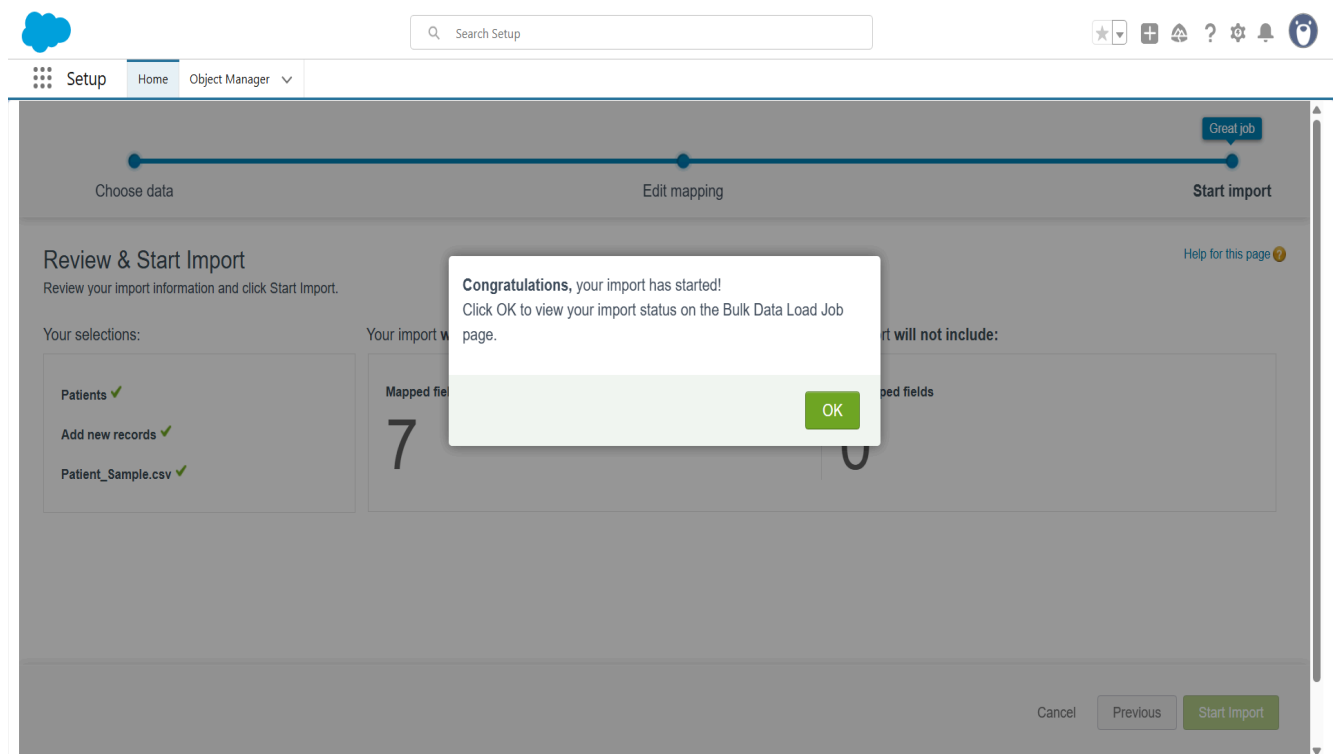










Phase 8: Data Management & Deployment


1) Data Import Wizard

- Imported sample data into **Patient__c** using a CSV file with Name, Email, Phone, Age, and Gender fields.
- Used the **Data Import Wizard** to upload and map fields automatically.
- Verified successful import by checking records in the Patient tab.





 Setup

Home

Object Manager

Monitor Bulk Data Load Jobs

[Help for this Page](#)

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: 82 milliseconds

IO: 90 bytes

Disk: 223 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	End Time	Status	Job Type	Operation	Object	Records Processed	Records Failed	Time to Complete (hh:mm:ss)
750NS00000WwLBQ	B_Saaketh	26/09/2025, 4:03 pm	26/09/2025, 4:03 pm	Closed	Bulk V1	Insert	Patient	5	0	00:01

2) Data Loader

- Data Loader is used for bulk operations (insert, update, delete, export).
- It is powerful for large datasets but not needed for our small-scale project.

3) Duplicate Rules

- Created a **Matching Rule** on **Patient__c** using **Email__c** and **Phone__c** as criteria.
- Built a **Duplicate Rule** named *Prevent Duplicate Patients* to block duplicate records.
- Activated the rule so Salesforce checks for duplicates when adding new Patients.

Cloud logo | Search Setup | Setup | Home | Object Manager

match

Data

Duplicate Management

Matching Rules

Didn't find what you're looking for? Try using Global Search.

Matching Rules

Matching Rule: Patient Email/Phone Match

Matching Rule Detail

Object	Patient
Rule Name	Patient Email/Phone Match
Unique Name	Patient_Email_Phone_Match
Description	
Matching Criteria	(Patient: Email EXACT MatchBlank = FALSE) OR (Patient: Phone EXACT MatchBlank = FALSE)
Status	Activating
Created By	Saaketh B. 26/09/2025, 4:10 pm
Modified By	Saaketh B. 26/09/2025, 4:10 pm

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dupl

Data

Duplicate Management

Duplicate Error Logs

Duplicate Rules

Matching Rules

Didn't find what you're looking for? Try using Global Search.

