

SMART HEALTHCARE PORTAL

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Data Management & Deployment Using Data Loader and VS Code

Overview

This document explains how to manage Salesforce data using **Data Loader** and deploy components using **VS Code with Manifest-based deployment**.

```
Data Loader requires Java JRE 17 or later. Checking if it is installed...

*****
**                                     **
**           Salesforce Data Loader           **
**           =====                     **
**                                     **
** Data Loader v64 is a Salesforce supported Open Source project to **
** help you import data to and export data from your Salesforce org. **
** It requires Java JRE 17 or later to run. **
**                                     **
** Github Project Url: **
**   https://github.com/forcedotcom/dataloader **
** Salesforce Documentation: **
**   https://help.salesforce.com/articleView?id=data_loader.htm **
**                                     **
*****
```

Part 1: Data Loader

Step 1: Install Data Loader - Download Data Loader from Salesforce Setup. - Install on your machine.

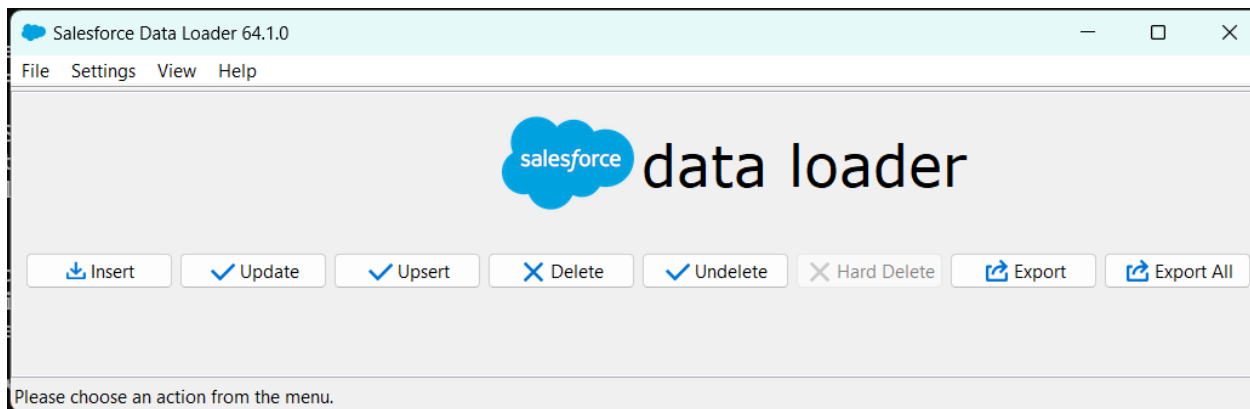
Screenshot Placeholder: Insert screenshot of Data Loader installation here

Step 2: Login to Data Loader - Open Data Loader. - Choose **Production** or **Sandbox**. - Enter **Username, Password + Security Token**.

Screenshot Placeholder: Insert screenshot of Data Loader login here

Step 3: Insert Data - Prepare CSV file with fields matching Salesforce API names. - Click **Insert** → Select Object → Browse CSV → Map Fields → Finish.

Step 4: Check Results - Data Loader provides **Success.csv** and **Error.csv**. - Review errors and correct CSV if needed.



Patient	Appointment Id	Appointment_Start	Appointment_End	Provider	Reason_for_Visit
Patient_1	A-0001	9/26/2025 18:57	9/26/2025 19:54	Dr. Lee	Follow-up
Patient_2	A-0002	9/28/2025 0:57	9/28/2025 1:52	Dr. Brown	Consultation
Patient_3	A-0003	9/29/2025 1:57	9/29/2025 2:36	Dr. Brown	General Checkup
Patient_4	A-0004	9/29/2025 19:57	9/29/2025 20:34	Dr. Davis	Follow-up
Patient_5	A-0005	10/1/2025 1:57	10/1/2025 2:34	Dr. Lee	Consultation
Patient_6	A-0006	10/2/2025 2:57	10/2/2025 3:34	Dr. Johnson	Flu Symptoms
Patient_7	A-0007	10/2/2025 23:57	10/3/2025 0:39	Dr. Smith	Consultation
Patient_8	A-0008	10/3/2025 21:57	10/3/2025 22:42	Dr. Brown	Flu Symptoms
Patient_9	A-0009	10/4/2025 23:57	10/5/2025 0:34	Dr. Johnson	General Checkup
Patient_10	A-0010	10/5/2025 20:57	10/5/2025 21:49	Dr. Davis	Consultation
Patient_11	A-0011	10/6/2025 18:57	10/6/2025 19:46	Dr. Brown	Consultation
Patient_12	A-0012	10/7/2025 18:57	10/7/2025 19:53	Dr. Brown	Consultation
Patient_13	A-0013	10/8/2025 23:57	10/9/2025 0:48	Dr. Lee	General Checkup
Patient_14	A-0014	10/10/2025 0:57	10/10/2025 1:45	Dr. Smith	Flu Symptoms
Patient_15	A-0015	10/11/2025 1:57	10/11/2025 2:49	Dr. Johnson	Follow-up
Patient_16	A-0016	10/11/2025 23:57	10/12/2025 0:30	Dr. Brown	Blood Test
Patient_17	A-0017	10/12/2025 23:57	10/13/2025 0:33	Dr. Johnson	Follow-up
Patient_18	A-0018	10/13/2025 21:57	10/13/2025 22:50	Dr. Lee	Consultation
Patient_19	A-0019	10/14/2025 18:57	10/14/2025 19:42	Dr. Davis	Blood Test
Patient_20	A-0020	10/15/2025 19:57	10/15/2025 20:50	Dr. Johnson	Blood Test
Patient_21	A-0021	10/16/2025 23:57	10/17/2025 0:53	Dr. Lee	Flu Symptoms
Patient_22	A-0022	10/17/2025 20:57	10/17/2025 21:42	Dr. Davis	General Checkup
Patient_23	A-0023	10/18/2025 21:57	10/18/2025 22:47	Dr. Brown	General Checkup

