Development: Data Management

Lesson 21: Data Management Tools

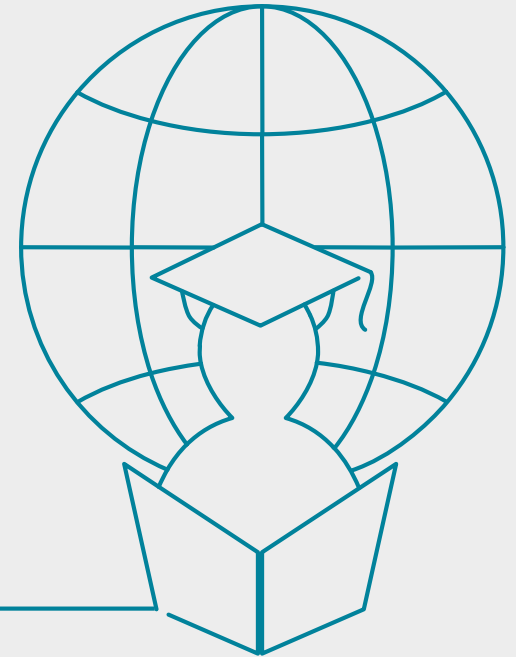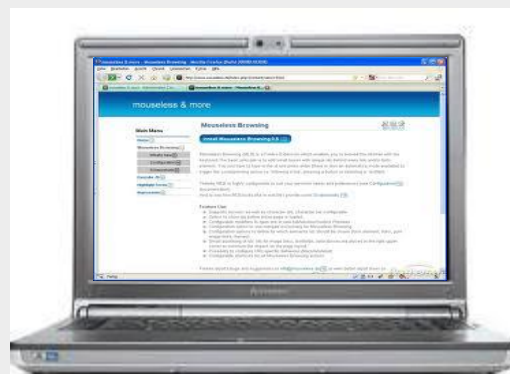# Lesson Objectives

By the end of this lesson, you will be able to :
- List objects exposed in the import wizard
- List some objects not exposed in the import wizard
- List some capabilities of API-based tools that the import wizards do not have
- State how to obtain the Data Loader
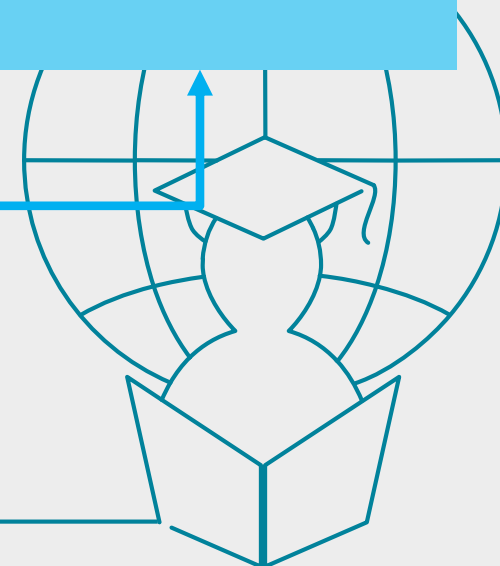- List the capabilities of the Data Loader

21.1: Import Wizards
Tools for Executing a Data Migration

Via Application Import Wizard

Accounts

Contacts

Leads

Solutions

Custom Objects

Via Web Service API

- Data Loader
- Partner Tools
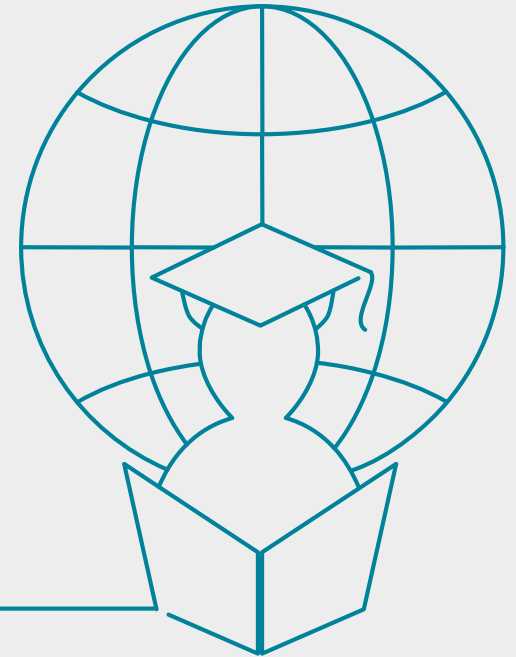- Custom-built Tools
- Open Source Tools

Import Wizards

Easy to use tool to load Accounts, Contacts, Leads, Solutions, or Custom Objects
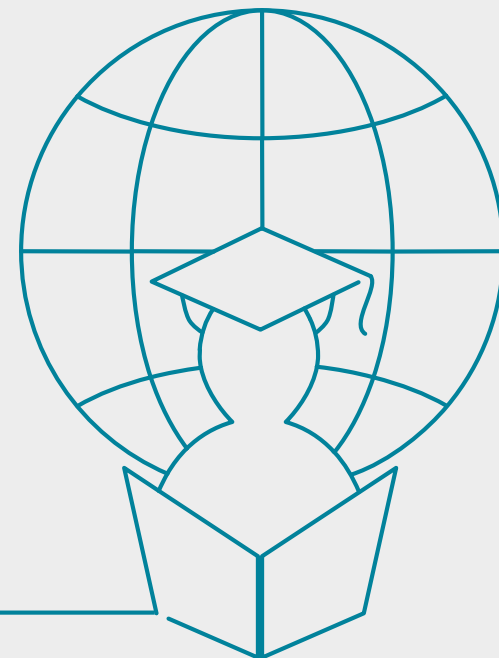
Load 50,000 records or less

