## Phase 8: Data Management & Deployment

### Data Import Wizard:

Healthcare: Import patient records, appointments, or staff data with guided steps.
Donation: Import donor contacts, pledges, and campaign contributions. Best for small to medium datasets, it's simple and user-friendly but has limited object support compared to Data Loader.

### Data Loader:

Healthcare: Bulk-load large patient histories or insurance claims securely.
Donation: Import/export thousands of donor or pledge records. Data Loader handles massive data volumes, supports scheduling, and allows complex field mappings beyond Import Wizard's limits.

### Duplicate Rules:

Healthcare: Prevent duplicate patient profiles that could risk treatment accuracy.
Donation: Stop duplicate donor entries to maintain clean fundraising records. Duplicate Rules identify, block, or allow duplicates with alerts, improving data quality.

### Data Export & Backup:

Healthcare: Schedule weekly exports of medical data for compliance and recovery.
Donation: Export donor and campaign data for audit purposes. Regular backups protect against accidental loss, corruption, or regulatory breaches.

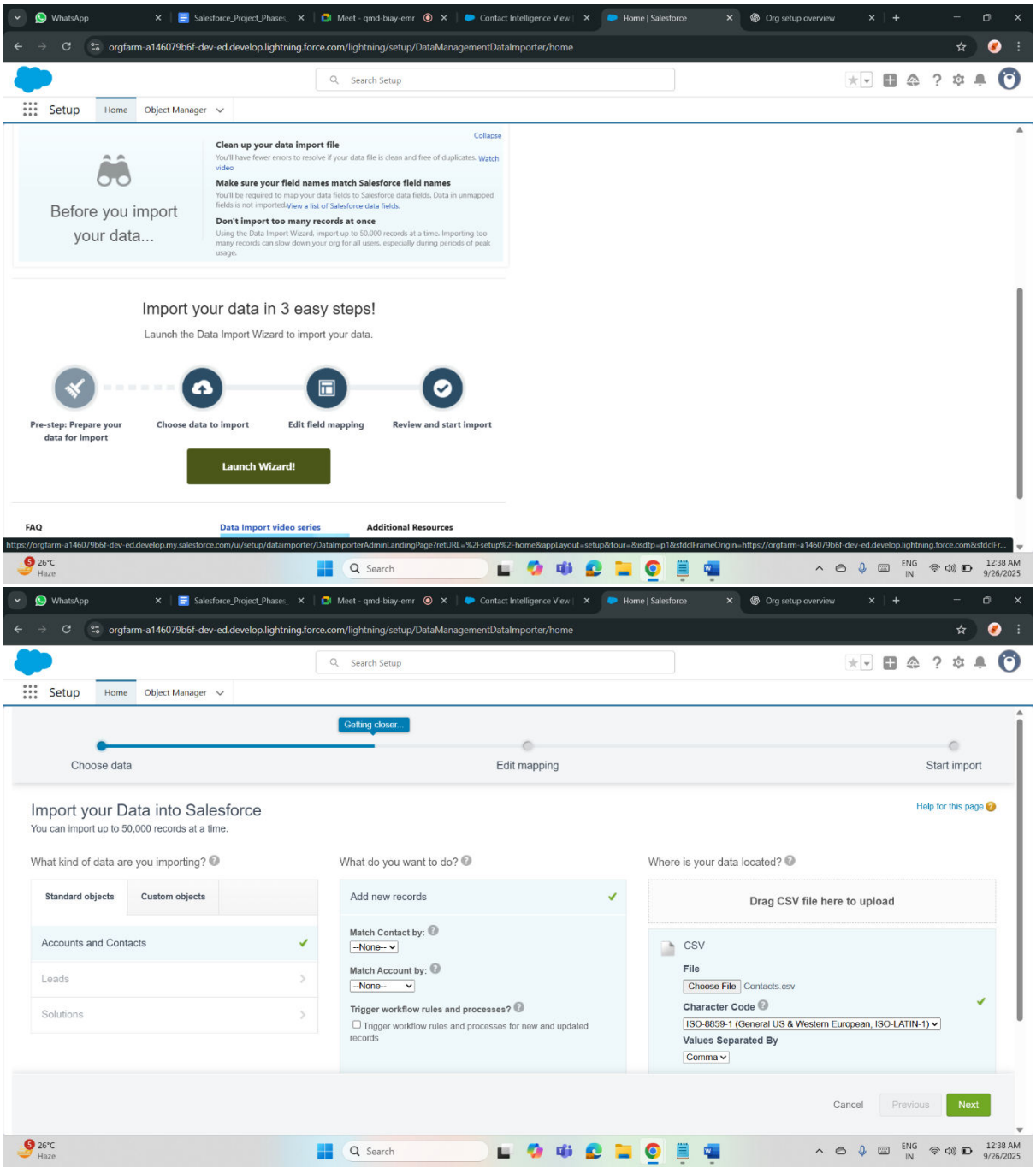
### Change Sets:

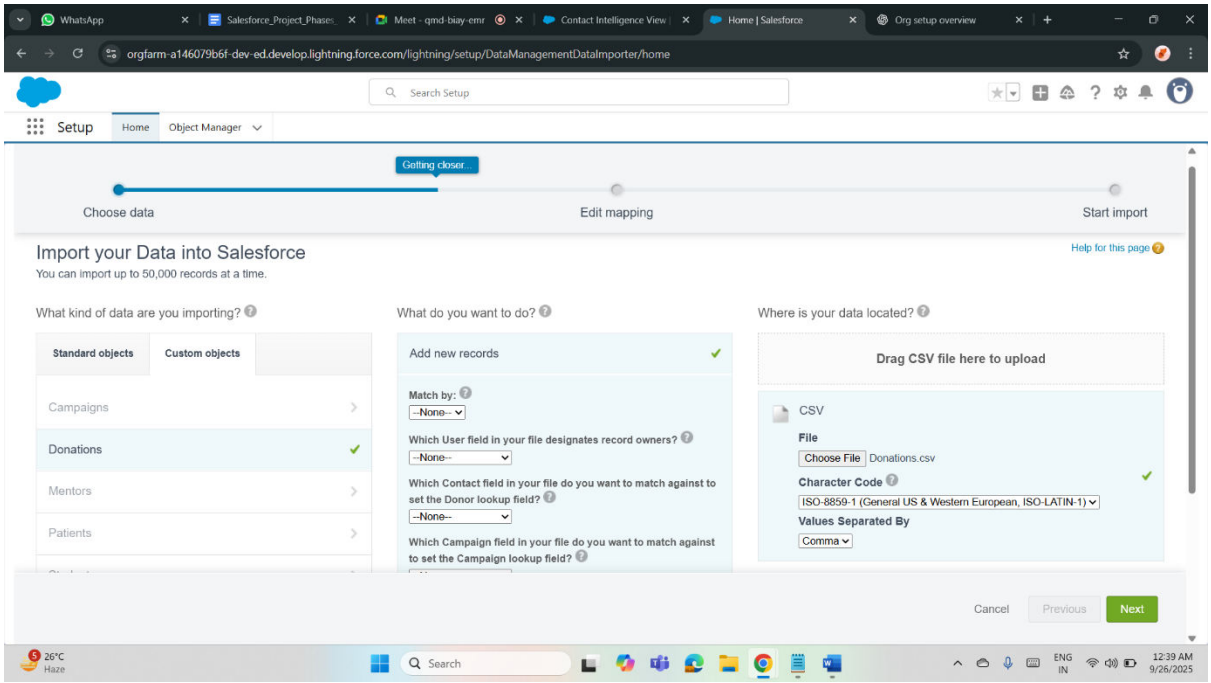
Healthcare: Deploy custom objects, validation rules, or flows for new patient workflows from sandbox to production.
Donation: Move campaign automation, page layouts, or donation workflows safely. Change Sets ensure tested features go live without manual reconfiguration.

### Unmanaged vs Managed Packages:

Healthcare: Use managed packages for secure hospital apps with vendor updates; unmanaged for internal prototypes like appointment trackers.
Donation: Managed packages for donation platforms, unmanaged for

temporary custom fundraising apps. Managed packages are vendor-maintained; unmanaged are editable, ideal for development.

