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.

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.

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.
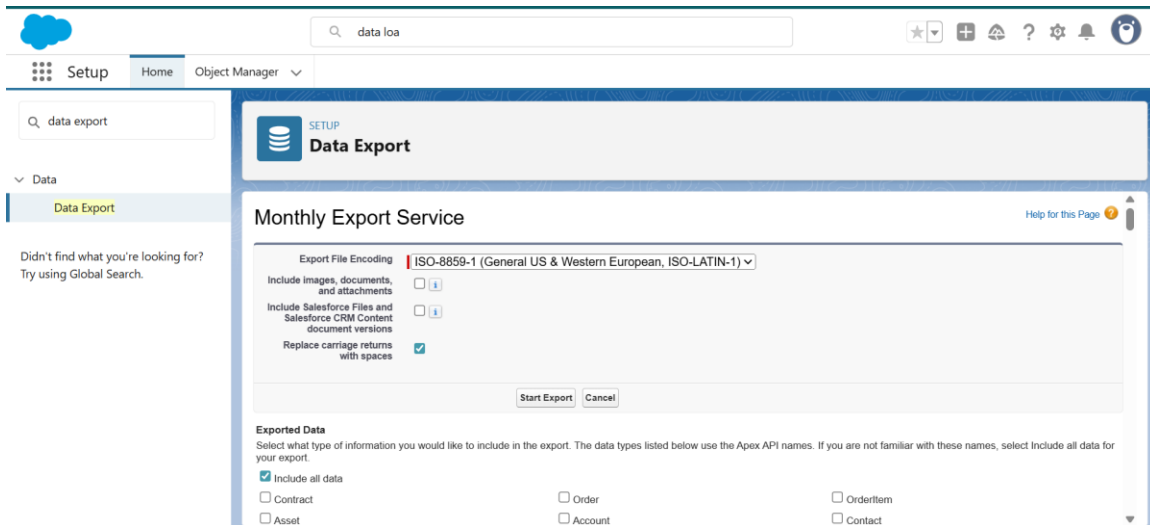

4. Data Export & Backup

• 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.
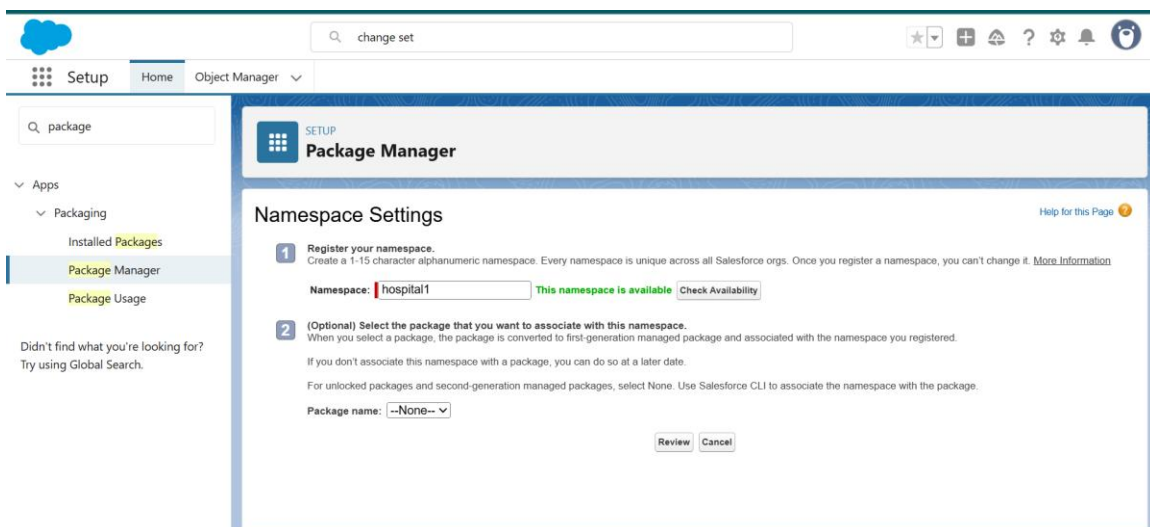
5. Change Sets

• 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.