Project HealthConnect 360

Phase 8: Data Management & Deployment

A Unified Patient Relationship & Clinic Management System
Prepared by: **Harsh Raj Mishra**

Salesforce Editions

- Used Salesforce Developer Edition for HealthConnect 360.
- Free edition with unlimited build and test access.
- Ideal for learning and demo purposes.

Data Import Wizard

- Created `Patients.csv` with 20 records (e.g., Amit Sharma).
- Imported 18 patient records into Accounts via Data Import Wizard.
- Verified in 'All Accounts' view; 2 failed (duplicates likely).
- Deferred Doctors and Appointments to Phase 9.

Data Import Wizard

Help for this page ❓

Recent Import Jobs

Status	Object	Records Created	Records Updated	Records Failed	Start Date	Processing Time (ms)
Closed	Account	18	0	2	09-26-2025 07:59	565

Bulk Api Monitoring

Before you import your data...

Collapse

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

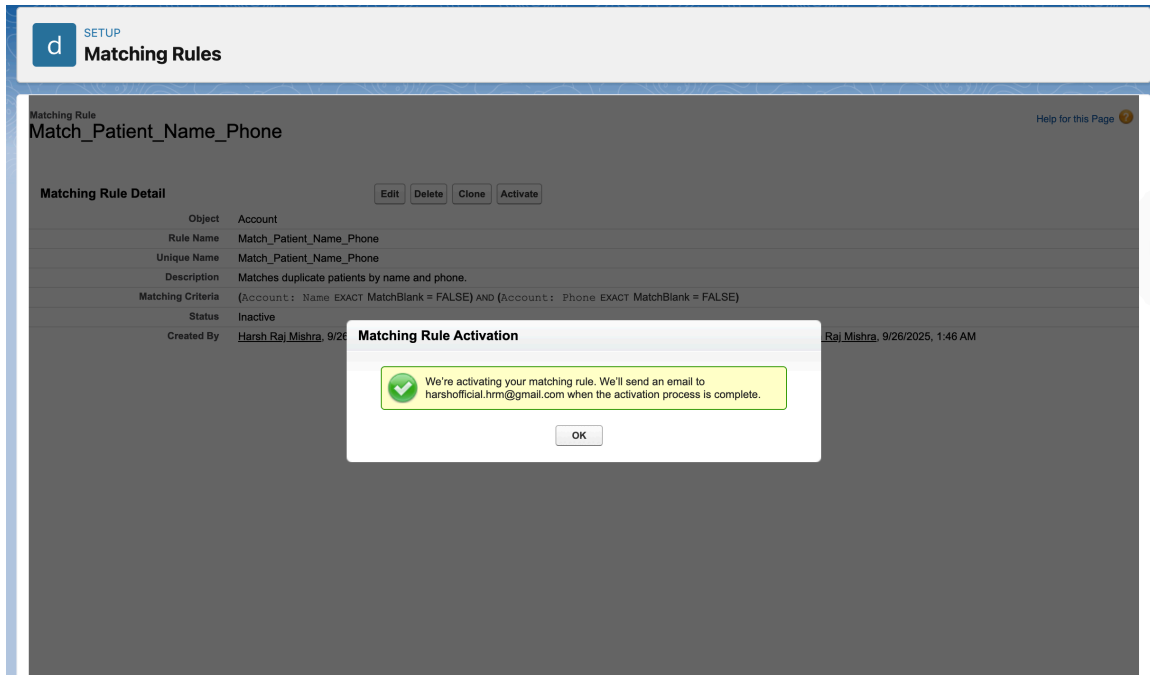**Make sure your field names match Salesforce field names**
You'll be required to map your data fields to Salesforce data fields. Data in unmapped fields is not imported.View a list of Salesforce data fields.

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.

Duplicate Rules
- Set up `Prevent_Patient_Duplicates` rule for Accounts.
- Used `Match_Patient_Name_Phone` with Exact match on name and phone.
- Tested by blocking duplicate Amit Sharma entry.
- Enhances data accuracy for all Accounts.

Change Sets
- Tried to find 'Change Sets' in Setup but not available.
- Skipped due to org limitations (no sandbox).
- Planned deployment via VS Code & SFDX later.
- Deferred to Phase 9 or post-project.

