

# EXCEL2SALESFORCE DATA IMPORTER (SALESFORCE APP)

INSTALLATION / USER GUIDE

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# INTRODUCTION

Excel2Salesforce is a Salesforce AppExchange app that can be installed from the AppExchange.

Import large volumes of Excel data into Salesforce easily with Excel2Salesforce. Unlike Data Loader, normal Salesforce users and portal community users can use it. Handles data loading asynchronously. Say goodbye to manual data entry and hello to increased productivity. Try it today!

# INSTALLATION AND SETUP

1. Browse for Excel2Salesforce in Salesforce AppExchange portal, and install to your Salesforce org for the required user profiles.
2. Once installed, you need to configure Excel2Salesforce by adding it to your Salesforce App Launcher and assigning permissions to the users who will be using it.
3. Before you can import Excel data into Salesforce using Excel2Salesforce, you need to set up the object names, field names, and field labels in the Custom Metadata Type "Data Import Mapping". This step is necessary to map the fields in your Excel file to the Salesforce objects and fields where you want to import the data.

# PRE-REQUISITES

1. To set up the Data Import Mapping, navigate to Setup -> Custom Metadata Types in your Salesforce org.
2. Click on the "Data Import Mapping" Custom Metadata Type.
3. Click on the "Manage Records" button to create new records for each object and field you want to import.
4. For each record, enter the object name, field name, and field label.
5. Save the records.

# CONFIGURATION

1. After installing Excel2Salesforce, you can configure either a Salesforce Lightning page or an Experience Site page to include the Lightning Web Component named "Excel2Salesforce Data Importer".
2. To add the Excel2Salesforce Data Importer to a Salesforce Lightning page, edit the page and drag the component onto the page. Then configure the component by specifying the default object and fields to be used for importing data.
3. To add the Excel2Salesforce Data Importer to an Experience Site page, create a new page and add the component to the page using the Site.com Studio editor. Then configure the component by specifying the default object and fields to be used for importing data.

# EXAMPLE: BULK UPLOAD CONTACTS FROM ACCOUNT PAGE

1. Manage Records in Custom Metadata Type – Data Import Mapping
2. Add a record for Contact object – leave field details empty
3. Add as many records as needed representing the required fields in Contact object

The screenshot shows the Salesforce Setup interface. At the top, there's a header bar with "Sandbox: ptop". Below it is a navigation bar with "Setup", "Home", and "Object Manager". A search bar "Search Setup" is on the right. On the left sidebar, "Custom Metadata Types" is selected under "Custom Code". The main content area is titled "Custom Metadata Types" and shows "Data Import Mapping" for the "Contact" object. A table lists the mappings for "Contact", "First Name", and "Last Name".

Sandbox: ptop

Search Setup

Setup Home Object Manager

custom m

Custom Code

Custom Metadata Types

Didn't find what you're looking for? Try using Global Search.

SETUP Custom Metadata Types

Data Import Mapping

View: All Create New View

New

| Action                                     | Label ↑    | Data Import Mapping Name | Namespace Prefix |
|--------------------------------------------|------------|--------------------------|------------------|
| <a href="#">Edit</a>   <a href="#">Del</a> | Contact    | Contact                  |                  |
| <a href="#">Edit</a>   <a href="#">Del</a> | First Name | First_Name               |                  |
| <a href="#">Edit</a>   <a href="#">Del</a> | Last Name  | Last_Name                |                  |

# EXAMPLE: BULK UPLOAD CONTACTS FROM ACCOUNT PAGE

4. If you need to link the imported data to a parent record, create another Data Import Mapping cmdt record with label “Parent Record Id” and Field API Name as the parent ID Field Name. In this example the field API name would be AccountId because we want the Contact records to be linked to the parent Account.

 **SETUP**  
**Custom Metadata Types**

### Data Import Mapping

**Data Import Mapping Edit**

SaveSave & NewCancel

Information

LabelParent Record IdProtected Component☐ 

Data Import Mapping NameParent Record Id

Object API NameContact

Field API NameAccountId

Field LabelParent Record Id

SaveSave & NewCancel



# EXAMPLE: BULK UPLOAD CONTACTS FROM ACCOUNT PAGE

5. Edit Account Page and include Excel2Salesforce Data Importer App

6. When any Account record is viewed users should be able to bulk upload

The screenshot displays the Salesforce Lightning App Builder interface for editing the 'Account Record Page'. The top navigation bar includes 'Lightning App Builder', 'Pages', and 'Account Record Page'. The main workspace shows a preview of the account record page for 'TestAcc', featuring fields like Type, Phone, Website, Account Owner (Vignesh Narayanan), Industry, and Billing Address. Below these fields are sections for 'Related' (Contacts, Partners, Notes & Attachments), 'Details', 'News', 'Activity', and 'Chatter'. A tooltip for 'ExcelLink Data Importer' is visible, stating 'Supported form factors: desktop'. On the right, the 'Page' configuration panel is open, showing the following settings:

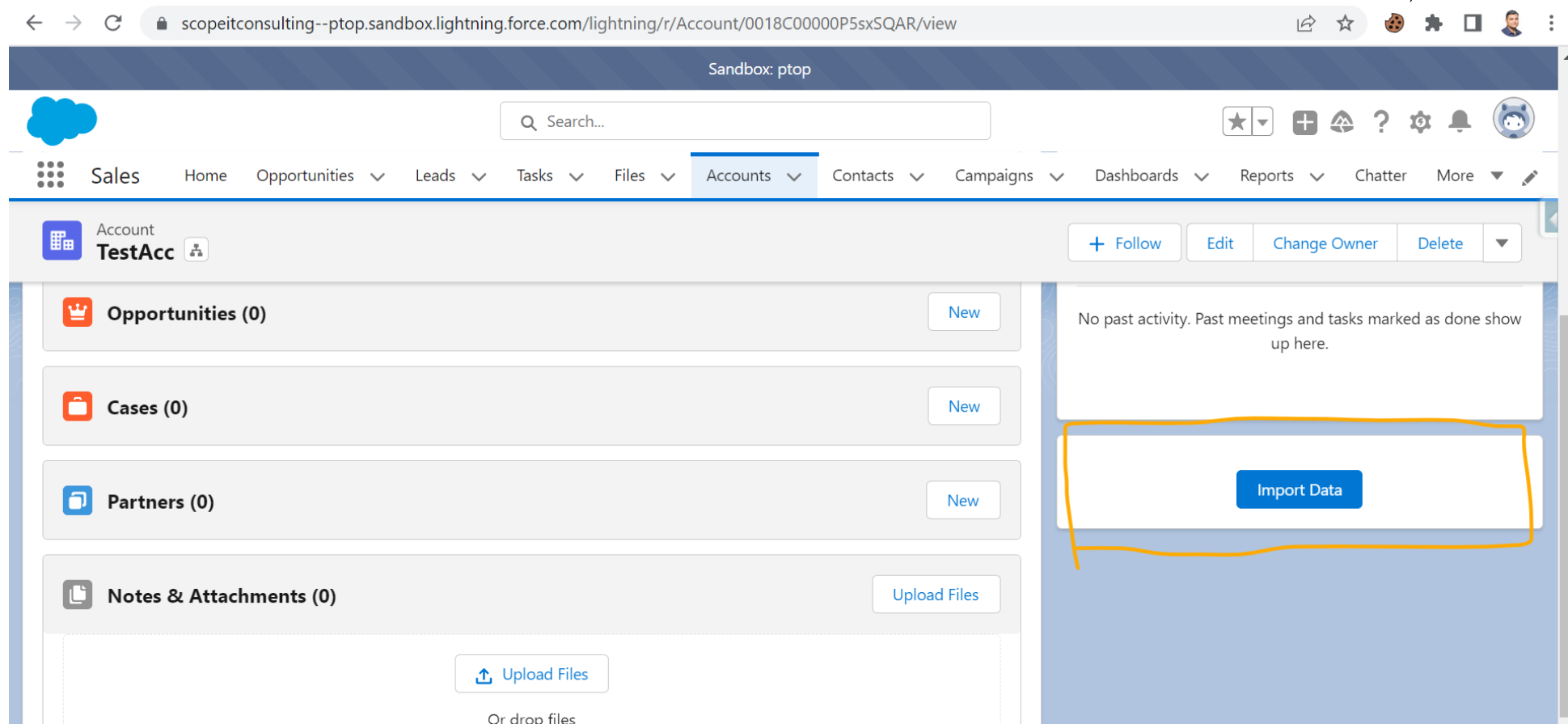
- Label:** Account Record Page
- API Name:** Account\_Record\_Page
- Page Type:** Record Page
- Object:** Account
- Template:** Header and Right Sidebar
- Description:** (empty field)

At the bottom of the page, there is a blue banner with the text 'Get more on the AppExchange'.

