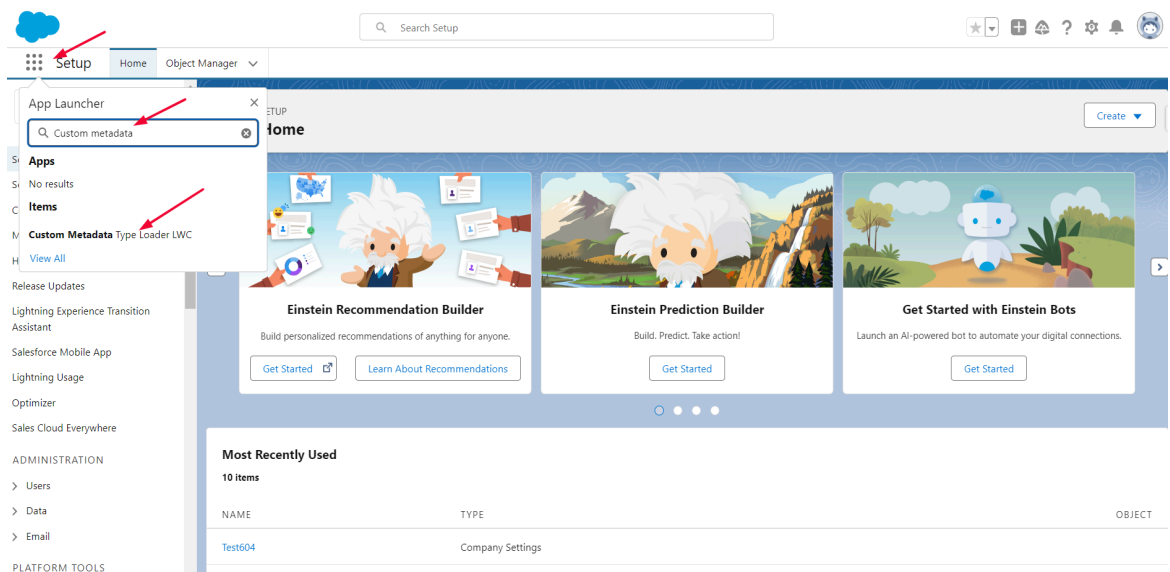


CUSTOM METADATA TYPE LOADER

Description:

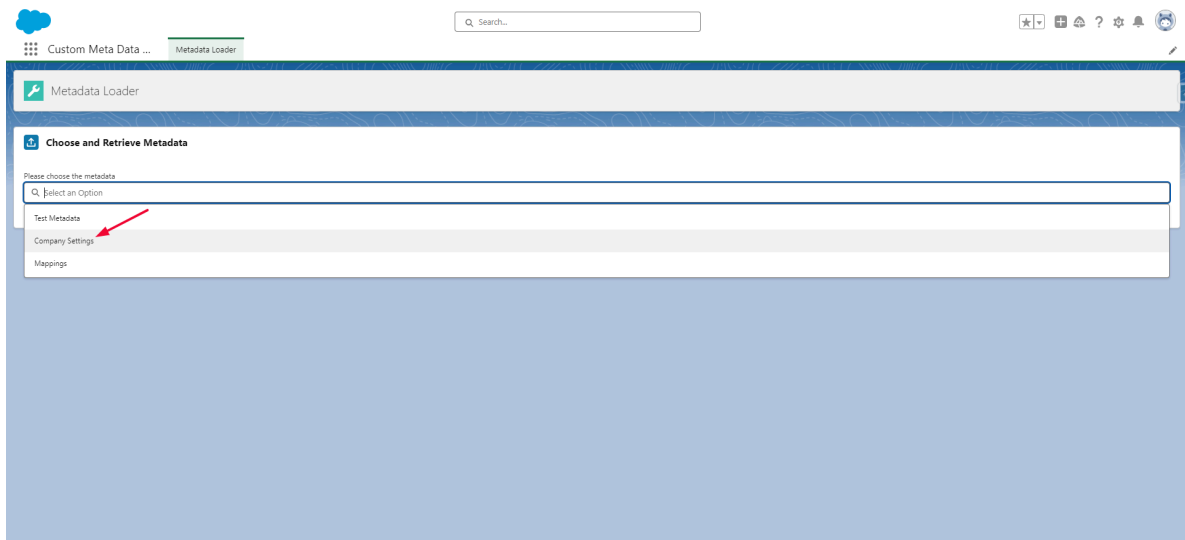
- ❑ **Custom Metadata Type Loader** is for Importing and Exporting a CSV file for inserting 1000 records at a time into a custom metadata type.
- ❑ After logging into Salesforce, navigate to the App Launcher, search for the **Custom Metadata Type Loader** app, and select it.



