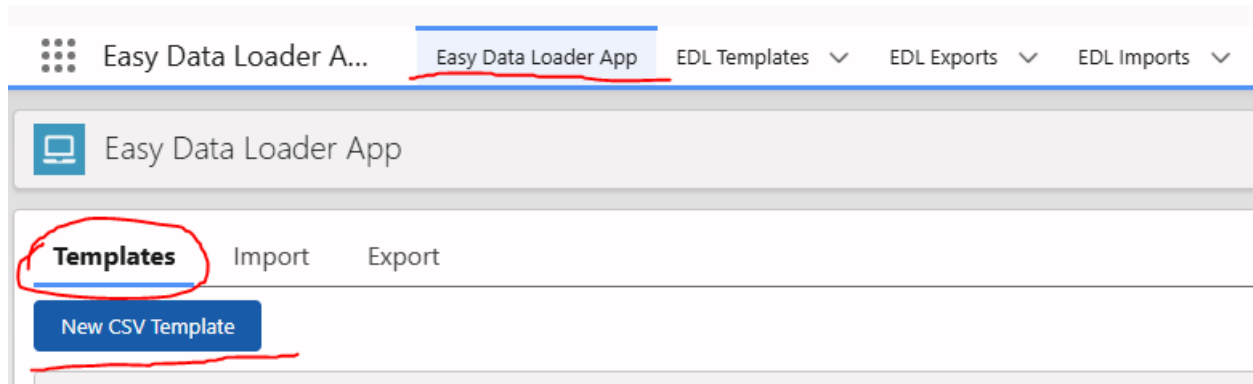


Easy Data Loader App - User Guide

Creating a template

From the Easy Data Loader App -> Templates sub-tab -> Click New CSV Template

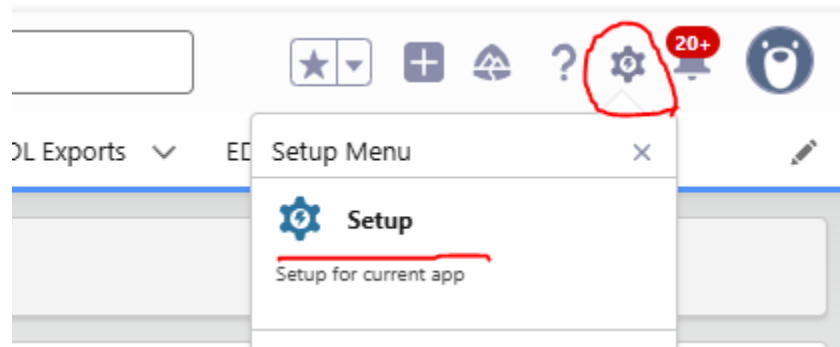


EDL Template Fields

A screenshot of the 'EDL Template' form. The form has a header with a trophy icon and the text 'EDL Template'. Below the header, there are several fields: a text field for '* Import/Export Template Name', a dropdown for '* Template Type' (with 'Import' selected), a dropdown for '* Import Type' (with '--None--' selected), a dropdown for '* Object' (with '--None--' selected), and a text field for 'Batch Size' (with '200' entered). At the bottom left, there is an 'Active' checkbox (which is unchecked) and an information icon. At the bottom right, there are 'Cancel' and 'Save' buttons.

- *Name* (Text Field)
- *Template Type* (Picklist)
 - Import
 - Export
- *Import Type* (Picklist) - Only visible for the "Import" template type
 - Import / Upsert (to insert new records and update existing ones)
 - Delete
- *Object* (Picklist)

- This comes loaded with many commonly used Default Objects.
- If you require any custom objects or default objects that are not included, an admin can add options to the picklist (“EDL Template” object).
 - Admins can navigate there via the gear icon (top-right) -> Setup



From the Object Manager tab, you can search for and click on the EDL Template object

Setup Home Object Manager

SETUP Object Manager 5 Items, Sorted by Label

Search: edl

LABEL	API NAME	TYPE	DESCRIPTION
EDL Export	BullitS_CSV_Export__c	Custom Object	
EDL Import	BullitS_CSV_Import__c	Custom Object	
EDL Import Line	BullitS_CSV_Import_Line__c	Custom Object	
EDL Import/Export Column	BullitS_CSV_Import_Column__c	Custom Object	
<u>EDL Template</u>	BullitS_CSV_Import_Template__c	Custom Object	

From the EDL Template Object, under the “Fields & Relationships” sub-tab (left), you can click into the “Object” field.