Duplicate Rules

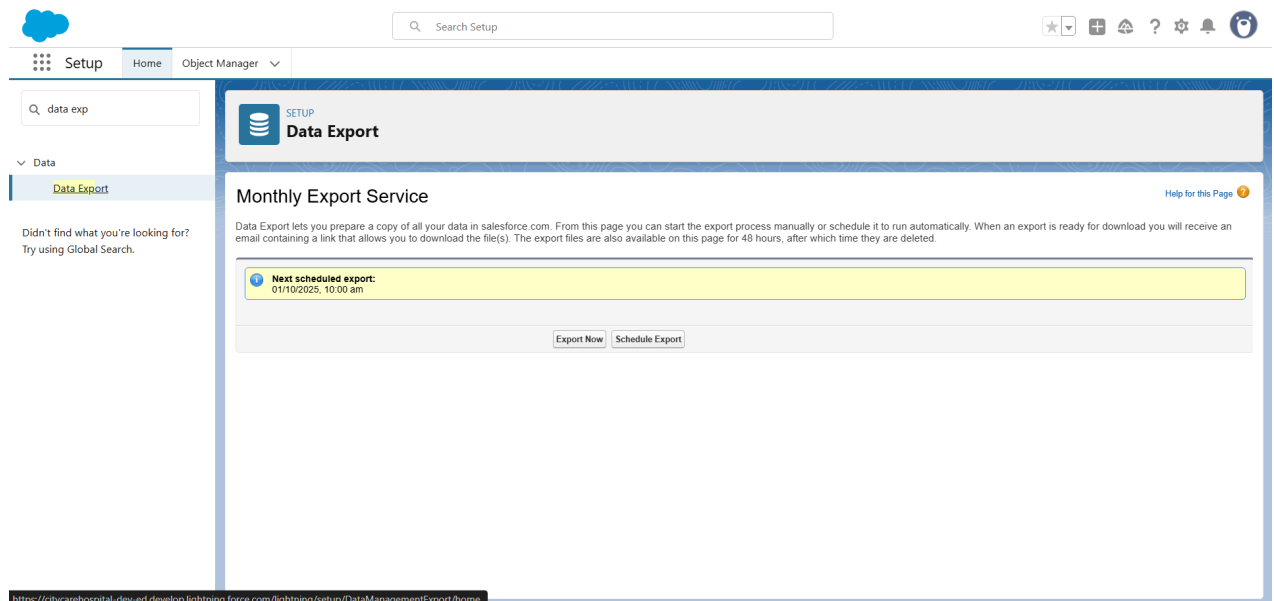
Patient Duplicate Rule: Prevent Duplicate Patients

Duplicate Rule Detail

Rule Name	Prevent Duplicate Patients	Order	1 of 1 [Reorder]
Description			
Object	Patient		
Record-Level Security	Enforce sharing rules		
Action On Create	Allow	Operations On Create	Alert Report
Action On Edit	Allow	Operations On Edit	Alert Report
Alert Text	Duplicate Email/Phone		
Active	Active		
Matching Rule	✓ Patient Email/Phone Match ✓ Mapped	Matching Criteria	(Patient: Email EXACT MatchBlank = FALSE) OR (Patient: Phone EXACT MatchBlank = FALSE)
Conditions			
Created By	Saaketh B. 26/09/2025, 4:12 pm	Modified By	Saaketh B. 26/09/2025, 4:14 pm

4) Data Export & Backup

- Configured **Data Export** in Setup to schedule weekly exports.
- Selected **Patient__c, Doctor__c, Appointment__c, Treatment_History__c** for backup.
- Set export format to CSV for easy access outside Salesforce.



5) Change Sets

- Change Sets are used to deploy customizations between Salesforce orgs.
- Our project was developed in a single org, so Change Sets were not required.

6) Unmanaged vs Managed Packages

- Packages allow bundling of metadata for distribution.
- Not applicable to our hospital project as it is internal only.

7) ANT Migration Tool

- ANT tool is a command-line utility for metadata migration.
- Not required since we used **VS Code & SFDX** for deployments.

8) VS Code & SFDX

- Used **VS Code with Salesforce Extensions** to deploy Apex Classes, Triggers, and LWCs.
- Verified deployment success in the **Output terminal**.
- Ensured metadata changes were synced to the Salesforce org.

```
16:28:32.244 Starting SFDX: Deploy This Source to Org

=== Deployed Source
STATE    FULL NAME    TYPE    PROJECT
PATH
-----
Changed  patientWireDemo LightningComponentBundle force-app\main\default\lwc\patientWireDemo\patientWireDemo.
html
Changed  patientWireDemo LightningComponentBundle force-app\main\default\lwc\patientWireDemo\patientWireDemo.
js
Changed  patientWireDemo LightningComponentBundle force-app\main\default\lwc\patientWireDemo\patientWireDemo.
js-meta.xml

16:28:34.650 Ended SFDX: Deploy This Source to Org
```