

Comparing the Best Ways to Import Data Into Salesforce

Salesforce, the market-leading cloud-based customer relationship management solution, is a powerful management tool for handling several company operations. You've presumably selected Salesforce for an established business with active sales opportunities and tasks in progress. If this is the case, you know how cumbersome manual data entry can be.

Well, fret not; there are several methods for [importing data](#) into Salesforce to ensure that you are up and running in the least amount of time conceivable.

How do I import Data Into Salesforce?

Data entry and extraction are [necessary skills](#) for every Salesforce Admin or Advisor. Did you know there are many programs available to assist you in your endeavor?

Salesforce offers a variety of data loaders, each with its own array of applications and suited to different methods of uploading and exporting your data.

In selecting the best data loader for Salesforce, keep in mind that it all relies on your particular objectives, experience level, and the degree of convenience you desire.

By far, the most frequently used data import Salesforce tools for managing complete data migration are Data Loader.io, Data Loader, and Data Import Wizard. But before we get into these three tools in greater depth, let's take a look at some of the other popular Salesforce data uploaders available.

Informatica Cloud Data Loader for Salesforce: Compatible with Salesforce Professional Editions and higher, this free data loading solution streamlines Salesforce data uploads and migrations between databases. Secure sensitive data via data masking with this key tool.

Jitterbit Data Loader for Salesforce: Available for Mac and PC, this free data migration tool helps Salesforce admins manage data import and export more efficiently, offering various task-automation alternatives.

XL-Connector: Here is an add-on for Excel that allows you to interact with your Salesforce data uploader directly from the spreadsheet. This approach is pretty convenient, given before most data loaders, you will be altering data in Excel anyhow.

Excel Connector by Force: This is an excellent free choice for individuals who adore Excel. This open-source application is compatible with Pro editions and higher. It's ideal for loading tiny batches or bidirectional data movement.

Apex Data Loader: The Apex Data Loader is another free and simple-to-use application that assists you in importing your data into Salesforce objects. Salesforce.com also created this, and it is a remarkably straightforward application.

Using this feature, you may import, export, and remove a limitless amount of data and information in Salesforce. Presently, Enterprise Edition and higher are required, and the downloaded app is only compatible with Windows PCs.

What is the Difference Between the Import Wizard, Data Loader, and Data Loader.io?

With any of the following widely used tools, the amount of data you can import relies partly on your permissions settings, the sort of data you're [preparing to import](#), and the overall data storage constraints of your company.

Data Loader.io

Dataloader.io is totally cloud-based and accessible via a web browser. You have the same options as with the Salesforce Data Loader, but with some added capabilities that really make this solution stand out.

Two user-favorite features are the ability to schedule tasks and the fact that dataloader.io can automatically locate parent records using text rather than an ID, effectively performing the VLookup for you.

Pros

- It saves you a lot of time and is incredibly precise
- The mass upload/insert capability simplifies the process of updating many data sets on multiple fields
- Although it has a simple UI, it is extremely powerful and entirely cloud-based

Cons

- Some users find it particularly costly, which makes convincing administrators to pay for upgraded versions harder
- Reviewers reference a steeper learning curve as a result of the interface's slightly less-than-optimal design

Dataloader.io was originally developed by Mulesoft and was later acquired by Salesforce.

Data Loader

This client program provides bulk data import and export from files or a database connection —

up to five million records of any data type at a time.

You can use Data Loader in two unique ways: Via UI or via the command line.

The user interface enables you to interact with configuration parameters, CSV files used for import and export, and field mappings that convert the field names in your import file to Salesforce field names.

When you use the command line (Windows only), you define the settings, data sources, mappings, and actions in files. This configuration enables you to automate the Data Loader processing.

Pros

- You can load objects that the Data Import Wizard does not support
- Regular data loads, such as nightly imports, can be scheduled
- For the seasoned Salesforce worker, this option is faster, more powerful, and has additional settings

Cons

- A maximum upload limit of five million records may be insufficient for some larger enterprises — if you want more than 5 million records to be loaded, we suggest working with a Salesforce partner or searching the AppExchange for a suitable partner solution
- Requires download and installation

Additionally, there are numerous backend configuration options, implying that this data loader can handle almost any circumstance.

Data Import Wizard

Developed by Salesforce.com, the Salesforce Import Wizard is marketed as an easy-to-use tool for importing accounts, contacts, leads, solutions, and custom objects.

This software provides an entirely free service that prevents the loading of duplicate data. Its user-friendly interface is also ideal for newcomers.

Accessed via the Setup menu, this tool can import up to 50,000 records simultaneously. It provides an intuitive interface for configuring the setup parameters, data sources, and field mappings that transfer the field names in your import file to their Salesforce equivalents.

Pros

- Intuitive and simple to use on the first go
- To avoid importing duplicate records, you can match records based on their name, email address, or Salesforce ID

Cons

- Working with a maximum upload limit of 50,000 records may not be suitable for your objectives
- Certain objects that you wish to import may be incompatible with the wizard
- The import procedure is not fully automated

All editions of Salesforce include the Salesforce Data Import Wizard. Its user-friendly interface guides you step-by-step through the process. It has also been improved in recent years to support the import of additional objects, including custom objects.

FAQ

Can you import Excel/CSV fields into Salesforce?

Yes! You may import data from Excel into Salesforce by exporting the Excel spreadsheet as a CSV file (comma-separated values). The process is straightforward if the following procedures are followed:

1. Prepare your CSV file for import or edit by following these prompts:
 - A comma must be used to separate field values within a row
 - When creating a record, you must include all needed fields
 - Any fields not described in the CSV file are ignored when changing a record
2. Navigate to your Salesforce instance's object tab and select 'Import' to initiate the import.
3. Select the type of object you wish to import or update.
4. Select whether to import new records, update current records, or perform both operations simultaneously.
5. Select the CSV file that you wish to import or change.
6. Map the data in your CSV file to the fields associated with the object type in your Salesforce instance. This step is typically performed automatically if your field headers match your Salesforce instance's field names.
7. You are redirected to a comprehensive page where you can view the import status, the number of records that were imported correctly, and the number of records that were not.

Where is the Data Import Wizard in Salesforce?

The Data Import Wizard tool is easily accessible via the Setup menu.

How do I import Leads into Salesforce?

If you have a database of leads, you're probably looking for a more efficient approach to import them into Salesforce than manually entering them.

First, verify that you have the required access or contact your Salesforce administrator for assistance to import leads.

Next, navigate to the bottom of the Leads home page and click the Import Leads link beneath the Tools heading. The Lead Import Wizard page will appear, guiding you through the procedure in four easy steps while providing helpful hints.

How do you automate data imports in Salesforce?

It is possible to automate the import process using API calls.

Application Programming Interface (API) calls denote certain activities that your client apps can invoke at runtime to accomplish tasks, such as:

- Conduct a data query on your organization's data
- Data can be added, updated, and deleted
- Acquire metadata for your data
- Execute utilities to complete administrative duties

Beforehand, make sure you've specified key data sources, field mappings, and other parameters within Data Loader's configuration files.

Next-Level Data Enablement with CapStorm

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CapStorm customers have [more autonomy over their Salesforce data](#), expediting data migrations while enhancing overall data control and usability. With CapStorm, you can access the full value of your Salesforce data. Request a demo today.