# USAGE – STEP 1

To import data from Excel, open Excel2Salesforce from the Salesforce App Launcher or navigate to the record or Experience Site page where you added the Excel2Salesforce Data Importer component.

Click the "Import Data" button to launch the import wizard.



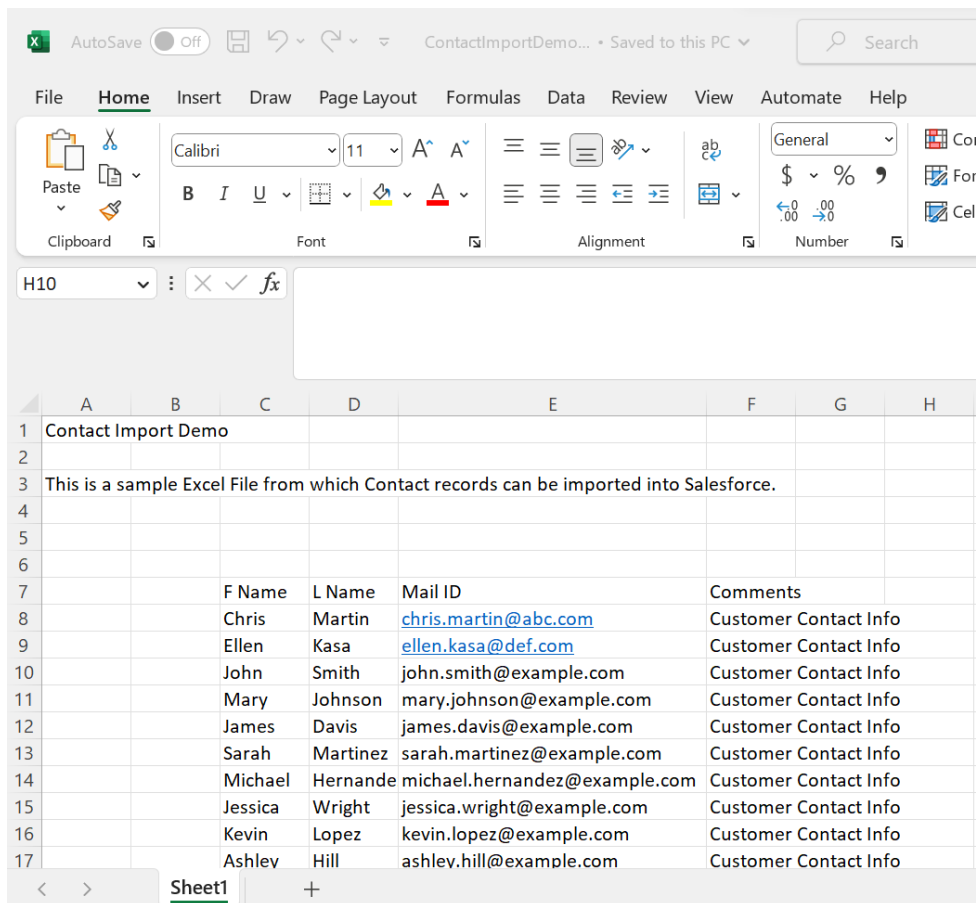
# USAGE – STEP 2

Select the target Salesforce object name from the picklist

The screenshot displays the Salesforce user interface. At the top, there is a navigation bar with the Salesforce logo, a search bar, and various utility icons. Below this is a secondary navigation bar with tabs for Sales, Home, Opportunities, Leads, Tasks, Files, Accounts (selected), Contacts, Campaigns, Dashboards, Reports, Chatter, and More. The main content area shows the 'Account TestAcc' page. On the left, there are four sections: 'Opportunities (0)' with a 'New' button, 'Cases (0)' with a 'New' button, 'Partners (0)' with a 'New' button, and 'Notes & Attachments (0)' with an 'Upload Files' button. At the bottom of this section is a large 'Upload Files' button with the text 'Or drop files'. On the right, there is a sidebar with a 'No past activity' message and a 'Please select the target Salesforce object.' section. This section contains a dropdown menu with 'Select an Option' and a button labeled 'Contact'.