Setup

Home

Object Manager

SETUP > OBJECT MANAGER

EDL Template

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Object Access

Triggers

Fields & Relationships

Quick Find

New

Deleted Fields

10 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE
Active	Active__c	Checkbox
Batch Size	Chunk_Size__c	Number(18, 0)
Created By	CreatedById	Lookup(User)
Currency	CurrencyIsoCode	Picklist
Import Type	Type__c	Picklist
Import/Export Template Name	Name	Text(80)
Last Modified By	LastModifiedById	Lookup(User)
<u>Object</u>	Object__c	Picklist
Owner	OwnerId	Lookup(User)
Template Type	Template_Type__c	Picklist

After clicking into the Object field, you can scroll down to see the picklist values. From here you can click “New” to add a new value. You can also delete / deactivate existing options if you wish

Setup Home Object Manager

SETUP > OBJECT MANAGER

EDL Template

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Object Access
Triggers
Flow Triggers
Validation Rules

Controlling Field [\[New\]](#)

Picklist Values Used

Active and inactive picklist values 10 (1,000 max)

Field Dependencies [New](#)

No dependencies defined.

Validation Rules [New](#)

No validation rules defined.

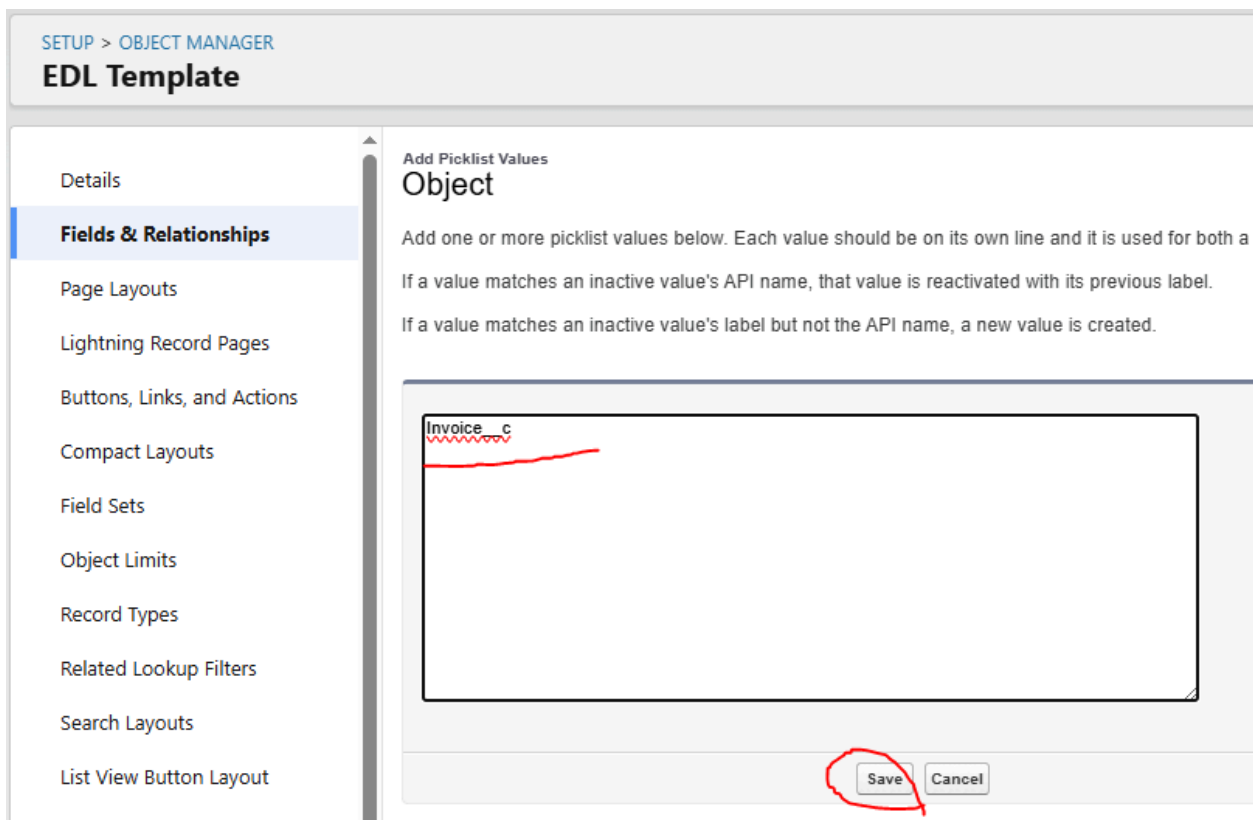
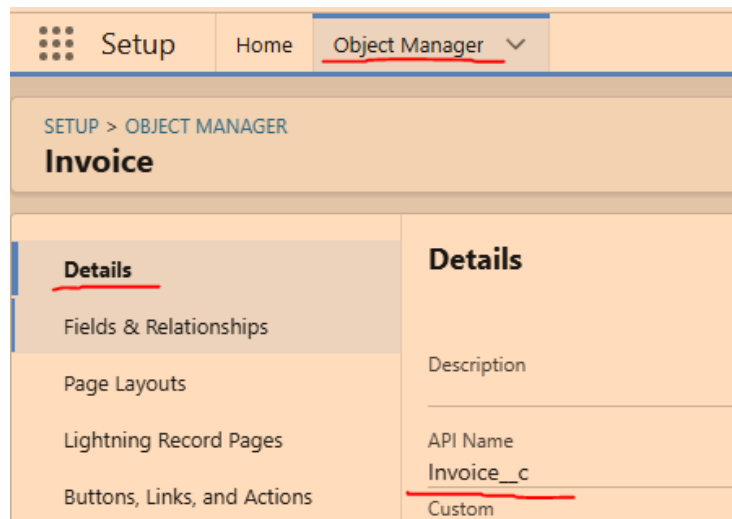
Values

