

Data Management

Data management deals with import/export of data or records to/from a Salesforce organization.

Data Import

Data can be easily imported into Salesforce through various tools provided by Salesforce.

Supported data sources include any program that can save data in the comma delimited text format (.csv).

There are basically 3 operations possible while importing data in salesforce:

1. Insert: It simply create new records in Salesforce.
2. Update: It modifies existing records in Salesforce with the help of record id or external id
3. Upsert: It is a combination of insert and update. It modifies the existing records and if the record is not present in the org, it creates a new record for it.

Salesforce basically offers two main methods for importing data.

- **Data Import Wizard**—this tool, accessible through the Setup menu which lets us import data in common standard objects, such as contacts, leads, accounts, opportunities, 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 it when you want to save

Note: Data Import Wizard only imports Accounts, Contacts, Solutions, leads and all the custom objects whereas Data loader imports all standard as well as custom objects.

Note: With both methods, the number of records you can import depends on your permissions, the type of data you're importing, and the overall data storage limits for your organization.

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Data Import methods Comparison:

	In browser import wizards	Data loader
No of records	up to 50000 records	50000+
Catches duplicates	Yes	No
Export data	No	Yes
Import data	Yes	Yes

Important points about Data Import:

This information can help you integrate your imported data into Salesforce.

- **New Values for Picklists and Multi-Select Picklists:** If our import file contains data to be displayed in picklists or multi-select picklists, the wizard warns you when you attempt to import a new picklist value that does not match any valid picklist values. If you ignore the warning, the new value is automatically added to the imported record. You can later edit the field to add the necessary values.
- **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.
- **Universally Required Fields**—you must include universally required fields in your import files or the import will fail.

Data Export

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Data can be easily exported from Salesforce either manually or on an automatic schedule.

The data is exported as a set of comma-separated values (CSV) files.

It provides a convenient way to export your data, either for backup or for importing into a different system.

Salesforce offers two main methods for exporting data.

- **Data Export Wizard:** It is an in-browser wizard, accessible through the Setup menu. It allows us to export data manually once every six days (for weekly export) or 28 days (for monthly export). We can also export data automatically, at weekly or monthly intervals using “Schedule Export”.
- **Data Loader:** It is a client application that needs to be installed 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.

Salesforce creates a zip archive of CSV files and emails you when it is ready. To download the zip file follow the link on email or click on Data Export.

Exports will complete as soon as possible, however Salesforce does not guarantee the date and time the export will get complete.

Large exports are broken up into multiple files.

Zip files are deleted 48 hours after the email is sent.

External ID

An external ID is a custom field that has the “External ID” attribute checked meaning that it contains unique record identifiers from a system outside of Salesforce.

When we select this option the import wizard will detect existing records in Salesforce that have the same External ID.

This operation is case-insensitive but if the custom field has separate “Unique” attribute then the case sensitive option for that field is selected that means Uppercase and Lowercase letters will not be considered identical.

An object can have at most 7 external id fields. External ID field type should be any one of auto-number, email, number or text.

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Custom fields marked as unique also count against an object's limit of 7 external id fields.

Record ID

Each Salesforce record in the Salesforce.com system has a unique ID field assigned to it which is known as record id.

It is system generated and cannot be edited or deleted. It is generated every time a new record is inserted into the application.

Entering a known record ID will direct you straight to the details page of that record. The first 3 characters of an ID indicate the object type.

For example: Accounts – 001, Contacts – 003, Leads – 00Q etc.

These prefixes can never be changed for objects.

Custom objects are assigned 3-char prefixes based on internal SFDC rules that we cannot predict.