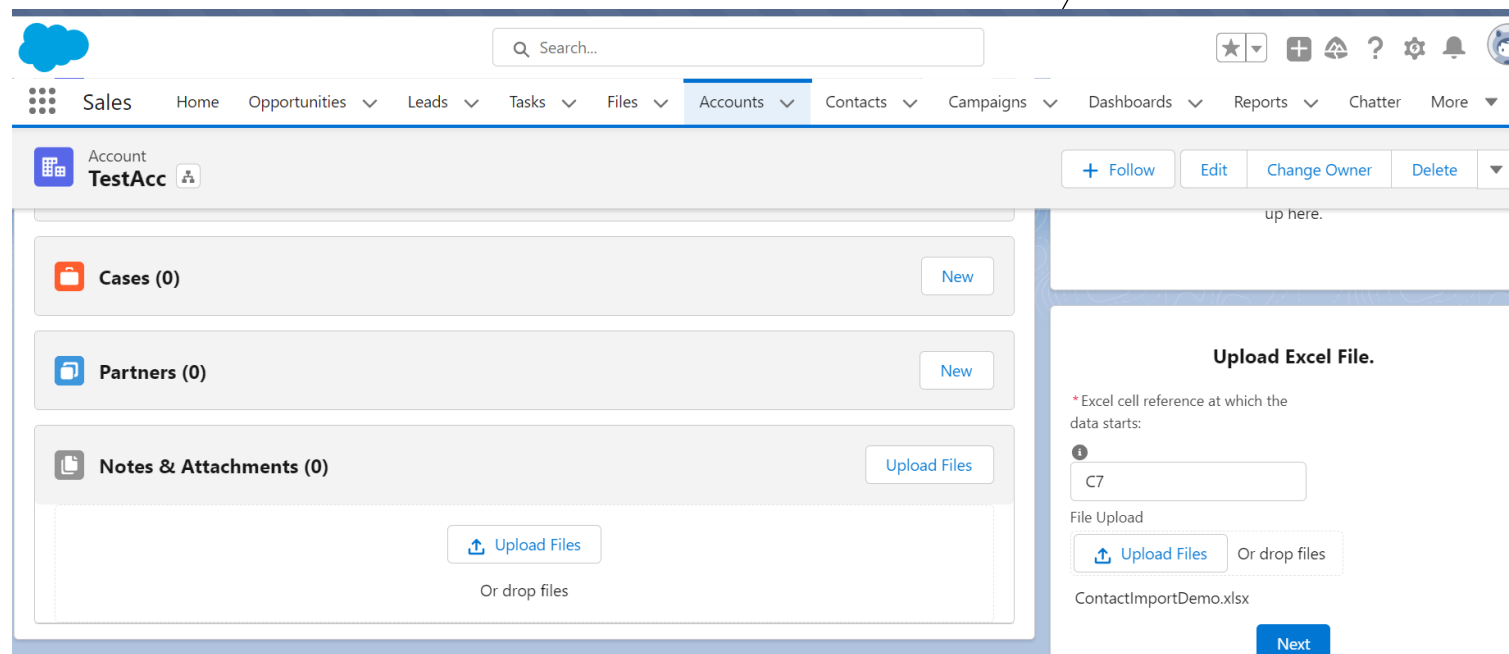
# USAGE – STEP 3

Upload the Excel file you want to import, and provide the cell reference from where the data table starts.



The screenshot shows the Microsoft Excel interface with a file named 'ContactImportDemo...'. The 'Home' tab is active. The formula bar shows 'H10' and the function 'fx'. The spreadsheet contains the following data:

