DataArt

Smart Import Tool

User Guide

Contents

1. Overview

The Smart Import Tool allows you to import data from a broad range of file formats, including CSV, XLSX, XLS and other, into your Salesforce Org with ease and efficiency.

A typical flow includes the following steps:

1. Select the operation - insert new records or update existing ones,

2. Select the object for import,

3. Upload a file with your data,

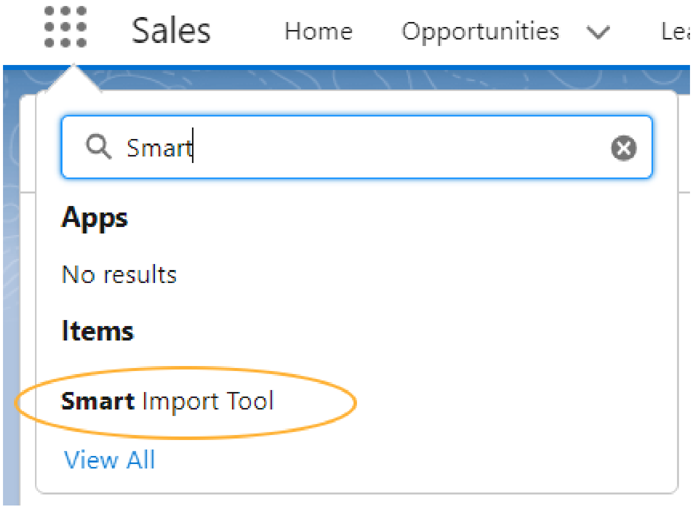
4. Validate and correct the data in the online editor, then import it and view results.

The first few steps only require a click, but the last step doesn't look as easy as the previous two, does it? This is true! This is the place where the magic happens.

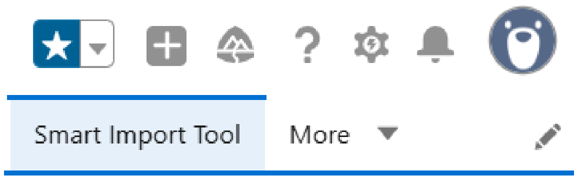
The Smart Import Tool is designed to simplify and streamline the process of importing dirty data that may contain typos, extra spaces, and names of related records instead of their ID. Unlike other import tools that work in the background and require you to prepare a carefully verified CSV file, the Smart Import Tool lets you see and fix the errors in your data before importing it. And the best part is, the import results appear on the same screen, so you can make corrections and try again without interruption. Forget about having to download CSVs with import errors, correct them in a spreadsheet editor, and start the import process all over again. With the Smart Import Tool, you can get the results faster and with less hassle.

2. Open Smart Import Tool

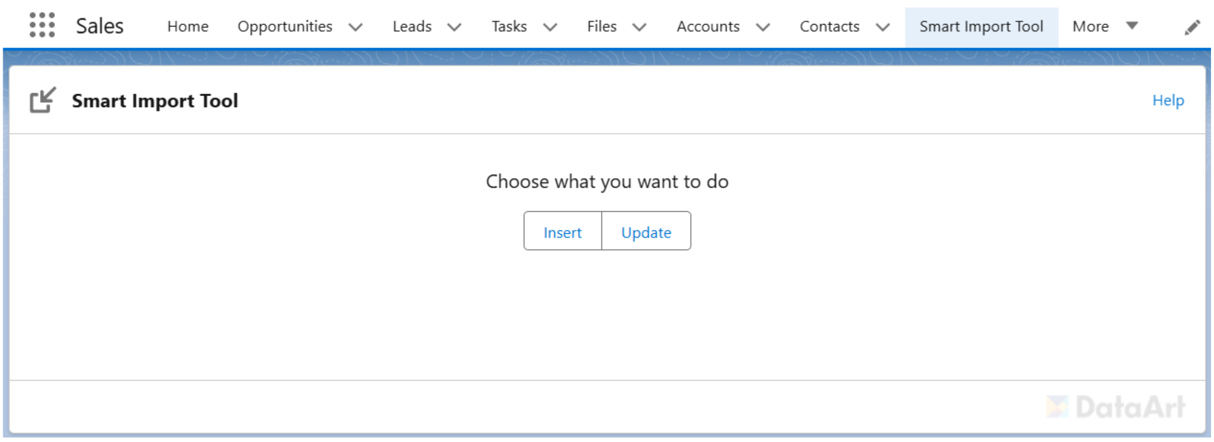
Once installed, Smart Import Tool Tab becomes available in App Menu. Open the menu and start typing the tab name to find it quickly.



To make the tab even more accessible, you can add it in App Navigation Items. See how to Personalize the Navigation Bar in Lightning Experience.

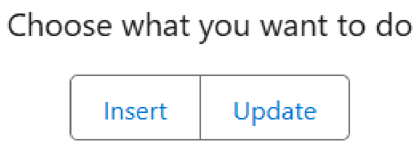


The open application takes up the entire area of the tab. It consists of three blocks: header, body and footer. The content of each of them changes depending on the context.



3. Select insert/update operation

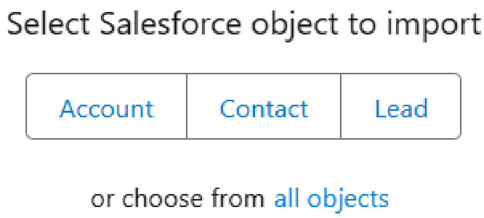
The first thing you need to do is choose one of two actions: insert new records or update existing ones. Just click one of the buttons.



