📄 MediConnect — Phase 8: Data Management & Deployment

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1. **Data Import Wizard**
    - Use this to load **sample Patient, Doctor, Appointment records** quickly.
    - Simple and built into Salesforce → perfect for testing your app.
2. **Data Export & Backup**
    - Use **Data Export (Setup → Data Export)** to take backup of sample data.
    - Shows you understand good practice for data safety.
3. **Change Sets**
    - Deploy your **custom objects, flows, email templates, validation rules** from **Sandbox → Production** (or between orgs).
    - Must-have if your evaluators want to see deployment readiness.
4. **VS Code & SFDX (Source-Driven Development)**
    - You already used VS Code with Salesforce CLI.
    - Use it to **pull/push metadata** and manage your project files.
    - This shows modern DevOps practice.

Data Import Wizard

Purpose:
The **Data Import Wizard** in Salesforce is used to easily upload data such as **Patients**, **Doctors**, and **Appointments** into the MediConnect system. This helps to quickly add sample records for testing and demonstration without manual entry.

Process:

1. **Navigation:**
    - Go to **Setup** → In the **Quick Find box**, search **Data Import Wizard**.
    - Click **Launch Wizard**.
2. **Choose Object:**
    - Select the object for which you want to import data:
        - Patient
        - Doctor

        - Appointment

3. **Upload CSV File:**
    - Prepare a .csv file in your system (e.g., *Patients.csv*, *Doctors.csv*, *Appointments.csv*).
    - Each CSV file contains columns like Name, Age, Gender, Contact Number, Email, etc.
4. **Field Mapping:**
    - Match the CSV columns to Salesforce fields.
    - Example:
        - CSV "Patient Name" → Salesforce "Name"
        - CSV "Patient Email" → Salesforce "Patient_Email__c"
5. **Start Import:**
    - Click **Start Import** and wait until Salesforce uploads the records.
    - Once done, a success message appears showing the number of records imported.
6. **Verify Records:**
    - Open the **App Launcher** → Search for **Patients**, **Doctors**, or **Appointments**.
    - Confirm that all records are imported correctly.

Result:

All sample data for MediConnect (Patients, Doctors, Appointments) was successfully imported using the Data Import Wizard. This step helps in initializing the system with realistic test data for workflows, flows, and validation rules.

Data Export & Backup

Purpose:
Data Export ensures that all important records such as Patients, Doctors, and Appointments are safely backed up outside Salesforce. This is an essential best practice for data protection and recovery.