|    | A                                                                                       | B       | C         | D                                                                                | E | F                     | G | H |
|----|-----------------------------------------------------------------------------------------|---------|-----------|----------------------------------------------------------------------------------|---|-----------------------|---|---|
| 1  | Contact Import Demo                                                                     |         |           |                                                                                  |   |                       |   |   |
| 2  |                                                                                         |         |           |                                                                                  |   |                       |   |   |
| 3  | This is a sample Excel File from which Contact records can be imported into Salesforce. |         |           |                                                                                  |   |                       |   |   |
| 4  |                                                                                         |         |           |                                                                                  |   |                       |   |   |
| 5  |                                                                                         |         |           |                                                                                  |   |                       |   |   |
| 6  |                                                                                         |         |           |                                                                                  |   |                       |   |   |
| 7  |                                                                                         | F Name  | L Name    | Mail ID                                                                          |   | Comments              |   |   |
| 8  |                                                                                         | Chris   | Martin    | <a href="mailto:chris.martin@abc.com">chris.martin@abc.com</a>                   |   | Customer Contact Info |   |   |
| 9  |                                                                                         | Ellen   | Kasa      | <a href="mailto:ellen.kasa@def.com">ellen.kasa@def.com</a>                       |   | Customer Contact Info |   |   |
| 10 |                                                                                         | John    | Smith     | <a href="mailto:john.smith@example.com">john.smith@example.com</a>               |   | Customer Contact Info |   |   |
| 11 |                                                                                         | Mary    | Johnson   | <a href="mailto:mary.johnson@example.com">mary.johnson@example.com</a>           |   | Customer Contact Info |   |   |
| 12 |                                                                                         | James   | Davis     | <a href="mailto:james.davis@example.com">james.davis@example.com</a>             |   | Customer Contact Info |   |   |
| 13 |                                                                                         | Sarah   | Martinez  | <a href="mailto:sarah.martinez@example.com">sarah.martinez@example.com</a>       |   | Customer Contact Info |   |   |
| 14 |                                                                                         | Michael | Hernandez | <a href="mailto:michael.hernandez@example.com">michael.hernandez@example.com</a> |   | Customer Contact Info |   |   |
| 15 |                                                                                         | Jessica | Wright    | <a href="mailto:jessica.wright@example.com">jessica.wright@example.com</a>       |   | Customer Contact Info |   |   |
| 16 |                                                                                         | Kevin   | Lopez     | <a href="mailto:kevin.lopez@example.com">kevin.lopez@example.com</a>             |   | Customer Contact Info |   |   |
| 17 |                                                                                         | Ashlev  | Hill      | <a href="mailto:ashlev.hill@example.com">ashlev.hill@example.com</a>             |   | Customer Contact Info |   |   |



The screenshot shows the Salesforce interface for the 'TestAcc' account. The 'Accounts' tab is selected. The 'Upload Excel File' section is visible on the right side of the page. It includes a text input field for the Excel cell reference, which is currently set to 'C7'. Below the input field, there is a 'File Upload' section with an 'Upload Files' button and a text area for dropping files. The 'Next' button is located at the bottom right of the 'Upload Excel File' section.

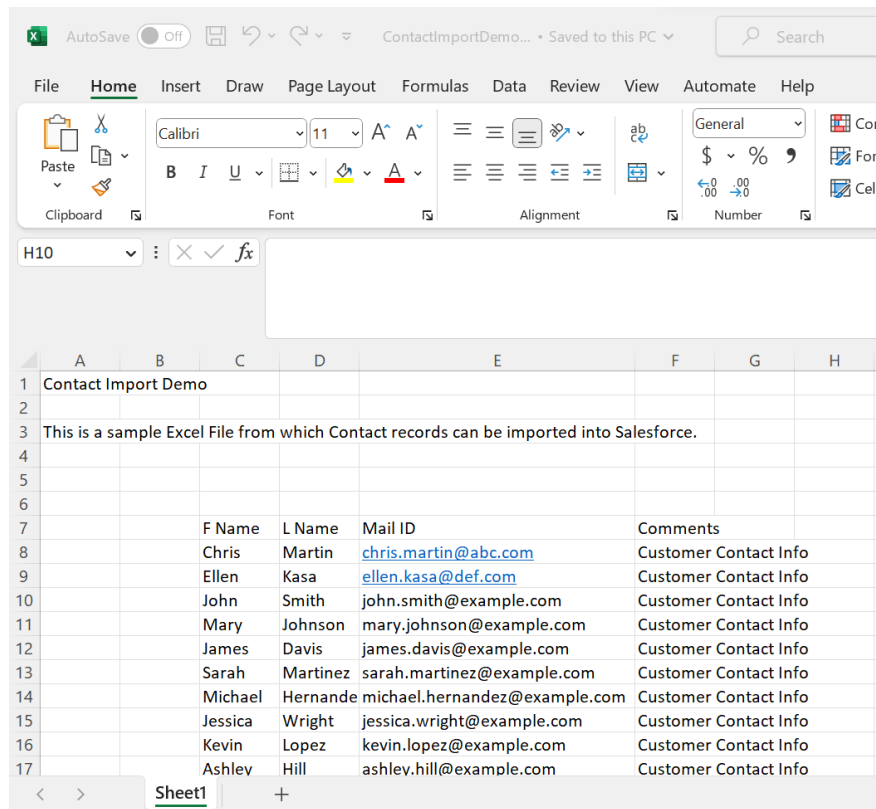
# USAGE – STEP 4

Map the fields in your Excel file to the Salesforce objects and fields where you want to import the data.

