

Data Loader for Salesforce

User Guide

Data Loader is a native platform application for importing data. Use it to insert, update, upsert, or delete Salesforce records.

Data Loader is able to import data from comma separated values (CSV) files.

Data Loader offers the following key features:

FEATURES

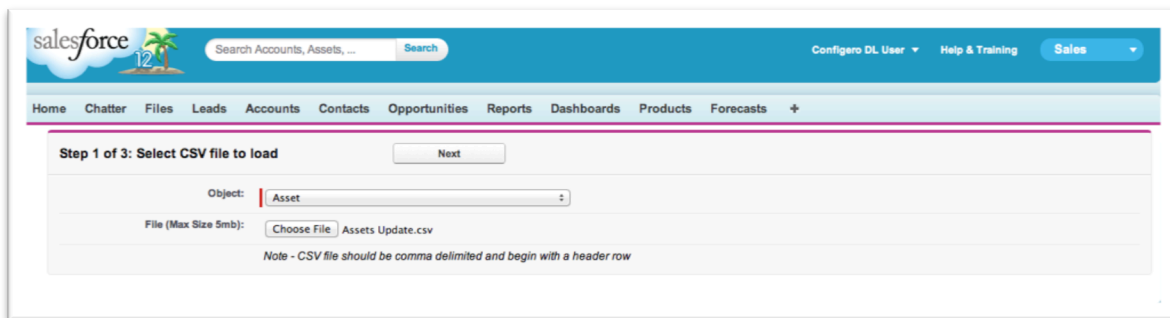
- 100% native Salesforce.com application
- Runs natively in Salesforce
- Support for up to 50 thousand records
- Support for all objects, including custom objects
- Preview and update data before committing to Salesforce

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General Usage

1. Select CSV File To Load



The screenshot shows the Salesforce Data Loader interface. At the top, there's a search bar and navigation links. The main section is titled "Step 1 of 3: Select CSV file to load". Below this, there's a "Next" button. The "Object:" dropdown is set to "Asset". The "File (Max Size 5mb):" section shows a "Choose File" button and the filename "Assets Update.csv". A note at the bottom states: "Note - CSV file should be comma delimited and begin with a header row".

Object

The object picklist displays all the standard and custom objects in your organization. Select the object you would like to update.

File

The Choose File button will open a file selection dialog. Browse your local machine for the file you would like to use to update the object selected.

- Data Loader accepts CSV (comma separated values) files
- The file must be UTF-8 encoded
- Lines separated by CRLF
- Header line with column names
- Fields containing line breaks (CRLF), Quotes or Commas must be put in double quotes
- If a field is quoted and contains a quote it can be escaped with a second quote

Data Formats Supported

Boolean

- True values (case insensitive) = yes, y, true, on, 1
- False values (case insensitive) = no, n, false, off, 0

Date Formats

We recommend you specify dates in the format yyyy-MM-dd HH:mm:ss

- yyyy is the four-digit year
- MM is the two-digit month (01-12)
- dd is the two-digit day (01-31)
- HH is the two-digit hour (00-23)
- mm is the two-digit minute (00-59)
- ss is the two-digit seconds (00-59)

The following date formats are also supported:

- ISO8601 format -
- yyyy-MM-dd hh:mm(:ss) where :ss is optional
- mm/dd/yyyy h:m ampm

Note the following tips for date formats:

- Dates will be stored based on the users timezone setting.

Double

Standard double string

ID

A Salesforce ID is a case-sensitive 15-character or case-insensitive 18-character alphanumeric string that uniquely identifies a particular record.

Integer

Standard integer string

String

All valid XML strings; invalid XML characters are removed.

2. Field Mapping

Step 2 of 3: Field Mapping

Previous Clear Map Auto Map Next

Instructions

Map fields from the CSV field list on the left with the Salesforce field list on the right and click "Map".
When finished, click "Next" to review the file data and upload to Salesforce.

