



DataArt

Smart Import Tool

Admin Guide

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1. Overview

The Smart Import Tool comes packaged with a Lightning component placed on the Smart Import Tool tab. It allows Administrators and Users to import data from a broad range of file formats, including CSV, XLSX, XLS and other, into your Salesforce Org with ease and efficiency. The tool is designed to simplify and streamline the process of importing dirty data that may contain typos, extra spaces, and other mistakes that can be validated and fixed before the import.

The tool can be used to insert or update data in standard and custom objects, standard and custom fields. It uses the configuration of the org where it is installed. The tool respects object-level, field-level, and row-level (sharing) security. So, when using the app, users will not receive more rights than they have according to the settings of their profiles, roles, etc.

2. Installation

To install the app, follow the [Application Installation Guide](#) from App Exchange. During installation, you can select user profiles for which the app will be available. Installed package appears in Setup → Installed Packages page.

If you want to make the application available to individual users for whom it was not originally installed, assign them "Smart Import Tool User" Permission Set which is included in the package.

3. Configuration

The application has several settings available to administrators on the Setup → Custom Metadata Types page. Open the page, find "Smart Import Tool Setting" and click "Manage Records" link to the left of the title. You can click the Edit link to edit each setting.

Smart Import Tool Settings

[Help for this Page ?](#)

View: All Settings ▼ [Edit](#) | [Create New View](#)

Action	Label ↑	SmartImportToolSetting Name	Value
Edit	 <u>BATCH SIZE</u>	BATCH_SIZE	200
Edit	 <u>QUICK OBJECT LIST</u>	QUICK_OBJECT_LIST	Account, Contact, Lead

Description of each setting:

Setting	Default Value	Description
ALLOW ALL OBJECTS	TRUE	If enabled, the user can select any Salesforce object to import that the user has write access to. Both standard and custom objects are supported. If you need to limit the list of objects available for import using Smart Import Tool, set this setting to FALSE and adjust QUICK OBJECT LIST.
ALLOW INSERT	TRUE	Allow or prohibit insertion of new records using Smart Import Tool. At least one of ALLOW INSERT, ALLOW UPDATE must be enabled.
ALLOW UPDATE	TRUE	Allow or prohibit updating existing records using Smart Import Tool. At least one of ALLOW INSERT, ALLOW UPDATE must be enabled.
BATCH SIZE	200	Maximum number of rows processed per transaction (batch), whereas the number of batches is not limited. Reduce the number if you encounter errors due to the substantial number of records being processed simultaneously.
INSERT NULL VALUES	FALSE	If enabled, empty cells are treated as nulls during insert/update operations instead of being skipped. Use this setting with care — it can unintentionally

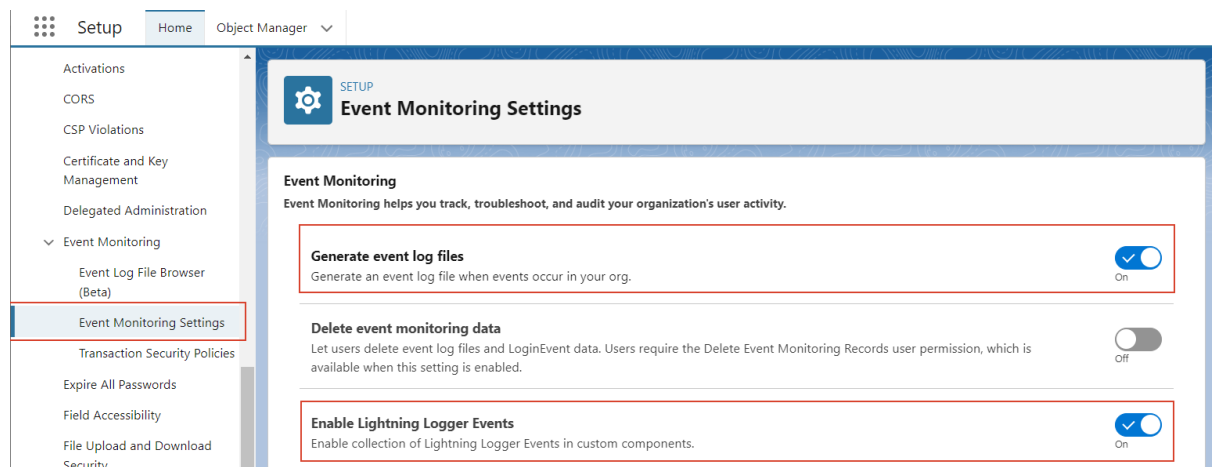
		overwrite existing data. Enable it only if you explicitly intend to clear values during import.
QUICK OBJECT LIST	Account, Contact, Lead	A comma-separated list of Salesforce object API names available in the Smart Import Tool for import. These objects are displayed as buttons for quick selection. Both standard and custom objects are supported. Feel free to edit the list to your needs. The final list of objects is displayed taking into account user permissions, so objects that the user doesn't have write access to are ignored. The total length of the list cannot exceed 255 characters.
OUTPUT FORMAT	CSV	File format of downloaded documents. Depending on the tools used in your organization, you may prefer one of the following formats: • XLSX - Microsoft Excel 2007 Worksheet • XLS - Microsoft Excel 97-2003 Worksheet • ODS - OpenDocument Spreadsheet • WK3 - Lotus Workbook • WK1 - Lotus Worksheet • CSV - Comma Separated Values Ask smart.import.tool@dataart.com if you need more info.
LMS ENABLED	FALSE	Enable Lightning Message Service (LMS) messages support. Using LMS you can log events or manage the app. Some development is required, see Developer Guide for details. Leave the setting disabled if you do not plan to use an extension.

