

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 screenshot displays the Salesforce Data Import Wizard interface, which is divided into three main sections: "What kind of data are you importing?", "What do you want to do?", and "Where is your data located?".

- What kind of data are you importing?:** This section includes tabs for "Standard objects" and "Custom objects". Under "Standard objects", "Accounts and Contacts" is selected and marked with a green checkmark. Other options listed are "Leads", "Solutions", and "Campaign Members".
- What do you want to do?:** This section is titled "Add new records" and includes several configuration options:
 - Match Contact by:** Set to "Name".
 - Match Account by:** Set to "Name & Site".
 - Which Contact field in your file do you want to match against to set the Account:** Set to "Primary Contact lookup field?".
 - Trigger workflow rules and processes?:** Checked.
 - Record type:** Set to "Client".
 - Assign All Contacts to Campaigns:** Checked.
- Where is your data located?:** This section is titled "Drag CSV file here to upload" and includes a "File" section with a "Choose File" button. Below this, there are options for "Outlook CSV", "ACT! CSV", and "Gmail CSV".

At the bottom of the wizard, there are buttons for "Cancel", "Previous", and "Next".

2. BULK DATA LOAD JOBS :

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.

Quote

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:
CIS 1. 5 million records

CPU: 0 milliseconds

IOK: 0 bytes
Disk: 0 bytes

In Progress

| Job ID | Submitted By | Start Time | Status | Job Type | Operation | Object | Records Processed | Records Failed | Progress |
|-----------------------|--------------|------------|--------|----------|-----------|--------|-------------------|----------------|----------|
| No records to display | | | | | | | | | |

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) |
|-----------------|--------------|--------------------|--------------------|--------|----------|-----------|---------|-------------------|----------------|-----------------------------|
| 7506.000007Cris | Besika_Cris | 9/27/2005, 5:30 AM | 9/27/2005, 5:30 AM | Closed | Bulk V1 | Insert | Patient | 10 | 0 | 00:12 |

3. DUPLICATE RULES :

Matching Rule
Patient duplicate rules matching rule [Help for this Page](#)

Matching Rule Detail [Edit](#) [Delete](#) [Clone](#) [Activate](#)

| | |
|-------------------|---|
| 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: Name EXACT MatchBlank = TRUE} |
| Status | Inactive |
| Created By | Chiray Beotra, 9/27/2025, 5:39 AM |
| Modified By | Chiray Beotra, 9/27/2025, 5:39 AM |

4. PACKAGE MANAGER :

SETUP
Package Manager

Package Version
PulsePoint CRM, Version 1.0 [Help for this Page](#)

[Back to Package](#)

Upload Complete
Your package is now available for install using the installation URL below. To publish on AppExchange, log on with your publisher login to access your public listings.

Version Detail [Deprecate](#)

| | | | |
|------------------|---|--------------------|-----------------------------------|
| Package Name | PulsePoint CRM | Uploaded By | Chiray Beotra, 9/27/2025, 5:42 AM |
| Version Name | Autumn 2025 | | |
| Version Number | 1.0 | | |
| Description | | Password Protected | [Change Password] |
| Installation URL | https://login.salesforce.com/packageinfo/installPackage.apex?o=049x.00000071.71 | | |

Package Components

▼ Fields (25)

| 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 |