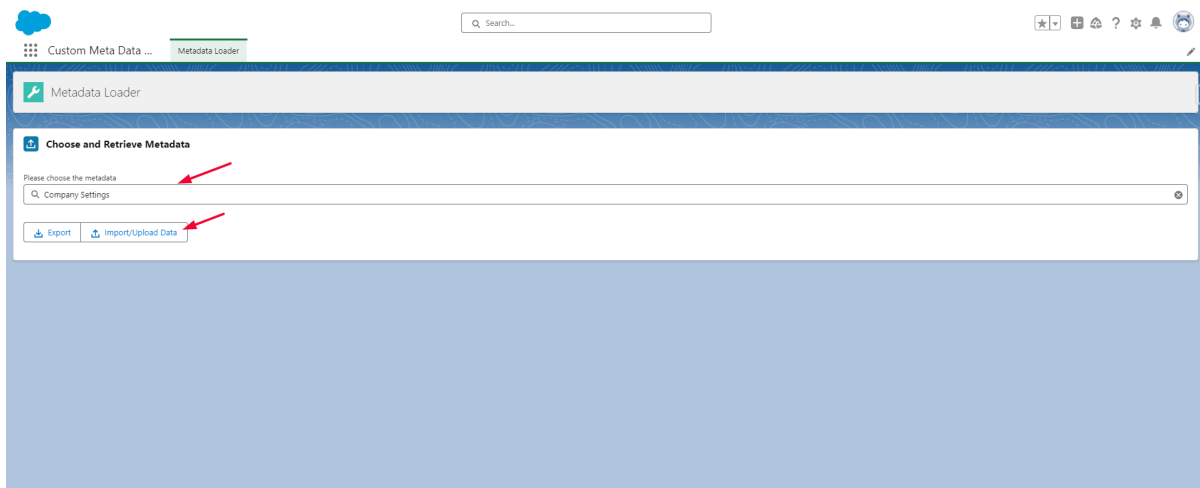
Import Functionality:

Insert Operation:

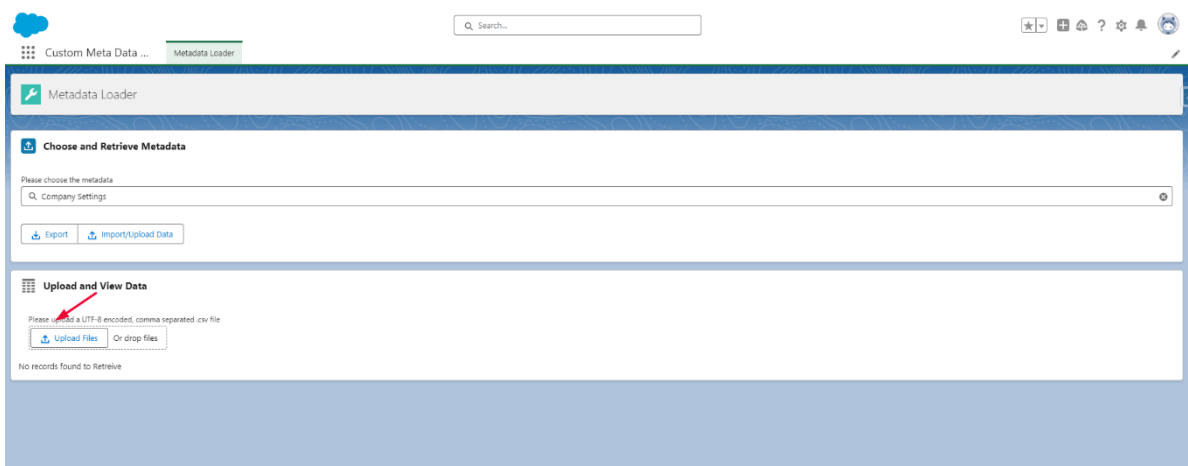
- ❑ To import data, choose the desired metadata type from the available options.



- After selecting the metadata type, you will see the **Import/Upload Data** option, allowing you to upload your file.



