

## **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.

The screenshot shows the Salesforce Data Import Wizard interface. At the top, there are three tabs: 'FAQ' (selected), 'Data Import video series', and 'Additional Resources'. Below the tabs, a progress bar indicates the process is 'Getting closer'.

**Before you import your data...**

- Clean up your data import file**: You'll have fewer errors to resolve if your data file is clean and free of duplicates. Watch video.
- Make sure your field names match Salesforce field names**: You'll be required to map your data fields to Salesforce data fields. Data in unmapped fields is not imported. View a list of Salesforce data fields.
- Don't import too many records at once**: Using the Data Import Wizard, import up to 50,000 records at a time. Importing too many records can slow down your org for all users, especially during periods of peak usage.

**Import your data in 3 easy steps!**

Launch the Data Import Wizard to import your data.

Pre-step: Prepare your data for import → Choose data to import → Edit field mapping → Review and start import

**Launch Wizard!**

**Import your Data into Salesforce**

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

**What kind of data are you importing?**

Standard objects    Custom objects

Accounts and Contacts   Leads   Solutions

**What do you want to do?**

Add new records  

Match Contact by:

Match Account by:

Trigger workflow rules and processes?

**Where is your data located?**

Drag CSV file here to upload

CSV

File  Contacts.csv

Character Code

Values Separated By

Cancel Previous Next

The screenshot shows the 'Data Management Data Importer' home page in the Salesforce Setup. The top navigation bar includes tabs for WhatsApp, Salesforce Project Phases, Meet - qnd-bay-emr, Contact Intelligence View, Home | Salesforce, Org setup overview, and other browser tabs. The main content area has a progress bar at the top labeled 'Getting closer' with three steps: 'Choose data', 'Edit mapping', and 'Start import'. Below the progress bar, the 'Import your Data into Salesforce' section states: 'You can import up to 50,000 records at a time.' The 'What kind of data are you importing?' section shows 'Standard objects' selected, with 'Campaigns', 'Donations', 'Mentors', and 'Patients' listed. The 'What do you want to do?' section shows 'Add new records' selected, with 'Match by:' set to 'None'. The 'Where is your data located?' section shows a CSV file named 'Donations.csv' uploaded, with character code ISO-8859-1 and values separated by commas. A 'Next' button is visible at the bottom right.

This screenshot shows the 'Edit mapping' step of the data import process. The 'Choose data' step is completed, indicated by a green checkmark. The 'Edit mapping' step is currently active, shown by a blue progress bar segment. The 'Start import' step is still greyed out. The 'Import your Data into Salesforce' section remains the same. The 'What kind of data are you importing?' section now shows 'Custom objects' selected, with 'Campaigns', 'Donations', 'Mentors', and 'Patients' listed. The 'What do you want to do?' section shows 'Add new records' selected, with 'Match by:' set to 'None'. The 'Where is your data located?' section shows a CSV file named 'Donations.csv' uploaded, with character code ISO-8859-1 and values separated by commas. A 'Next' button is visible at the bottom right.

This screenshot shows the final 'Start import' step of the data import process. The 'Edit mapping' step is completed, indicated by a green checkmark. The 'Start import' step is now active, shown by a blue progress bar segment. The 'Import your Data into Salesforce' section remains the same. The 'What kind of data are you importing?' section shows 'Custom objects' selected, with 'Campaigns', 'Donations', 'Mentors', and 'Patients' listed. The 'What do you want to do?' section shows 'Add new records' selected, with 'Match by:' set to 'None'. The 'Where is your data located?' section shows a CSV file named 'Patients.csv' uploaded, with character code ISO-8859-1 and values separated by commas. A 'Next' button is visible at the bottom right.

