Importing Data:

Salesforce is compatible with any program that uses comma delimited txt format (.csv files)

Two main methods to import:

- Data Import Wizard
  - Accessible through Setup
  - Up to 50k records at a time
  - Provides a simple interface to align/map data config with field names in your Salesforce org and objects

  Summary- use when - need to load less than 50k records, objects are supported by the Wizard, and you don't need to automate the process.

- Data Loader:
  - Client application that can import up to 5mil records at a time
  - Can handle any data type, file or DB connection (via API assumedly)
  - Can use a UI or the CMD line
  - CMD Line requires specifying sources, mapping fields etc but allows you to automate the import process via API calls.
  - Uses SOAP API by default, but can be configured for Bulk API for speed due to parallel processing and fewer round trips over the network.

Summary - use when - need to load more than 50k records, need to load into an object not supported by wizard, or you want to schedule/automate the load (ex: nightly imports during off hours)

Steps to prep data for import:

1. Use existing software to create an export file.
2. Clean up the file - remove duplicates, delete unnecessary info, correct spelling, enforce naming conventions
3. Compare current data fields with Salesforce fields to import to. Verify data will be mapped into appropriate fields. Fine tuning may be needed.
4. Make an config changes required in Salesforce to handle incoming data. This may involve creating custom fields, adding new values to picklists, or temp deactivating workflow rules.
5. Best Practice: import using a small test file first to review the outcome.

Using Data Import Wizard:

1. Start wizard- 'Setup' find 'Data Import Wizard' and select it. Review welcome page, then launch Wizard
2. Choose data to import.
   a. If you are importing accts, contacts, leads, solutions, person accts, campaign member you will select standard objects. If custom, click custom objects.

    b. Specify whether you want to add new records, update existing, or add and update simultaneously.
    c. Specify matching criteria where necessary.
    d. Specify file containing data. Do this by dragging to the upload area or by clicking the CSV category and navigating to the file.
    e. Choose a character encoding method. Most of the time default will be acceptable. Click Next.
3. Map data fields to Salesforce fields. Salesforce will do as much of this automatically as it can.  The rest you can do manually. Unmapped fields are not imported into Salesforce. *If you'd like to see standard fields for an object, click the object manager, select the obj and click Fields and Relationships
    a. Scan the list of mapped data fields and locate any unmapped fields.
    b. Click Map to the left of each
    c. Choose the Salesforce fields you want to map to and Click Map.
    d. To edit auto-mapped selections, click Change, then choose the fields to map and Click Map. Click Next
4. Review and begin import.
    a. Review the import on Review page. Any unmapped fields will be dropped, so click Previous to go back and mapp them.
    b. Click Start Import
5. Check import Status. 'Setup', quick find 'Bulk Data Load Jobs' and select it.

More tips to importing Data:

- New values for Picklists - If you import a picklist value that does not match existing value
    - On an unrestricted picklist, the Wizards will use the value from your file
    - On restricted, the Wizard uses the picklists's default value.
- Multi-Select Picklists - to import multiple values into a multi-select picklist, separate the values by a semicolon in the importing file.
- Checkboxes - use 1 for checked values and 0 for unchecked values
- Default Values - 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. (for picklists, checkboxes, etc.  Not sure what the default value is for each)
- Date/Time fields - Ensure the format matches how Salesforce is set to display per locale setting.
- Formula fields - cannot accept imported data because they are read-only.
- Field Validation Rules - salesforce runs validation rules on records before importing. Records that fail aren't imported.  Consider deactivating the appropriate validation rules before running an import if your data will be affected.

Exporting Data:

You can export manually or on automated schedules. Exports are delivered as (.csv) files. You can obtain a copy of your salesforce data for backup or importing to a different system.

Two main methods for exporting:

- Data Export Wizard - in-browser wizard found in ‘Setup’. Allows manual export once every 7 days, or 29 days.
- Data Loader - client app you must install separately, operated through UI or CMD line. Much like importing, this is the option for automating or using APIs with another system.

Steps to Export via Wizard:

1. ‘Setup’, find ‘Data Export’, select it, and choose Export Now or Schedule Export
    a. Export Now - prepares files immediately. Only available if window has passed since last export.
    b. Schedule Export - allows you to schedule the export process for weekly/monthly
2. Select the wanted encoding for export file.
3. Select appropriate options if you want imags, docs, attachments included in your data
4. Select ‘Replace carriage returns with spaces’ to have spaces instead of carriage returns or line breaks in your export files.  Useful if you plan to use export files for importing or other integrations.
5. If scheduling, select frequency, start/end dates, time of day…
6. Under Exported Data, select types of data to include in export.  Include all data recommended until more familiar.
7. Click Start Export or Save.

*Note: Salesforce creates a zip archive of CSV files and emails exporter when ready.  Time it takes to complete can vary as larger exports are broken up.  The link in email will take to zip files, or click Data Export to download them.  **They are deleted after 48hrs from email send!**