

MediCare Connect Phase 8 – Data Management & Deployment

Introduction

This phase focuses on securely loading and backing up MediCare Connect data, avoiding duplicates, and preparing a pathway for future deployments. We imported patient data, configured duplicate rules, performed manual data export, and documented options for large-scale imports, packages and CLI deployments.

1. Data Import Wizard

Patient records were imported as Contacts using Salesforce's built-in **Data Import Wizard**. This allowed us to quickly load test data (name, email, birthdate, MRN) without needing any external tool.

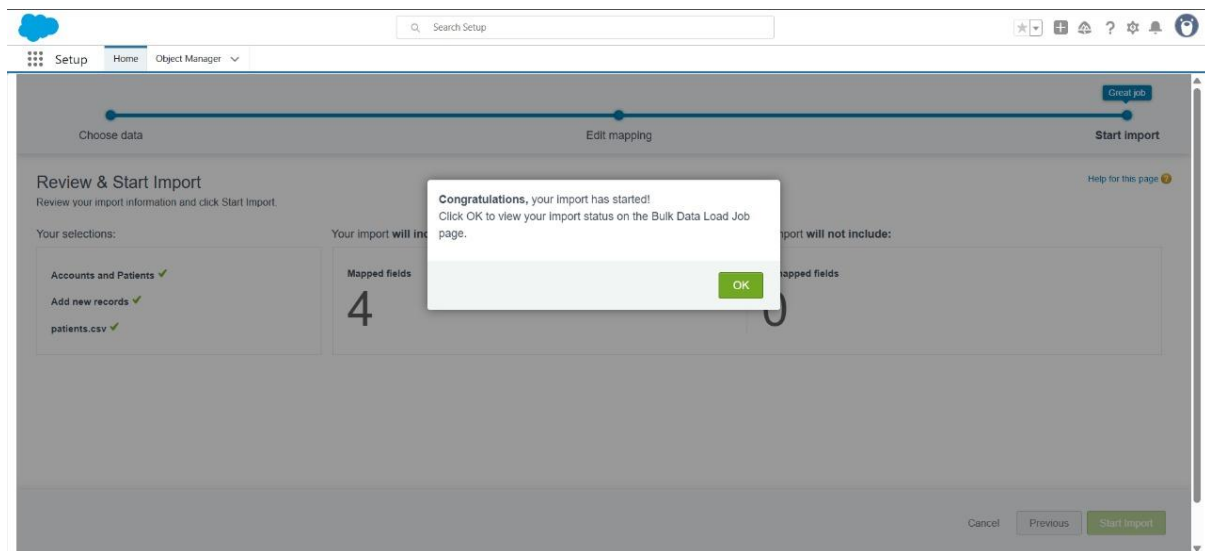


Fig-1 DataImportWizard

2. Data Loader

For bulk loading of related or custom objects such as Appointment__c, Salesforce's **Data Loader** can be used. It supports mapping lookups to Contact Ids and is better for large imports or scheduled upserts. In MediCare Connect it could be used to load hundreds of appointments or medical cases from hospital ERP into Salesforce.

3. Duplicate Management (Matching & Duplicate Rules)

To prevent duplicate patient entries, a **Matching Rule** on Contact Email and a **Duplicate Rule** were created. When a user tries to create a Contact with an email already in Salesforce, they see an alert warning. This keeps patient records clean.

4. Data Export & Backup

A **manual Data Export** was performed and a ZIP backup downloaded containing Contacts, Appointments and Medical Cases. This ensures hospital data can be restored or migrated if needed. Weekly exports can also be scheduled.