4. Monitor who and how uses the app

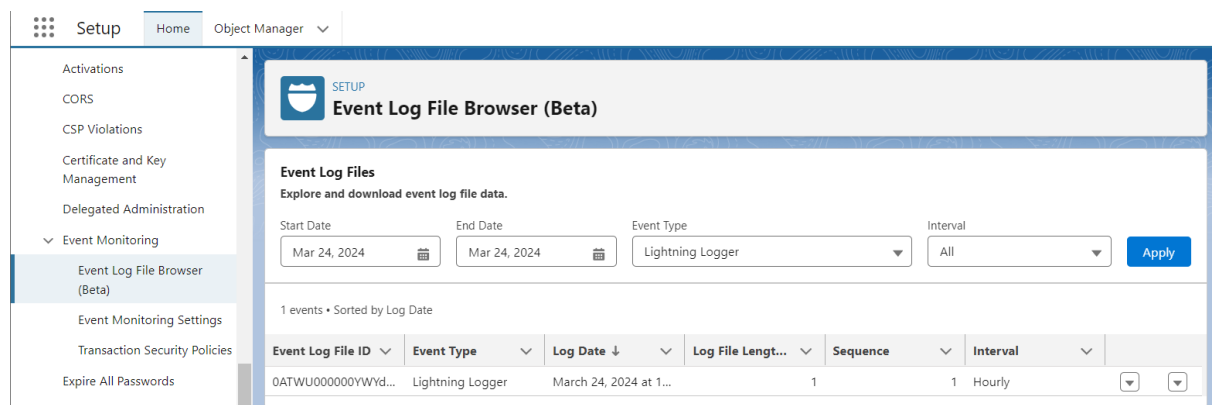
This feature is available to customers who purchased Salesforce Shield or Salesforce Event Monitoring add-on subscriptions.

In order to turn on event monitoring for lightning web components, go to Setup → Event Monitoring Settings and turn on the settings below as shown in the picture.

- Generate event log files
- Enable Lightning Logger Events



In order to view events, go to Setup → Event Log File Browser (Beta). Select desired period of dates, select “Lightning Logger” Event Type, optionally select Interval and finally click Apply button. Then you can download shown logs as CSV files.



There are two types of logs: hourly, which usually appear two hours after the event, and daily, which appear the day after the event.

Using the CSV files, you can filter events related to the Smart Import Tool: filter PAGE_ENTITY_TYPE column by the “DataArt__Smart_Import_Tool” value. The tool logs every import attempt. USER_ID column contains the user Id who performed the operation, and MESSAGE column contains JSON with the details:

- Operation – insert or update,
- Object – API name of the Salesforce object into which the import was made,
- File – the file name which was uploaded for the import,
- Success – number of records successfully imported,
- Errors – number of records failed during the import.

5. Contact us

If you are experiencing any issues with configuring the app in your Org, please reach out to smart.import.tool@dataart.com where a member of our team will be happy to assist.