

Phase 8: Data Management & Deployment

Project: Health Prescription & Appointment Management System

Purpose:

This phase ensures that both data integrity and deployment practices are well managed in Salesforce. The goal is to make sure that healthcare data (patients, prescriptions, appointments) is securely imported, validated, backed up, and deployed across different environments with reliable tools and strategies.

1. Data Import Wizard

- A simple UI-based tool for importing small datasets (up to 50,000 records).
- Used to load patients, doctors, and appointment records during initial setup.
- Provides basic de-duplication and field mapping.

The screenshot shows the Salesforce Data Import Wizard interface. At the top, there's a navigation bar with 'Setup', 'Home', and 'Object Manager'. Below this, a progress bar indicates the current step: 'Getting closer...' (highlighted in blue), with 'Choose data' and 'Edit mapping' as previous steps, and 'Start import' as the next step. The main content area is titled 'Import your Data into Salesforce' and includes a sub-header 'You can import up to 50,000 records at a time.' Below this, there are three sections: 'What kind of data are you importing?' with tabs for 'Standard objects' and 'Custom objects', where 'Accounts and Contacts' is selected; 'What do you want to do?' with options 'Add new records' (selected and marked with a green checkmark) and 'Match Contact by:' (set to '--None--') and 'Match Account by:'; and 'Where is your data located?' with a 'Drag CSV file here to upload' area and a 'CSV' file icon. At the bottom right, there are 'Cancel', 'Previous', and 'Next' buttons.

2. Data Loader

- A client application for handling large volumes of data (up to 5 million records).
- Used for bulk operations like importing prescription histories or exporting large patient datasets.
- Supports both insert and update operations.

Bulk Data Load Jobs

Monitor Bulk Data Load Jobs

Monitor the status of recent bulk data load jobs. These jobs are created by Data Loader and other Bulk API client applications.

Quota

Your organization has processed **0** batches in the last 24 hours. Your organization can process **15,000** batches in a 24-hour period.

Resource used in the last 24 hours:

- CPU: 0 milliseconds
- IO: 0 bytes
- Disk: 0 bytes

In Progress

Job ID	Submitted By	Start Time	Status	Job Type	Operation	Object	Records Processed	Records Failed	Progress
No records to display.									

Completed last 7 days

Job ID	Submitted By	Start Time	Status	Job Type	Operation	Object	Records Processed	Records Failed	Time to Complete (hh:mm:ss)
No records to display.									

3. Duplicate Rules

- Ensures data quality by preventing duplicate patient or prescription records.
- Configured rules to check for duplicate patient names + contact numbers and duplicate prescription IDs.

Duplicate Rules

All Duplicate Rules

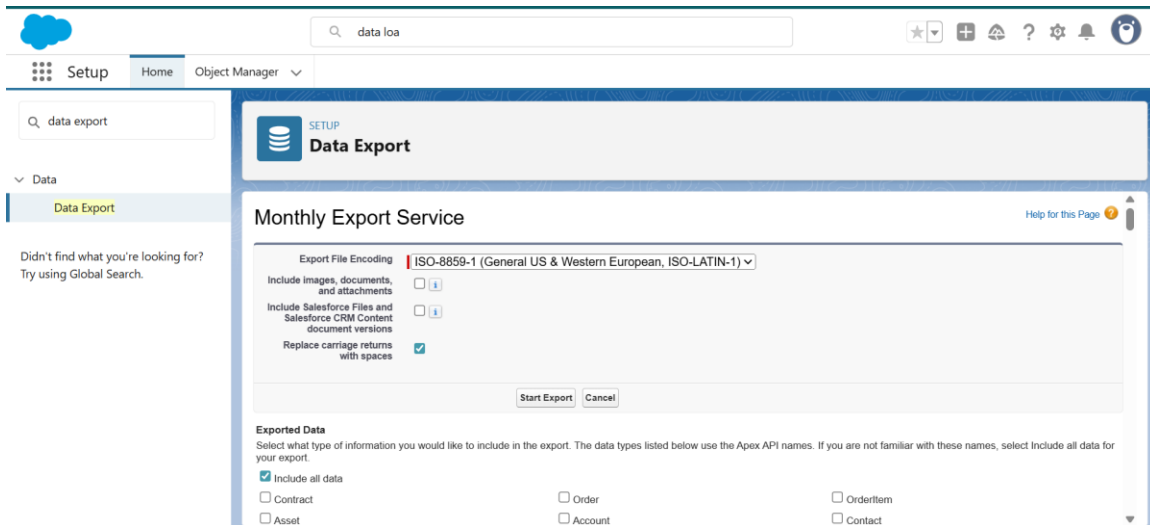
What Are Duplicate Rules? [\[Expand \]](#)

