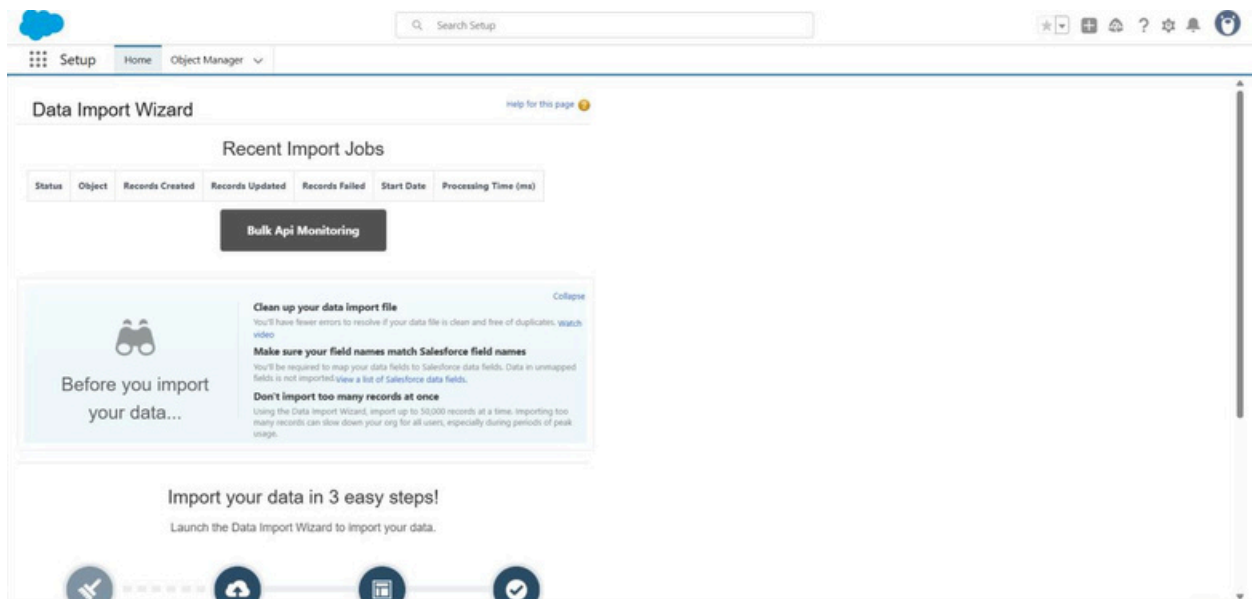


Phase 8: Data Management & Deployment

Data Import Wizard

The ***Data Import Wizard*** in Salesforce allows users to quickly import records for standard and custom objects, including Contacts, Accounts, and Cases.

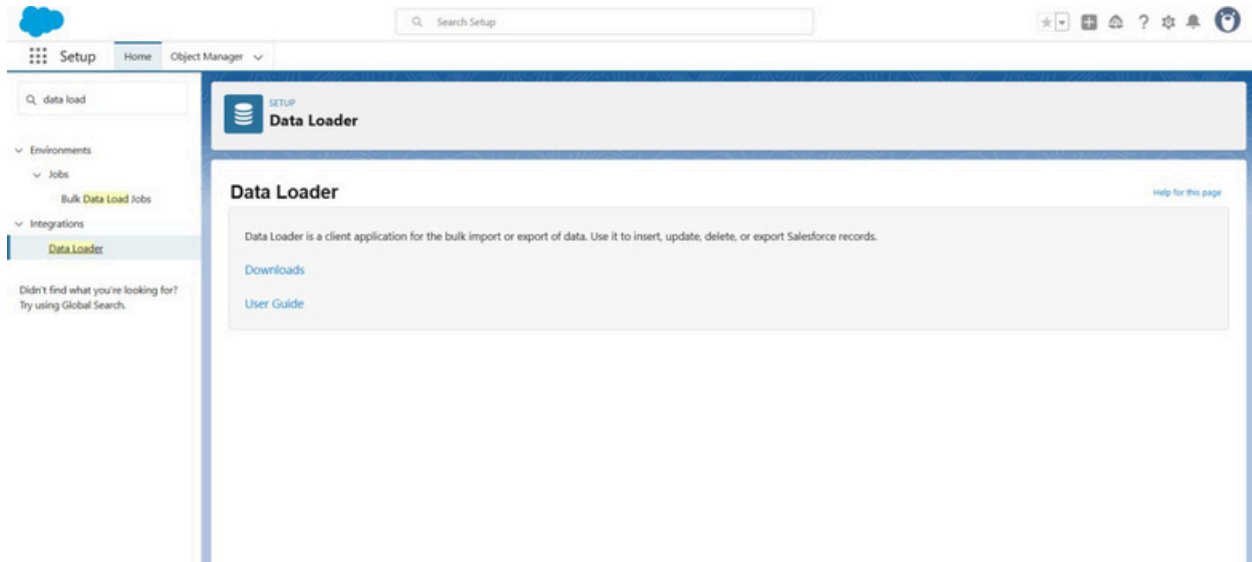
For this project, patient data can be imported using this wizard to populate the Contact object with necessary fields such as ***Patient ID, Age, Gender, and Preferred Doctor***.