[New](#) [Reorder](#) [Replace](#) [Printable View](#) [Chart Colors](#)

[Delete Selected](#) [Deactivate Selected](#) [Replace Selected](#)

☐ Action	Values	API Name	Default
☐ Edit Del Deactivate	Account	Account	☐
☐ Edit Del Deactivate	Campaign	Campaign	☐
☐ Edit Del Deactivate	Case	Case	☐
☐ Edit Del Deactivate	Contact	Contact	☐
☐ Edit Del Deactivate	Lead	Lead	☐
☐ Edit Del Deactivate	Opportunity	Opportunity	☐
☐ Edit Del Deactivate	Product2	Product2	☐
☐ Edit Del Deactivate	Quote	Quote	☐
☐ Edit Del Deactivate	Document_Field_Line_Column__c	Document_Field_Line_Column__c	☐
☐ Edit Del Deactivate	PricebookEntry	PricebookEntry	☐

- When entering a new object into the list, you would use the object API name as the picklist value (which you can find on the object details page). If we want to add our custom “Invoice” object, we navigate to the details tab of the Invoice object and copy the API name, which we can paste into the next screen



- **Batch Size**
 - Controls the number of records which get created/updated/deleted in a single batch (imports can have multiple batches).
 - It is recommended to keep the default value of 200
- **Active (checkbox)** - This needs to be set to checked / true in order to use the template

For Import -> Delete templates: You cannot select any fields. The object Id is added to the template automatically.