This step can be skipped if the admin has allowed only one of the operations, then it is selected automatically.

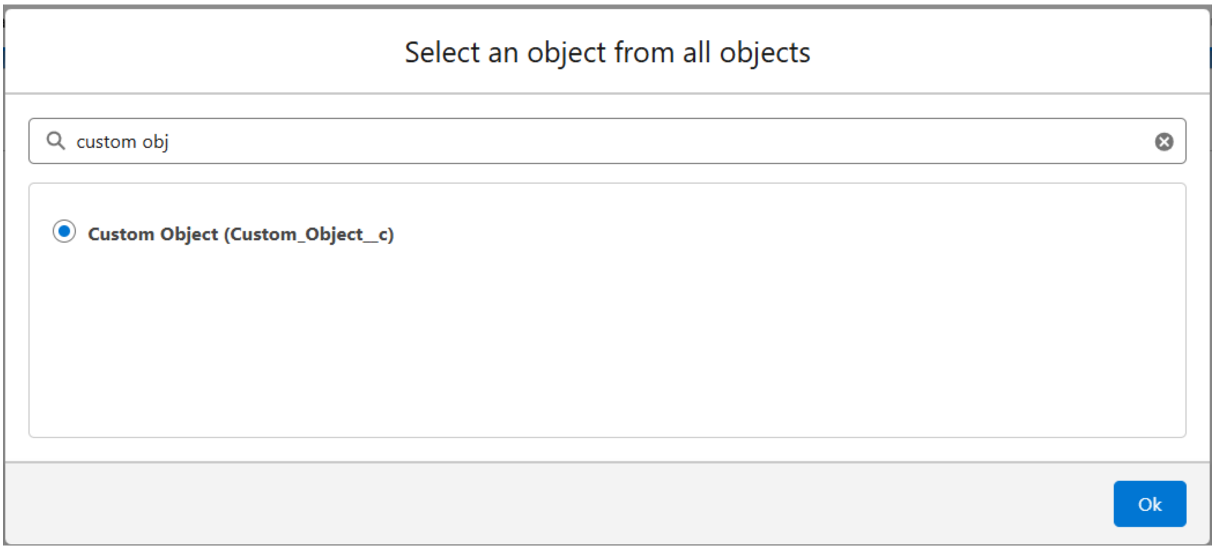
4. Select the object for import

The second step is as simple as the first. Just click the button to select the object to which you want to import the data.



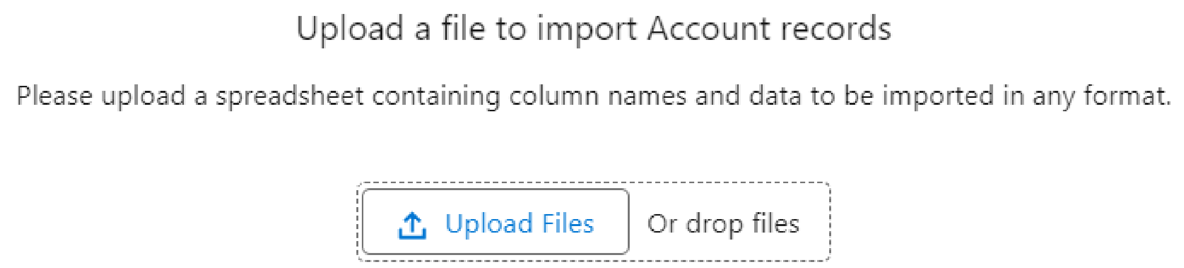
The list of objects is shortened for convenience, so you don't have to look for what you need in a long list. If the desired object is not present in the list, ask your Admin to add items to the list or change their order. The tool supports all standard and custom objects. So, if you have access to the object, it will not be difficult to fulfill your request.

If ‘all objects’ feature is enabled, you can also click on ‘all objects’ link and select the desired object in the pop-up window. The ‘all objects’ list is also limited by the objects you can write to but not limited to the shortened list above. Start typing the object name to filter the list.



5. Upload a file

The third step is simple too – just click Upload Files button and select the file you need to upload or drag-and-drop it into the area.



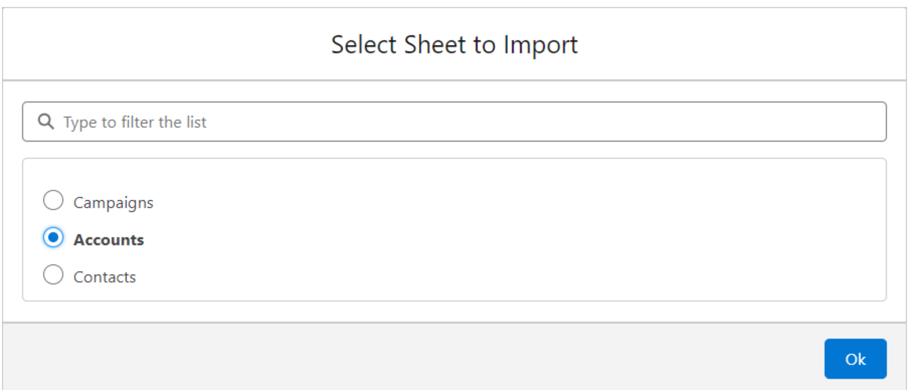
Prepare your file before uploading it. It should have the required data and column headings. Ensure the heading row is at the top with no text above it to avoid confusion. Use the same names as the Salesforce object fields (field API Name or Label) for the columns. This will make field mapping easier. Do not worry if the document contains empty columns or rows, the tool will automatically remove them.