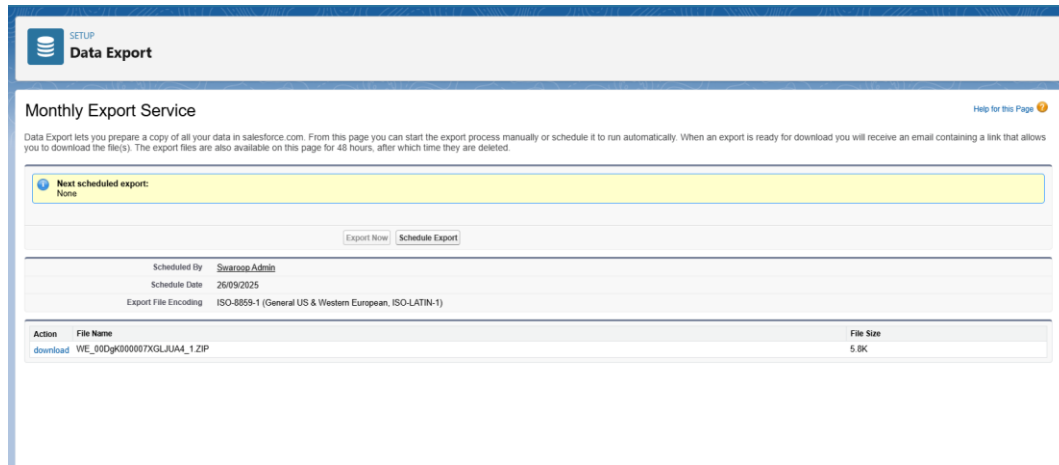


Fig-5 Data Export

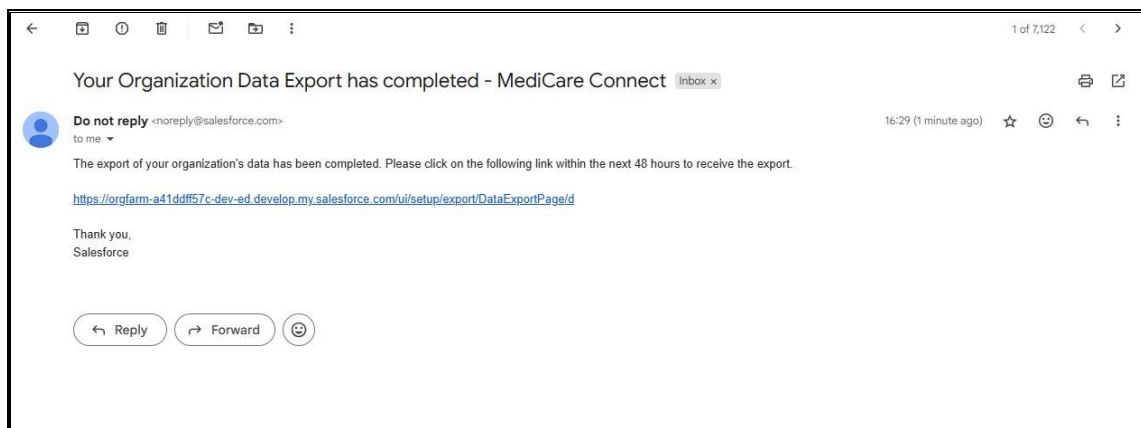


Fig-6 Data Export Success Email

5.Change Sets (skipped but documented)

For moving metadata (fields, page layouts, flows) from Sandbox to Production, Salesforce **Change Sets** can be used. In MediCare Connect, a Change Set would bundle the custom Appointment object, Lightning pages and Flows for deployment to a live org.

6.Unmanaged vs Managed Packages (skipped but documented)

If the hospital wanted to install the MediCare Connect customisation in multiple Salesforce orgs, an **Unmanaged Package** could be created. For AppExchange distribution a **Managed Package** is required. This packages all custom objects, fields, and LWCs for easy install.

7.ANT Migration Tool (skipped but documented)

As an alternative to Change Sets, Salesforce provides the **ANT Migration Tool**, which uses XML build files to retrieve and deploy metadata. This is useful for scripted deployments and CI/CD pipelines but was not needed in our current phase.

8. VS Code & SFDX

The project already used **VS Code with Salesforce CLI (SFDX)** in Phase 6 for developing and deploying Lightning Web Components.

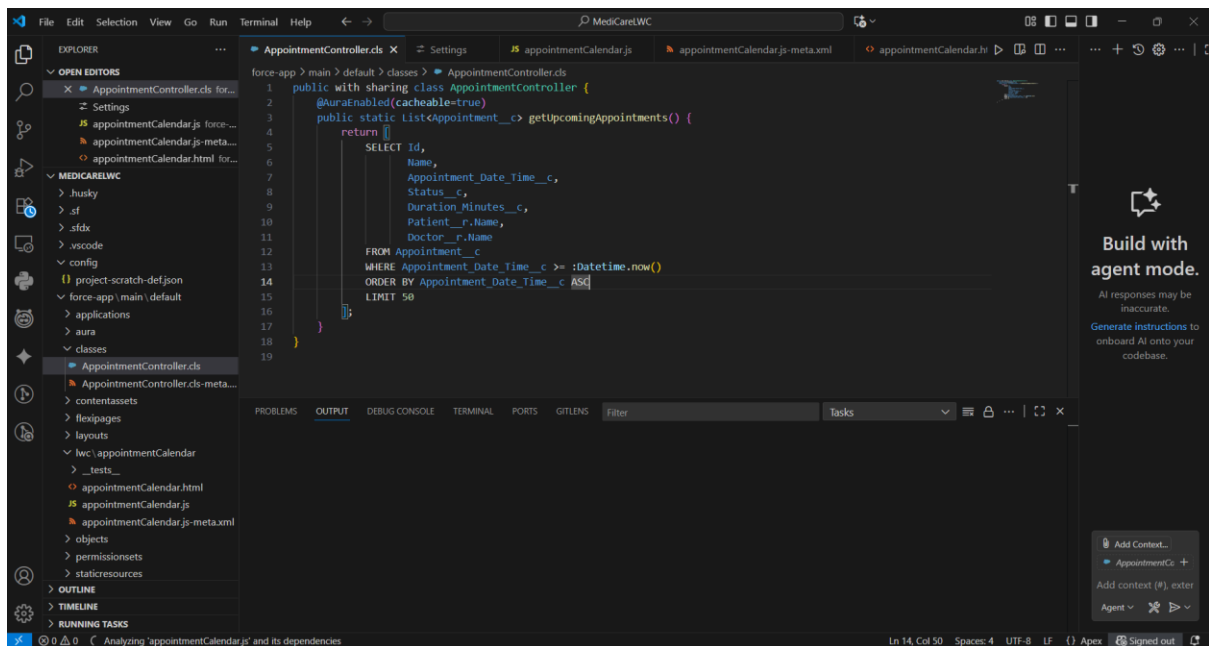


Fig-7 VS Code/SFDX

9. Result

By the end of Phase 8, patient data was successfully imported, duplicate rules were activated, and a full backup was exported. We documented the use of Data Loader, Change Sets, Packages, ANT, and SFDX for future scaling. This establishes a solid data management and deployment foundation for MediCare Connect.