



Data Migration and Data Loading tools

Introduction to AppExchange

By- Ashima Tandon

Data Migration?

- Data migration is the process of moving your company's data from one platform or system to another.
- There are many factors that can influence the difficulty of performing this task. Larger sets of data are going to take more time and make it more difficult to ensure the validity of the transferred data. An incomplete transfer can lead to lost information that impacts the functionality of the new platform or compromise the integrity of the resulting data repository.
- The goal of the entire process is to be able to work with the same data sets in a new location. This could be due to the data previously residing in multiple orgs or environments, or maybe you're simply upgrading to a quality platform like Salesforce.
- Salesforce data migration aims to verify your data once it is compiled into a singular location to guarantee comprehensive data integrity.

Data loading tools provided by Salesforce

- 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 loading tools provided by 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.
- Data Loader.io

What to use when?

- **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 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.

Some cheat sheet points :

- 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.

Some cheat sheet points :

- **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

External / Third party tools for data migration

- Workbench(workbench.developerforce.com/login.php?startUrl=%2Fquery.php)

AppExchange Basics

- AppExchange also offers extension, connection, and innovation. AppExchange is the marketplace for all things Salesforce, including apps, Lightning components, Flow solutions, and more.
- AppExchange has something for every Salesforce cloud and product, but in general, you can see two kinds of listings: solutions and consultants. A solution is something that plugs into Salesforce and extends its core functionality. For example, an app that integrates an external survey tool with Service Cloud.

Thank You !

