

Quick Start to Salesforce Data Loader

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In brief

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Being a CRM solution, Salesforce is widespread within multiple enterprises and small businesses worldwide. In particular, 23% percent of all existing businesses use it on a daily basis for tracking user activities, speeding up lead generation processes, and improving the quality of customer care.

It's common that data from Salesforce about deals, clients, or custom objects needs to be shared or simply saved in the CSV file locally. There also might be the case to bring some fresh data into Salesforce from other destinations. All this is possible with Salesforce Data Loader or other similar solutions.

In this article, we provide a detailed overview of the Data Loader developed by Salesforce. Also, we present Skyvia as a decent alternative for Salesforce data import/export.

Why Salesforce Data Loader

Those who need to manage data on the Salesforce platform can consider Data Loader powered by Salesforce. This is a desktop application suitable for import and export operations on Windows and macOS operating systems. In particular, the data can be loaded from CSV files to CRM or vice versa.

Here are the key characteristics of Salesforce Data Loader:

1. It allows for performing batch operations for the import or export of data.
2. It supports such data manipulations as INSERT, UPDATE, UPSERT, and DELETE.
3. It handles large amounts of data with batch processing.
4. It provides CLI as an alternative to GUI for Windows users.
5. It generated detailed logs with specifications of errors if any.
6. It ensures that all data operations comply with contemporary online security requirements.

Salesforce Data Loader appears a great helper when it's needed to:

- Switch from legacy systems
- Integrate data from other applications
- Adding large datasets
- Creating backups
- Sharing data with external stakeholders

Preparing Your System

Now there should be no doubt about the helpfulness of Salesforce Data Loader. So let's see how to prepare your environment for installation and configuration of this desktop app.

Prerequisites

- Install Java Runtime Environment (JRE) for your OS.
- Check the system requirements on the official website.

Step-by-step

- Download Data Loader from the official website.
- With the zip archive utility, extract all the files from the downloaded package.
- Find the installer file in the folder: installer.command on MacOS and installer.bar on Windows.
- Go through the installation steps.

Basic Terminology

Before starting to use Data Loader, learning the basic terms and concepts is necessary. This is particularly recommended for beginners and non-tech people.

- CSV files - files storing data in rows where each field is separated by a delimiter.
- Records - each record contains information about a certain object (email, name, surname, and other details of a customer).
- Fields - is an attribute of a record.
- API calls - known as methods or requests, they serve for communicating two applications with each other and exchange information.

Getting Started

Before using the tool, it's worth reviewing its core functionality and user interface. Note that here we focus only on the desktop solution with GUI.

User Interface

Below find the main screen of the tool - it contains the main menu in the upper bar and operation buttons in the central area. In the main menu, it's possible to indicate locations for retrieving or saving files, configure settings such as Bulk API enabling, change the window view, or get help. In the central area, it's possible to select the needed operation for the import or export of the Salesforce data.

Main Components and Their Functionalities

Let's have a look at the functions of the Data Loader:

- IMPORT - inserts all the data from the chosen CSV file.
- UPDATE - if a record in the CSV file matches the one in Salesforce, the latter gets updated.
- UPSERT - if a record in the CSV file matches the one in Salesforce, the latter gets updated, otherwise a new record is created in Salesforce.
- DELETE - the records are deleted.
- EXPORT - selected Salesforce objects are saved in a CSV file and located on the computer.
- EXPORT ALL - all the Salesforce objects are saved in a CSV file and located on the computer.

Guide to Importing Data

To import data using Salesforce Data Loader, make sure that application is open, first of all. Then, proceed with the following steps:

1. Select Insert, Update, or Delete option depending on the operation to be executed. (f the system asks for Salesforce credentials, enter them in the corresponding fields and click Next)

2. Select the objects to import data into.
3. Click Browse to select the CSV file for import.
4. Define the mapping settings and click Next. (The system might ask you to Indicate the output CSV files location)
5. Click Finish to execute import.

Guide to Exporting Data

To export data with Salesforce Data Loader, make sure that application is open. Then, proceed with the following steps:

1. Select the Export operation from the range of available options. (If the system asks for Salesforce credentials, enter them in the corresponding fields and click Next)
2. Select the objects for export. (The system might ask you to indicate location for the resulting CSV file)
3. Create a SOQL query for the data export.
4. Click Finish to perform the export operation.

Skyvia as Easier Alternative

To break down the wall of limitations imposed by Data Loader, we offer Skyvia Salesforce Data Loader as another great option for importing and exporting data within Salesforce. This is an ETL tool for data integration operations (import, export, synchronization, and replication). It also embeds data backup, query, automation, endpoint connection, and some other necessary functions.

Skyvia is characterized by the following advantages:

- Works on any computer with any modern internet browser.
- Connects to multiple cloud platforms and databases, and supports CSV files.
- Has an outstanding GUI where all the integration operations can be set up visually.
- Doesn't impose limitations on the number of records for transfer - each business can select the volume it wants.

While using Skyvia for the import and export of Salesforce data is cool, the service isn't limited only to such operations. So you might consider Skyvia as a strong player in your data orchestration unit.

Conclusion

CRM systems such as Salesforce have become an integral part of businesses' software toolkits. To take advantage of Salesforce to a greater extent, the use of Data Loader or Skyvia is highly recommended. It takes only several minutes to set everything up, and learning basic terms beforehand would be useful.

References

1. skyvia.com - data-integration / salesforce-data-loader - <https://skyvia.com/data-integration/salesforce-data-loader>