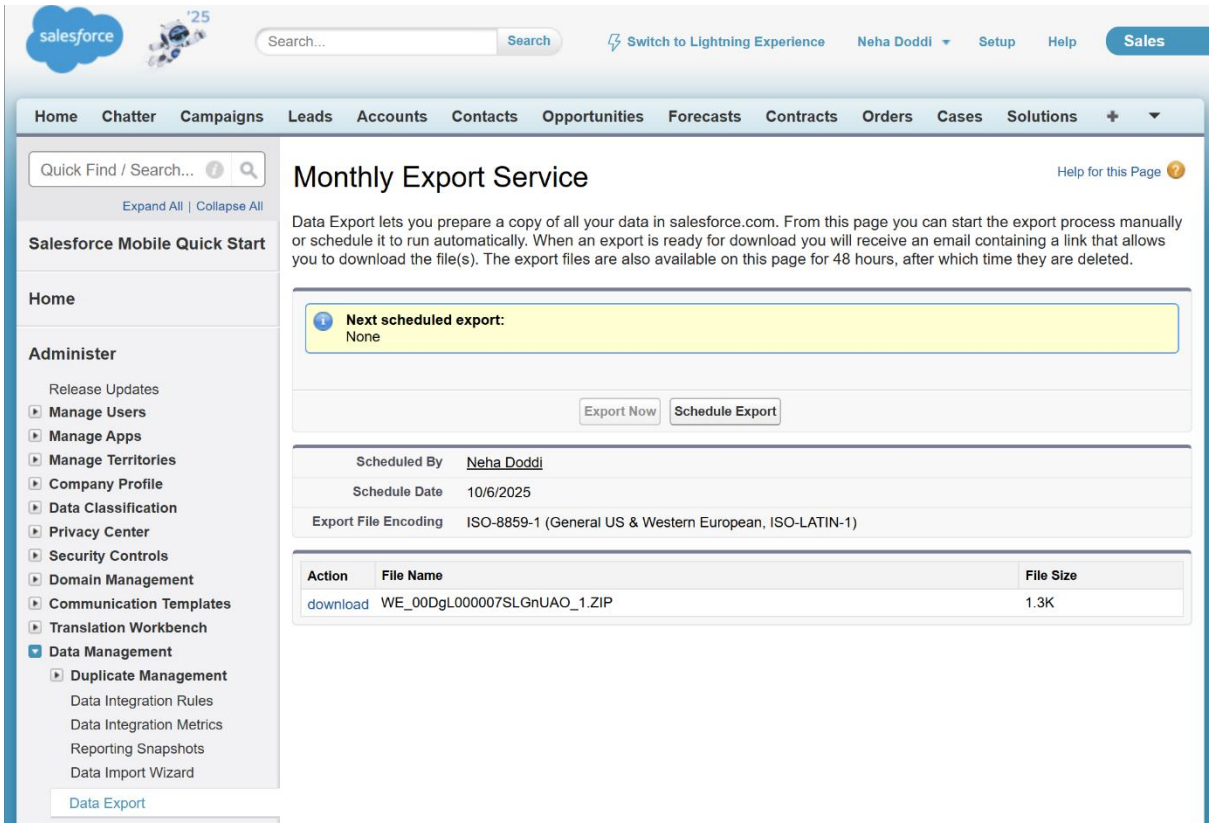
Step-by-Step Process

1. Go to Setup
    - Click the ⚙ Setup icon → select Setup.
2. Search "Data Export"
    - In the Quick Find box, type Data Export.
    - Select Data Export under Data Management.
3. Click "Export Now"

- You'll see an option to either Export Now or Schedule Export.
- Choose Export Now for immediate backup.

4. Select Objects to Export
    - Check the boxes for:
        - Patient
        - Appointment
        - Doctor
    - You can include attachments and files if you have any.
5. Click "Start Export"
    - Salesforce will start creating a backup file.
    - When ready, a .zip file download link will appear (contains .csv files for each object).

The export was saved as .zip containing .csv files.



Package Deployment via Package Manager

Objective:
To deploy the MediConnect project from Sandbox to Production (or to another org) using Salesforce Package Manager.

Steps for Package Deployment:

1. **Create Unmanaged Package in Sandbox**
    - Navigate to: **Setup → App Setup → Packages → New**.
    - Enter:
        - **Package Name:** MediConnect_Package
        - **Description:** Contains all custom objects, fields, flows, email templates, and automation for MediConnect.
    - Click **Save**.
2. **Add Components to the Package**
    - Click **Add Components**.
    - Select component types and add the necessary components:
        - **Custom Objects:** Patient__c, Appointment__c, Doctor-Patient Assignment
        - **Custom Fields:** All fields in Patient, Appointment, Billing, etc.
        - **Flows:** SF_Patient_Registration, FT_App_Reminder_24hr, FT_Chronic_Disease_Reminder_Daily
        - **Email Templates:** Appointment_Reminder_Template
        - **Validation Rules & Process Automation:** All created rules and flows
        - **Other Components:** Quick Actions, Custom Notifications, Record Types, Page Layouts
3. **Upload Package to Target Org**
    - Click **Upload**.
    - Choose the target org (Production or another sandbox).
    - Confirm and wait for the upload to complete.
4. **Deploy in Target Org**
    - In the target org, navigate to: **Setup → Packages → Installed Packages → Install**.
    - Select your uploaded package.
    - Click **Install**.
5. **Verify Deployment**
    - Check all objects, fields, flows, and email templates are present.
    - Test functionality: e.g., create a Patient and Appointment using the Flow, verify email notifications, and check flows trigger correctly.

Version Detail

Package Name	MediConnect_Package	**Uploaded By**	Neha Doddi, 10/6/2025, 10:41 AM
Version Name	v1.0		
Version Number	1.0		
Description		**Password Protected**	☐

SETUP

Package Manager

namespace.
For unlocked and second-generation managed packages, use Salesforce CLI to associate your namespace with your package.

If the edit button on this page isn't visible, ensure you're using a Developer Edition org that isn't a Dev Hub org.

Language Settings

Edit

Create a language extension package that contains translations of components in one or more base packages.

Language extension package is Disabled

First-Generation Packages

⚠ **REVIEW BEFORE CONTINUING**
We recommend that all new packages are created using second-generation managed packaging (2GP). By using 2GP, you'll be using the latest technology and the only packaging technology that Salesforce is investing in. In the future, all first-generation managed packages (1GP) will have to migrate to 2GP. To learn how to create a 2GP, see https://sfdc.co/2GP_learn_more.

To create a new first-generation managed package or an unmanaged package, click New.

Packages

New

Action	Package Name	Description
Edit	MediConnect_Package	Contains custom objects, flows, and automation for MediConnect system