This screenshot shows the configuration for a 'Lead Delete' template. The form includes the following fields and options:

- * Import/Export Template Name:** A text input field containing 'Lead Delete'.
- * Template Type:** A dropdown menu set to 'Import'.
- * Import Type:** A dropdown menu set to 'Delete'.
- * Object:** A dropdown menu set to 'Lead'.
- Batch Size:** A text input field containing '200'.
- Active:** A checkbox that is checked.
- IMPORT COLUMNS:** A blue header bar.
- * Field API Name:** A text input field containing 'Id'.
- * Sort Order:** A text input field containing '10'.
- Required:** A checkbox that is checked.
- Upsert/Delete Key:** A checkbox that is checked.
- Buttons:** 'Cancel' and 'Save' buttons at the bottom right.

For Import/Upsert Templates:

After selecting the object, you will then be able to select the fields that will be included in the template. There will be an “add column” button to add fields to the template

This screenshot shows the configuration for an 'EDL Template'. The form includes the following fields and options:

- * Import/Export Template Name:** A text input field containing 'Lead Import'.
- * Template Type:** A dropdown menu set to 'Import'.
- * Object:** A dropdown menu set to 'Lead'.
- Active:** A checkbox that is checked.
- Add Column:** A button located below the 'Active' checkbox, highlighted with a red underline.


EDL Template

* Import/Export Template Name

Lead Import

* Template Type

Import

* Import Type

Import/Upsert

* Object

Lead

Batch Size

200

Active
☒

IMPORT COLUMNS

* Field API Name

Q FirstName

* Sort Order

10

Required
☐

Upsert/Delete Key
☐

Remove

* Field API Name

Q LastName

* Sort Order

20

Required
☐

Upsert/Delete Key
☐

Remove

* Field API Name

Q Email

* Sort Order

30

Required
☐

Upsert/Delete Key
☐

Remove

Email (ConvertedContact.Email)

Email (CreatedBy.Email)

Email (Email)

Email (LastModifiedBy.Email)

Cancel Save

- **Field API Name** is where you type/select the actual field.
 - ***Please note this field can be slow to show results due to searching many relationship objects. You may have to wait a moment after typing**
- **Sort Order** is the order it will show up in the excel sheet (lowest -> highest).
 - This should auto-populate, but you can adjust these values to re-order your template after selecting fields if you wish
- **Required** (Checkbox) - check this box if you'd like to mandate that this field be given a value in all imports
- **Upsert/Delete Key** - This is used to match on existing records to update them (instead of creating new records)
 - Ex: Match existing records on the "Email" field
 - When importing, if there is a lead with the same email, it will update the existing lead. Otherwise it will create a new lead.

****Take care when adding fields, as lots of additional fields from objects related to the template object will be selectable. In most cases, you would only select fields from the selected template object (Lead in this case). Any field with a "." is a field from a relationship field. We want the (Email) field as opposed to the (CreatedBy.Email) or other (Example.Email) ****

For Export Templates:

- **Field API Name** - is where you type/select the actual field.
 - ****Please note this field can be slow to show results due to searching many relationship objects. You may have to wait a moment after typing***
- **Sort Order** - is the order it will show up in the excel sheet (lowest -> highest).
 - This should auto-populate, but you can adjust these values to re-order your template after selecting fields if you wish
- **Use as Export Filter**
 - This allows you to filter and sort your exports by the data contained in this field

*** Import/Export Template Name**
Lead Export

*** Template Type**
Export

*** Object**
Lead

Batch Size
200

Active
☒

EXPORT COLUMNS			
* Field API Name 🔍 Id	* Sort Order 10	Use as Export Filter ☐	Remove
* Field API Name 🔍 Email (Email)	* Sort Order 20	Use as Export Filter ☒	Remove
* Field API Name 🔍 Status (Status)	* Sort Order 30	Use as Export Filter ☒	Remove

Add Column

Cancel **Save**

Exporting

From the Easy Data Loader App -> Export Tab, you can select your export template and optional criteria. Then click the Export button at the top right of the page.

Easy Data Loader A...