Authorization Successful!

You can now close this browser window and return to Data Loader.



Step 4: Finish

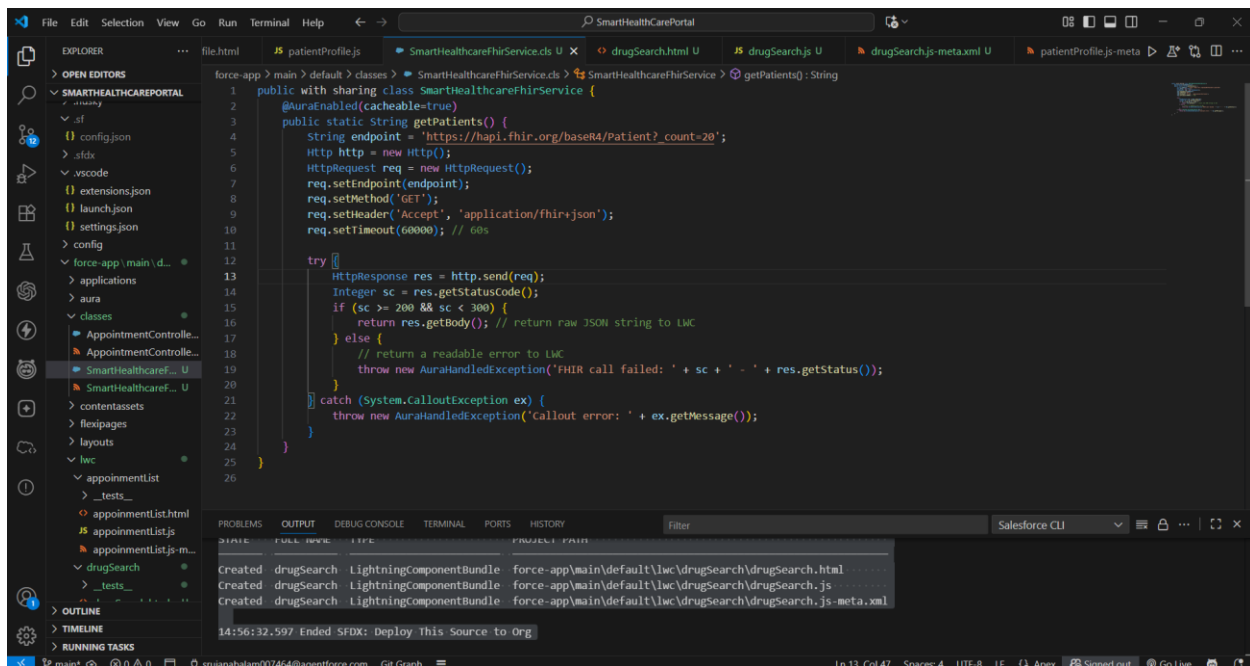


Import batch size: 200 Start at row: 0
Current API usage for the org: 38
API Limit for the org: 15,000

Results Folder:

Part 2: Deployment Using VS Code

Step 1: Prepare VS Code Project - Open Salesforce DX project in VS Code. - Ensure all LWCs, Apex classes, and metadata are in **force-app/main/default**.



Step 2: Use Manifest (package.xml) for Deployment - Create or edit **package.xml** to include components to deploy. - Example snippet:

```
<types>
  <members>*</members>
  <name>ApexClass</name>
</types>
<types>
  <members>*</members>
  <name>LightningComponentBundle</name>
</types>
```

Step 3: Deploy to Org - Right-click **manifest/package.xml** → **SFDX: Deploy Source to Org**
- Check **Output Panel** for deployment success or errors.

Step 4: Verify Deployment - Log in to Salesforce org. - Check LWCs, Apex classes, and other components deployed correctly.