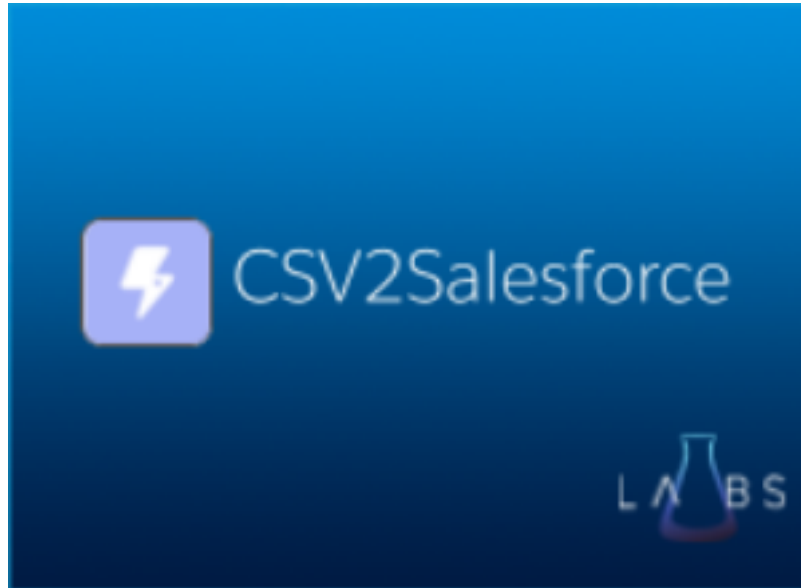


CSV2Salesforce

Set Up and User Guide



Create. Innovate. Educate.

Introduction

* Salesforce Labs provides free, open source solutions to the AppExchange.

System requirements:

Available for use in Enterprise, Unlimited, Force.com, Developer, and Performance Editions of Salesforce.

CSV2Salesforce is a free solution designed to optimise the user experience by allowing quick and easy insert of records (up to 3k or 500 KB of CSV file).

Generate records for any of your Salesforce objects with ease, via a drag and drop CSV upload. No need to give users too many permissions for this task!

This solution allows you to populate a CSV file with your field APIs as column headers and the rows as the record data.

Drag and drop/upload your CSV, state which object you wish to upload and away you go! (Salesforce admins, you can lock which object is used if you really want too!)

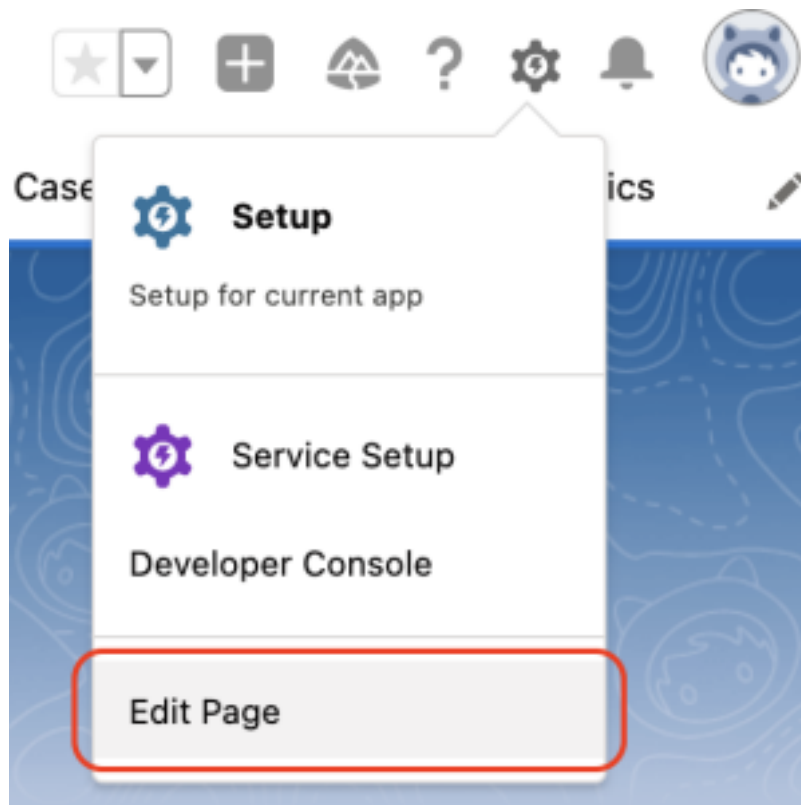
Installation Guide

Login with your Salesforce or Trailhead credentials and navigate to our listing on Appexchange.
Select “Get it Now” from the listing and select the org you want to install it in from the drop down