Easy Data Loader App

EDL Templates

* More

Easy Data Loader App

Templates

Import

Export

 **CSV Export**

Cancel

Export

 **Important Reminder**

1. CSV File will be automatically downloaded.

2. Date format must be **yyyy-MM-dd**.

3. Datetime format must be **yyyy-MM-dd HH:mm:ss**.

4. Time format must be **HH:mm:ss**.

5. Do not add (,) on numeric values.

* CSV Template

Export Lead

Export Filter

* Condition

Select an Option

All Conditions Are Met

Any Condition is Met

Custom Logic Is Met

No Criteria

Add Filter

Export Filters

Condition

To export all records of your chosen template object, you can select “no criteria” from the “condition” picklist

The options for “All Conditions”, “Any Condition”, and “Custom Logic” behave the same way as Salesforce reports and List View filters.

- “All” means only records meeting all criteria will be exported, vs “Any” meaning records meeting 1 or more of the conditions will be exported vs custom logic where you can use more complicated logic

The screenshot shows the 'Export Filter' configuration interface. It includes a 'Condition' dropdown set to 'All Conditions Are Met', a 'Limit' text box, and an 'Order By' dropdown set to 'Email ASC'. Below these is a table for defining filter rules:

#	* Field	* Comparison Operator	Value	
1	Email	Contains	example.com	Remove
2	Status	Equals	New	Remove

At the bottom left is an 'Add Filter' button. A dropdown menu is open for the 'Comparison Operator' of the second rule, showing options: 'Equals' (selected with a checkmark), 'Not equal to', and 'Less than'.

Limit

You can enter a number to limit the number of records that get exported. This should normally be left blank

Order By

You can optionally order the export spreadsheet by any of the fields marked as “Use as Export Filter” in your template. You can order ASC (ascending) or DESC (descending).

Custom Logic

This field only shows up when selecting custom logic from the condition field. You can use the filter line number, AND, OR, and parenthesis () to construct your custom logic

- Example Logic for an export with 3 separate filters

- 1 AND (2 OR 3)
- This means exported records would have to meet filter #1 and at least one of #2 or #3

To create a filter, click the add filter button, then you can select a **Field**, **Comparison operator**, and a **Value**

- Available fields will be anything in the template marked as “Use as Export Filter”
- Comparison Operators Options
 - Equals
 - Not equal to
 - Less than
 - Less or equal
 - Greater than
 - Greater or equal
 - Contains
 - Starts with
 - IN
 - NOT IN
 - INCLUDES (Multi-picklist)
 - EXCLUDES (Multi-picklist)
- Value is simply a text field where you type in your search value

Comparison Operators

- Most common / simple operators to use
 - **Equals**
 - Just type in the exact value you want the records to have
 - **Not Equal To**
 - Type in the exact value you do not want records to have
 - **Contains**
 - Find records that include your typed value anywhere within the text
 - Using “[example.com](#)” on the email field will return all records with an [example.com](#) email address
 - **Starts with**
 - Like the “Contains” operator, but only looks at the beginning of the record
- For number and date / datetime fields
 - Less than
 - Less or equal
 - Greater than
 - Greater or equal

**** Date format: yyyy-MM-dd**

Datetime format: yyyy-MM-dd HH:mm:ss

Order By
CreateDate DESC ▼

#	* Field	* Comparison Operator	Value	
1	CreateDate ▼	Greater than ▼	2025-06-15 00:00:00	Remove

[Add Filter](#)

ADVANCED Comparison operators

When using the following operators (**INCLUDES**, **EXCLUDES**, **IN**, **NOT IN**), you can use a comma separated list of values. **Ex: Value1,Value2,etc..**

- **INCLUDES**
 - Only for multi-picklists
 - Will return records that have any of the specified values included
 - **Example:** You want to export all records that have “Product1” or “Product2” as a value of the Products of Interest multi-picklist field
 - Products of Interest Field -> INCLUDES -> **Product1,Product2**

Export Filter

* Condition
All Conditions Are Met ▼

Limit

Order By
Select an Option ▼

#	* Field	* Comparison Operator	Value	
1	Products_of_Interest_c ▼	INCLUDES (Multi-pick... ▼	Product1,Product2	Remove

[Add Filter](#)

- **Example 2:** If you want to export records that contain BOTH “Product1” AND “Product2” values, you would use separate filters for each value, like so:

#	* Field	* Comparison Operator	Value	
1	Products_of_Interest_c ▼	INCLUDES (Multi-picklist) ▼	Product1	Remove
2	Products_of_Interest_c ▼	INCLUDES (Multi-picklist) ▼	Product2	Remove

[Add Filter](#)

- **EXCLUDES**
 - Only for multi-picklists
 - Will only return records that do not have ANY of the specified values
 - **Example:** You want to export all records that do not have either “Product1” or “Product2” listed as a value in the Products of Interest Multi-picklist field
 - Products of Interest Field -> EXCLUDES -> **Product1,Product2**
- **IN**
 - This is essentially the same as the “Equals” operator, but for multiple values. It is useful if you want to specify many different values, so that you don’t have to create a separate filter for each.
 - Example: You want to export all Leads with a Status of “New” or “Enrich”
 - Status Field -> IN -> **New,Enrich**
- **NOT IN**
 - This is essentially the same as the “Not Equal To” operator, but for multiple values. It is useful if you want to specify many different values, so that you don’t have to create a separate filter for each.
 - Example: You want to export all Leads that DO NOT have a Status of “New” or “Enrich”
 - Status Field -> NOT IN -> **New,Enrich**

Downloading Your Export File

After clicking the “Export” button at the top right of the page, a **green success message** will appear near the top of the page. If you instead see a **red error message**, there was an issue with the export and you will need to retry the export or contact your System Admin for assistance.

You should also see the “All Exports” List view at the bottom of the page (you can also access this from the EDL Exports tab). We recommend sorting this by most recent Created Date (if it isn’t already sorted this way). You may also have to click the refresh button on the right if you don’t see your export right away.

✓ **Success**
 Batch Export has been successfully started: EX-0000000103

⋮ Easy Data Loader A... | Easy Data Loader App | EDL Templates | EDL Exports | EDL Imports | Leads

Templates | Import | **Export**

📄
CSV Export

ℹ️
Important Reminder

1. CSV File will be automatically downloaded.
2. Date format must be **yyyy-MM-dd**.
3. Datetime format must be **yyyy-MM-dd HH:mm:ss**.
4. Time format must be **HH:mm:ss**.
5. Do not add (,) on numeric values.

*
CSV Template

Select Template

📁

EDL Exports
All Exports

⚙️
↻

20+ items • Sorted by Created Date • Filtered by All edl exports • Updated 2 minutes ago

#	Export Nu... ▼	Import/E... ▼	Query ▼	Total # of Records ▼	Status ▼	Created Date ↓ ▼
1	EX-0000000100	Lead Export	SELECT Id, Email, Status, Cre...	1	Completed	8/5/2025 1:55 PM ▼
2	EX-0000000099	Lead Export	SFI FCT Id. Email. Status. Cre...	2	Completed	8/5/2025 1:54 PM ▼

- You can view an individual export by clicking the Export Number link in the first column of the view.
- From the EDL Export record you can see the Template used, the SOQL query, the number of records exported, and the status of the export

 EDL Export
EX-0000000103

Related

Details

Export Number	EX-0000000103	
Import/Export Template	Lead Export	
Query	SELECT Id, Email, Status, CreatedDate, Products_of_Interest_c FROM Lead	
Total # of Records	25	
Status	Completed	
Created By	 Alex Hicks , 8/5/2025 2:19 PM	

- From the “related” tab you can access and download the CSV export file.

 EDL Export
EX-0000000103

Related

Details

 **Files (1)**

 [Export_2025-08-05 18:19:10](#)
~~Aug 5, 2025 • 2KB • csv~~

Importing

In the Easy Data Loader App, from the “Import” tab, you can select either Insert/Update OR Delete, then select a CSV Template from the dropdown menu.

Once you’ve selected the template, a link appears to download it. You only have to do this once. This will give you an empty CSV spreadsheet with the appropriate column Headings per the template selected. When importing, your spreadsheet columns need to match the template columns

You can copy this sheet, add your data and then use the upload Files button to select your file. Alternatively, you can also drag and drop the file over the upload files button.