There are two versions of Record IDs:

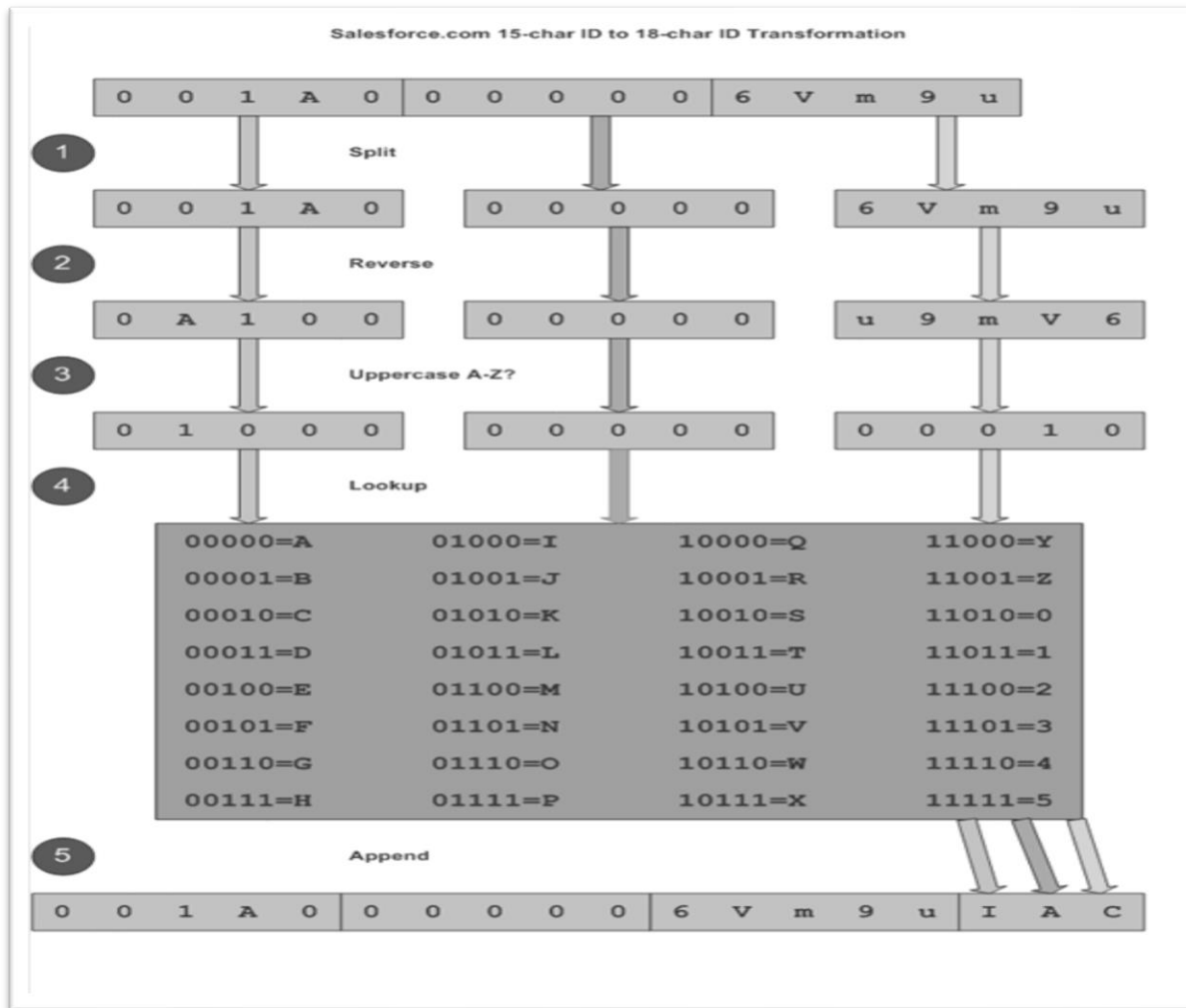
1. **15 digit case-sensitive version:** It is referenced in the user interface.
2. **18 digit case-insensitive version:** It is referenced through the API. The last 3 digits of it is the checksum of the capitalization of the first 15 characters.

15-digit id can be converted into 18- digit id using CASESAFEID() function. And to convert 18 digit id into 15 digit simply remove the last 3 digits from it.

Note: Record IDs are identical only in the Full Copy Sandbox and Production environments.

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Security Token

Accessing Salesforce from outside the trusted IP range of the organization using the desktop client or the API requires a security token to log in.

It is a case-sensitive alphanumeric code that needs to be append to the password or entered as a separate field in the client application or the API.

Security token gets reset automatically every time the password is changed.

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