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Search Setup
Setup
Home
Object Manager
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?
Standard objects
Custom objects
Campaigns
Donations
Mentors
Patients
What do you want to do?
Add new records
Match by:
--None--
Which User field in your file designates record owners?
--None--
Which Contact field in your file do you want to match against to set the Donor lookup field?
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Which Campaign field in your file do you want to match against to set the Campaign lookup field?
Where is your data located?
Drag CSV file here to upload
CSV
File
Choose File
Donations.csv
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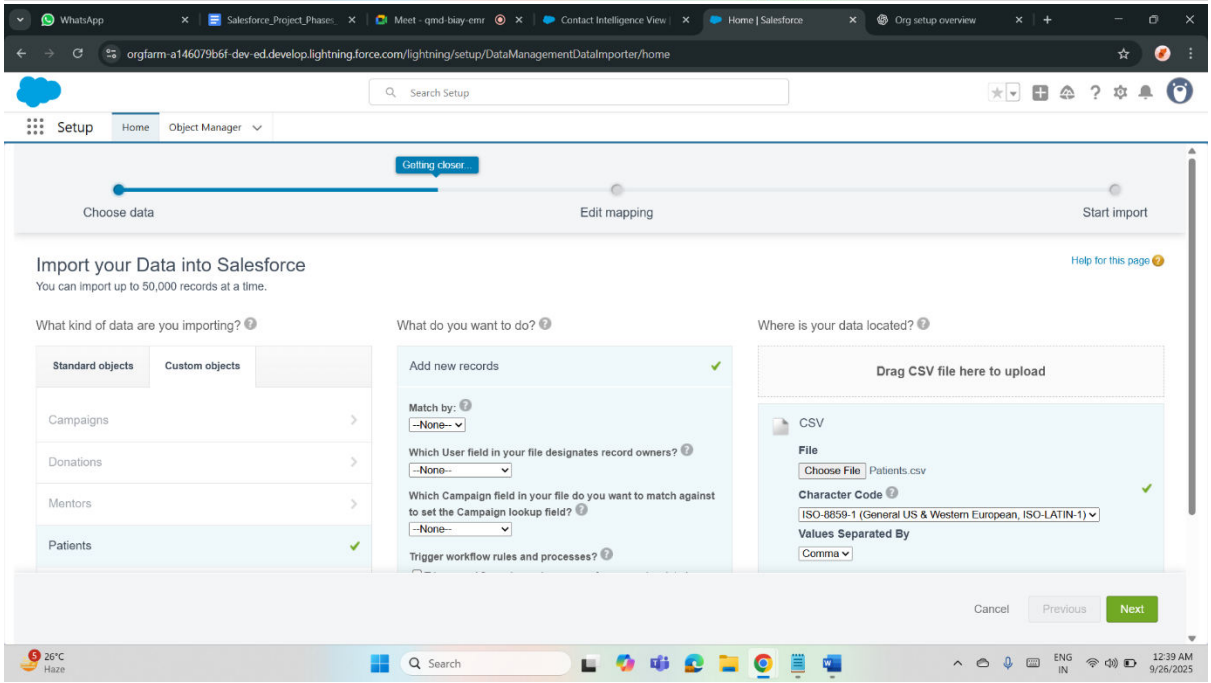
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Add new records
Match by:
--None--
Which User field in your file designates record owners?
--None--
Which Campaign field in your file do you want to match against to set the Campaign lookup field?
--None--
Trigger workflow rules and processes?
Where is your data located?
Drag CSV file here to upload
CSV
File
Choose File
Patients.csv
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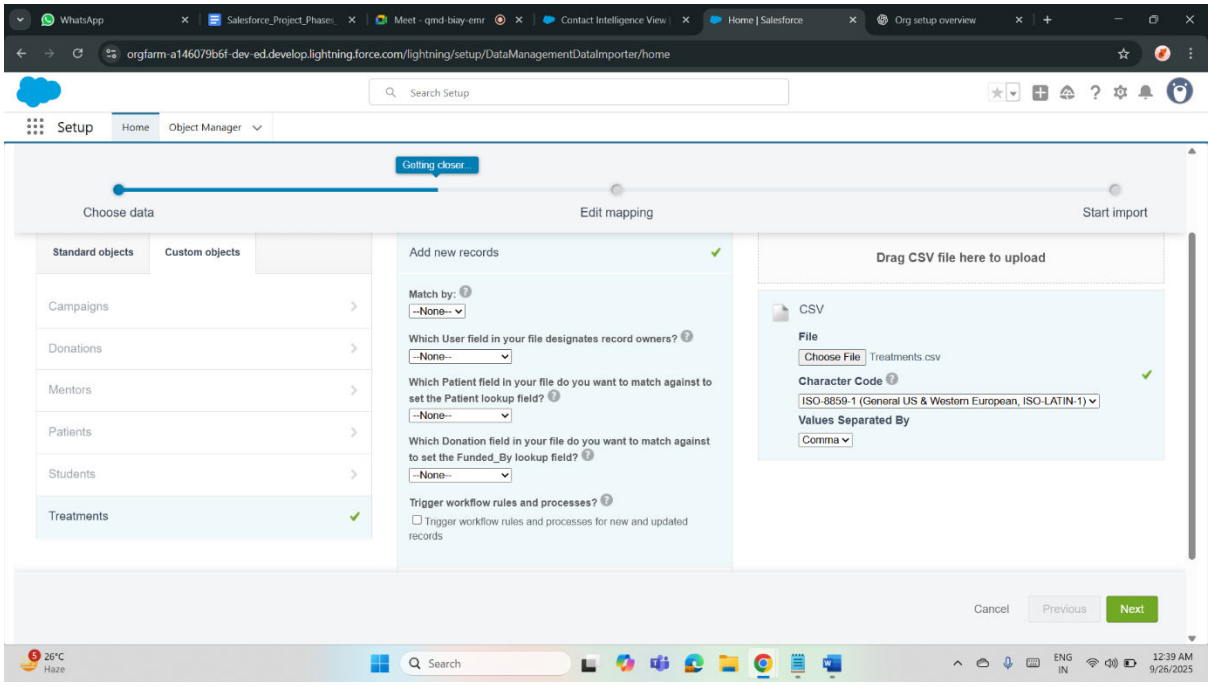
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Setup
Home
Object Manager
Getting closer...
Choose data
Edit mapping
Start import
Standard objects
Custom objects
Campaigns
Donations
Mentors
Patients
Students
Treatments
Add new records
Match by:
--None--
Which User field in your file designates record owners?
--None--
Which Patient field in your file do you want to match against to set the Patient lookup field?
--None--
Which Donation field in your file do you want to match against to set the Funded_By lookup field?
--None--
Trigger workflow rules and processes?
Trigger workflow rules and processes for new and updated records
Drag CSV file here to upload
CSV
File
Choose File
Treatments.csv
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