Data Export & Backup
- Exported data using 'Data Export' with UTF-8 encoding.
- Unchecked 'Replace carriage returns' for data integrity.
- Downloaded `export.zip` with 18 patient records.
- Ensured backup for all clinic data.

Monthly Export Service

Data Export lets you prepare a copy of all your data in salesforce.com. From this page you can start the export process manually or schedule it to run automatically. When an export is ready for download you will receive an email containing a link that allows you to download the file(s). The export files are also available on this page for 48 hours, after which time they are deleted.

> ℹ️ **Next scheduled export:**
> A data export is currently in progress for your organization.

Export Now   Schedule Export

Your export has been queued. You will receive an email notification when it is completed.

Scheduled By	Harsh Raj Mishra
Schedule Date	9/26/2025
Export File Encoding	Unicode (UTF-8)

Your Organization Data Export has completed - HealthConnect 360   Inbox ×

🖨 ⤢

Do not reply <noreply@salesforce.com>   2:57 PM (2 minutes ago)   ☆   ☺   ↩   ⋮
to me ▾

The export of your organization's data has been completed. Please click on the following link within the next 48 hours to receive the export.

https://orgfarm-f2294782a3-dev-ed.develop.my.salesforce.com/ui/setup/export/DataExportPage/d

The exported data files were created using Unicode (UTF-8) character encoding. To view the characters correctly, open the files in a text editor, or follow the instructions below for opening the files in Microsoft® Excel.

Microsoft® Excel (pre-2003 versions)
1. Open the file in Microsoft® Excel and select File -> Save As, and save the file as type Web Page.
2. Select Tools -> Options -> General tab and click the Web Options button.
3. Select the Encoding tab, and then choose the "Unicode (UTF-8)" option.
4. Click OK to close the dialog boxes.
5. Select File -> Save to save the file with selected encoding.
These steps will need to be repeated for each file.

Microsoft® Excel 2003
1. Open Microsoft® Excel and click File -> New.
2. Click Data -> Import External Data -> Import Data.
3. Select the CSV file to open and Microsoft® Excel will launch the text import wizard.
4. Select "Delimited" and choose the "Unicode (UTF-8)" option for File origin.
5. Click Next.
6. Select "Comma" in the Delimiters section and click Finish. You may be prompted to select a range of cells.
These steps will need to be repeated for each file.