The tool supports a wide range of file formats:

- Comma Separated Values (.csv)
- Microsoft Excel 2007 Worksheet (.xlsx)
- Microsoft Excel 97-2003 Worksheet (.xls)
- OpenDocument Spreadsheet (.ods, .fods)
- Lotus 1-2-3 Spreadsheet (.wk1, .wk3)
- iWork 2013+ Spreadsheet (.numbers)
- Quattro Pro Spreadsheet (.qpw)

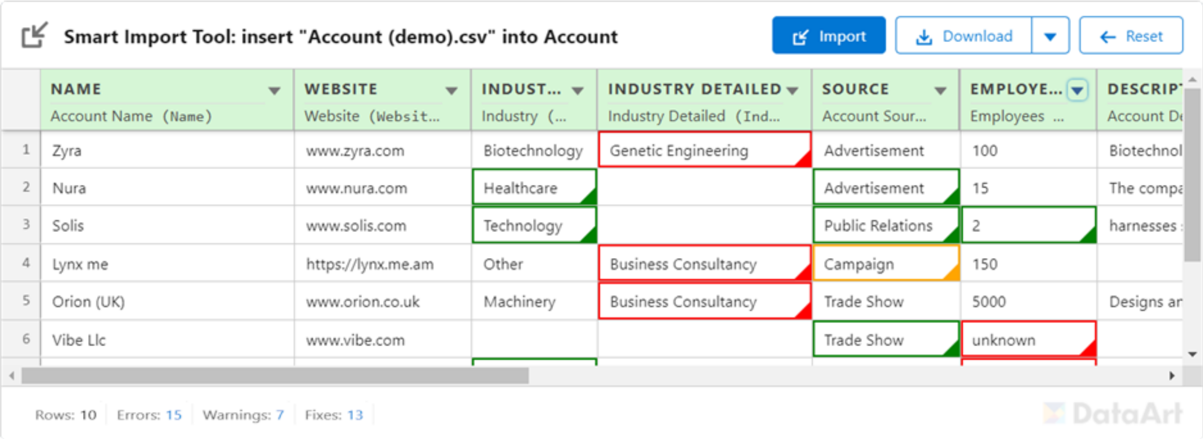
And many other, including TXT, HTML, RTF. If using CSV or text files, prefer UTF-8 encoding to preserve national characters. If you are using Google Sheets, click File → Download → Comma Separated Values (.csv) menu item to export the document into a local file first.

If the uploaded document contains multiple sheets, you will be asked to select one of them.



6. Validate and import the data

As soon as the file is uploaded, its contents open in the online editor. The columns are automatically matched to the fields of the selected Salesforce object, if possible, and the data is validated - you can see cells with colored borders.



At the top left corner, you can see a header that indicates the name of the uploaded file and the object into which it is imported. So even if you get distracted, it will be easy to see what exactly you are doing.

At the top right corner, you can see a few buttons which are available for clicking at any time while working with the document:

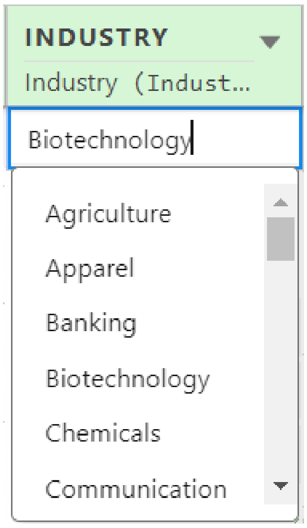
- Import – import all the rows in the document into the selected object.
- Download – download and save a file with all the changes made.
- Reset – reset the current document and go to the 1st step, to start a new import.

At the bottom left corner, you can see statistics: the number of rows in the document, the number of errors highlighted, etc.

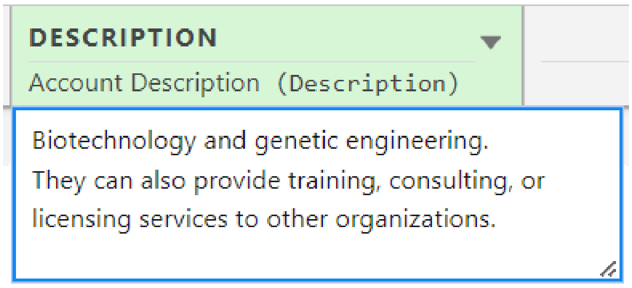
The central place is occupied by the table with your data. Column widths adjust automatically to provide the best appearance, but you can always change the width by dragging the separator between the header cells.

All cells, including header cells, are editable. Just click and start typing. Depending on the field type matched to the column, a simple input field can be replaced with a special one.

For example, cells of the picklist type open with a drop-down list. You can select an option or start typing to filter the list. Even if you have not completed the name of the option, you can simply press Enter and the first suitable option will be selected. You can also use Up/Down arrow keys to navigate throw the options.



Another example is a cell of type TextArea. To view or enter a multi-line comment, simply drag the bottom right corner to expand the cell. Since pressing Enter saves the cell and moves to the cell below, to start a new line in TextArea, use Ctrl-Enter or Alt-Enter shortcuts.

