

Phase 8: Data Management & Deployment

1. Goal:

To manage patient, doctor, appointment, and prescription data efficiently, ensure **data integrity**, and deploy configurations safely across Salesforce orgs for testing and demo purposes.

2. Data Import Wizard:

- **Purpose:** Import standard and custom object records without coding.
- **Use in Project:**
 - Bulk import **Patients** from Excel/CSV
 - Import **Doctors** and initial **Appointments**
- **Steps:**
 1. Navigate to **Setup** → **Data Import Wizard**
 2. Select object (Patient, Doctor, Appointment)
 3. Map CSV fields to Salesforce fields
 4. Run import & verify success

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), followed by 'Choose data', 'Edit mapping', and 'Start import'. The main content area is titled 'Import your Data into Salesforce' and includes a note: 'You can import up to 50,000 records at a time.' The interface is divided into three columns: 'What kind of data are you importing?', 'What do you want to do?', and 'Where is your data located?'. The first column has tabs for 'Standard objects' and 'Custom objects'. Under 'Standard objects', 'Appointments' is selected with a green checkmark. The second column, 'What do you want to do?', has a tab for 'Add new records' (also with a green checkmark). It contains several dropdown menus for matching fields: 'Match by' (set to '-None--'), 'Which User field in your file designates record owners?' (set to '-None--'), 'Which Doctor field in your file do you want to match against to set the Doctor lookup field?' (set to '-None--'), 'Which Patient field in your file do you want to match against to set the Patient lookup field?' (set to '-None--'), and 'Which Receptionist field in your file do you want to match against to set the Receptionist lookup field?' (set to '-None--'). The third column, 'Where is your data located?', has a tab for 'CSV' and a section titled 'Drag CSV file here to upload'. It includes a 'File' section with a 'Choose File' button and a file name 'Appointments.csv'. Below this, the 'Character Code' is set to 'ISO-8859-1 (General US & Western European, ISO-LATIN-1)' and the 'Values Separated By' is set to 'Comma'. At the bottom right, there are 'Cancel', 'Previous', and 'Next' buttons.

3. Data Loader

- **Purpose:** Advanced data import/export for large volumes or complex operations.
- **Use in Project:**
 - Insert/update **Appointments** in bulk
 - Export patient and appointment records for backup
- **Features:**
 - Supports **Insert, Update, Upsert, Delete, Export**
 - Can run via **UI or command line**

4. Duplicate Rules

- **Purpose:** Prevent duplicate records for Patients or Doctors.
- **Example:**
 - Matching rules on **Email** and **Phone Number**
 - Block duplicates or allow alert for manual review