Options / Available Fields

Operation Type: ☒ Insert ☐ Update ☐ Upsert ☐ Delete
Match on Field: N/A
Batch Size: 50
Save Mapping: ☒

CSV Fields

- Actual_Close_Date__c
- Additional_Comments__c
- Alliance_Delivery_Type__c
- Auto_Renewal_Clause__c
- Auto_Renewal_Term__c
- CPI_Clause__c
- DSS_Consulting_Type__c
- Delivery_Type__c
- Opportunity_Product_Link__c
- Product_Effective_Date__c

Asset Fields

- ContactId
- CreatedById
- CreatedDate
- CurrencyIsoCode
- DB_Days__c
- Description
- Id
- InstallDate
- IsCompetitorProduct
- IsDeleted

Map

Mapped Fields

CSV Field	Salesforce Field	Match on Field	Unmap
AccountId	AccountId		Unmap
MS_CRM_Legacy_ID__c	External_Id__c	N/A	Unmap
Name	Name	N/A	Unmap
Product2Id	Product2Id		Unmap
Status	Status	N/A	Unmap

Inserting, Updating, or Deleting Data

- Select the Operation Type – Insert, Update, Upsert, Delete
 - Upsert is a combination of inserting and updating. If the record matches an existing record based on the match field (see below) then the record is updated, otherwise it is inserted.
- Match on Field
If you are performing an Update, Upsert, or Delete your CSV file must have an ID column to match against. The listbox will show a list of fields from the selected object that can be used for matching.
(you must also map the selected field in the mapping step)
Data loader can match on the following types of fields:
 - Salesforce record ID (Id)
 - External Id – a custom field with the “External ID” attribute
- Batch size
Data loader will commit the updates in batches of records. If you are updating a large number of records then you may want to increase the batch size to improve performance.
- Save Mapping
When checked, Data Loader saves the mapping associated with the CSV file and will use the same mapping the next time a file with the same name is loaded.

Mapping

In order for data loader to update the selected object in Salesforce you must map the columns in your CSV file to fields on the selected object.

On the Field Mapping page under the Options / Available Fields section data loader shows a list of fields that have not been mapped for both the CSV file and the selected Salesforce Object.

Data loader will automatically map fields where the column name in the CSV file matches a field name on the object.

To map the remaining fields, select a field in the CSV Fields list and the corresponding field in the Object Fields list and then press Map. A new row will show in the Mapped Fields section.

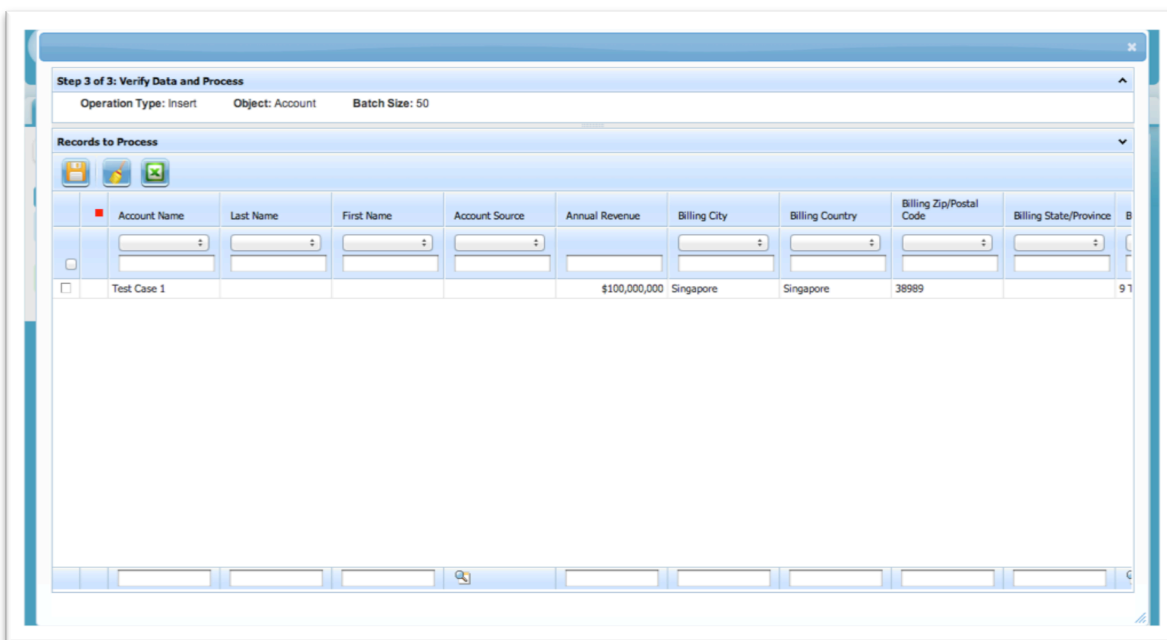
Mapped Fields

The mapped fields section shows fields that have already been mapped. If there are fields that you do not want to update or the mapping is incorrect, click on the Unmap button to remove the mapping. The fields will now be in the available fields listboxes to be remapped.