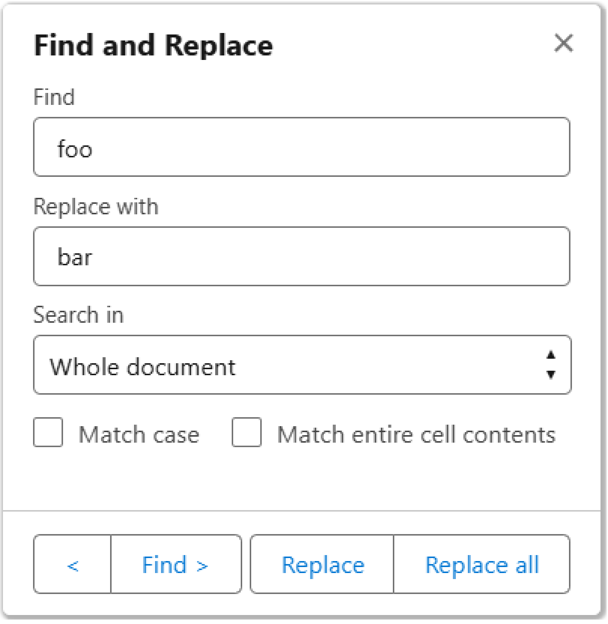


When editing a cell, pressing the following keys will finish editing:

- Enter – save the current cell and start editing the cell below (if exist).
- Shift-Enter – save the current cell and start editing the cell above (if exist).
- Tab – save the current cell and start editing the cell on the right (if exist).
- Shift-Tab – save the current cell and start editing the cell on the left (if exist).
- Escape – cancel editing without saving the changes.

A cell can be active without being in editing mode. You can move active cell with arrow keys. Pressing Enter or Space switches the active cell to edit mode.

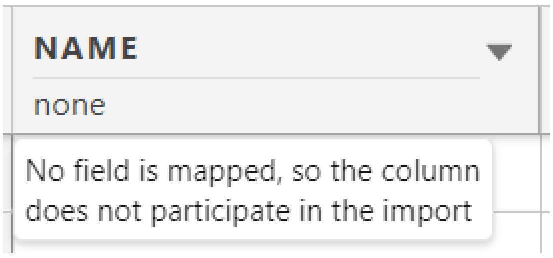
You can also find a specific cell, correct its value, or replace one string with another throughout the specified column or entire document using Find and Replace. To open the Find and Replace toolbar use the Ctrl-H shortcut or by selecting column menu or data cell context menu. You can move the toolbar to the side by dragging the title so that it doesn't cover the active cell.



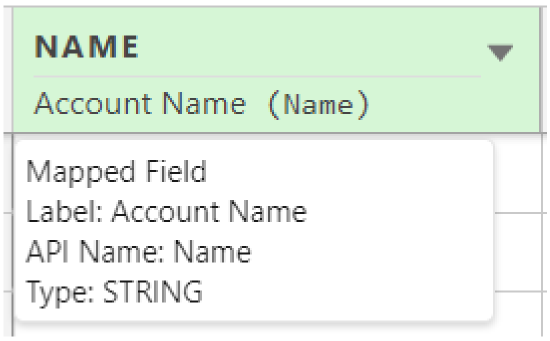
6.1. Matching columns

To import data, the columns in the document must be mapped to the corresponding fields of the object in Salesforce. The Smart Import Tool does this automatically right after uploading a file. If you were careful when naming the columns in your document, you will not have to do anything extra.

The unmapped column is coloured grey. You can see “none” label in the second line.



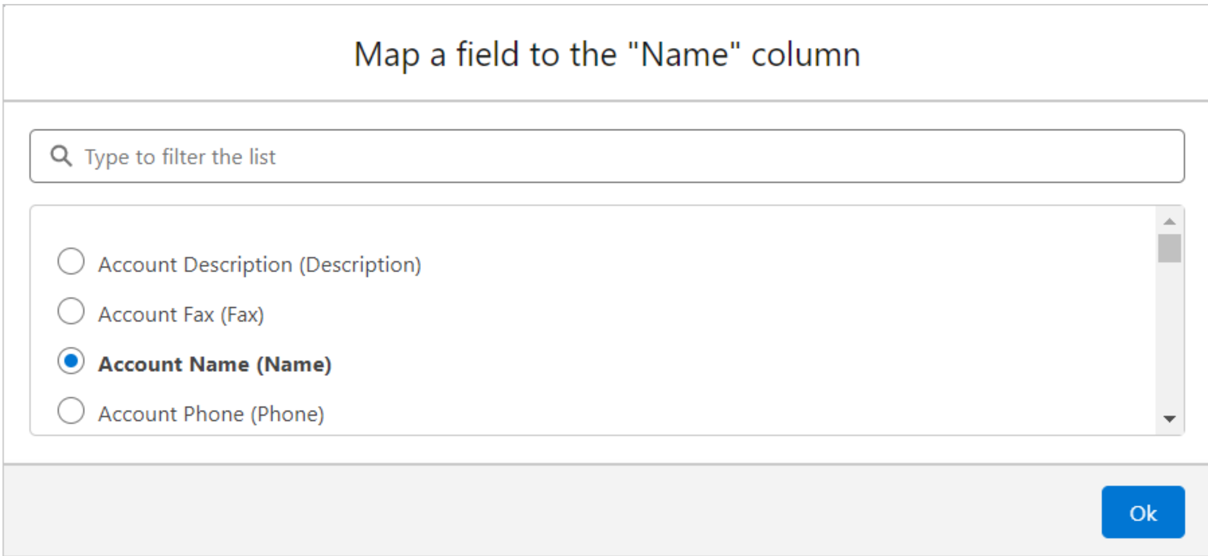
For comparison, the mapped column is coloured green. In the second line you can see the name of the mapped field and its API name in brackets. When you hover your mouse over the field name, additional information appears.



When matching columns, the Smart Import Tool looks up the corresponding field by field label or API name. It uses fuzzy logic so that minor typos do not interfere with matching.

