

# ❓ Phase 8: Data Management & Deployment

In this phase, we focus on how healthcare data is imported, validated, backed up, and how metadata changes are deployed across Salesforce environments.

## 1. Data Import Using Data Import Wizard

Used Salesforce Data Import Wizard (Setup > Data > Data Import Wizard) for importing sample data into critical healthcare objects like **Patients** and **Appointments**. Followed wizard steps to upload CSV files and map fields accurately to custom fields such as Appointment\_Date\_\_c, Doctor\_\_c, and Contact\_Number\_\_c. Data import for patient onboarding and appointment scheduling was completed using the wizard, ensuring field-level validation and clean record creation.

 patients	
Recently Viewed ▾ 	
3 Items • Updated a few seconds ago	
<input type="checkbox"/> patient name	
1	<input type="checkbox"/> Varun
2	<input type="checkbox"/> Raj
3	<input type="checkbox"/> SHIVA

## 2. Duplicate Rules

Configured Matching Rules and Duplicate Rules to prevent duplicate records in **Patients** and **Appointments**. Setup located in Setup > Duplicate Management > Matching Rules and Duplicate Rules.

SETUP

Matching Rules

Matching Rule  
Prevent\_Duplicate\_Patients

Help for this Page

Matching Rule Detail

DeleteCloneDeactivate

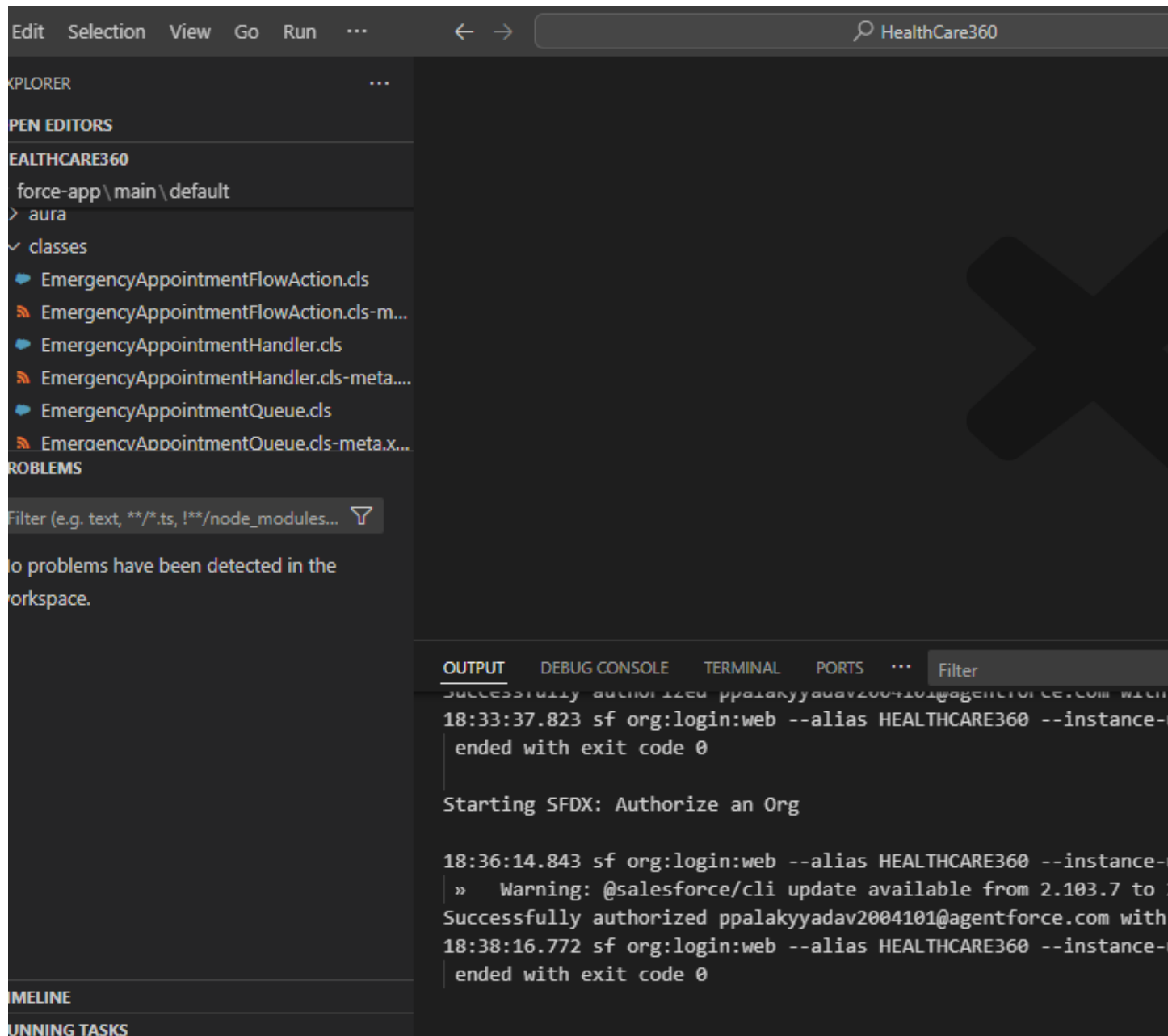
Object	patient
Rule Name	Prevent_Duplicate_Patients
Unique Name	Prevent_Duplicate_Patients
Description	Blocks duplicate patient records based on Name + Phone
Matching Criteria	(patient: First_Name EXACT MatchBlank = FALSE) AND (patient: Patient_id EXACT MatchBlank = FALSE) AND (patient: Email EXACT MatchBlank = FALSE) AND (patient: Contact_Number EXACT MatchBlank = FALSE)
Status	Active
Created By	Palak Yadav, 10/1/2025, 5:17 AM
Modified By	Palak Yadav, 10/1/2025, 5:21 AM