The screenshot shows the 'Easy Data Loader App' interface. At the top, there's a navigation bar with 'Easy Data Loader A...', 'Easy Data Loader App', 'EDL Templates', and '* More'. Below this, the 'Import' tab is selected. The main section is titled 'CSV Bulk Upload'. It contains an 'Important Reminder' box with 8 instructions. Below the reminder, there's a '* Type' section with 'Insert/Update' and 'Delete' buttons. The '* CSV Template' dropdown is set to 'Lead Import'. Below the dropdown, there's a link 'Download the template [here.](#)' which is circled in red. At the bottom, there's an 'Upload CSV' section with an 'Upload Files' button, also circled in red.

- After successfully uploading your file, you will see an orange banner and will be able to click the Import button in the top right.

Easy Data Loader A... Easy Data Loader App EDL Templates EDL Exports EDL Imports Leads

Easy Data Loader App

Templates **Import** Export

CSV Bulk Upload Cancel Import

Important Reminder

1. Do not change the header of the csv template.
2. Date format must be **yyyy-MM-dd**.
3. Datetime format must be **yyyy-MM-dd HH:mm:ss**.
4. Time format must be **HH:mm:ss**.
5. Do not add (,) on numeric values.
6. Upsert/Delete Key field is used as the unique identifier (key) for upserting or deleting records within the system. Should be an Id or External Id field.
7. For Delete templates, use the **Id** field as the value for Upsert/Delete Key.
8. If the template contains multiple upsert key field, it will use the latest key field for upserting records.

lead-import.csv has been uploaded. Click import to start the bulk creation of records. Click Cancel to upload another file.

EDL Imports **All Imports**

- After clicking import, you should receive a green success message and be able to view the import from the “All Imports” list view below. You may need to click refresh in order to see your latest import. You can also access the list view via the EDL Imports tab.

Easy Data Loader A... Success Batch Import has been successfully started: IM-0000000050 Imports Leads

Easy Data Loader App

Templates **Import** Export

CSV Bulk Upload

Important Reminder

1. Do not change the header of the csv template.
2. Date format must be **yyyy-MM-dd**.
3. Datetime format must be **yyyy-MM-dd HH:mm:ss**.
4. Time format must be **HH:mm:ss**.
5. Do not add (,) on numeric values.
6. Upsert/Delete Key field is used as the unique identifier (key) for upserting or deleting records within the system. Should be an Id or External Id field.
7. For Delete templates, use the **Id** field as the value for Upsert/Delete Key.
8. If the template contains multiple upsert key field, it will use the latest key field for upserting records.

*Type
Insert/Update Delete

*CSV Template
 Select Template

EDL Imports **All Imports**

20+ items • Sorted by Created Date • Filtered by All edl imports • Updated 28 minutes ago

Search this list...

Import Number	Type	Import/Export T...	Total # of ...	Complete...	Created Date	
1	IM-0000000049	Upsert	Lead Import	0	1	8/6/2025 10:54 AM

- After clicking into an import record, you can see some information such as the template used and the total number of records affected.
- There should also be some files attached at the bottom of the record.
 - There will be an “ImportFile” which should be the exact sheet you uploaded
 - Also an “ImportSuccess” file which will show the records that were successfully imported, along with their Salesforce ID.
 - If there are any errors, there will be an “ImportError” file which should provide a brief description of the error encountered for each record that was not successfully imported.


[Easy Data Loader A...](#)
[Easy Data Loader App](#)
[EDL Templates](#)
[EDL Exports](#)
[EDL Imports](#)


EDL Import
IM-0000000051

Import Number	IM-0000000051
Import/Export Template	Lead Import
Completed Batch Count	1
Expected Batch Count	1
Total # of Records	3
Type	Upsert
Created By	 Alex Hicks , 8/6/2025 11:28 AM


EDL Import Lines (1)

Import Format Number	Content Version Id
IML-0000000080	068G1000006fZBFIA2


Files (2)


[ImportSuccess_IML-0000000080_2025-08-06 15:28:34](#)
 Aug 6, 2025 • 457B • csv


[ImportFile_1.csv](#)
 Aug 6, 2025 • 364B • csv