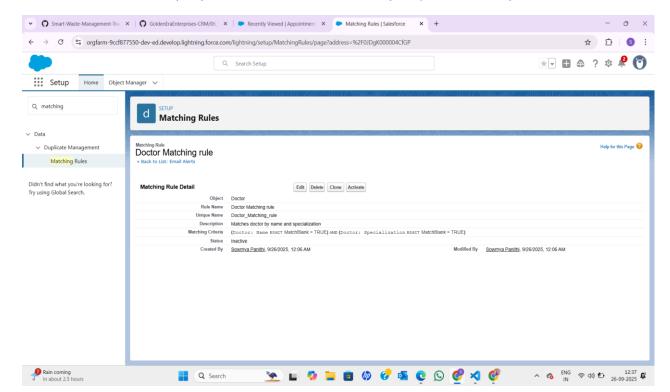**Project: Hospital Management System CRM**

Step 1: Duplicate Management

Prevent duplicate Patient records (by Email/Phone/Name) and surface potential duplicates during data entry or import to maintain patient safety and data integrity.

1) Create the Matching Rule

1. **Setup → Quick Find → Matching Rules → New Rule**

2. **Object:** Patient (Patient__c)

3. **Rule Name:** HMS_Patient_Email_Phone_Match

4. **Add Matching Criteria:**

   o **Field** = Email → **Matching Method** = Exact

   o **Click Add Row → Field** = Phone → **Matching Method** = Exact

   o **Click Add Row → Field** = Patient Name → **Matching Method** = Fuzzy (to catch similar names)

5. **Save** the rule

6. **Click Activate** (only active rules can be used by Duplicate Rules)

2) Create the Duplicate Rule

1. **Setup → Quick Find → Duplicate Rules → New Rule**

2. **Object:** Patient

3. **Rule Label:** HMS_Patient_DuplicateRule

4. **Under Matching Rules**, click **Add** and select the HMS_Patient_Email_Phone_Match matching rule

5. **Action on Create:** Choose **Alert** (start in Alert mode while testing)

6. **Action on Edit:** Choose **Alert**

7. **(Optional) Scope:** Set record types or profiles for medical staff only

8. **Save**, then click **Activate**

Screenshot Reference: Duplicate Rule configuration

3) Doctor Duplicate Prevention

Matching Rule for Doctors:

- **Object:** Doctor (Doctor__c)

- **Rule Name:** HMS_Doctor_License_Match

- **Matching Criteria:** Medical License Number (Exact), Email (Exact)

- **Purpose:** Prevent duplicate doctor registrations

   Step 2: Data Backup

   Healthcare Data Backup Process

   Steps:

1. **Setup → Quick Find → Data Export → Data Export**

2. **Choose backup type:**

   - **Export Now →** Run immediate medical data backup

   - **Schedule Export →** Set weekly/monthly automated backups for compliance

3. **Select Healthcare Objects:**

   - **Patient** (critical patient demographics and medical history)

   - **Doctor** (provider information and credentials)

   - **Appointment** (scheduling and treatment records)

   - **Medical Records** (if implemented)

   - **Standard Objects:** Users, Profiles, Permission Sets

4. **Click Start Export** (for immediate) or **Save** (for scheduled)

5. **Wait →** Salesforce emails when backup is ready

6. **Download** the .zip file → extract CSV files

7. **Store securely** (encrypted drive, HIPAA-compliant storage, secure cloud)

Monthly Export Service

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	Sowmya Panithi
Schedule Date	9/26/2025
Export File Encoding	ISO-8859-1 (General US & Western European, ISO-LATIN-1)

Action	File Name	File Size
download	WE_00DgK00000BpIcTUAV_1.ZIP	1.1K

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- Administer
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  - Manage Territories
  - Company Profile
  - Data Classification
  - Privacy Center
  - Security Controls
  - Domain Management
  - Communication Templates
  - Translation Workbench
  - Data Management
    - Duplicate Management
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	Id	OwnerId	IsDeleted	Name	CreatedDa	CreatedBy	LastModifi	LastModifi	SystemMo	Specialization_	Consultati	Availability_From__c	Availability_To__c
2	a03gK0000	005gK0000	0	Dr. Anil Kumar	########	005gK0000	########	005gK0000	########	Cardiology			
3	a03gK0000	005gK0000	0	Dr. Priya Sharma	########	005gK0000	########	005gK0000	########	Pediatrics			
4	a03gK0000	005gK0000	0	Dr. Rohan Mehta	########	005gK0000	########	005gK0000	########	Orthopedics			
5	a03gK0000	005gK0000	0	Ananya Verma	########	005gK0000	########	005gK0000	########	General	2000	0	21600000
6	a03gK0000	005gK0000	0	harika	########	005gK0000	########	005gK0000	########	Pediatrics	3000	900000	2700000

Sheet: Doctor__c

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3	K000C 005gK000C	0	Id-0002	########	005gK000C	########	005gK000C	########		a03gK00000CF	########	4000									
4	K000C 005gK000C	0	Id-0003	########	005gK000C	########	005gK000C	########		a03gK00000CF	########	3000									

Appointment__c

Ready   Accessibility: Unavailable