**Introduction to Data Import**

You can easily import external data into Salesforce. Supported data sources include any program that can save data in the comma delimited text format (.csv).

Salesforce offers two main methods for importing data.

* **Data Import Wizard**—this tool, accessible through the Setup menu, lets you import data in common standard objects, such as contacts, leads, accounts, as well as data in custom objects. It can import up to 50,000 records at a time. It provides a simple interface to specify the configuration parameters, data sources, and the field mappings that map the field names in your import file with the field names in Salesforce.
* **Data Loader**—this is a client application that can import up to five million records at a time, of any data type, either from files or a database connection. It can be operated either through the user interface or the command line. In the latter case, you need to specify data sources, field mappings, and other parameters via configuration files. This makes it possible to automate the import process, using API calls.

**Use the Data Import Wizard When:**

* You need to load less than 50,000 records.
* The objects you need to import are supported by the wizard.
* You don’t need the import process to be automated.

**Use Data Loader When:**

* You need to load 50,000 to five million records. If you need to load more than 5 million records, we recommend you work with a Salesforce partner or visit the [AppExchange](http://appexchange.salesforce.com/) for a suitable partner product.
* You need to load into an object that is not supported by the Data Import Wizard.
* You want to schedule regular data loads, such as nightly imports.

Follow these steps before you start importing any data.

1. Use your existing software to create an export file.
2. Clean up the import file for accuracy and consistency. This involves updating the data to remove duplicates, delete unnecessary information, correct spelling and other errors, and enforce naming conventions.
3. Compare your data fields with the Salesforce fields you can import into, and verify that your data will be mapped into the appropriate Salesforce fields. You might need to fine-tune the mapping before starting the import. For details, see [Field Mapping for Data Sources](https://help.salesforce.com/apex/HTViewHelpDoc?id=field_mapping_for_other_data_sources_and_organization_import.htm&language=en_US) in the online help.
4. Make any configuration changes required in Salesforce to handle the imported data. For example, you might need to create new custom fields, add new values to picklists, or temporarily deactivate workflow rules.

**Use the Data Import Wizard**

Once you have created an export file and cleaned up the data for import, follow these steps to import data using the Data Import Wizard.

1. Start the wizard.
   1. From Setup, enter Data Import Wizard in the Quick Find box, then select **Data Import Wizard**.
   2. Review the information provided on the welcome page, then click **Launch Wizard!**
2. Choose the data that you want to import.
   1. To import accounts, contacts, leads, solutions, person accounts, or campaign members, click **Standard Objects**. To import custom objects, click **Custom Objects**.
   2. Specify whether you want to add new records to Salesforce, update existing records, or add and update records simultaneously.
   3. Specify matching and other criteria as necessary. Hover over the question marks for more information about each option.
   4. Specify the file that contains your data. You can specify your data file by dragging the CSV to the upload area of the page or by clicking the CSV category you’re using and then navigating to and selecting the file.
   5. Choose a character encoding method for your file. Most users can accept the default character encoding.
   6. Click **Next**
3. Map your data fields to Salesforce data fields. The Data Import Wizard tries to map as many of your data fields as possible to standard Salesforce data fields. If Salesforce can’t automatically map fields, however, you do it manually. Unmapped fields are not imported into Salesforce. To see a list of standard Salesforce data fields, from Setup, at the top of the page, click **Object Manager**. Click the object whose fields you’re interested in, and click **Fields & Relationships**. For example, if you want to see a list of standard Salesforce fields for leads, click **Object Manager** | **Lead** | **Fields & Relationships**.
   1. Scan the list of mapped data fields and locate any unmapped fields.
   2. Click **Map** to the left of each unmapped field.
   3. In the Map Your Field dialog box, choose the Salesforce fields you want to map to and click **Map**. The Map Your Field dialog box also gives you the option of saving data from unmapped fields in a general notes field for accounts and contacts. To do so, choose Account Note or Contact Note from the Map To drop-down list and click **Map**.
   4. To change mappings that Salesforce performed automatically, click **Change** to the left of the appropriate field, then choose the Salesforce fields you want to map to and click **Map**.
   5. Click **Next**.
4. Review and start your import.
   1. Review your import information on the Review page. If you still have unmapped fields that you want to import, click **Previous** to return to the previous page and specify your mappings.
   2. Click **Start Import**.
5. Check import status. From Setup, enter “Bulk Data Load Jobs” in the Quick Find box, then select **Bulk Data Load Jobs**.  The user who starts the data import receives a status email when the import is completed.

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.

**Introduction to Data Export**

You can easily export data from Salesforce, either manually or on an automatic schedule. The data is exported as a set of comma-separated values (CSV) files. Data export tools provide a convenient way to obtain a copy of your Salesforce data, either for backup or for importing into a different system.

Salesforce offers two main methods for exporting data.

* **Data Export Service**—an in-browser service, accessible through the Setup menu. It allows you to export data manually once every 7 days (for weekly export) or 29 days (for monthly export). You can also export data automatically at weekly or monthly intervals. Weekly exports are available in Enterprise, Performance, and Unlimited Editions. In Professional Edition and Developer Edition, you can generate backup files only every 29 days, or automatically at monthly intervals only.
* **Data Loader**—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.

Follow these steps to export data using the Data Export Service.

1. From Setup, enter Data Export in the Quick Find box, then select **Data Export** and **Export Now** or **Schedule Export**.
   * The **Export Now** option prepares your files for export immediately. This option is only available if enough time has passed since your last export.
   * The **Schedule Export** option allows you to schedule the export process for weekly or monthly intervals.
2. Select the desired encoding for your export file.
3. If you want images, documents, attachments, and so on included in your data, select the appropriate options.
4. Select Replace carriage returns with spaces to have spaces instead of carriage returns or line breaks in your export files. This is useful if you plan to use your export files for importing or other integrations.
5. 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.
6. Under Exported Data, select the types of data to include in your export. We recommend that you select **Include all data** if you’re not familiar with the terminology used for some of the types of data.
7. Click **Start Export** or **Save**. 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.