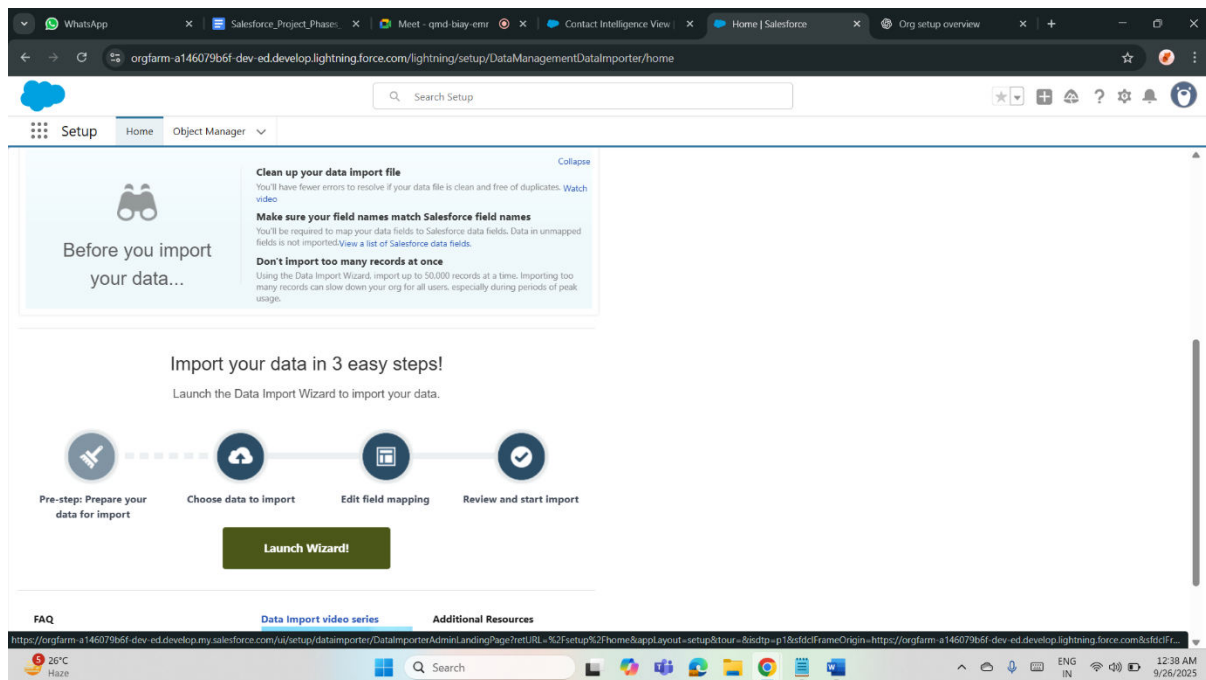# Phase 8: Data Management & Deployment

Data Import Wizard:

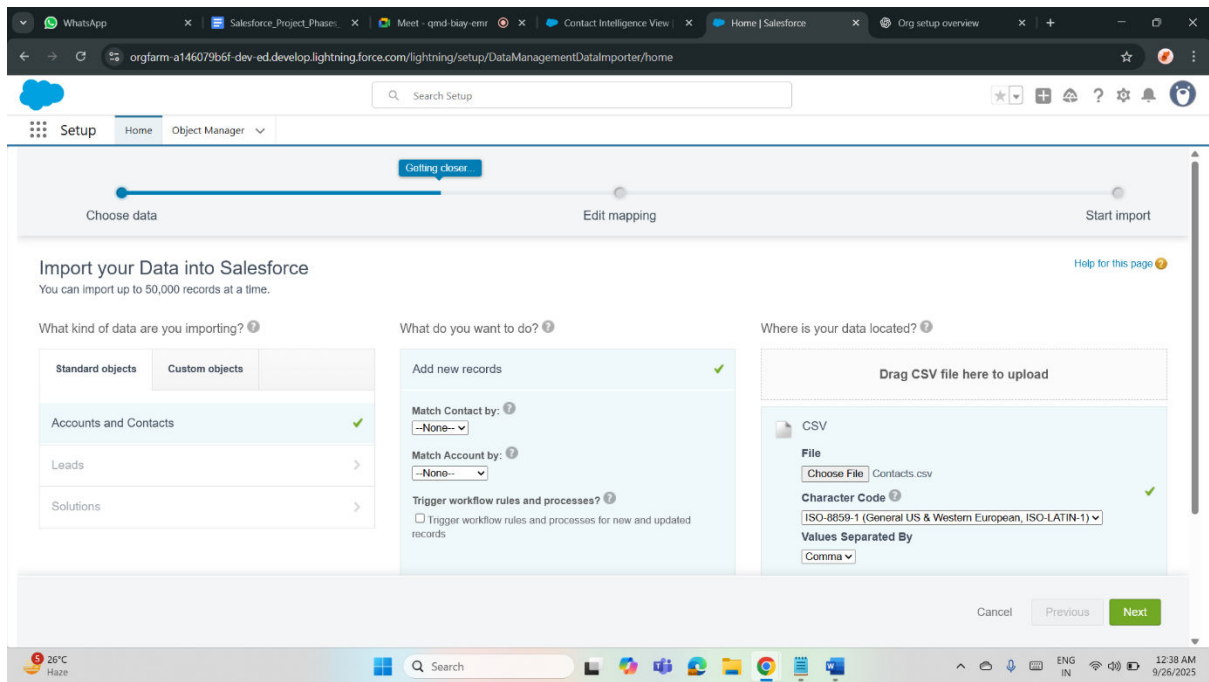Healthcare: Import patient records, appointments, or staff data with guided steps.

