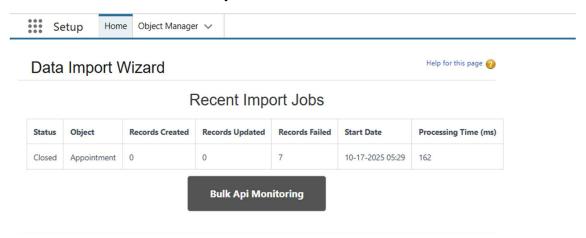# PHASE – 8 Data Management & Deployment
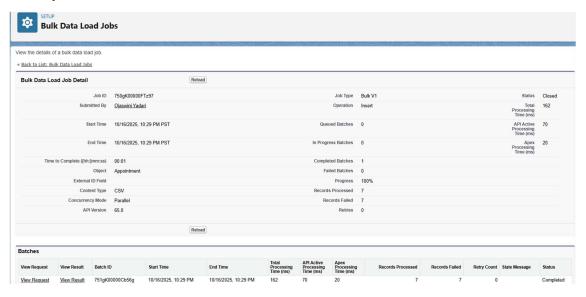
1.Data Import Wizard

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.
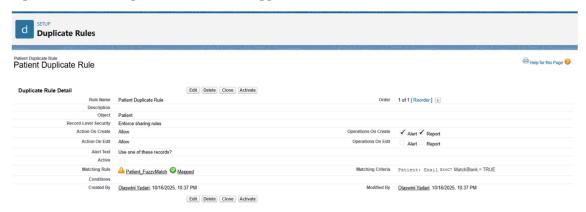

2.Data Loader

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.

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.
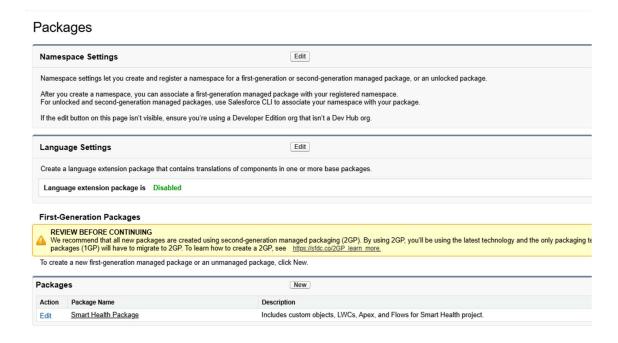

4.Data Export & Backup

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.

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.

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.