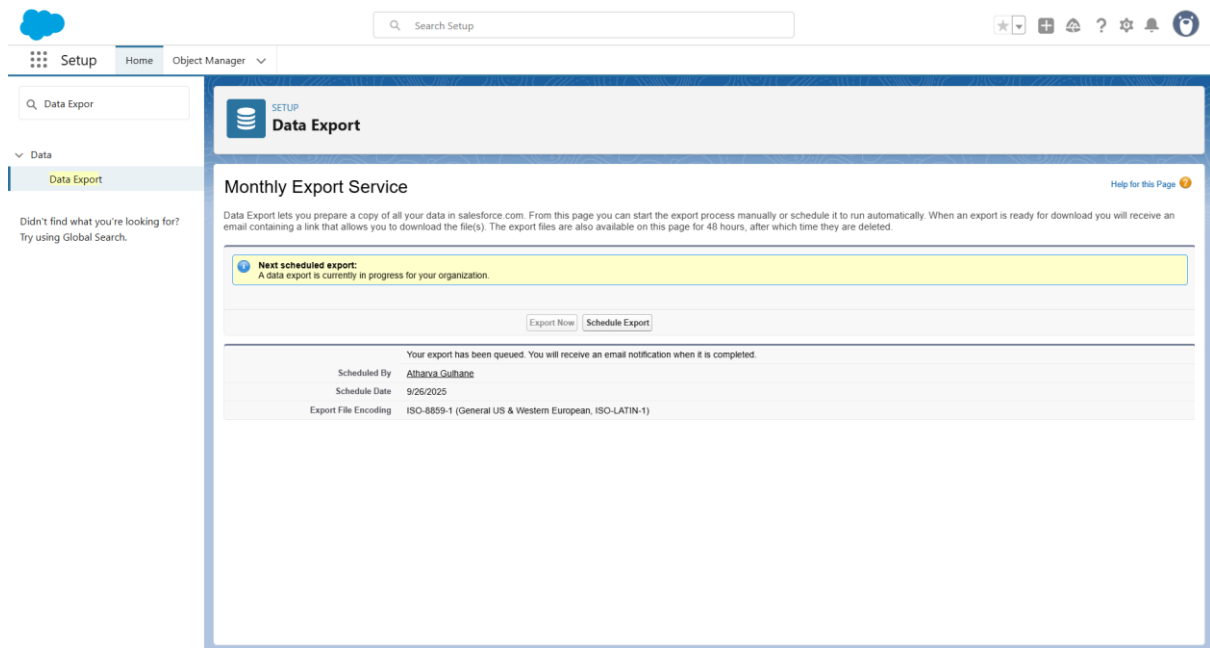
The screenshot shows the Salesforce 'Duplicate Rules' setup page. The left sidebar contains navigation links for 'Setup', 'Home', and 'Object Manager'. The main content area is titled 'Duplicate Rules' and includes a search bar, a 'What Are Duplicate Rules?' section, and a table of rules. The table has columns for Rule Name, Description, Object, Matching Rule, Active status, Last Modified By, and Last Modified Date. The rules listed are: 'prevent duplicate account phone' (Account, prevent.duplicate.phone, Active), 'prevent phone' (Account, ath, Active), 'Standard Account Duplicate Rule' (Account, Standard Account Matching Rule, Active), 'Standard Contact Duplicate Rule' (Contact, Standard Lead Matching Rule, Active), and 'Standard Lead Duplicate Rule' (Lead, Standard Contact Matching Rule, Active).

Rule Name	Description	Object	Matching Rule	Active	Last Modified By	Last Modified Date
prevent duplicate account phone		Account	prevent.duplicate.phone	✓	ath	8/7/2025
prevent phone		Account	ath	✓	ath	8/7/2025
Standard Account Duplicate Rule	Identify accounts that duplicate other accounts.	Account	Standard Account Matching Rule	✓	OEPIG	7/17/2025
Standard Contact Duplicate Rule	Identify contacts that duplicate other contacts and leads.	Contact	Standard Lead Matching Rule Standard Contact Matching Rule	✓	OEPIG	7/17/2025
Standard Lead Duplicate Rule	Identify leads that duplicate other leads and contacts.	Lead	Standard Lead Matching Rule Standard Contact Matching Rule	✓	OEPIG	7/17/2025

<https://orgfarm-b624c7538d-dev-ed.develop.lightning.force.com/lightning/setup/DuplicateRules/home>

5. Data Export & Backup

- **Purpose:** Ensure safe storage of critical hospital data.
- **Options:**
 - **Weekly or Monthly Export** via Salesforce
 - Use **Data Loader** or **Scheduled Reports** for backup
- **Data Export Includes:** Patients, Doctors, Appointments



6. Change Sets

- **Purpose:** Deploy metadata (objects, fields, flows, layouts) between Salesforce orgs.
- **Use in Project:**
 - Move custom objects, flows, page layouts, and tabs from Dev → Test → Demo org
- **Steps:**
 1. Create **Outbound Change Set** in source org
 2. Add components (Objects, Flows, Profiles, etc.)
 3. Upload to target org and **Deploy**

7. VS Code & Salesforce DX (SFDX)

- **Purpose:** Modern development & deployment toolchain

- **Use in Project:**
 - Connect VS Code with Salesforce orgs
 - Retrieve & deploy metadata via **SFDX commands**
 - Version control integration (GitHub) for **flows, LWCs, Apex**
- **Benefits:**
 - Track changes
 - Manage multiple orgs efficiently
 - Automate deployments