Data Loader

Data Loader is a more advanced tool for bulk import, export, update, and deletion of Salesforce records. It is particularly useful for large volumes of data exceeding the wizard limits.

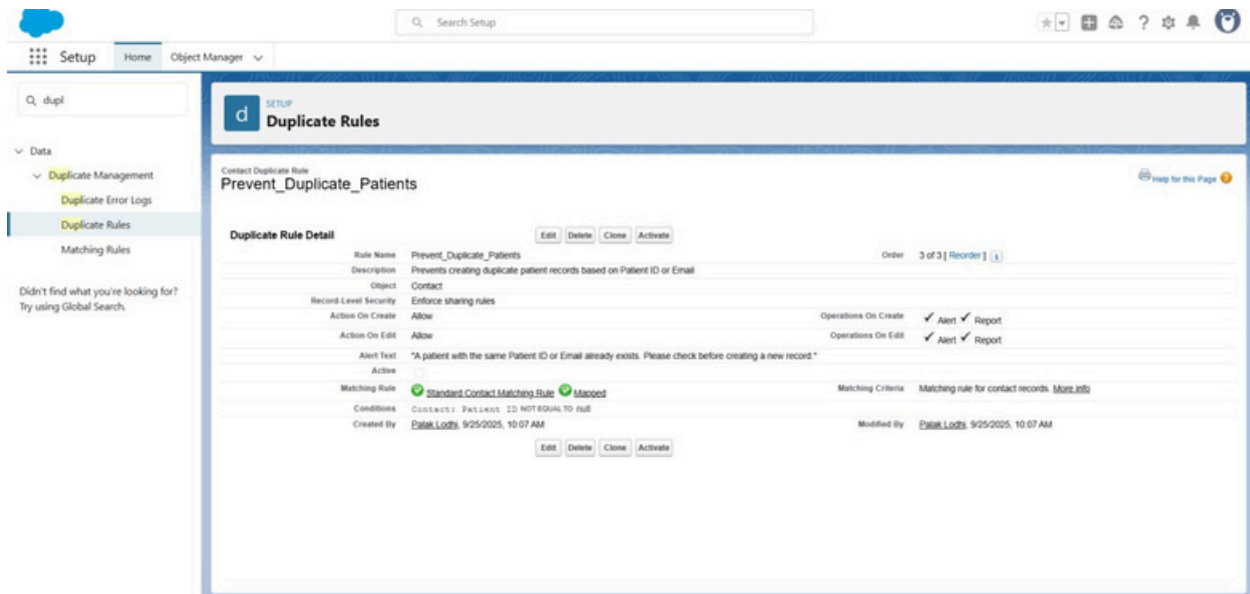
For this project, since the number of records is minimal, ***Data Loader was not used***, and all testing data was added manually.



Duplicate Rules

Duplicate rules prevent the creation of duplicate patient records. A ***Duplicate Rule*** was created on the Contact object to ensure no duplicate Patient ID is allowed.

