Phase 8: Data Management & Deployment

A comprehensive guide to managing patient data, prescription records, and system deployment for your Pharmacy Inventory System Salesforce implementation.

Importing Patient Data with the Data Import Wizard

This is the fastest way to add new patient or contact records to your system.

Prepare the CSV File

Create a spreadsheet with patient data. It should have columns like Name, Email, and Phone. Save this as a CSV file (e.g., NewPatients.csv).

Launch the Wizard

In Salesforce, go to Setup > Data Import Wizard. Click Launch Wizard.

Configure the Import

Select Standard Objects and then choose the Contacts object. Click Add New Records and then upload your NewPatients.csv file.

Map Fields

The wizard will automatically map the fields. Confirm that Name is mapped to Name, Email to Email, and so on.

Run the Import

Click Start Import and then OK. You will receive an email once the import is complete.

Exporting Prescription Data with Data Loader

This is a powerful tool for backing up a large number of records.

Install Data Loader

If you haven't already, go to Setup > Integrations > Data Loader and download the application.

Log In

Launch Data Loader and click Export. Log in to your Salesforce org.

Select the Object

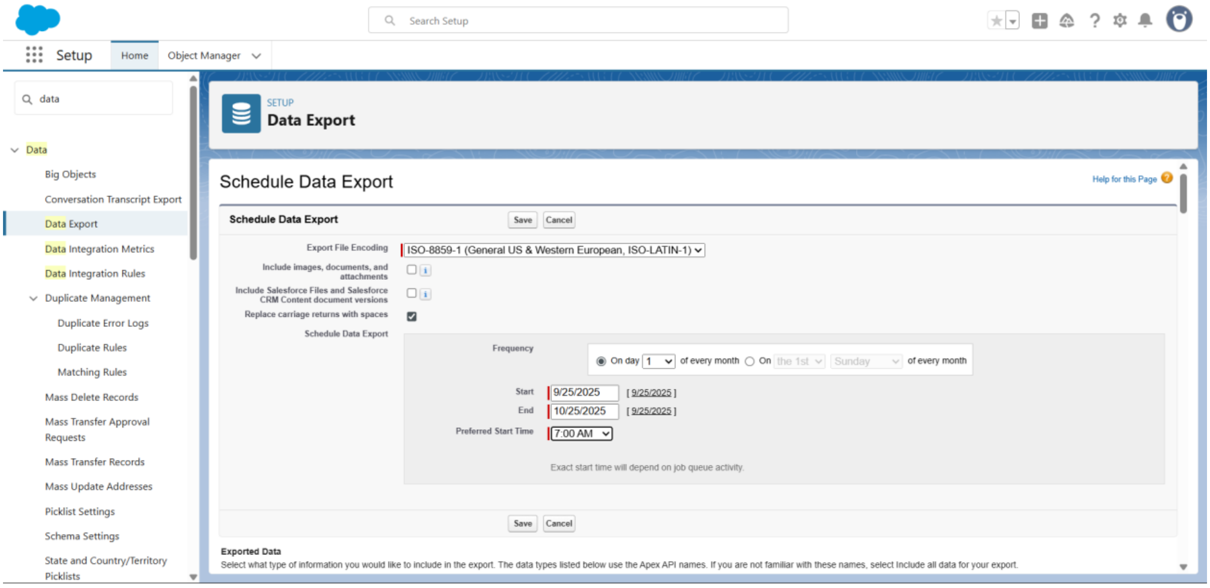
Choose the Prescription object (Prescription__c) from the list.

Select Fields

Click Select all fields to export a complete backup of your prescription data. Choose a location to save your backup file.

Run the Export

Click Finish. A CSV file containing all your prescription data will be created on your computer.



Creating Duplicate Rules for Patient Records

This helps maintain data quality for your Contact or Patient records.

Task A: Prevent Duplicates with Same Email

Matching Rule:

Go to Setup > Matching Rules. Create a rule for the Contact object that matches on Email (Exact).

Duplicate Rule:

Go to Setup > Duplicate Rules. Create a rule for Contact that uses your new matching rule. Set the Action on Create and Action on Edit to Block to prevent saving duplicates.

Task B: Warn on Duplicates with Same Name & Phone

Matching Rule:

Create another Matching Rule for Contact that matches on Name (Fuzzy) and Phone (Exact).

Duplicate Rule:

Create a new Duplicate Rule that uses this matching rule. For the Action on Create, set it to Allow and check the box to Alert the user.

Scheduling a Weekly Data Export

This sets up an automated backup of your entire PharmaFlow system.

Navigate to Data Export

Go to Setup > Data Export.

Schedule the Export

Click Schedule Export.

Configure

Select the frequency (Weekly), choose a day, and make sure to select the Include all data option.

Save

Click Save to finalise the schedule. Salesforce will automatically email you a link to download a zip file containing a backup of all your data.

VS Code & SFDX

Development Toolset

This is the toolset a developer would use to build new features for Pharmacy inventory system, like a flow to automate refilling prescriptions. You write and manage the code and metadata in VS Code and use the Salesforce CLI (SFDX) to deploy them.

VS Code provides a modern development environment with powerful extensions for Salesforce development, whilst SFDX offers command-line tools for managing your org and deploying changes efficiently.

Change Sets

Simple Deployment Method

You would use this to move the Prescription and Product objects, the formula fields, and your reports from your sandbox to the live production environment. It's a simple, point-and-click way to deploy between two orgs.

Change Sets provide a user-friendly interface for moving customisations between connected Salesforce orgs without requiring technical expertise in command-line tools.