FOCUSONFORCE

Using DataLoader with Lookup Fields

Martin Gessner

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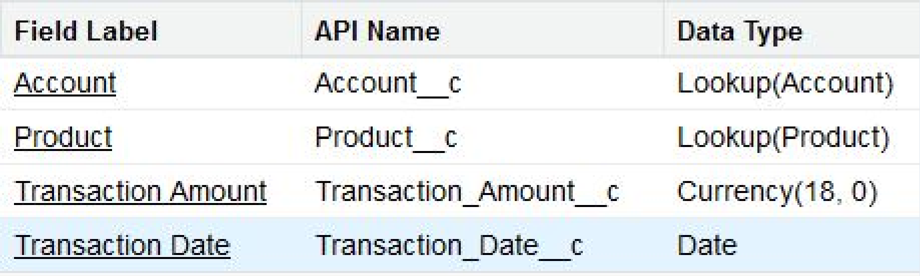
Using DataLoader with Lookup Fields

External Ids provide a convenient way to integrate data from an external system, by allowing the use of a unique record identifer for records instead of the Salesforce Id.

For example, you may define an Account Code external id on the Account object, which is the unique key for an account record in an ERP system that is integrated with Salesforce. When using DataLoader or another integration tool to update data, the external id can be used instead of the Salesforce id to uniquely identify records.

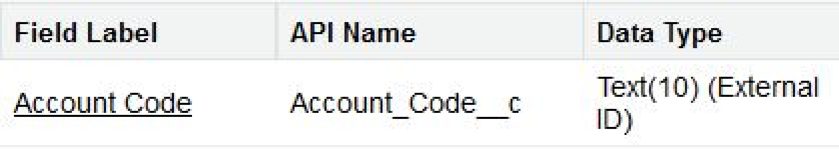
External Ids can also be used when you need to load data into an object that has lookups, and the objects that the looksups are associated with have external ids defined. This makes loading data much simpler, than having to supply the salesforce ids for each lookup field.

Lets look at a case where we have an object that stores Customer Transactions, and it is loaded with data from an external system. The object has 4 fields, Account, Product, Transaction Amount and Transaction Date. Account and Product are lookups to their respective objects.



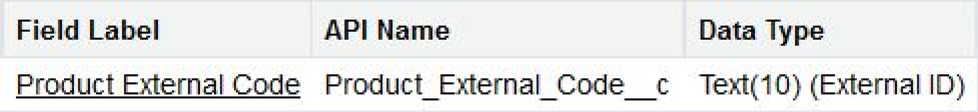
Field Label	API Name	Data Type
Account	Account__c	Lookup(Account)
Product	Product__c	Lookup(Product)
Transaction Amount	Transaction_Amount__c	Currency(18, 0)
Transaction Date	Transaction_Date__c	Date

The Account object has an external id defined – Account Code.



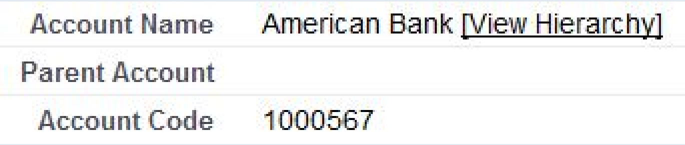
Field Label	API Name	Data Type
Account Code	Account_Code__c	Text(10) (External ID)

The Product object also has an external id defined, Product Code.



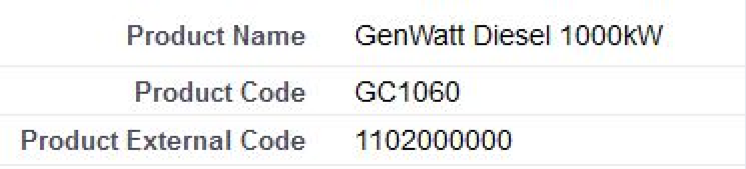
Field Label	API Name	Data Type
Product External Code	Product_External_Code__c	Text(10) (External ID)

We have an account record with an Account Code defined:



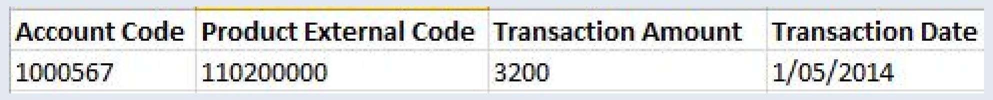
Account Name	American Bank [View Hierarchy]
Parent Account	
Account Code	1000567

And also a product record with an External Product Code:



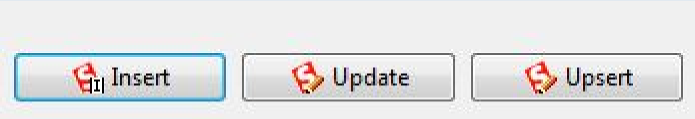
Product Name	GenWatt Diesel 1000kW
Product Code	GC1060
Product External Code	1102000000