### 3. Data Backup (Optional)

Reviewed Salesforce Data Export (Setup > Data > Data Export) for backup options. Scheduled weekly exports for key healthcare objects including Patient\_\_c, Appointment\_\_c, and Insurance\_\_c. Manual exports used during sandbox refreshes and rollback planning. ZIP files containing CSVs were stored securely in encrypted folders to meet data security and disaster recovery compliance.

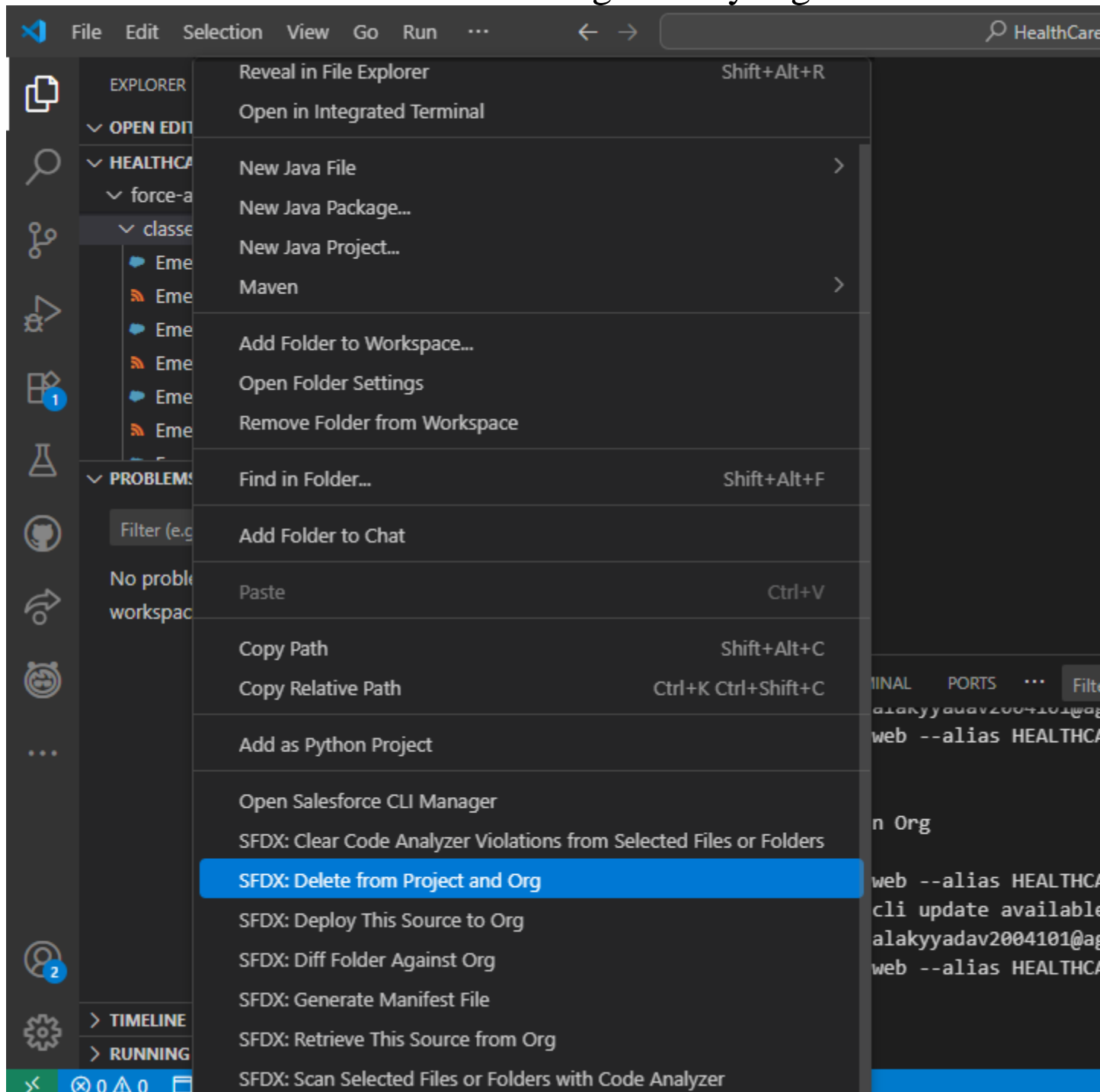
### 4. Version Control and Deployment Strategy

VS Code & SFDX Visual Studio Code (VS Code) is the modern IDE used for Salesforce development.



SFDX (Salesforce DX) is the command-line interface (CLI) that enables source driven development, continuous integration, and automated deployments. Command for

Authentication: `sf force:auth:web:login -a myOrgAlias`



Metadata can be deployed using vs code just right click on main file and then click and Deploy This Source to Org