For look up fields and master detail fields a dropdown list will show in the Match on Field column. Select the appropriate field to match on based on the data in your file.

Once mapping is complete click on Next

3. Verify Data and Process



Step 3 of 3: Verify Data and Process


Operation Type: Insert Object: Account Batch Size: 50

Records to Process

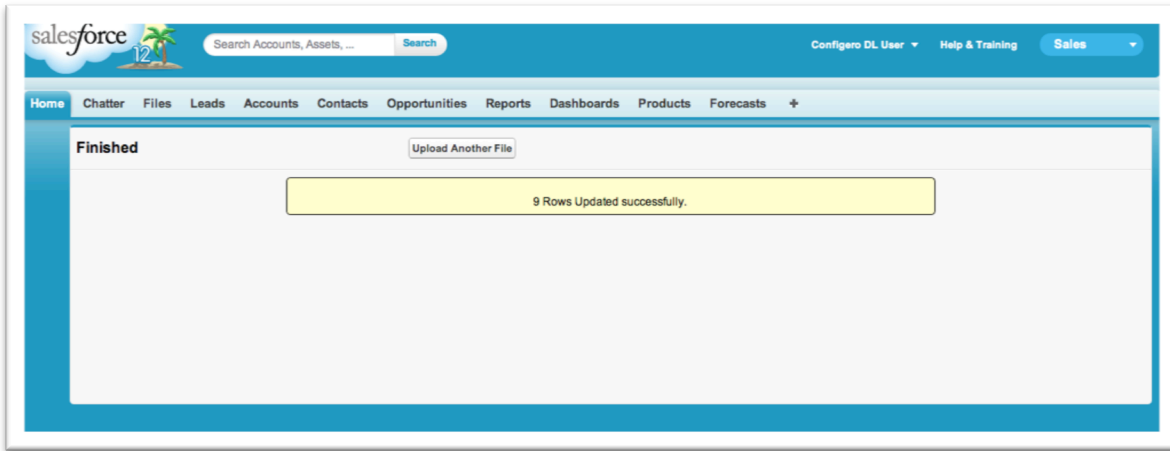
	Account Name	Last Name	First Name	Account Source	Annual Revenue	Billing City	Billing Country	Billing Zip/Postal Code	Billing State/Province	
<input type="checkbox"/>										
<input type="checkbox"/>	Test Case 1				\$100,000,000	Singapore	Singapore	38999		91

The Verify and Process page displays the operation, object and batch size at the top, and the data to be updated in an editable grid on the bottom.

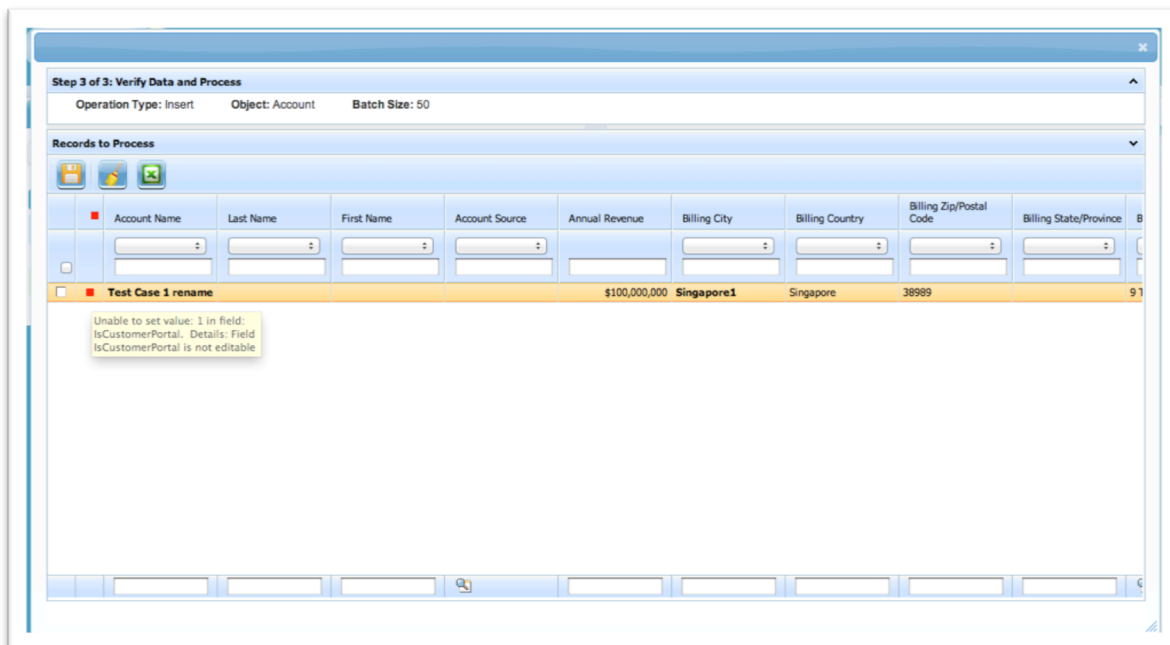
The grid allows you to perform inline editing in addition to mass updates to the file data before you commit it to Salesforce. See [Using the Grid](#) for more details.