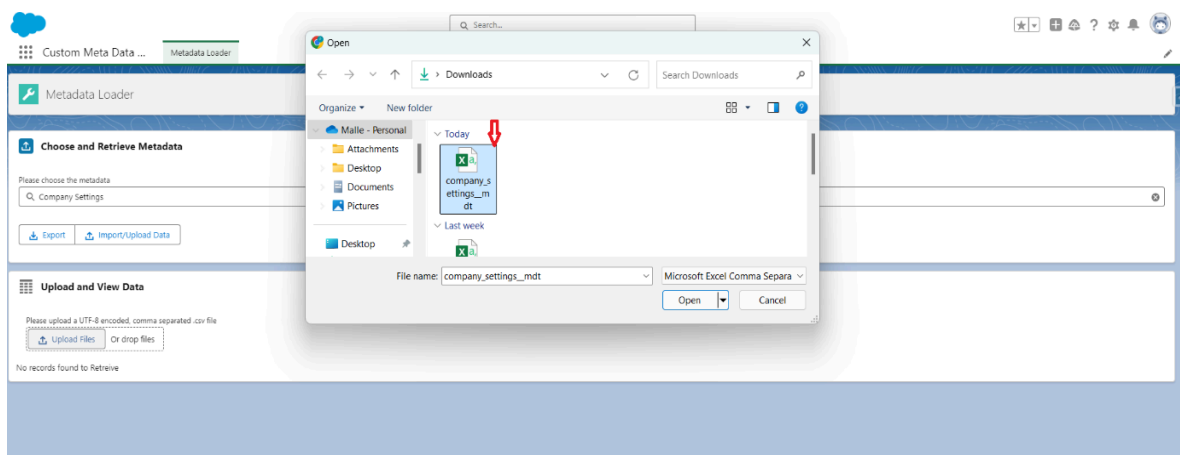
- After selecting the **Import Data** option, you will see the **Upload and View Data** section, where you can upload your CSV file.



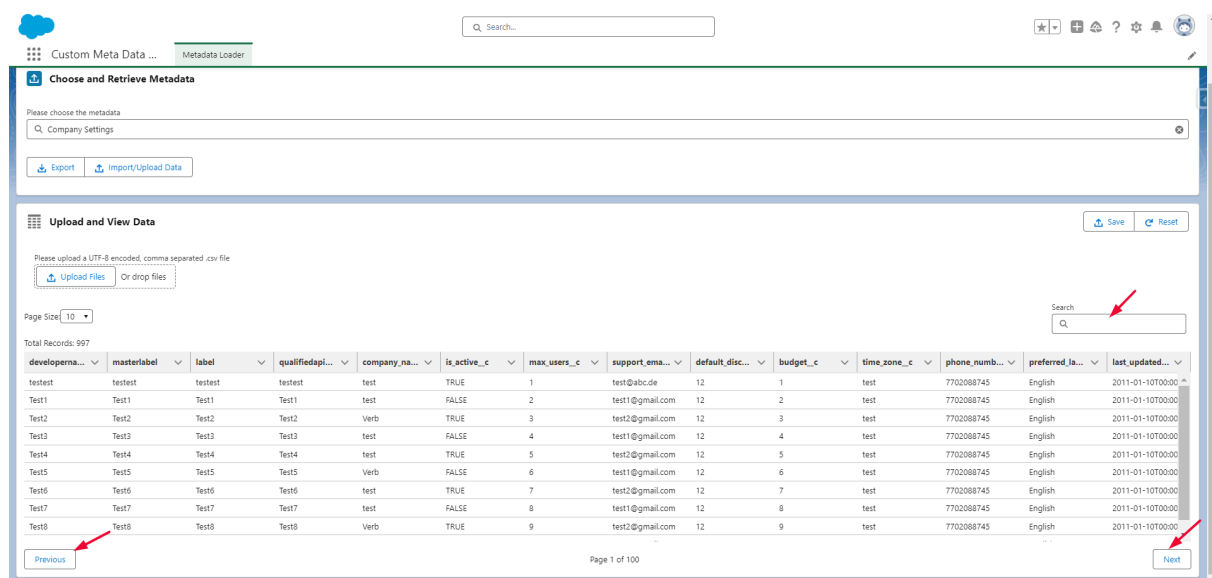
- ❗ Make sure the file is in CSV (UTF-8) format before uploading it.

Note: The field header should be the field API Name.

- Every time when you Export the data from Metadata Loader it needs to be changed to Standard Format and then you need to import it again to the Another Developer environment or Partial and Developer Sandboxes.
- After saving all the data in the CSV file, click on the **Upload Files** option and select the CSV file you wish to import.



- After selecting the CSV file, the records will be displayed, allowing you to search for specific entries to verify that the data has been included. You can also navigate through the data using the **Previous** and **Next** buttons. Pagination is provided to help check the count of records.



- Now, click on the **Save** button to proceed with inserting the records into your selected metadata object.