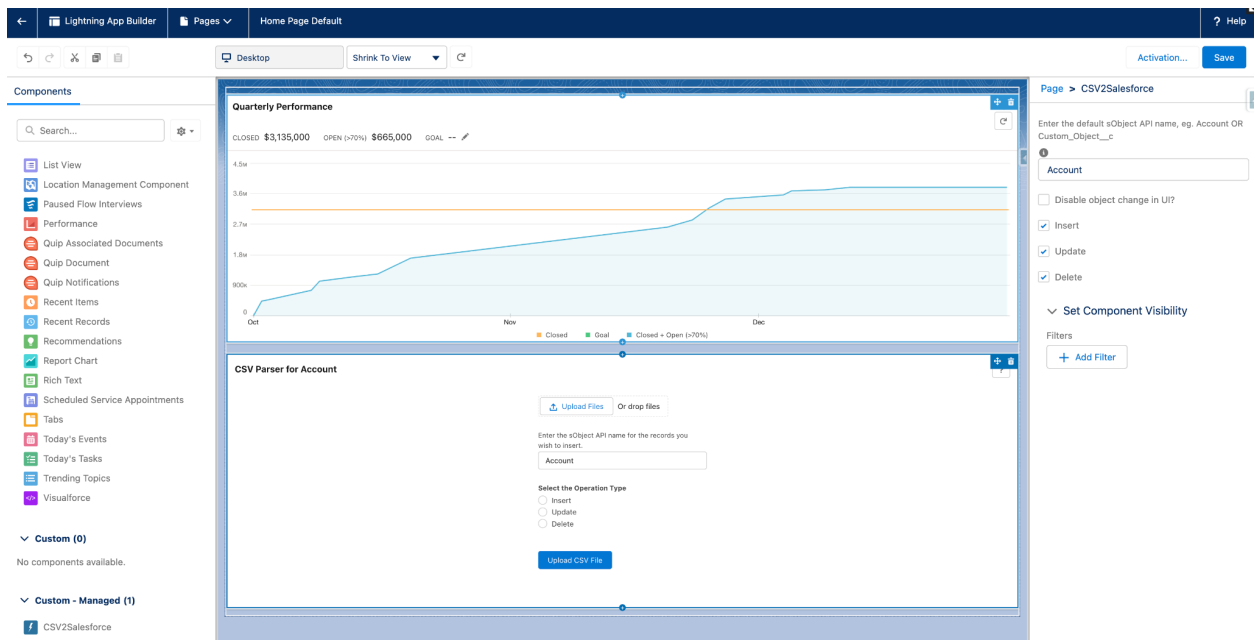
1. Agree to the terms and conditions
2. **Select “Get it Now” from the listing and select the org you want to install it in from the drop down**
3. Agree to the terms and conditions
4. Once you have redirected to the Salesforce login page, input the credentials for the Salesforce org you wish to install the solution in
5. Select the profiles you wish to access the solutions (Admins Only, Everyone, or Specific Profile>)

Set Up Guide

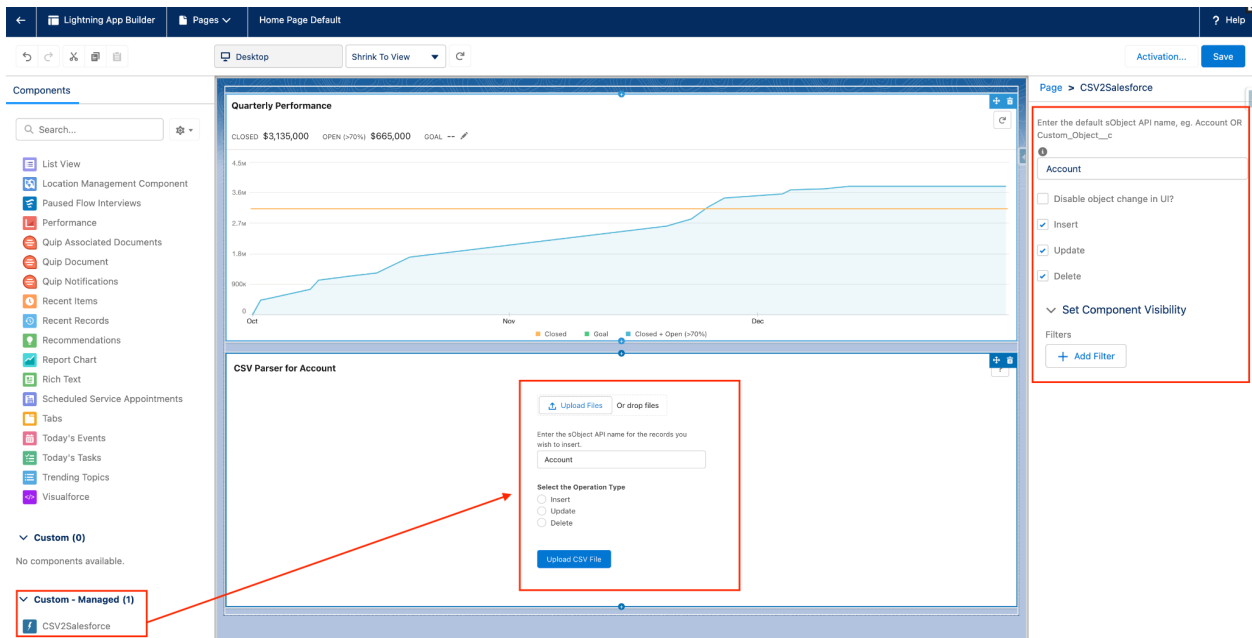
Upon installing the package, you are ready to use this Lightning component on any Lightning page you wish. Click the ‘cog wheel’ and click ‘Edit Page’.



