

# PHASE – 8 Data Management & Deployment

## 1.Data Import Wizard

The Data Import Wizard is a built-in Salesforce tool used to quickly import small to medium-sized data files (such as CSV files) into Salesforce. It allows users to add, update, or upsert records for standard objects like Accounts and Contacts as well as custom objects like Appointments or Patients. The Wizard guides you through uploading a CSV, mapping fields, and starting the import without needing any code. It’s ideal for admins who need a simple UI-based method to load data accurately.

Setup

Home

Object Manager ▾

Data Import Wizard

Help for this page ?

Recent Import Jobs

Status	Object	Records Created	Records Updated	Records Failed	Start Date	Processing Time (ms)
Closed	Appointment	0	0	7	10-17-2025 05:29	162

Bulk Api Monitoring

## 2.Data Loader

Salesforce Data Loader is a desktop application for handling large data volumes. It supports bulk insert, update, insert, delete, and export operations using CSV files. Admins use it for migrating data between orgs or for mass updates. Unlike the Data Import Wizard, Data Loader runs faster and lets you schedule automated jobs. It’s ideal for handling complex data tasks securely.

SETUP

Bulk Data Load Jobs

View the details of a bulk data load job.

[Back to List: Bulk Data Load Jobs](#)

Bulk Data Load Job Detail

Reload

Job ID	750gK00000FTz97	Job Type	Bulk V1	Status	Closed
Submitted By	Ojaswini Yadav	Operation	Insert	Total Processing Time (ms)	162
Start Time	10/16/2025, 10:29 PM PST	Queued Batches	0	API Active Processing Time (ms)	70
End Time	10/16/2025, 10:29 PM PST	In Progress Batches	0	Apex Processing Time (ms)	20
Time to Complete (hh:mm:ss)	00:01	Completed Batches	1		
Object	Appointment	Failed Batches	0		
External ID Field		Progress	100%		
Content Type	CSV	Records Processed	7		
Concurrency Mode	Parallel	Records Failed	7		
API Version	65.0	Retries	0		

Reload

Batches

View Request	View Result	Batch ID	Start Time	End Time	Total Processing Time (ms)	API Active Processing Time (ms)	Apex Processing Time (ms)	Records Processed	Records Failed	Retry Count	State Message	Status
<a href="#">View Request</a>	<a href="#">View Result</a>	751gK00000C656g	10/16/2025, 10:29 PM	10/16/2025, 10:29 PM	162	70	20	7	7	0		Completed

### 3. Duplicate Rules

Duplicate Rules prevent users from creating duplicate records in Salesforce. Admins can define matching criteria (for example, same email or phone number) and set actions to allow, block, or alert when a duplicate is found. These rules help maintain clean and reliable data by stopping repeated entries for patients, doctors, or appointments.

The screenshot shows the 'Duplicate Rules' setup page in Salesforce. The page title is 'Patient Duplicate Rule'. Below the title, there are buttons for 'Edit', 'Delete', 'Clone', and 'Activate'. The main section is titled 'Duplicate Rule Detail' and contains a table with the following fields:

Rule Name	Patient Duplicate Rule	Order	1 of 1 [Reorder]
Description			
Object	Patient		
Record-Level Security	Enforce sharing rules		
Action On Create	Allow	Operations On Create	<input checked="" type="checkbox"/> Alert <input checked="" type="checkbox"/> Report
Action On Edit	Allow	Operations On Edit	<input type="checkbox"/> Alert <input type="checkbox"/> Report
Alert Text	Use one of these records?		
Active	<input type="checkbox"/>		
Matching Rule	Patient_FuzzyMatch  Mapped	Matching Criteria	Patient: Email EXACT MatchBlank = TRUE
Conditions			
Created By	Ojaswini Yadav	Modified By	Ojaswini Yadav
	10/16/2025, 10:37 PM		10/16/2025, 10:37 PM

At the bottom of the table, there are buttons for 'Edit', 'Delete', 'Clone', and 'Activate'.

### 4. Data Export & Backup

Salesforce provides Data Export tools to download your data as CSV files for backup. Admins can schedule weekly or monthly exports or export data on demand using the Data Export service in Setup. This ensures you always have a secure copy of your important records (like appointments and patient information) for recovery or offline analysis.

The screenshot shows the 'Data Export' setup page in Salesforce. The page title is 'Monthly Export Service'. Below the title, there is a description of the service and a 'Help for this Page' link. The main section is titled 'Next scheduled export:' and contains a yellow box with the text 'A data export is currently in progress for your organization.' Below this, there are buttons for 'Export Now' and 'Schedule Export'. The bottom section is titled 'Your export has been queued. You will receive an email notification when it is completed.' and contains a table with the following fields:

Scheduled By	Ojaswini Yadav
Schedule Date	10/16/2025
Export File Encoding	ISO-8859-1 (General US & Western European, ISO-LATIN-1)

### 5. Unmanaged vs Managed Packages

Salesforce packages bundle components for deployment or distribution. Unmanaged packages are used for sharing open-source projects or training code that recipients can modify. Managed packages are controlled and upgradable (by ISVs or AppExchange partners) and are used for commercial apps. For internal projects like Smart Health, unmanaged packages are recommended for simple sharing.

## Packages

**Namespace Settings** Edit

Namespace settings let you create and register a namespace for a first-generation or second-generation managed package, or an unlocked package.

After you create a namespace, you can associate a first-generation managed package with your registered 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 (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
<a href="#">Edit</a>	<a href="#">Smart Health Package</a>	Includes custom objects, LWCs, Apex, and Flows for Smart Health project.

## 6.VS Code & SFDX

Visual Studio Code (VS Code) combined with Salesforce DX (SFDX) is the modern development environment for Salesforce. Developers use VS Code to write Apex, LWC, and metadata and deploy them directly to orgs using SFDX CLI commands. It enables source control (Git), team collaboration, and faster development through automation and scratch orgs.

```
1 {
2   "openapi": "3.0.1",
3   "info": {
4     "title": "Clinic Booking API",
5     "description": "Minimal demo API for Smart Health",
6     "version": "1.0.0"
7   },
8   "servers": [
9     { "url": "https://postman-echo.com" }
10  ],
11  "paths": {
12    "/appointments": {
13      "post": {
14        "summary": "Create appointment",
15        "operationId": "createAppointment",
16        "requestBody": {
17          "required": true,
18          "content": {
19            "application/json": {
20              "schema": {
21                "type": "object",
22                "properties": {
23                  "patientId": { "type": "string" },
24                  "doctorId": { "type": "string" }
25                }
26              }
27            }
28          }
29        }
30      }
31    }
32  }
33 }
```

12:05:52.695 Starting SFDX: Deploy This Source to Org

STATE	FULL NAME	TYPE	PROJECT
Changed	quickCreateAppointment.html	LightningComponentBundle	force-app\main\default\lwc\quickCreateAppointment\quickCreateAppointment.
Changed	quickCreateAppointment.js	LightningComponentBundle	force-app\main\default\lwc\quickCreateAppointment\quickCreateAppointment.