

Salesforce Project Implementation Phases with Concepts (Admin + Developer)

Problem Statement:

Healthcare organizations often face challenges in managing patient records, scheduling appointments, tracking billing, and maintaining communication between patients, doctors, and administrative staff. Since updates and interactions are scattered across calls, paper records, and separate systems, this leads to inefficiency, missed appointments, delayed billing, and lower patient satisfaction.

Proposed Solution : A tailored CRM solution, PulsePoint CRM, is designed to centralize patient data, streamline appointment scheduling, automate billing generation, and enable doctors and staff to have real-time access to patient information. This solution improves healthcare workflow efficiency, reduces manual errors, and enhances overall patient care.

Phase 8: Data Management & Deployment

1. **DATA IMPORT WIZARD :**

The **Data Import Wizard** is a built-in Salesforce tool to import (insert / update / upsert) data into supported standard & custom objects via a CSV file. It provides a friendly, guided interface and helps with field mapping, matching existing records, and basic de-duplication.

Getting closer

Choose data

Edit mapping

Start import

Import your Data into Salesforce

You can import up to 50,000 records at a time.

[Help for this page](#)

What kind of data are you importing?

What do you want to do?

Where is your data located?

Standard objects

Custom objects

Accounts and Contacts ✓

Leads >

Solutions >

Campaign Members >

Add new records ✓

Match Contact by:

Name

Match Account by:

Name & Site

Which Contact field in your file do you want to match against to set the Account:

Primary Contact lookup field?

Contact Name

Trigger workflow rules and processes?

Trigger workflow rules and processes for new and updated records

Record type

Client

Assign All Contacts to Campaigns

Assign contacts to campaigns

Update existing records >

Drag CSV file here to upload

CSV

File

Choose File

Accounts (1) csv ✓

Character Code

ISO-8859-1 (General US & Western European, ISO-LATN-1)

Values Separated By

Comma

Outlook CSV

ACT! CSV

GMail CSV

Cancel

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2. BULK DATA LOAD JOBS :

Bulk Data Load Jobs are records in Salesforce that represent asynchronous, large-scale data operations (insert / update / upsert / delete / query) done via the **Bulk API** or via tools that use Bulk API (Data Loader, integrations) rather than doing record-by-record operations

Monitor Bulk Data Load Jobs

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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 10,000 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
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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)
7206.000000000000	Besika_Cheek	9/27/2025, 5:30 AM	9/27/2025, 5:30 AM	Closed	Bulk V1	Insert	Partner	10	0	00:12

3. DUPLICATE RULES:

Duplicate Rules are part of Salesforce's Duplicate Management feature. They define what happens when a new or updated record potentially matches an existing record per certain criteria

The screenshot shows the 'Matching Rule Detail' page for a rule named 'Patient duplicate rules matching rule'. The rule is for the 'Patient' object and is currently 'Inactive'. The matching criteria are defined as: (PATIENT.Mobile EXACT MatchBlank = TRUE) AND (PATIENT.Stark EXACT MatchBlank = TRUE). The rule was created by Chrya Bectora on 9/27/2025 at 5:39 AM and was last modified by the same user at the same time.

Field	Value
Object	Patient
Rule Name	Patient duplicate rules matching rule
Unique Name	Patient_duplicate_rules_matching_rule
Description	
Matching Criteria	(PATIENT.Mobile EXACT MatchBlank = TRUE) AND (PATIENT.Stark EXACT MatchBlank = TRUE)
Status	Inactive
Created By	Chrya Bectora, 9/27/2025, 5:39 AM
Modified By	Chrya Bectora, 9/27/2025, 5:39 AM

4. PACKAGE MANAGER:

A **package** is a self-contained bundle of metadata (components, schema, automation, assets, etc.) that can be transported, installed, upgraded, or reused across Salesforce orgs or business units.

The screenshot shows the 'Package Manager' interface for 'PulsePoint CRM, Version 1.0'. The package is marked as 'Upload Complete' and is available for installation. The version details include the package name 'PulsePoint CRM', version name 'Autumn 2025', and version number '1.0'. The package was uploaded by Chrya Bectora on 9/27/2025 at 5:42 AM. The installation URL is provided, and there is a link to change the password for the package.

Package Components

Component Name	Parent Object	Component Type
Email	Doctor	Custom Field
Name	Doctor	Custom Field
Status	Appointment	Custom Field
Specialty	Doctor	Custom Field
Contact Number	Doctor	Custom Field
Patient	Appointment	Custom Field