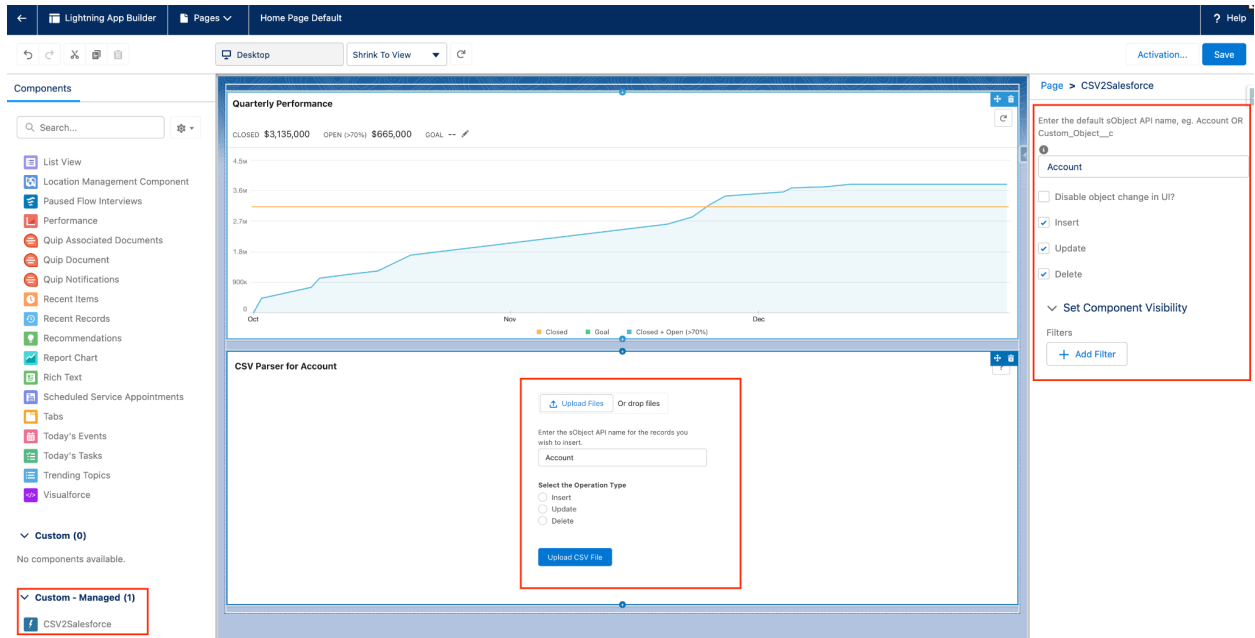
On the Lightning App Builder screen, look to the left sidebar. Scroll down to the ‘Custom’ section. Here you will see ‘CSV2Salesforce’.



Drag and drop this component to your desired location on the page.



Now, on the right sidebar, you can configure the component.



Here, you can set the default object for users to insert records to. You can also choose to disable users from changing the object in the UI on the fly.

Page > CSV2Salesforce

Enter the default sObject API name, eg. Account OR Custom_Object__c



Account

☐ Disable object change in UI?

☒ Insert

☒ Update

☒ Delete

Set Component Visibility

Filters

+ Add Filter

Select at least one operation type to **ENABLE** the “Upload CSV File” button. Once you are satisfied with your configurations, click Save and Activate to enable the component.

User Guide

This Lightning component is simple to use once the steps above have been configured. Create a CSV file with your object's field API names as the column headers on the first row. Each row after, populate with your record data.

For example, a Contact CSV may look like the following:

	A	B	C	D	E
1	FirstName	LastName	Title	Birthdate	Custom_Field__c
2	Jonathan	Fox	Senior Technical Consultant	1995-02-16	Custom data

Formats

- Date field use “yyyy-mm-dd” format, example : “2022-12-20”
- DateTime field use “yyyy-mm-dd HH:mm:ss” format, example : “2022-12-20 19:30:00”

Once you have the CSV downloaded, drag and drop or click ‘Upload files’. Select your file.

Click the blue ‘Upload CSV File’ button. You should now see a green toast success message.

Change Log

- Supports Insert, Update and Delete operations (configurable)
- Configurable custom labels for email subject, body for each operation type

New Custom Label					
Action	Name ↑	Categories	Short Description	Value	Language
Edit	 csv2sf_EmailBody		Email message body	Attached are the records you just inserted with their newly assigned IDs.	English
Edit	 csv2sf_EmailBody_Deleted		Email message body for Deleted	Records deleted successfully	English
Edit	 csv2sf_EmailBody_Update		Email message body for Updated	Attached are the records you just updated.	English
Edit	 csv2sf_Email_Subject		Email Subject for Insert	Inserted Records - Salesforce	English
Edit	 csv2sf_Email_Subject_Deleted		Email Subject Deleted	Records Deleted Successfully	English
Edit	 csv2sf_Email_Subject_Update		Email Subject for Update	Updated Records - Salesforce	English

- Fixed error while uploading case data

Resources

- [Example walkthrough](#)