



Self-Service Data Loads for Business Users

In organisations where frequent data updates are required (such as for campaigns, product updates, or sales changes), the process can often burden Salesforce administrators and technical teams. By implementing a self-service data load process, non-technical users can manage smaller, controlled data imports and updates without relying on IT or Salesforce admins.

It's important to balance the freedom to upload data with the need to maintain data integrity. Controls must be carefully implemented to ensure that only authorised users can perform these actions, and only at predefined times.

Using file templates, email triggered connections and activation blocks, CONVAYR allows business units to quickly upload their own data with built-in safeguards like row limits and specific timeframes and authorised users for data loads.

CONVAYR also provides error logs and can notify specific users on any successes and failures, including detailed record by record track and trace using record IDs.

Empowering business users to handle their own data uploads reduces bottlenecks in IT or Salesforce administration, allowing technical teams to focus on more strategic tasks. This self-service model enhances agility and allows for faster, more responsive updates to critical business data, all while maintaining control and data quality.

Learn more at the
[Salesforce AppExchange](#)

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