The columns in header row of excel file are listed as Excel Fields.

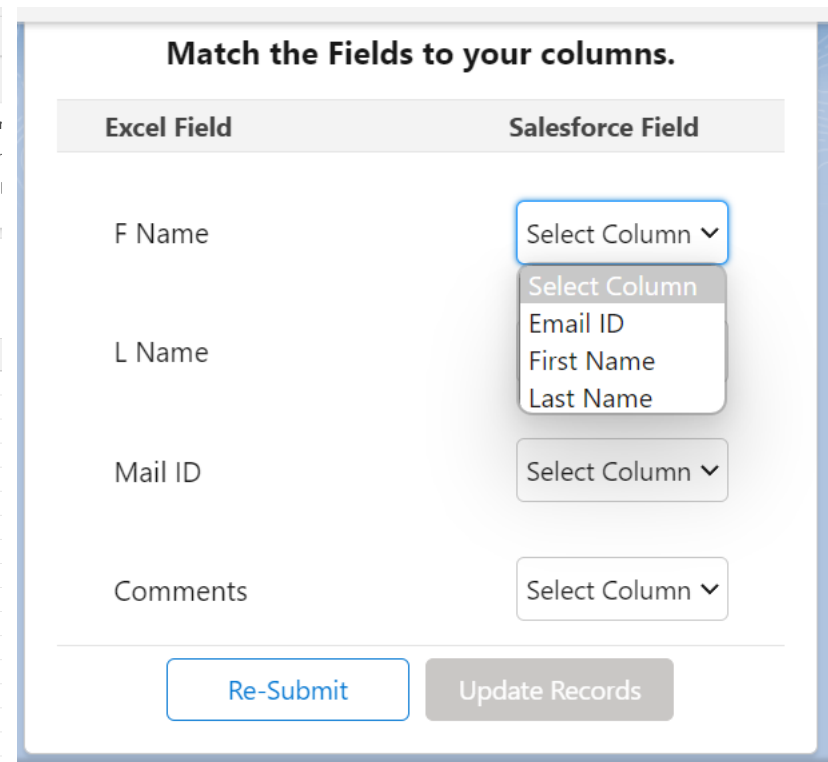
The Data Import Mapping records you set up in the pre-requisite step are available as Salesforce fields.

Excel fields which are not required to be imported can be skipped.



The screenshot shows an Excel spreadsheet with the following data:

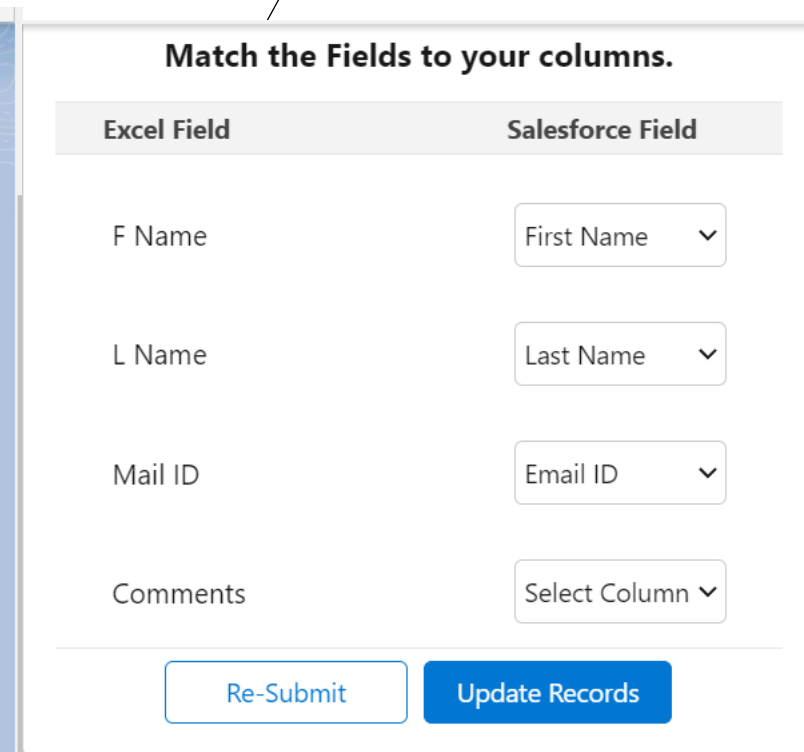
|    | A                                                                                       | B       | C         | D                                                                                | E | F                     | G | H |
|----|-----------------------------------------------------------------------------------------|---------|-----------|----------------------------------------------------------------------------------|---|-----------------------|---|---|
| 1  | Contact Import Demo                                                                     |         |           |                                                                                  |   |                       |   |   |
| 2  |                                                                                         |         |           |                                                                                  |   |                       |   |   |
| 3  | This is a sample Excel File from which Contact records can be imported into Salesforce. |         |           |                                                                                  |   |                       |   |   |
| 4  |                                                                                         |         |           |                                                                                  |   |                       |   |   |
| 5  |                                                                                         |         |           |                                                                                  |   |                       |   |   |
| 6  |                                                                                         |         |           |                                                                                  |   |                       |   |   |
| 7  |                                                                                         | F Name  | L Name    | Mail ID                                                                          |   | Comments              |   |   |
| 8  |                                                                                         | Chris   | Martin    | <a href="mailto:chris.martin@abc.com">chris.martin@abc.com</a>                   |   | Customer Contact Info |   |   |
| 9  |                                                                                         | Ellen   | Kasa      | <a href="mailto:ellen.kasa@def.com">ellen.kasa@def.com</a>                       |   | Customer Contact Info |   |   |
| 10 |                                                                                         | John    | Smith     | <a href="mailto:john.smith@example.com">john.smith@example.com</a>               |   | Customer Contact Info |   |   |
| 11 |                                                                                         | Mary    | Johnson   | <a href="mailto:mary.johnson@example.com">mary.johnson@example.com</a>           |   | Customer Contact Info |   |   |
| 12 |                                                                                         | James   | Davis     | <a href="mailto:james.davis@example.com">james.davis@example.com</a>             |   | Customer Contact Info |   |   |
| 13 |                                                                                         | Sarah   | Martinez  | <a href="mailto:sarah.martinez@example.com">sarah.martinez@example.com</a>       |   | Customer Contact Info |   |   |
| 14 |                                                                                         | Michael | Hernandez | <a href="mailto:michael.hernandez@example.com">michael.hernandez@example.com</a> |   | Customer Contact Info |   |   |
| 15 |                                                                                         | Jessica | Wright    | <a href="mailto:jessica.wright@example.com">jessica.wright@example.com</a>       |   | Customer Contact Info |   |   |
| 16 |                                                                                         | Kevin   | Lopez     | <a href="mailto:kevin.lopez@example.com">kevin.lopez@example.com</a>             |   | Customer Contact Info |   |   |
| 17 |                                                                                         | Ashlev  | Hill      | <a href="mailto:ashlev.hill@example.com">ashlev.hill@example.com</a>             |   | Customer Contact Info |   |   |



Match the Fields to your columns.

| Excel Field | Salesforce Field |
|-------------|------------------|
| F Name      | Select Column ▼  |
| L Name      | Select Column ▼  |
| Mail ID     | Select Column ▼  |
| Comments    | Select Column ▼  |

Re-Submit Update Records



Match the Fields to your columns.

| Excel Field | Salesforce Field |
|-------------|------------------|
| F Name      | First Name ▼     |
| L Name      | Last Name ▼      |
| Mail ID     | Email ID ▼       |
| Comments    | Select Column ▼  |