Review that all columns are mapped to correct fields after uploading a file. If a column is not mapped, it is ignored during import. If it also needs to be imported, you need to map it. To do this, you can edit the column heading. The Smart Import Tool will try to find a match immediately after editing.

You can also change the field mapping using the column or context menu – click on the triangle icon on the right side of the column header or right-click the column header. Select "Map a field..." to find and assign a field in a pop-up window. In the pop-up window for selecting a field, you can start writing it to filter the list, then select an option and click the Ok button. Otherwise, select the "Unset the field" menu item to reset the mapping of the mapped column.



Please keep in mind that only fields that you can edit are offered for selection. So, a read-only field cannot be mapped to a column.

The Smart Import Tool checks that there are enough columns in the document to import into the selected object. So, after every field mapping change, it checks

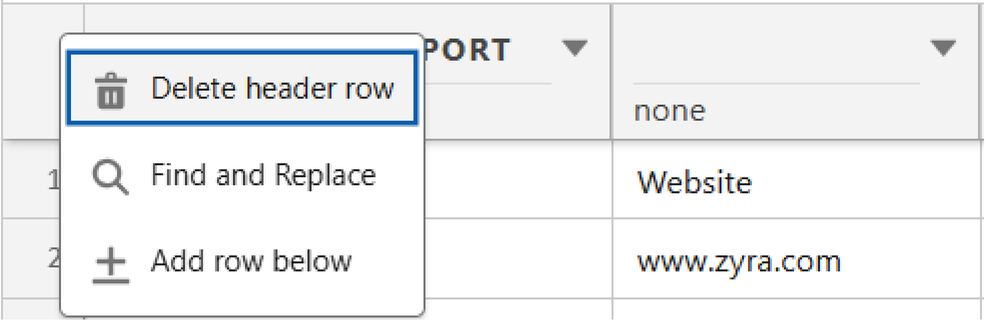
- all required fields which do not have default value are mapped.
- controlling fields are mapped if dependent picklist fields are mapped.
- duplicate fields are not mapped (a field must be mapped to a single column).

In case of error, an error message appears in the top of the screen.

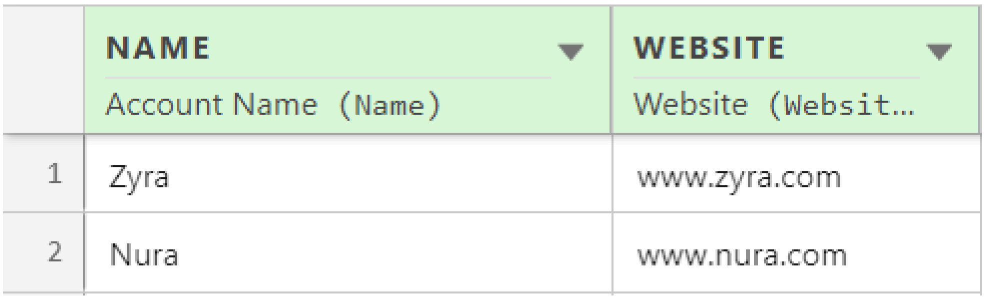
In such cases, you should check the field mapping. If it turns out that the uploaded file did not contain a required field, or you would like to add additional information, you do not need to add a column to the file and upload it again. You can add a column directly in the online editor. Just select "Add column left" or "Add column right" item from the menu of any column. And then fill in the column cells.

It is ok if some columns are left unmapped and used as notes. However, if such columns are not needed, you can remove them by selecting "Delete column" menu item in the column or context menu.

In some cases, a document containing a table may contain some heading text which is incorrectly interpreted as a table column. In this case, you don't have to re-upload the document. Open the context menu by right-clicking or long-tapping on mobile on the leftmost cell in the header row of the table, then select ‘Delete header row’ menu item.



As a result, the incorrect header row will be removed and the following row will take its place. If it contains correct headers, fields will be automatically mapped to the columns.



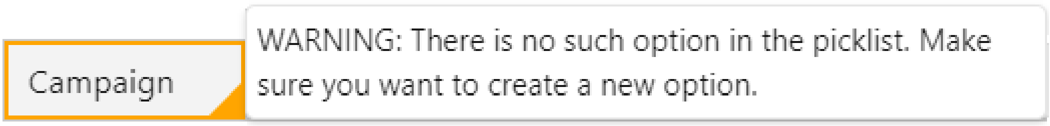
6.2. Data validation

The Smart Import Tool validates every cell value of mapped columns according to their field type. It also re-validates the values after mapping columns or editing the cells. The tool automatically removes spaces at the end of values, which often appear when filling out an Excel sheet. Other checks cause the cell to be highlighted so you pay attention. There are three types of highlighting depending on the importance.

1. Information message – green border.

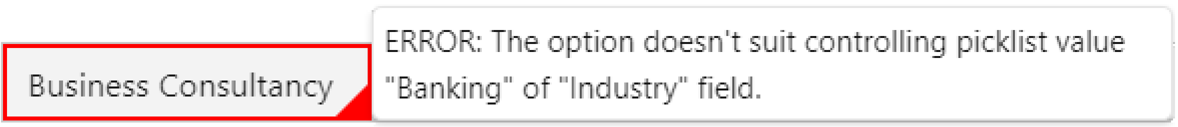
These are changes that the tool makes automatically. In this way it corrects the spelling of picklist options, date format, etc. You can hover your mouse over the triangle in the lower right corner of the cell to see exactly what was done.