Donation: Import donor contacts, pledges, and campaign contributions. Best for small to medium datasets, it's simple and user-friendly but has limited object support compared to Data Loader.

Data Loader:

Healthcare: Bulk-load large patient histories or insurance claims securely.

Donation: Import/export thousands of donor or pledge records. Data Loader handles massive data volumes, supports scheduling, and allows complex field mappings beyond Import Wizard's limits.
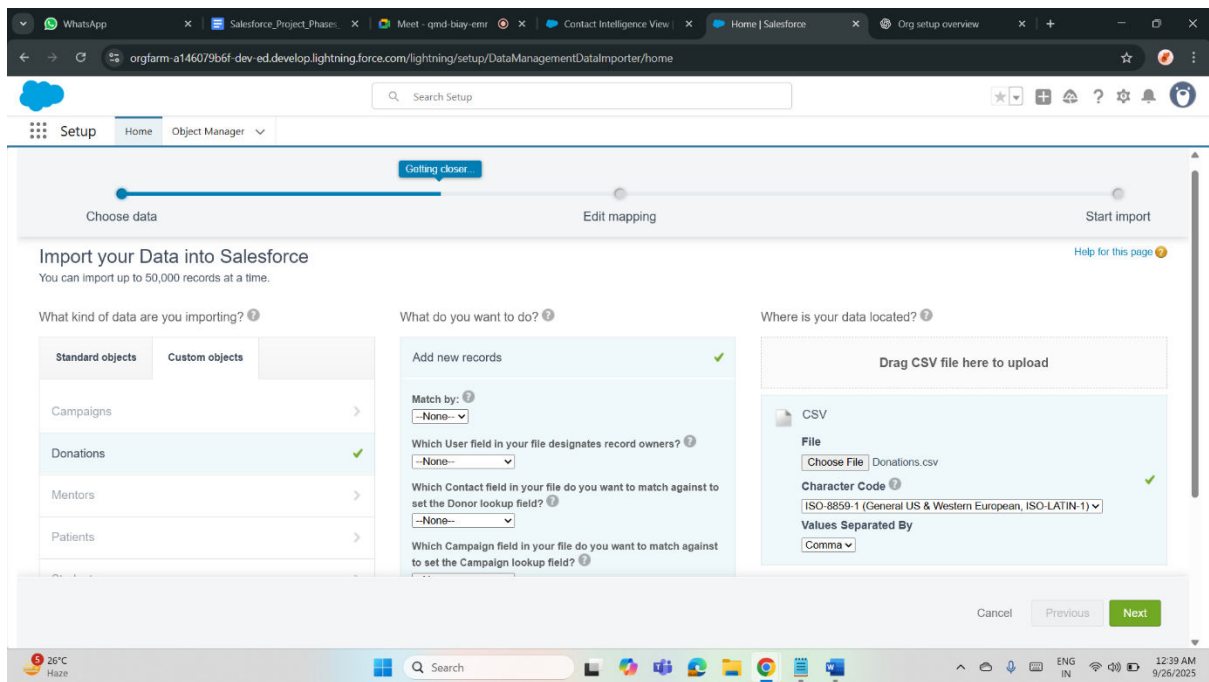
Duplicate Rules:

Healthcare: Prevent duplicate patient profiles that could risk treatment accuracy.

Donation: Stop duplicate donor entries to maintain clean fundraising records.