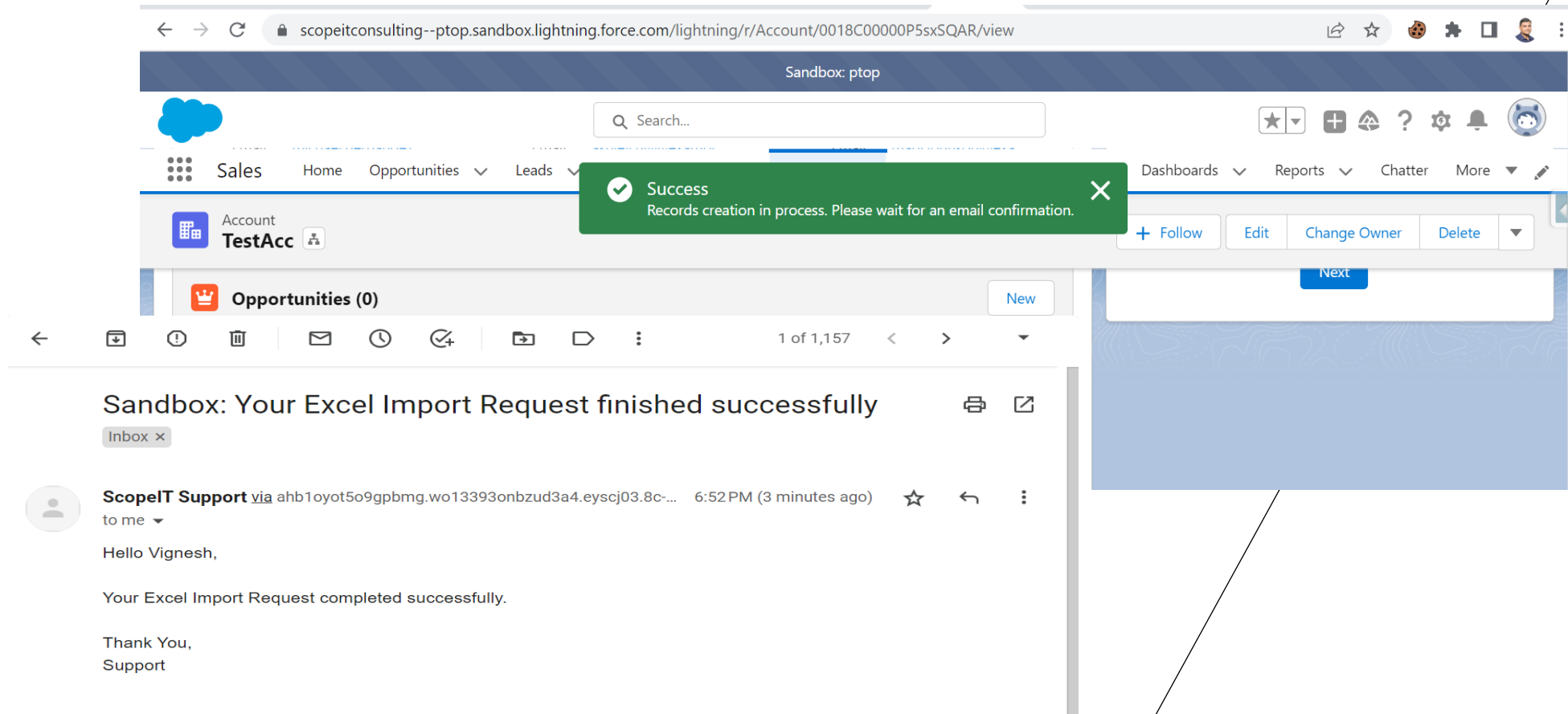
Re-Submit Update Records

# USAGE – STEP 5

Finally click Update Records to initiate import.

The data import is asynchronous and can handle huge volumes of data.

Submitting user will get an email advising of the completion of import.



# USAGE – STEP 7

Reload the parent Account record to see the related Contacts now loaded from the Excel sheet.

The screenshot shows the Salesforce interface for an Account record named 'TestAcc'. The 'Accounts' tab is selected in the navigation bar. Below the account name, there are buttons for '+ Follow', 'Edit', 'Change Owner', and 'Delete'. The 'Contacts' section is expanded, showing a list of 6+ contacts. The contacts are displayed in a grid with their names, titles, emails, and phone numbers. A 'View All' link is at the bottom of the contacts list. On the right sidebar, there is a section for 'Upcoming & Overdue' activities, which currently shows 'No activities to show.' and 'No past activity.' There is also an 'Import Data' button at the bottom of the sidebar.

| Name              | Title | Email                 | Phone |
|-------------------|-------|-----------------------|-------|
| Amanda Baker      |       | amanda.baker@exa...   |       |
| James Davis       |       | james.davis@exam...   |       |
| Christopher Green |       | christopher.green@... |       |
| Michael Hernandez |       | michael.hernandez...  |       |
| Ashley Hill       |       | ashley.hill@exampl... |       |
| Mary Johnson      |       | mary.johnson@exa...   |       |

# LIMITATIONS

1. Excel2Salesforce can be used by normal Salesforce users and portal community users, while Salesforce Data Loader can only be used by Salesforce admins.
2. Excel2Salesforce only supports importing data, not exporting or updating data in Salesforce.
3. Excel2Salesforce supports importing data from Excel files only, not CSV or other file formats.





# THANK YOU

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