2. Warning message – yellow border.



In this way, the tool marks cells whose data could technically be imported, but you might prefer to correct it. For example, it could be a non-existent option in a non-restricted picklist. When imported, it will be added as a new inactive option. If this is what you expect, you can ignore the message. Otherwise, select another option.
Similarly, it marks invalid URLs, empty cells, which will be replaced with the default value during import, and other cases.

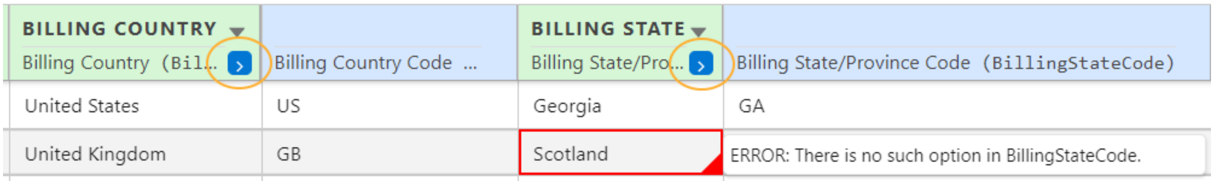
3. Error message – red border.



This marks the cells that definitely need to be corrected before the import. If you try to import data with such value, you will receive an error from Salesforce. There can be many examples, such as an invalid date, number, email, non-existent option in a restricted picklist. Or, as shown in the picture, an inappropriate option in the dependent picklist.

In the footer you can see general statistics: the number of errors, warnings and fixes in the document. Clicking on the indicator in the footer highlights the first cell found with the corresponding error, warning or fix message. When you click while holding down the Shift key, the search is conducted in the opposite direction.

If the "State and Country/Territory Picklists" are enabled in your org, Country and State fields of complex Address fields must correspond to the specified values which are selected from the drop-down list. The Smart Import Tool considers Country and State values like dependent picklists. That is, the State/Province value must correspond to the selected Country according to the settings. For example, there are no states in the United Kingdom by default, so you cannot specify Scotland as a state.



BILLING COUNTRY		BILLING STATE	
Billing Country (Bil...	Billing Country Code ...	Billing State/Pro...	Billing State/Province Code (BillingStateCode)
United States	US	Georgia	GA
United Kingdom	GB	Scotland	ERROR: There is no such option in BillingStateCode.

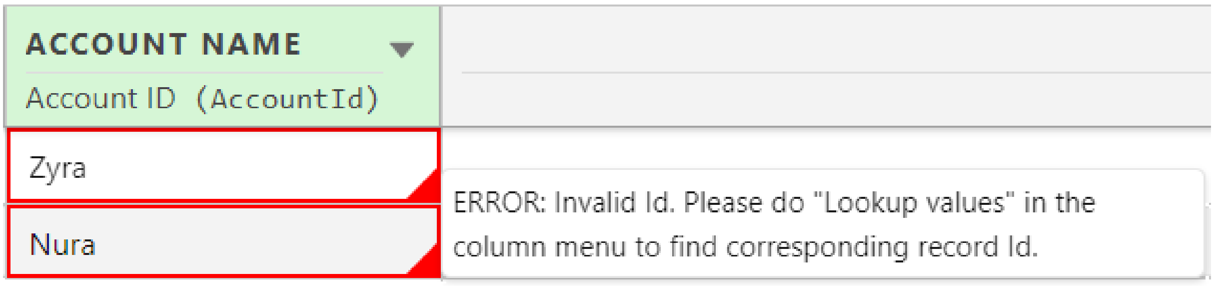
In the picture you can also see additional columns that contain the country code and state code; they can be expanded by clicking on the icon in the column header. You cannot edit the values in these columns directly.

Despite validation being implemented for all field types, the tool cannot consider restrictions imposed by business logic, such as Validation Rules, Duplicate Rules, checks implemented in Flows, or Apex Triggers. So, a row that is completely valid from the tool's point of view may still need correction.

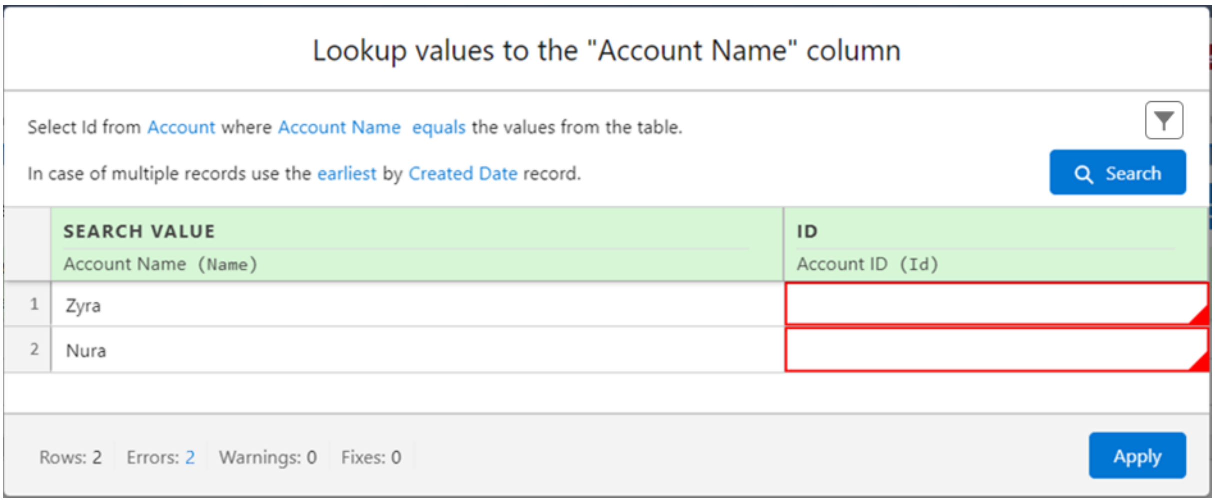
6.3. Lookup values

Objects in the Salesforce are often related to each other, and when filling out one record, it is often necessary to indicate references to records of other objects. Typically, when importing, you must specify the Id of the record to which the current one refers. This can be done a little easier with the Smart Import Tool. You can specify names or other identifiers instead of Id, and then find the corresponding records in bulk mode.