Choose and Retrieve Metadata

Please choose the metadata

Company Settings

Export Import/Upload Data

Upload and View Data

Please upload a UTF-8 encoded, comma separated .csv file

Upload Files Or drop files

Page Size: 10

Total Records: 997

developer...	masterlabel	label	qualifiedapi...	company_na...	is_active_c	max_users_c	support_ema...	default_disc...	budget_c	time_zone_c	phone_num...	preferred_la...	last_updated...
testtest	testtest	testtest	testtest	test	TRUE	1	test@abc.de	12	1	test	7702088745	English	2011-01-10T00:00
Test1	Test1	Test1	Test1	test	FALSE	2	test1@gmail.com	12	2	test	7702088745	English	2011-01-10T00:00
Test2	Test2	Test2	Test2	Verb	TRUE	3	test2@gmail.com	12	3	test	7702088745	English	2011-01-10T00:00
Test3	Test3	Test3	Test3	test	FALSE	4	test1@gmail.com	12	4	test	7702088745	English	2011-01-10T00:00
Test4	Test4	Test4	Test4	test	TRUE	5	test2@gmail.com	12	5	test	7702088745	English	2011-01-10T00:00
Test5	Test5	Test5	Test5	Verb	FALSE	6	test1@gmail.com	12	6	test	7702088745	English	2011-01-10T00:00
Test6	Test6	Test6	Test6	test	TRUE	7	test2@gmail.com	12	7	test	7702088745	English	2011-01-10T00:00
Test7	Test7	Test7	Test7	test	FALSE	8	test1@gmail.com	12	8	test	7702088745	English	2011-01-10T00:00
Test8	Test8	Test8	Test8	Verb	TRUE	9	test2@gmail.com	12	9	test	7702088745	English	2011-01-10T00:00

Previous Page 1 of 100 Next

- After clicking **Save**, The process will initiate to create the records in the selected metadata object. You will receive a success message, and an email notification will be sent to the logged-in user.

Metadata Loader

Success
Update enqueued(707a00000g9XZC) Please check your Email you will also get status update below

Choose and Retrieve Metadata

Please choose the metadata

Company Settings

Export Import/Upload Data

Upload and View Data

Please upload a UTF-8 encoded, comma separated .csv file

Upload Files Or drop files

Page Size: 10

Total Records: 997

developer...	masterlabel	label	qualifiedapi...	company_na...	is_active_c	max_users_c	support_ema...	default_disc...	budget_c	time_zone_c	phone_num...	preferred_la...	last_updated...
testtest	testtest	testtest	testtest	test	TRUE	1	test@abc.de	12	1	test	7702088745	English	2011-01-10T00:00
Test1	Test1	Test1	Test1	test	FALSE	2	test1@gmail.com	12	2	test	7702088745	English	2011-01-10T00:00
Test2	Test2	Test2	Test2	Verb	TRUE	3	test2@gmail.com	12	3	test	7702088745	English	2011-01-10T00:00
Test3	Test3	Test3	Test3	test	FALSE	4	test1@gmail.com	12	4	test	7702088745	English	2011-01-10T00:00
Test4	Test4	Test4	Test4	test	TRUE	5	test2@gmail.com	12	5	test	7702088745	English	2011-01-10T00:00
Test5	Test5	Test5	Test5	Verb	FALSE	6	test1@gmail.com	12	6	test	7702088745	English	2011-01-10T00:00
Test6	Test6	Test6	Test6	test	TRUE	7	test2@gmail.com	12	7	test	7702088745	English	2011-01-10T00:00
Test7	Test7	Test7	Test7	test	FALSE	8	test1@gmail.com	12	8	test	7702088745	English	2011-01-10T00:00

- After receiving the success message, the system will begin processing your records. You can view the status of the deployed records using the metadata type in the email you received by clicking the '**View Deployment Details**' button.

We have an update regarding your recent metadata upload.

Deployment Status: Succeeded

[View Deployment Details](#)

Thank you for using our metadata deployment service. If you have any questions, please don't hesitate to contact the support team.

Best regards,
Your Admin Team

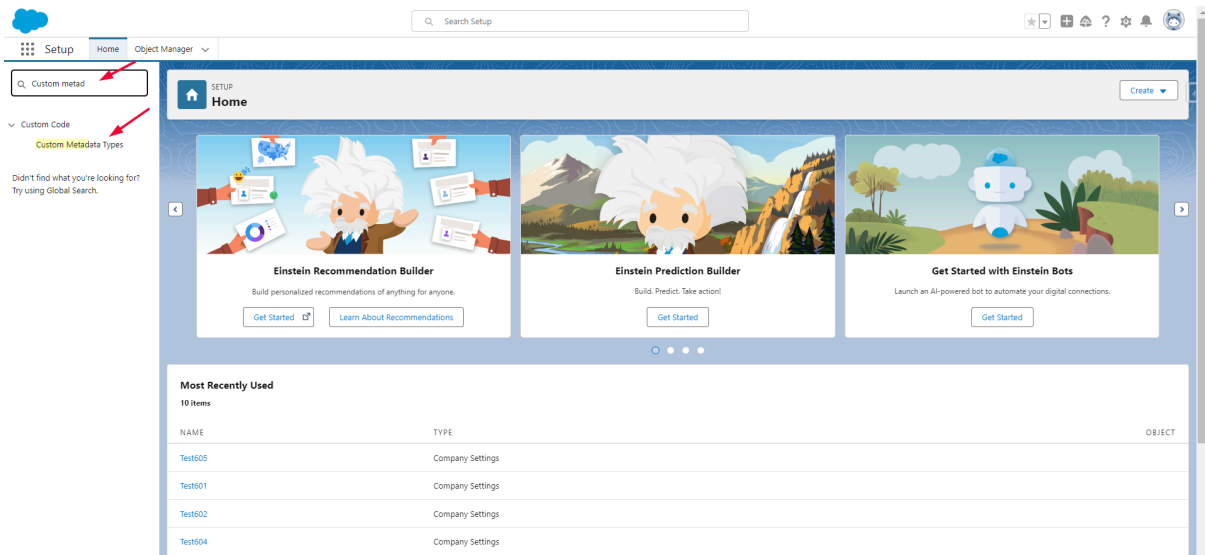
Successful Components (1 records created)

