

Data Management

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Importing Data

Data Import Wizard	Data Loader
Allows you to import up to 50,000 records at a time for standard and custom objects.	Import up to 5 MM records at a time of any data type.
Use this method if you don't need the process to be automated.	Through the command line, you can automate the import process using API calls. You need to specify data sources, field mappings and other parameters via configuration files in order to make this work.
Catches dupes	Does not catch duplicates
Option to turn off workflow	Only recognizes one field for the street address, so Address 1 and Address 2 must be combined.

Note

The number of records you can import depends on your permissions, the type of data you're importing, and the overall data storage limits for your organization.

The type of objects you can import depends on your edition.

This information can help you integrate your imported data into Salesforce.

- **New Values for Picklists and Multi-Select Picklists**—If you import a picklist value that doesn't match an existing picklist value:
 - For an unrestricted picklist, the Data Import Wizard uses the value that's in the import file.
 - For a restricted picklist, the Data Import Wizard uses the picklist's default value.
- **Multi-Select Picklists**—To import multiple values into a multi-select picklist, separate the values by a semicolon in your import file.
- **Checkboxes**—To import data into a checkbox field, use 1 for checked values and 0 for unchecked values.
- **Default Values**—For picklist, multi-select picklist, and checkbox fields, if you do not map the field in the import wizard, the default value for the field, if any, is automatically inserted into the new or updated record.
- **Date/Time Fields**—Ensure that the format of any date/time fields you are importing matches how they display in Salesforce per your locale setting.
- **Formula Fields**—Formula fields cannot accept imported data because they are read-only.
- **Field Validation Rules**—Salesforce runs validation rules on records before they are imported. **Records that fail validation aren't imported. Consider deactivating the appropriate validation rules before running an import if they affect the records you are importing.**

From <https://trailhead.salesforce.com/data_management/data_import>

Exporting Data

Data Export Wizard—this is an in-browser wizard, accessible through the Setup menu. It allows you to export data manually once every six days (for weekly export) or 28 days (for monthly export). You can also

export data automatically, at weekly or monthly intervals.

Data Loader—this is a client application that you must install separately. It can be operated either through the user interface or the command line. The latter option is useful if you want to automate the export process, or use APIs to integrate with another system.

Salesforce creates a zip archive of CSV files and emails you when it's ready. Exports will complete as soon as possible, however we can't guarantee the date and time the export will complete. Large exports are broken up into multiple files. Follow the link in the email or click Data Export to download the zip file. Zip files are deleted 48 hours after the email is sent.

If you're scheduling your export, select the frequency (only available for organizations with monthly exports), start and end dates, and time of day for your scheduled export.