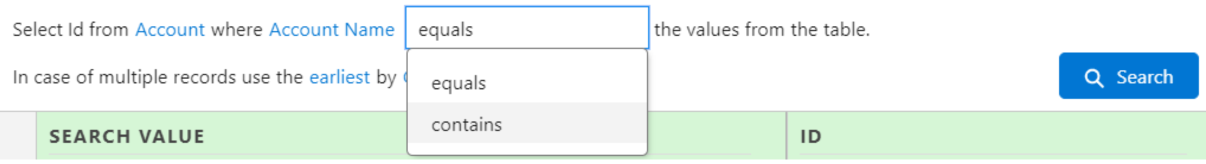
Let us look at an example. When creating contacts, you usually need to specify their company. When importing, you can do the same. However, since you provided company names, they are not valid Ids, and the corresponding cells are highlighted in red.



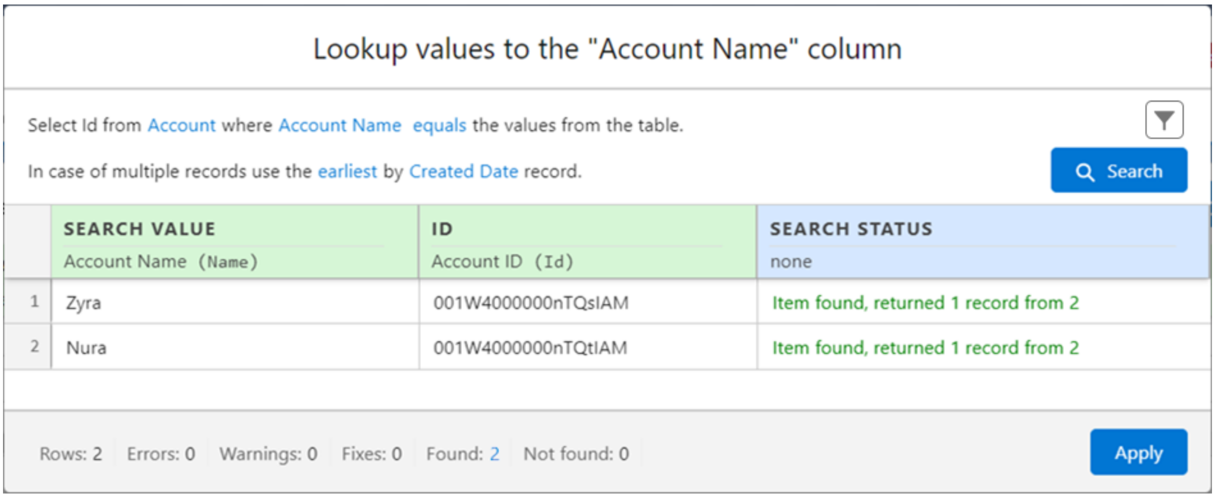
You need to find the corresponding accounts and fill in their Id. Select "Lookup values..." in the column or context menu to open a pop-up window. All unique names from the corresponding column are pulled into the table in the window. Since the Ids have not yet been found, the Id cells are highlighted in red.



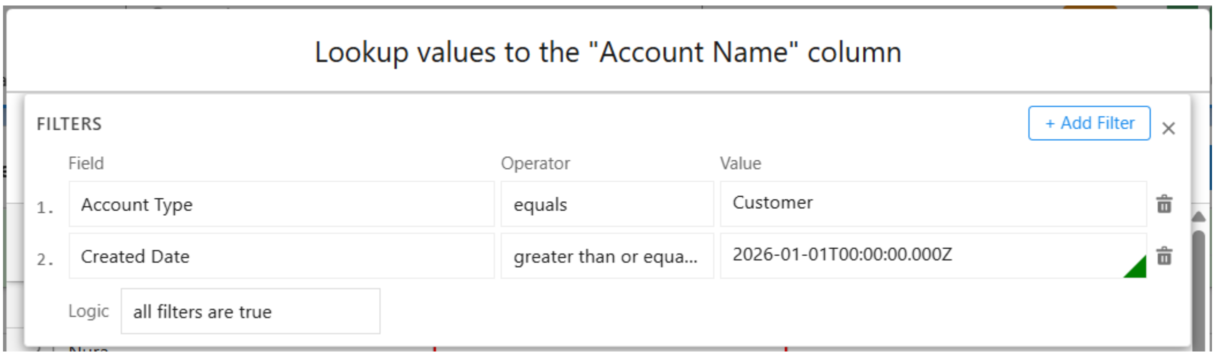
Above the table you can see a simplified query that will be executed for the search. You can click on the blue words to change, for example, the field where to search or use a substring match instead of an exact match. The next line specifies a condition to filter only one record.



By default, the search is performed using the Name field, which is likely in most cases. So, you can just click the Search button and get the results.

