



# 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.

01

---

## 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).

02

---

## Launch the Wizard

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

03

---

## Configure the Import

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

04

---

## Map Fields

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

05

---

## 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.

## 1 Install Data Loader

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

## 2 Log In

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

## 3 Select the Object

Choose the Prescription object (Prescription\_\_c) from the list.

## 4 Select Fields

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

## 5 Run the Export

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

Weekly  
\$80 or exports

\$468.00  
78 Weekly Exports

2 365-day

Search Setup

★

+

🔒

?

⚙️

🔔

👤

Setup

Home

Object Manager

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

State and Country/Territory Picklists

SETUP

Data Export

Schedule Data Export

Help for this Page

Schedule Data Export

Save

Cancel

Export File Encoding

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

Include images, documents, and attachments

☐

i

Include Salesforce Files and Salesforce CRM Content document versions

☐

i

Replace carriage returns with spaces

☒

Schedule Data Export

Frequency

☒ On day 1 of every month

☐ On the 1st Sunday of every month

Start

9/25/2025

[ 9/25/2025 ]

End

10/25/2025

[ 9/25/2025 ]

Preferred Start Time

7:00 AM

Exact start time will depend on job queue activity.

Save

Cancel

Exported Data

Select what type of information you would like to include in the export. The data types listed below use the Apex API names. If you are not familiar with these names, select Include all data for your export.

# 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.



Search Setup



Setup

Home

Object Manager

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

State and Country/Territory  
Picklists



SETUP

## Matching Rules

### Rule Details

**\*** = Required Information

Object	Contact
Rule Name	<input type="text" value="Contact Match"/>
Unique Name	<input type="text" value="Contact_Match"/> <a href="#">i</a>
Description	<div></div>

### Matching Criteria

Tell the rule which fields to compare and how.

|

Field	Matching Method <a href="#">i</a>	Match Blank Fields <a href="#">i</a>	
<input type="text" value="Email"/>	<input type="text" value="Exact"/>	<input type="checkbox"/>	AND
<input type="text" value="Phone"/>	<input type="text" value="Fuzzy: Phone"/>	<input type="checkbox"/>	AND
<input type="text" value="Account Name"/>	<input type="text" value="Exact"/>	<input type="checkbox"/>	AND
<input type="text" value="--None--"/>	<input type="text" value="Exact"/>	<input type="checkbox"/>	AND
<input type="text" value="--None--"/>	<input type="text" value="Exact"/>	<input type="checkbox"/>	

[Add Filter Logic...](#)

Previous Save Cancel