Now we want to load data using a CSV file into the transaction object, and use the external ids for the Account and Product. The csv file looks like this:

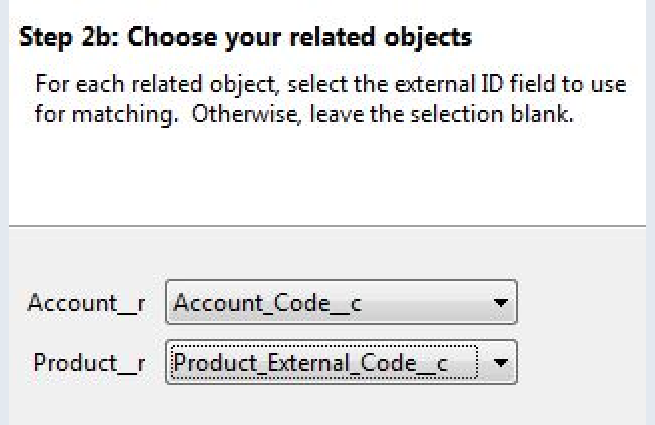


Account Code	Product External Code	Transaction Amount	Transaction Date
1000567	110200000	3200	1/05/2014

Now we can use DataLoader to load the data.
The first step is to make sure you choose UPSERT and not INSERT. This will make sure that you will get the option to specify the external id fields.



Now at step 2a, you can choose the external ids for the objects:



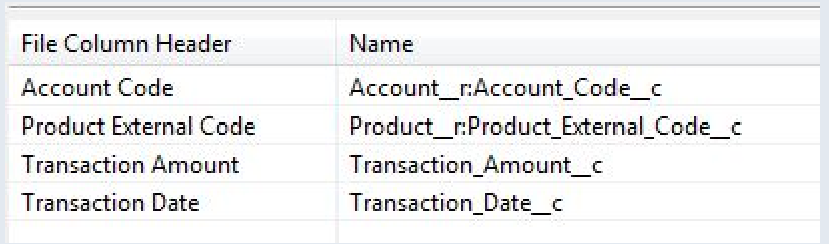
Step 2b: Choose your related objects

For each related object, select the external ID field to use for matching. Otherwise, leave the selection blank.

Account__r: Account_Code__c

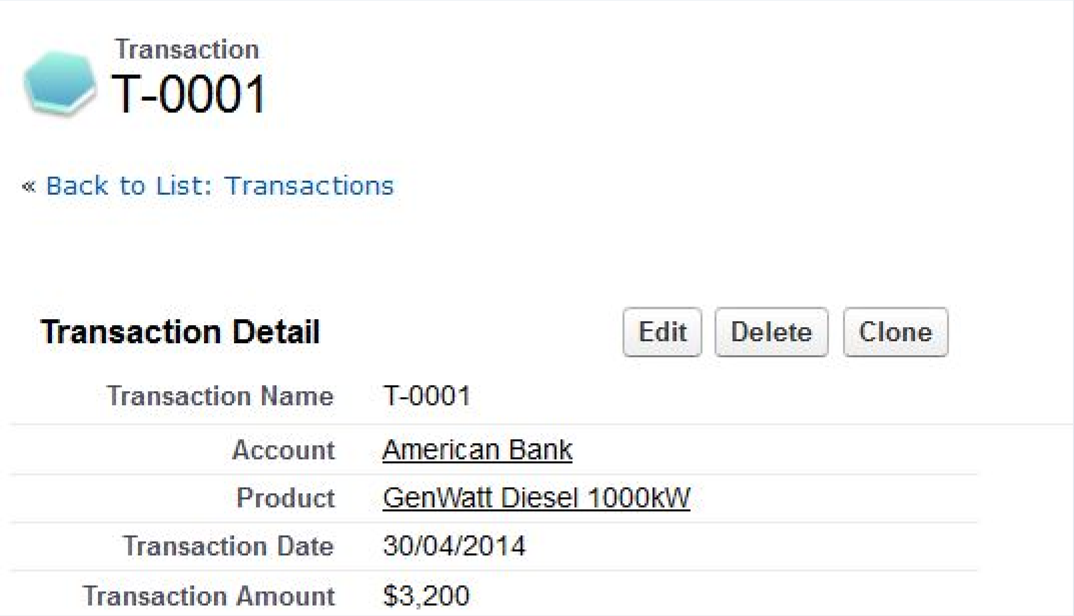
Product__r: Product_External_Code__c

Then when you get to the mapping step, map the external id fields to the relationship fields.



File Column Header	Name
Account Code	Account__r:Account_Code__c
Product External Code	Product__r:Product_External_Code__c
Transaction Amount	Transaction_Amount__c
Transaction Date	Transaction_Date__c

And finally, our record is loaded with the lookup fields of account and product populated correctly.



Transaction
T-0001

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Transaction Detail

Transaction Name	T-0001
Account	American Bank
Product	GenWatt Diesel 1000kW
Transaction Date	30/04/2014
Transaction Amount	$3,200