Once you have confirmed the data is ready to be saved to Salesforce and verified the operation is correct, click the save icon  to update Salesforce.

A successful update will show the Success page.

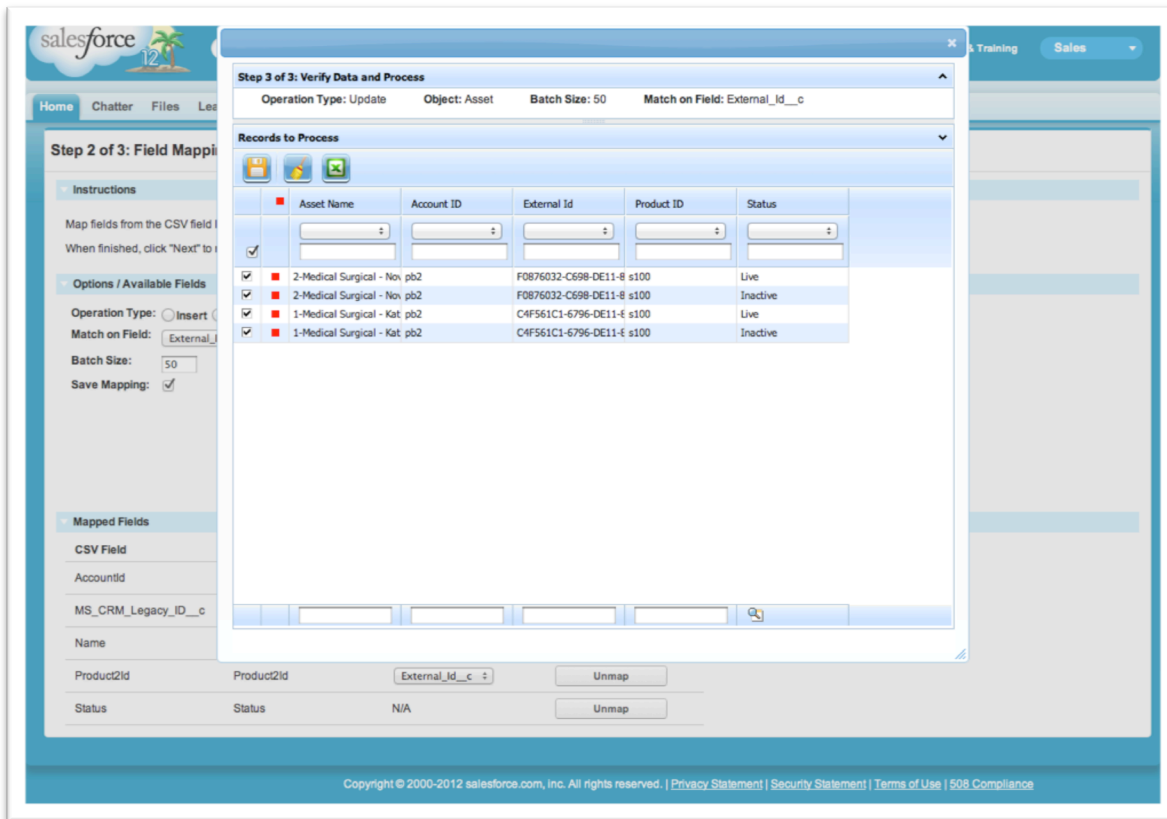


If there are errors, the Grid will display with the items that had issues marked. Move your mouse over the red icon to see the error details.



If there are a large number of errors or if you are not ready to make updates and try again you can export the results by checking the selection box (or select all) and clicking on the export icon





4. Frequently Asked Question

1. Does data loader support loading attachments?

No, Data Loader does not support loading attachments