Component Name

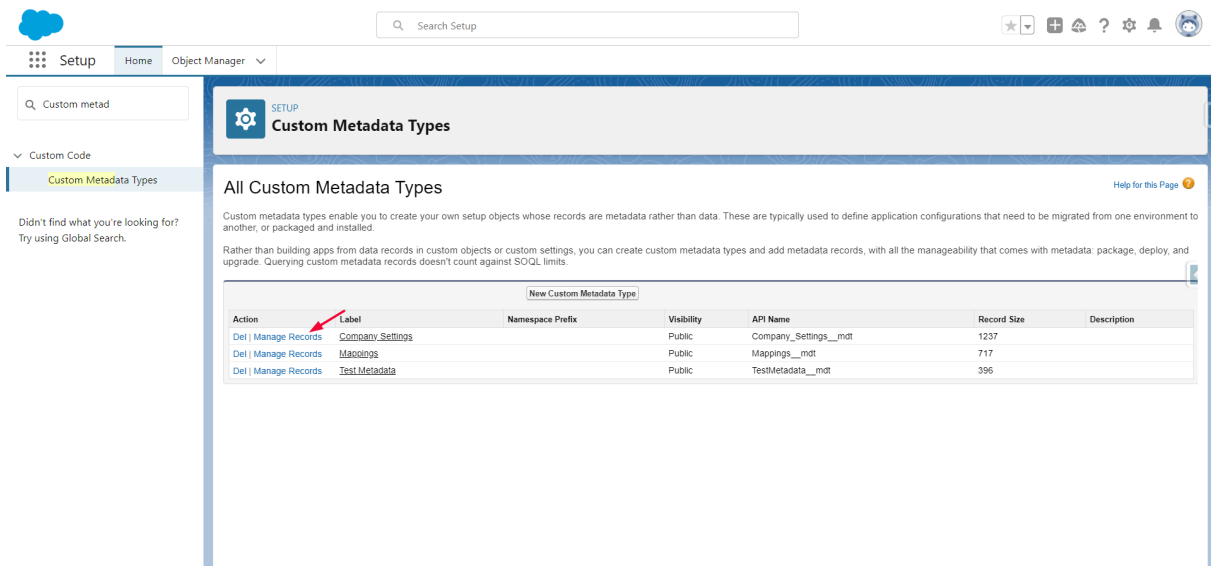
Team

The screenshot shows the Salesforce user interface. At the top, there's a navigation bar with the Salesforce logo, a user profile for 'Surya K', and links for 'Setup', 'Help', and 'Force.com'. Below this is a 'Home' section with a search bar and a 'Lightning Experience Transition Assistant' button. The main content area is titled 'Deployment Details' and includes a 'Back to Deployment Status' link. The deployment status is 'Deployment Succeeded'. It lists details: Name: 0AfaI00002OgGG1, Type: API, Deployed By: Surya K, Start Time: 10/3/2024, 6:39 AM, and End Time: 10/3/2024, 6:39 AM. To the right, there are two progress indicators: '1 Deploy Components' with a green circle showing '996/996' and '2 Run Apex Tests' with a grey circle showing 'Not Required'. A red arrow points to the 'Deploy Components' indicator.

