Salesforce Project Implementation Phases with Concepts (Admin + Developer)
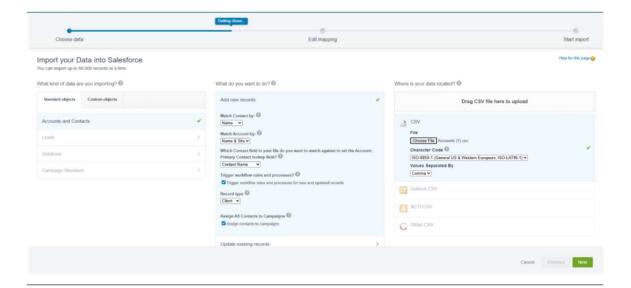
Problem Statement:

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.

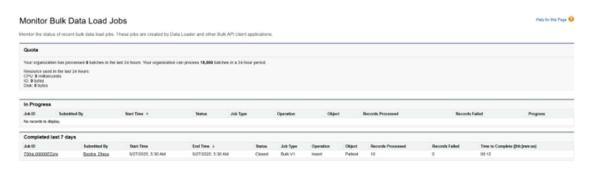# Phase 8: Data Management & Deployment

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.
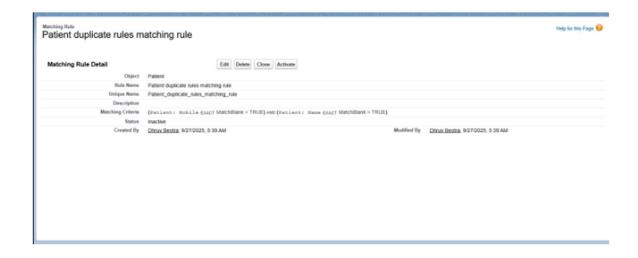
Choose data   Edit mapping   Start import

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? ❓

Standard objects	Custom objects	
Accounts and Contacts		✔
Leads		›
Solutions		›
Campaign Members		›

What do you want to do? ❓

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   ›

Where is your data located? ❓

Drag CSV file here to upload

CSV

File
[Choose File] Accounts (1).csv

Character Code ❓
[ISO-8859-1 (General US & Western European, ISO-LATIN-1) ▾]

Values Separated By
[Comma ▾]

✔

Outlook CSV

ACT! CSV

GMail CSV

Cancel   Previous   Next

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

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

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.