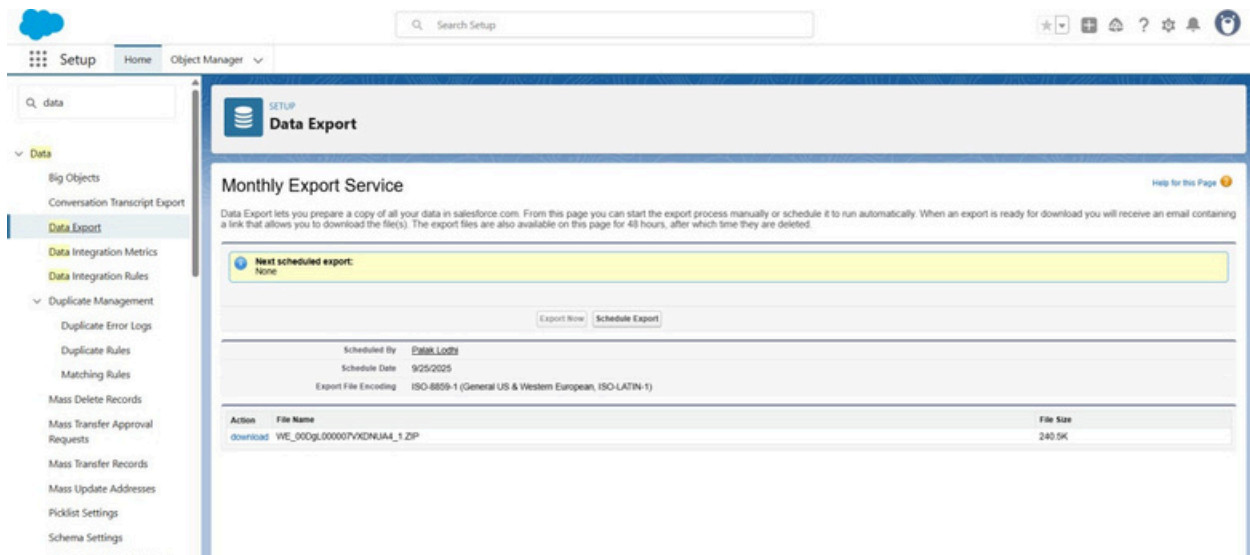
- ***Action on Create:*** Alert
- ***Action on Edit:*** Alert
- ***Matching Criteria:*** Patient ID field checked to prevent duplication.



The screenshot shows the Salesforce Setup interface for the 'Duplicate Rules' section. The left sidebar contains a search bar with 'dupl' and a list of navigation items: Data, Duplicate Management, Duplicate Error Logs, Duplicate Rules (selected), and Matching Rules. Below this is a message: 'Didn't find what you're looking for? Try using Global Search.' The main content area is titled 'Duplicate Rules' and shows a 'Contact Duplicate Rule' named 'Prevent_Duplicate_Patients'. The rule details include: Rule Name: Prevent_Duplicate_Patients, Description: Prevents creating duplicate patient records based on Patient ID or Email, Object: Contact, Record Level Security: Enforce sharing rules, Action On Create: Allow, Action On Edit: Allow, Alert Text: 'A patient with the same Patient ID or Email already exists. Please check before creating a new record.', Alert Active: ☐, Matching Rule: ☒ standard.Contact Matching Rule ☒ Mapped, Conditions: ☒ CONTACT.PATIENT_ID NOT EQUAL TO null, Created By: Patrick Loddy, 9/25/2025, 10:07 AM, Modified By: Patrick Loddy, 9/25/2025, 10:07 AM. The rule is currently inactive. Buttons for Edit, Delete, Clone, and Activate are visible.

Data Export & Backup

Data export allows regular backups of Salesforce records. While a *backup export was queued*, it is optional for the project and not necessary for functionality.



The screenshot shows the Salesforce Setup interface for the 'Data Export' section. The left sidebar contains a search bar with 'data' and a list of navigation items: Big Objects, Conversation Transcript Export, Data Export (selected), Data Integration Metrics, Data Integration Rules, Duplicate Management, Duplicate Error Logs, Duplicate Rules, Matching Rules, Mass Delete Records, Mass Transfer Approval Requests, Mass Transfer Records, Mass Update Addresses, Picklist Settings, and Schema Settings. The main content area is titled 'Data Export' and shows the 'Monthly Export Service'. It includes a description: '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.' Below this is a yellow box indicating 'Next scheduled export: None'. There are buttons for 'Export Now' and 'Schedule Export'. The export details show: Scheduled By: Patrick Loddy, Schedule Date: 9/25/2025, Export File Encoding: ISO-8859-1 (General US & Western European, ISO-LATIN-1). A table at the bottom shows the export results:

Action	File Name	File Size
download	WE_000gl.000007VXDNJUAJ_1.ZIP	240.5K

Change Sets

Change Sets are used to migrate metadata between Salesforce orgs (sandbox → production).

For this project, ***Change Sets were not required*** since all development was performed in a single org.

Unmanaged vs Managed Packages

- ***Managed Packages***: Pre-built apps from Salesforce AppExchange with limited customization.
- ***Unmanaged Packages***: Provide full access to code and configuration.
For this project, no packages were installed; all objects, flows, and layouts were custom-built.

ANT Migration Tool

The ***ANT Migration Tool*** is a command-line utility to deploy metadata.

For this project, ***ANT was not used***, as deployment was performed within the same org.

VS Code & SFDX

Visual Studio Code with Salesforce DX allows advanced development using local files and scratch orgs.

For this project, ***VS Code and SFDX were not used***, as development was done directly in the Salesforce web interface.