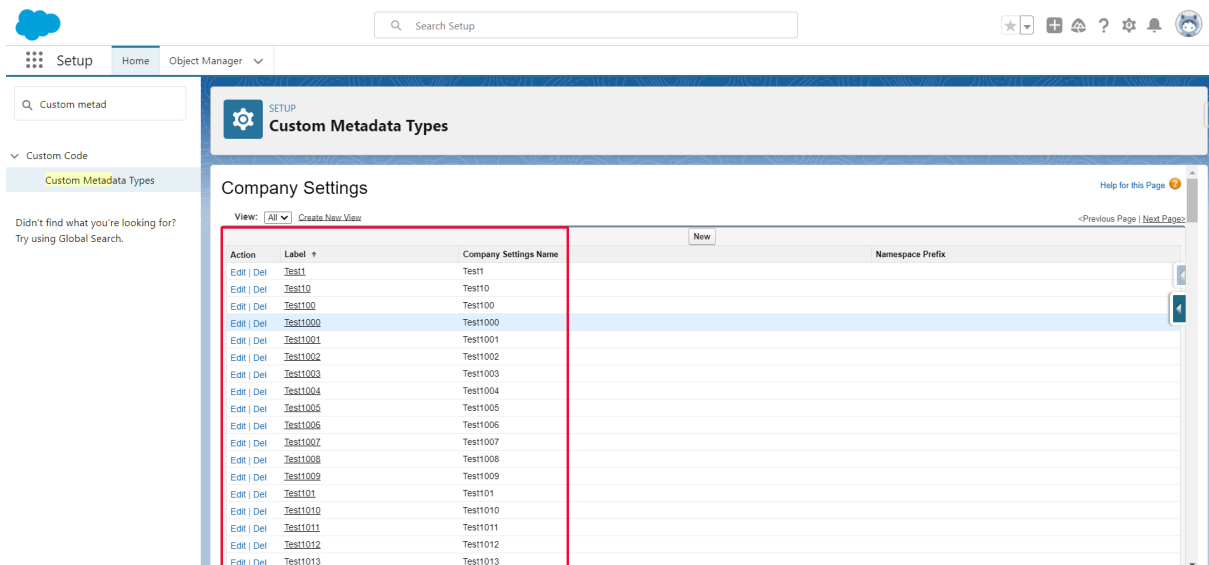
- Once the deployment is completed. Go to setup and Search for Custom Metadata Types and select it.



- Click on Manage records left to metadata which you have imported the records.



- Now you can see the Imported metadata here.



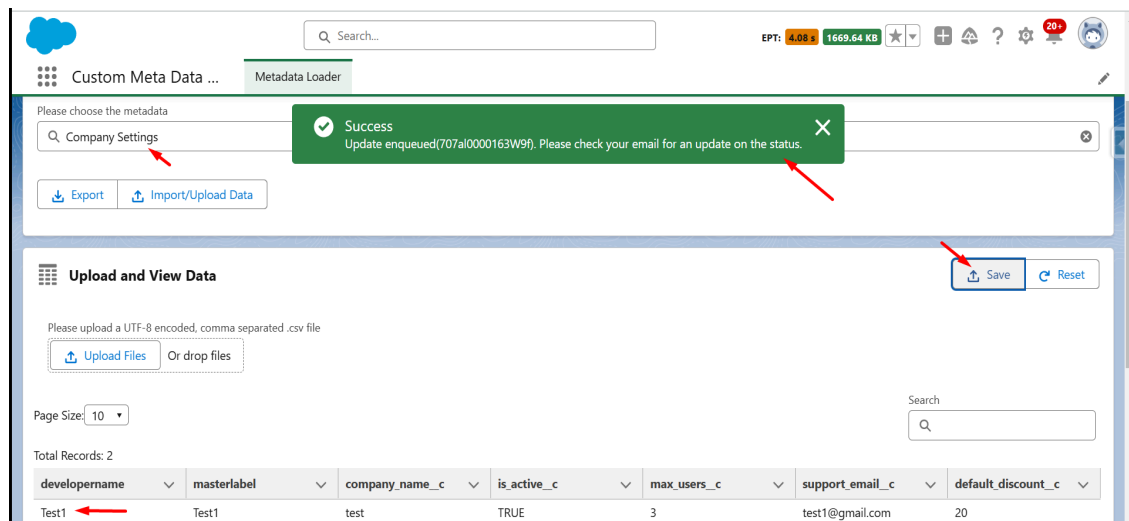
Update Operation:

- We can update the record in already existing records in a custom metadata type.
- Based on the DeveloperName the tool will understand if the record already exists or not. If it is already present the record will get updated.
- Follow the same steps you use to insert the data. Choose your Custom Metadata Type and upload your file.
- The file looks like below.

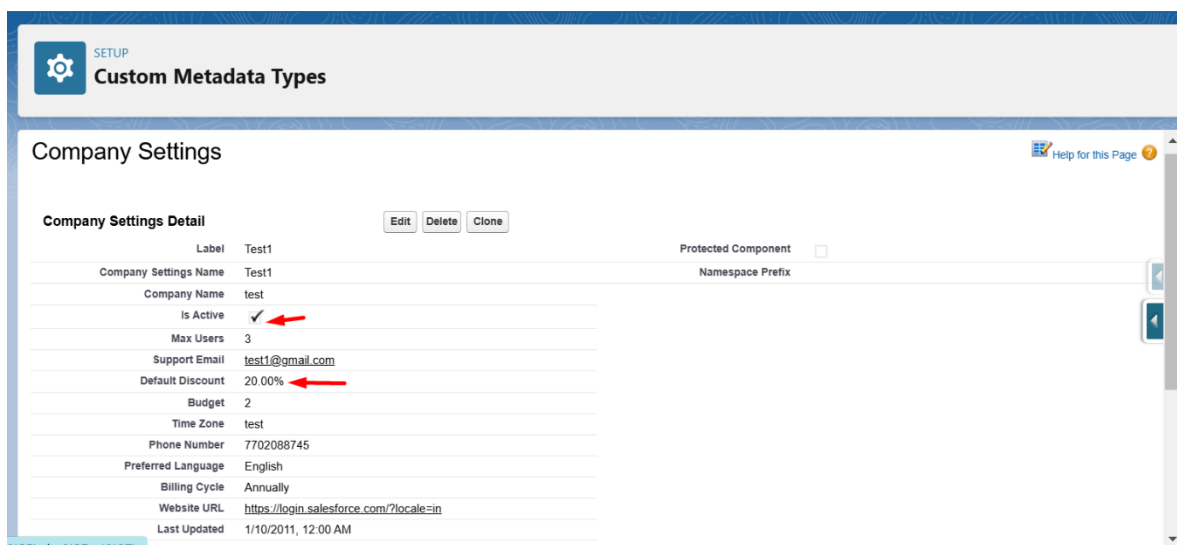
The screenshot shows an Excel spreadsheet with the following data:

	A	B	C	D	E	F	G
1	developername	masterlabel	company_name_c	is_active_c	max_users_c	support_email_c	default_discount_c
2	Test1	Test1	test	TRUE	2	test1@gmail.com	12
3							
4							
5							

- Now you can upload the updated CSV file to your custom metadata type.
- After clicking Save, The process will initiate to update the records in the selected metadata object. You will receive a success message, and an email notification will be sent to the logged-in user.

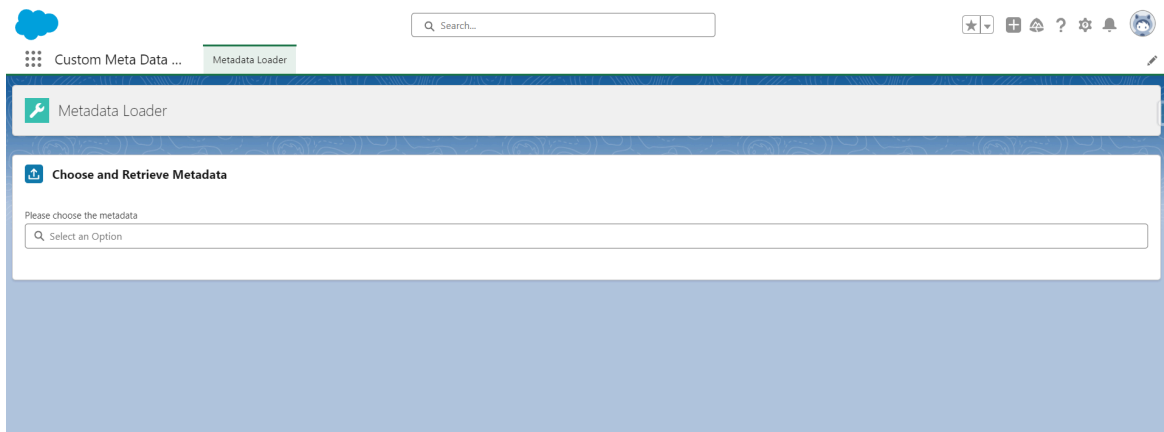


- You can find the updated fields for the respective custom metadata type record.

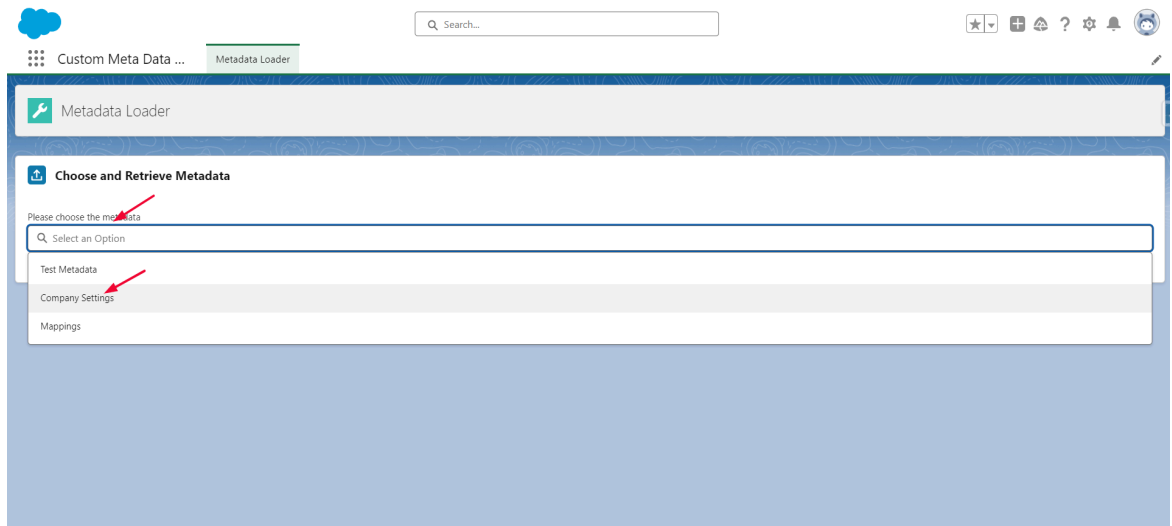


Export Functionality:

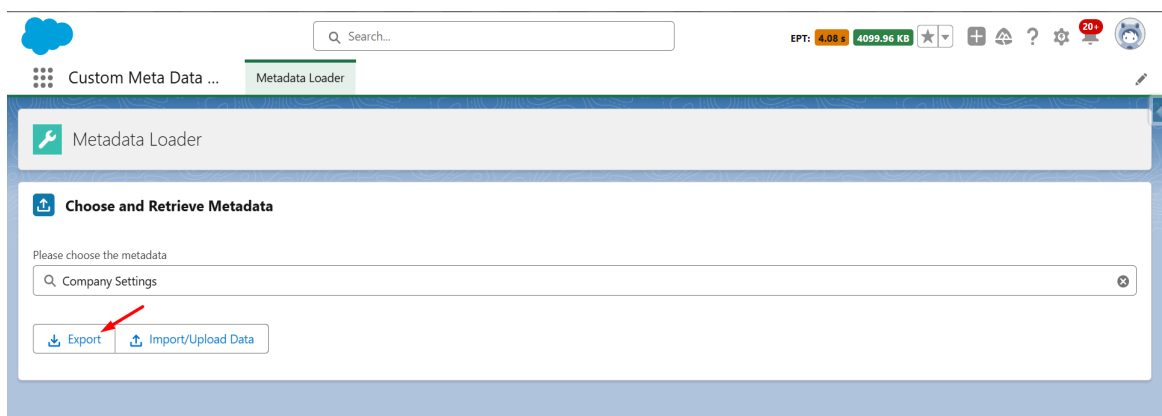
- Once the **Custom Metadata Type Loader** app is selected, you will be redirected to the app page, which will resemble the image shown below.



- In **Please choose the metadata** option, all custom metadata objects related to the current environment will be visible in a dropdown. Click on the dropdown and select the custom metadata object where records need to be inserted.



- After selecting the custom metadata type, you will have the option to **Export** from a file.



- Click on **Export**, and the data will be displayed below, including all fields. You will see options to download the data in both **Excel** and **CSV** formats. Additionally, a search bar is available to search records and verify your data. The **Reset** button can be used to reset the component and select a new Custom Metadata Type for **Import/Export**.

The screenshot shows the 'Metadata Loader' interface. At the top, there's a search bar and a 'Custom Meta Data ...' tab. Below this is the 'Choose and Retrieve Metadata' section with a search bar and 'Export' and 'Import/Upload Data' buttons. The main section is 'View Data/Download', which includes a 'Page Size' dropdown set to 10 and a 'Total Records: 2208' indicator. A table of records is displayed with columns like 'id', 'devel...', 'mas...', 'langu...', 'label', 'qualifi...', 'syste...', 'compa...', 'is...', 'm...', 'su...', 'd...', 'b...', 'ti...', 'p...', 'pr...', 'billing_cycle_c', 'website...', 'last_upd...', 'is_p...', 'd...', and 'allowed...'. At the bottom of the table are 'Previous' and 'Next' buttons. On the right side of the 'View Data/Download' section, there are buttons for 'Download (Excel)', 'Download (CSV)', and 'Reset', along with a search bar. Red arrows point to these buttons and the search bar.

- Click on **Download (.CSV)**, and the file will be downloaded to your system.

The screenshot shows the 'Metadata Loader' interface after a successful CSV download. A green success message 'Success CSV downloaded successfully' is displayed at the top. The 'View Data/Download' section is visible, showing a table of records with columns like 'id', 'devel...', 'mas...', 'langu...', 'label', 'qualifi...', 'syste...', 'compa...', 'is...', 'm...', 'su...', 'd...', 'b...', 'ti...', 'p...', 'pr...', 'billing_cycle_c', 'website...', 'last_upd...', 'is_p...', 'd...', and 'allowed...'. At the bottom of the table are 'Previous' and 'Next' buttons. On the right side of the 'View Data/Download' section, there are buttons for 'Download (Excel)', 'Download (CSV)', and 'Reset', along with a search bar. Red arrows point to the success message and the 'Download (CSV)' button.

Known Limitation:

- Only 1,000 records can be imported at a time,
- The CSV file should not contain more than 15 columns (fields) for import.
- The Date format should be standard Metadata Type Date & Date Time data in a CSV File for Metadata Loader (2011-01-10T00:00:00Z)