View: **All Duplicate Rules**

Rule Name	Description	Object	Matching Rule	Active	Last Modified By	Last Modified Date
Standard Account Duplicate Rule	Identify accounts that duplicate other accounts.	Account	Standard Account Matching Rule	✓	OEPIC	7/16/2025
Standard Contact Duplicate Rule	Identify contacts that duplicate other contacts and leads.	Contact	Standard Lead Matching Rule Standard Contact Matching Rule	✓	OEPIC	7/16/2025
Standard Lead Duplicate Rule	Identify leads that duplicate other leads and contacts.	Lead	Standard Lead Matching Rule Standard Contact Matching Rule	✓	OEPIC	7/16/2025

4. Data Export & Backup

- Scheduled weekly and monthly exports to create secure backups of patient and prescription data.
- Ensures compliance with healthcare data retention policies and disaster recovery requirements.

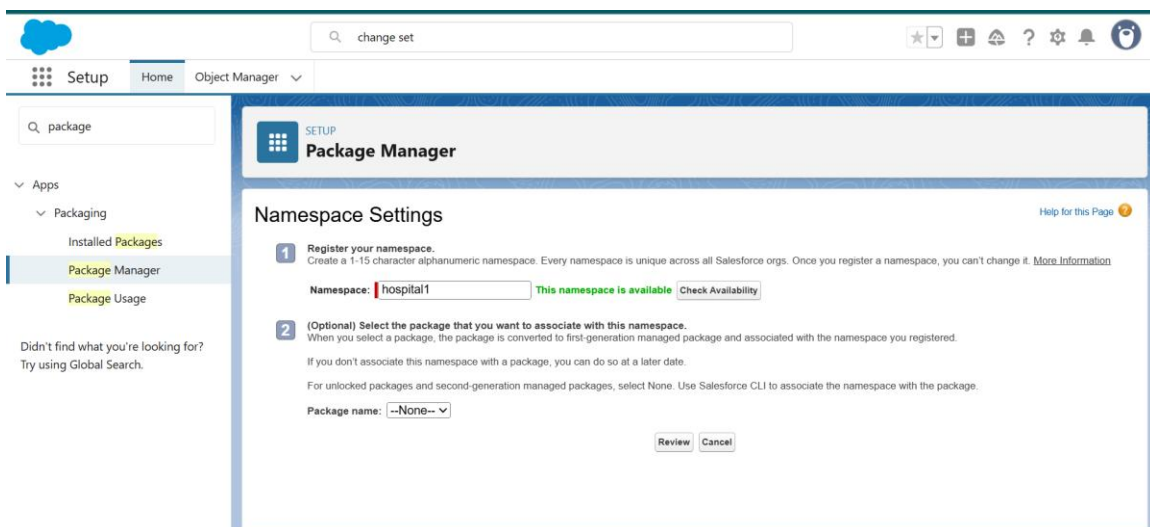


5. Change Sets

- A declarative deployment tool to move metadata (custom objects, fields, validation rules, etc.) between environments (e.g., from Sandbox → Production).
- Used for promoting configuration changes related to appointments and prescription workflows.

6. Unmanaged vs Managed Packages

- Unmanaged Packages – used internally for development/testing, editable after deployment.
- Managed Packages – used for distributing the solution to clients (e.g., hospitals, clinics).
- For this project, Unmanaged Packages were used during development phases.



Conclusion

Phase 8 successfully established a robust framework for data management and deployment in Salesforce. With tools like Data Import Wizard, Data Loader, Duplicate Rules, and Export/Backup for data handling, along with Change Sets, the Health Prescription & Appointment Management System is both data-secure and deployment-ready for long-term scalability.