Duplicate Rules identify, block, or allow duplicates with alerts, improving data quality.
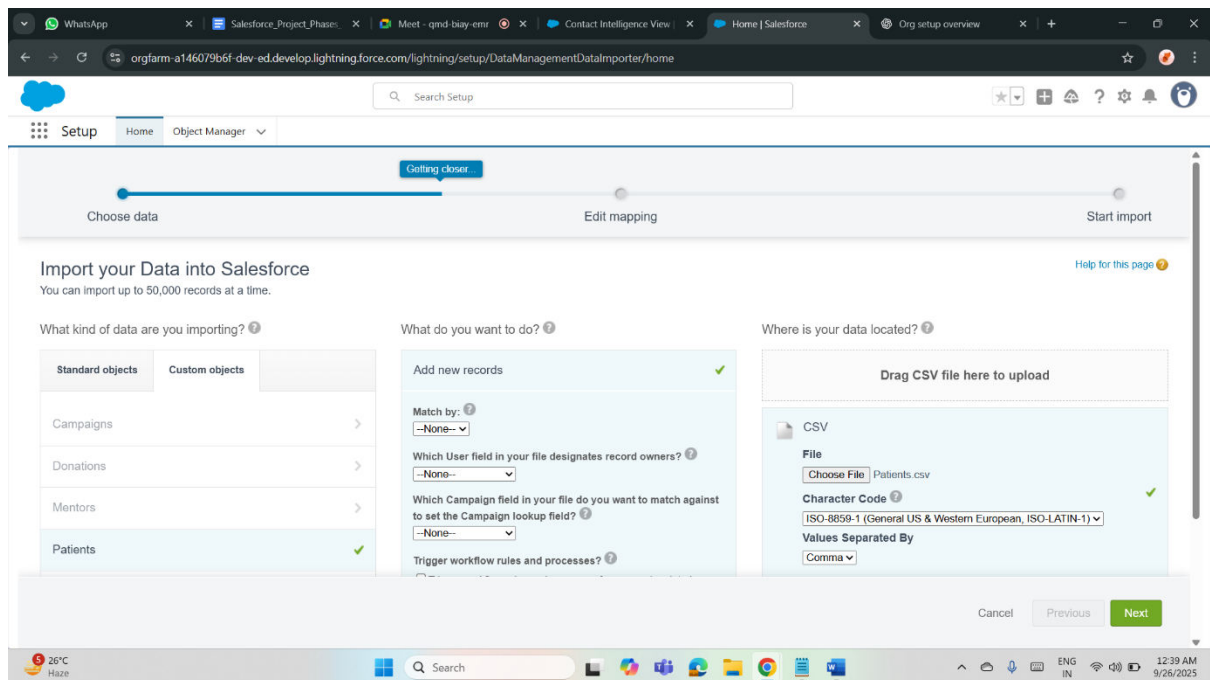

Data Export & Backup:

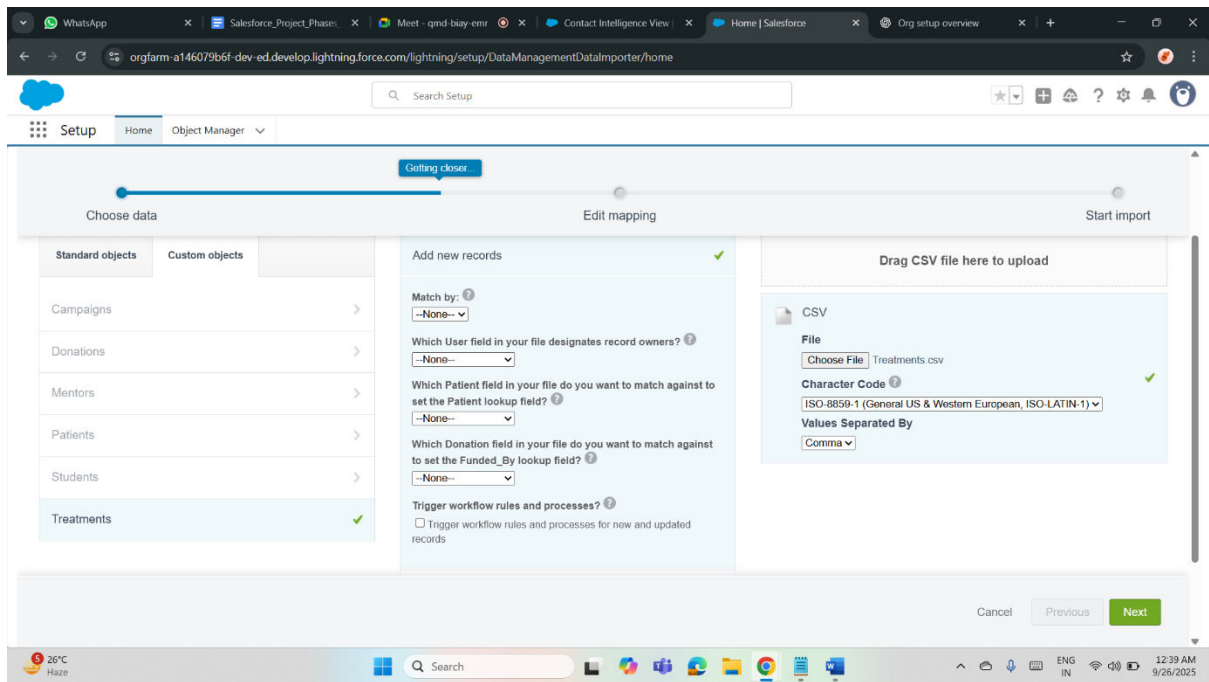Healthcare: Schedule weekly exports of medical data for compliance and

recovery.

Donation: Export donor and campaign data for audit purposes. Regular backups protect against accidental loss, corruption, or regulatory breaches.

Change Sets:

Healthcare: Deploy custom objects, validation rules, or flows for new patient workflows from sandbox to production.

Donation: Move campaign automation, page layouts, or donation workflows safely. Change Sets ensure tested features go live without manual reconfiguration.

Unmanaged vs Managed Packages:

Healthcare: Use managed packages for secure hospital apps with vendor updates; unmanaged for internal prototypes like appointment trackers. Donation: Managed packages for donation platforms, unmanaged for temporary custom fundraising apps. Managed packages are vendor-maintained; unmanaged are editable, ideal for development.