Thank you,
Salesforce

RecordId	Name	Type	ParentId	BillingStreet	BillingCity	BillingState	BillingPostalCode	BillingCountry	BillingStateCode	BillingCountryCode
	Edge Communications	Customer - Direct	000000000000000AAA	312 Constitution Place Austin, TX 78767 USA	Austin	TX		United States	TX	US
	Burlington Textiles Corp of America	Customer - Direct	000000000000000AAA	525 S. Lexington Ave	Burlington	NC	27215	USA	NC	US
	Pyramid Construction Inc.	Customer - Channel	000000000000000AAA	2 Place Jussieu	Paris		75251	France		FR
	Dickenson plc	Customer - Channel	000000000000000AAA	1301 Hoch Drive	Lawrence	KS	66045	USA	KS	US
	Grand Hotels & Resorts Ltd	Customer - Direct	000000000000000AAA	2334 N. Michigan Avenue, Suite 1500 Chicago, IL 60601, USA	Chicago	IL		United States	IL	US
	United Oil & Gas Corp.	Customer - Direct	000000000000000AAA	1301 Avenue of the Americas New York, NY 10019	New York	NY		United States	NY	US
	Express Logistics and Transport	Customer - Channel	000000000000000AAA	620 SW 5th Avenue Suite 400 Portland, Oregon 97204 United States	Portland	OR		United States	OR	US
	University of Arizona	Customer - Direct	000000000000000AAA	888 N Euclid Halls Center, Room 501 Tucson, AZ 85721 United States	Tucson	AZ		United States	AZ	US
	United Oil & Gas, UK	Customer - Direct	000000000000000AAA	Kings Park, 17th Avenue, Team Valley Trading Estate, Gateshead, Tyne and Wear NE26 3HS United Kingdom		UK				
	United Oil & Gas, Singapore	Customer - Direct	000000000000000AAA	9 Tagore Lane Singapore, Singapore 787472 Singapore	Singapore	Singapore				
	GenePoint	Customer - Channel	000000000000000AAA	345 Shoreline Park Mountain View, CA 94043 USA	Mountain View	CA		United States	CA	US
	sForce			000000000000000AAA	The Landmark @ One Market	San Francisco	CA	94087	US	CA	US
	Sample Account for Entitlements		000000000000000AAA							
	Amit Sharma		000000000000000AAA	123 Clinic Road	Jabalpur	Madhya Pradesh	482001	India	MP	IN
	Priya Gupta		000000000000000AAA	456 Hospital Lane	Jabalpur	Madhya Pradesh	482002	India	MP	IN
	Aastha Sharma		000000000000000AAA	city	Jabalpur	Madhya Pradesh	482002	India	MP	IN
	Ravi Kumar		000000000000000AAA	789 Medical Street	Jabalpur	Madhya Pradesh	482003	India	MP	IN
	Neha Patel		000000000000000AAA	101 Health Avenue	Jabalpur	Madhya Pradesh	482004	India	MP	IN
	Suresh Yadav		000000000000000AAA	202 Care Lane	Jabalpur	Madhya Pradesh	482005	India	MP	IN
	Shalini Mishra		000000000000000AAA	96 Hospital Road	Jabalpur	Madhya Pradesh	482040	India	MP	IN
	Hemant Jain		000000000000000AAA	973 Hospital Road	Jabalpur	Madhya Pradesh	482011	India	MP	IN
	Manish Rawat		000000000000000AAA	906 Health Nagar	Jabalpur	Madhya Pradesh	482049	India	MP	IN
	Deepak Agarwal		000000000000000AAA	458 Wellness Path	Jabalpur	Madhya Pradesh	482042	India	MP	IN
	Geeta Mehta		000000000000000AAA	166 Health Nagar	Jabalpur	Madhya Pradesh	482010	India	MP	IN
	Ramesh Agarwal		000000000000000AAA	423 Hospital Road	Jabalpur	Madhya Pradesh	482045	India	MP	IN
	Vikram Bhatt		000000000000000AAA	843 Clinic Street	Jabalpur	Madhya Pradesh	482045	India	MP	IN
	Arun Mishra		000000000000000AAA	576 Care Road	Jabalpur	Madhya Pradesh	482042	India	MP	IN
	Arun Shukla		000000000000000AAA	77 Care Road	Jabalpur	Madhya Pradesh	482038	India	MP	IN
	Geeta Bhatt		000000000000000AAA	243 Wellness Path	Jabalpur	Madhya Pradesh	482038	India	MP	IN
	Meena Verma		000000000000000AAA	910 Clinic Street	Jabalpur	Madhya Pradesh	482022	India	MP	IN
	Nitin Chauhan		000000000000000AAA	811 Wellness Path	Jabalpur	Madhya Pradesh	482048	India	MP	IN
	Vikram Rawat		000000000000000AAA	786 Care Road	Jabalpur	Madhya Pradesh	482048	India	MP	IN
	Alok Agarwal		000000000000000AAA	897 Wellness Path	Jabalpur	Madhya Pradesh	482019	India	MP	IN
	Hemant Jain		000000000000000AAA	757 Wellness Path	Jabalpur	Madhya Pradesh	482047	India	MP	IN

Business Alignment

- Supports Receptionists managing patient records.
- Allows Doctors secure access to patient data.
- Enables Management to oversee backups.
- Aligns with Phase 1-7 goals for patient care.

Deployment Basics

- Used point-and-click for quick setup.
- Skipped Change Sets; planned SFDX for production.
- Simple and fast configuration process.
- Ready for future deployment needs.

Summary of Achievements

- Imported 18 patient records successfully.
- Added Duplicate Rules for data quality.
- Skipped Change Sets due to limits.
- Completed data backup for safety.

Challenges and Resolutions

- Faced 2 import failures; accepted 18/20.
- Couldn't use Change Sets; planned SFDX.
- Resolved with minimal impact.

- Ready to move to Phase 9.

Next Steps
- Move to Phase 9 for Reporting and Dashboards.
- Visualize patient data with dashboards.
- Review import failures later.
- Prepare for project demo.