Prevent duplicates:

- Account Name and Site; Account IDs
- Contact Email Address; Contact Name; Contact ID
- Lead Email Address; Lead IDs
- Custom Object Name or ID

Load any object supported by the API

Load more than 50,000 records

Schedule regular data loads such as nightly feeds

Export data for backup

Mass delete supported objects

21.2: API-Based Tools
Apex Data Loader

The Apex data Loader

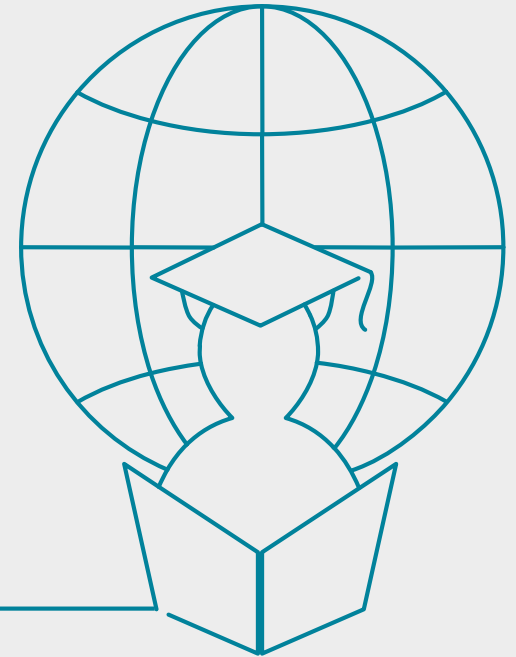It is fully supported salesforce.com product

Supports import from CSV or export to CSV

Supports loading from or exporting to a database via JDBC

Supports custom relationships for upsert

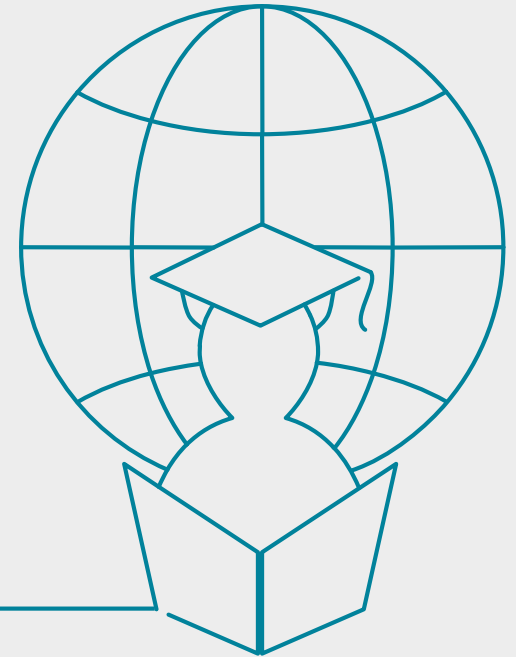Can be run from command line

Can be run in batch mode

Available for System Administrators to download from UE,EE and DE orgs

Also available as an Open Source Project
- SourceForge.net
- Not supported by salesforce.com

21.2: API-Based Tools
Which Tool Do You Use?

Wizard vs. API is the essential question. Answer will depend on:
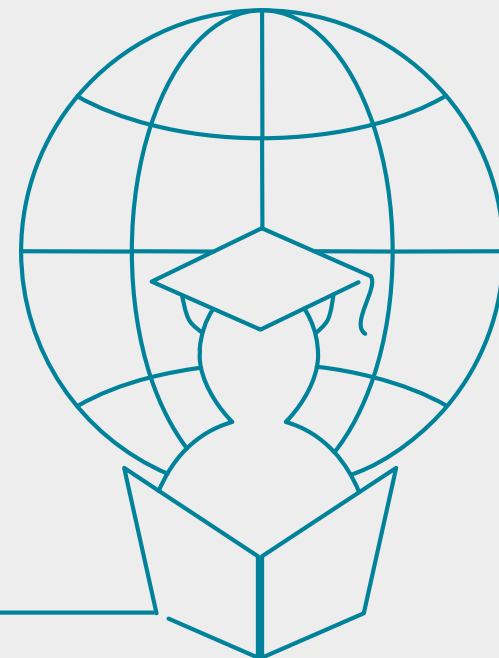
Operations you want to perform

The objects involved

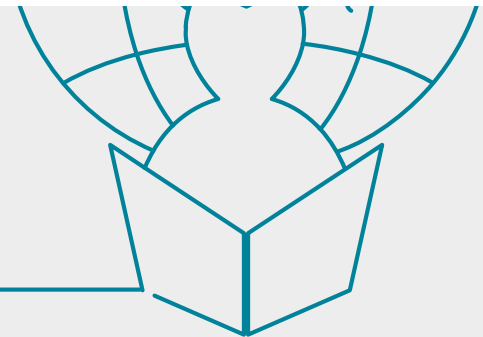Your Scheduling needs

Your de-duping needs

The number of records involved

The data sources/destinations involved

Summary

Tools for Executing a Data Migration
- Import Wizards
- Apex Data Loader

Can you import data into custom objects using the Salesforce Import Wizard?
How do you decide which import tool to use?