

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 image shows a screenshot of the Salesforce Data Import Wizard interface, specifically the 'Choose data' step. The browser address bar shows the URL: `orgfarm-a146079b6f-dev-ed.develop.lightning.force.com/lightning/setup/DataManagementDataImporter/home`. The page header includes the Salesforce logo, a search bar, and navigation tabs for Setup, Home, and Object Manager. The main content area is titled 'Before you import your data...' and includes instructions on cleaning up the data import file, ensuring field names match Salesforce field names, and not importing too many records at once. Below this, a section titled 'Import your data in 3 easy steps!' shows a progress bar with four steps: Pre-steps: Prepare your data for import, Choose data to import, Edit field mapping, and Review and start import. A 'Launch Wizard!' button is prominently displayed. The bottom section, 'Import your Data into Salesforce', is divided into three columns: 'What kind of data are you importing?' (with options for Standard objects, Custom objects, and Accounts and Contacts), 'What do you want to do?' (with options for Match Contact by, Match Account by, and Trigger workflow rules and processes), and 'Where is your data located?' (with options for CSV file upload, Character Code, and Values Separated By). The 'Next' button is visible at the bottom right.

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Setup Home Object Manager

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-steps: Prepare your data for import | Choose data to import | Edit field mapping | Review and start import

Launch Wizard!

FAQ | Data Import video series | Additional Resources

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Setup Home Object Manager

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? ☐ Trigger workflow rules and processes for new and updated records

Where is your data located?

Drag CSV file here to upload

CSV

File: Contacts.csv

Character Code:

Values Separated By:

Cancel | Previous | Next

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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.

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?
--None--

Which Campaign field in your file do you want to match against to set the Campaign lookup field?
--None--

Where is your data located?

Drag CSV file here to upload

CSV

File
Choose File Donations.csv ✓

Character Code
ISO-8859-1 (General US & Western European, ISO-LATIN-1) ✓

Values Separated By
Comma ✓

Cancel Previous Next

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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.

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 Campaign field in your file do you want to match against to set the Campaign lookup field?
--None--

Trigger workflow rules and processes?
--None--

Where is your data located?

Drag CSV file here to upload

CSV

File
Choose File Patients.csv ✓

Character Code
ISO-8859-1 (General US & Western European, ISO-LATIN-1) ✓

Values Separated By
Comma ✓

Cancel Previous Next

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SetupHomeObject Manager

Getting closer...

Choose dataEdit mappingStart import

Standard objectsCustom objects

Campaigns>

Donations>

Mentors>

Patients>

Students>

Treatments>

Add new records

Match by: 1
--None--

Which User field in your file designates record owners? 2
--None--

Which Patient field in your file do you want to match against to set the Patient lookup field? 3
--None--

Which Donation field in your file do you want to match against to set the Funded_By lookup field? 4
--None--

Trigger workflow rules and processes? 5
☐ Trigger workflow rules and processes for new and updated records

Drag CSV file here to upload

CSV

File
Choose FileTreatments.csv

Character Code 6
ISO-8859-1 (General US & Western European, ISO-LATIN-1)

Values Separated By
Comma

CancelPreviousNext

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Search

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