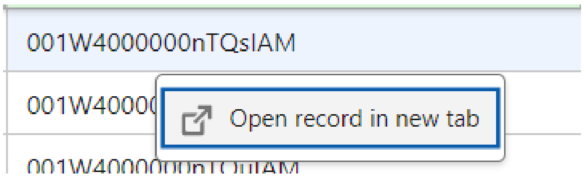


The filter panel allows you to specify additional search criteria. For example, you can limit your search to Customer accounts created after the beginning of 2026.



Values in filter fields are validated according to the selected field type. For example, a DateTime field must contain a date and time. The tool automatically corrects the value or highlights errors, just like in table cells for import. The search button is disabled if the filters are invalid.

When a search is performed, the ID column is populated, as well as an additional "Search Status" column, where you can see the success or failure status of the search. If you want to doble check the record that has been found, select 'Open record in new tab' context menu item on the Id cell, so it will be opened in a separate browser tab for your review. The same can be done faster by simply clicking on Id while holding down Ctrl button.



When all Ids are found, you can click Apply button to transfer the received Ids to the main table.

Matched Ids appear in an additional read-only column, which can be expanded. Eventually, the imported contacts will be linked to the specified accounts.

ACCOUNT NAME Account ID (Acco...	ACCOUNT NAME ID Account ID (AccountId)
Zyra	001W4000000nTQsIAM
Nura	001W4000000nTQtIAM

If your search in the Lookup Values window does not return any results, try changing the search conditions and repeating the search. You can repeat the search as many times as you like in the same window. In this case, only those records which Id has not yet been found will be searched. If changing the conditions does not help, you may need to adjust the Search Value in the cell. In this case, the corrected value will also be transferred to the main table. Finally, if all else fails, you can find the desired entry in some other way and put its Id into the ID column directly.

The Lookup Values technique can be applied to any lookup or reference fields. For example, you can import data for multiple owners at once. Just add an Owner column and indicate the names of the people who will own each entry. Using the Lookup Values window, you will find the Id of their users to indicate in OwnerId field.

When update records and the document doesn't contain Id column which is required for the update, you can use Lookup Values technique to find Ids of records that need to be updated. Open Lookup Values window from the Name, Email or External ID column's menu.

The next point is intended more for administrators or advanced users. The Smart Import Tool simplifies working with Record Types if they are defined in the object to be imported. You can simply specify their Names or Developer Names, and the tool will automatically fill in their Id in an additional column without having to lookup values.

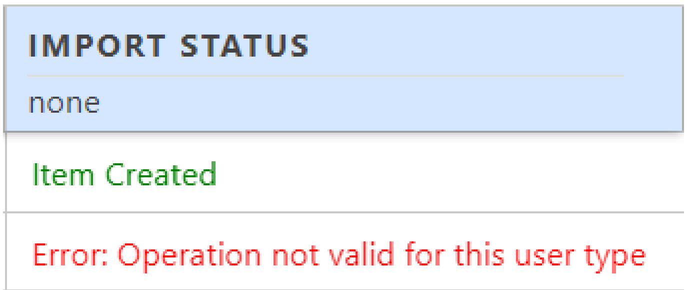
RECORD TYPE Record Type ID (...	RECORD TYPE ID Record Type ID (RecordTypeId)
Business Development	0123C000000kOjOQAU
Prospect	0123C000000kOjOQAU

6.4. Data import

After correcting and enriching the data, it is time to import. Make sure the Errors indicator in the footer is zero and click "Import" button.

To speed up import, the Smart Import Tool splits rows into batches, with 200 rows per batch by default. There is a progress indicator to monitor the process. Import errors on one line do not affect others. So, the whole operation may be partially successful. And as a result, you will receive a message like this one.

The import adds two columns to the document in the online editor: "Id" to the very first column with the Ids of successfully imported rows, and "Import Status" to the last column with the details of the import of each row.

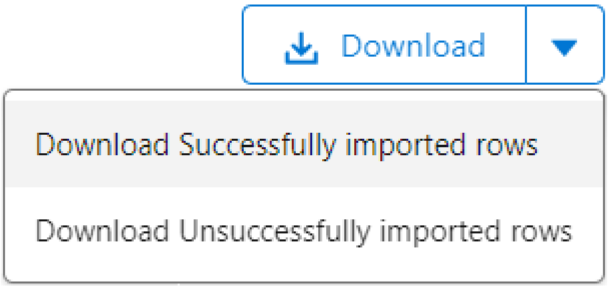


If the row was inserted successfully, you will see "Item Created" in green. Or if it was updated successfully, you will see "Item Updated". Otherwise, the error will be shown in red. Analyze errors if there are any, and if it is possible to fix them by correcting the data for import, you can do this directly in the same document. After the correction, you can click the "Import" button again, and as many times as you like. This will only import rows that have not yet been successfully imported. So, eventually, all the rows can be imported, although not on the first try.

Although the Smart Import Tool has no limits on the number of imported rows at a time, obviously working with huge documents in the online editor will not be comfortable. You may notice some lag in the interface depending on your computer's performance. In such cases, it is recommended to split the data into smaller files.

6.5. Download results

Immediately after uploading a file and opening the document in the online editor, you can click "Download" button to save the document into a new file with all the corrections made by the Smart Import Tool. And after importing, you can download successfully and unsuccessfully imported rows into separate files – use the Download button menu.



The resulting files contain all columns, including hidden columns for lookup fields, as well as "Id" and "Import Status" if an import attempt was made.

By default, the Smart Import Tool exports documents in universal CSV format. If your organization uses MS Office, Open Office, Lotus 1-2-3, or other office suits and you want to have files in their format, ask your admin to change the downloading files format.

7. Contact us

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