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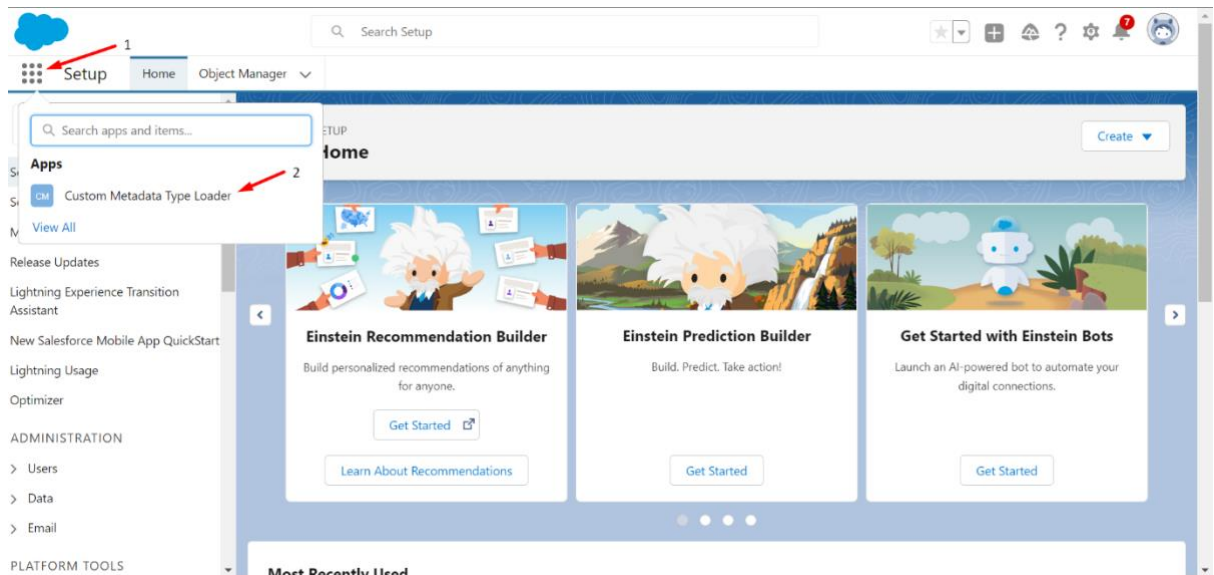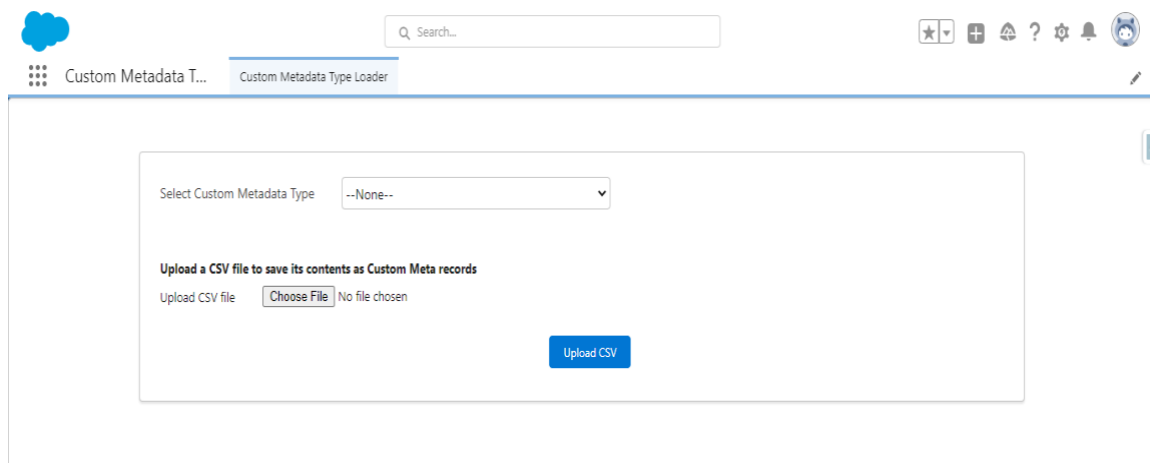# CUSTOM METADATA TYPE LOADER

➤ Custom Metadata Type Loader is for uploading a CSV file for inserting n number of records into a custom metadata type.

➤ After login into the salesforce, environment go to the **App Launcher** and click on **Custom Metadata Type Loader** App**.**
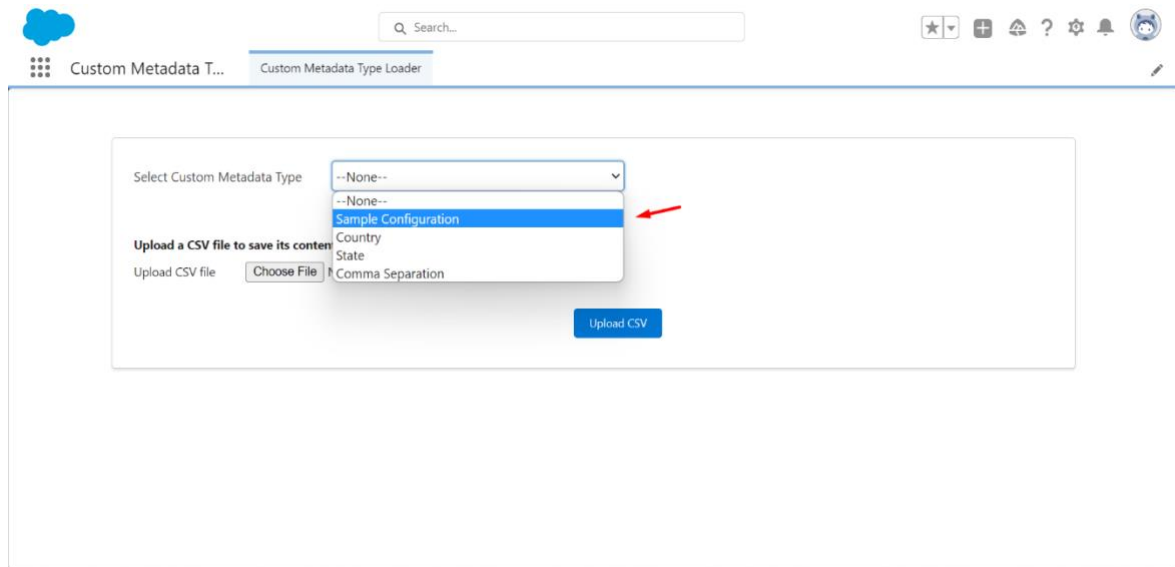


• Once you select the Custom Metadata type Loader app then you will be redirected to the custom metadata type loader app page which will look like the below picture.
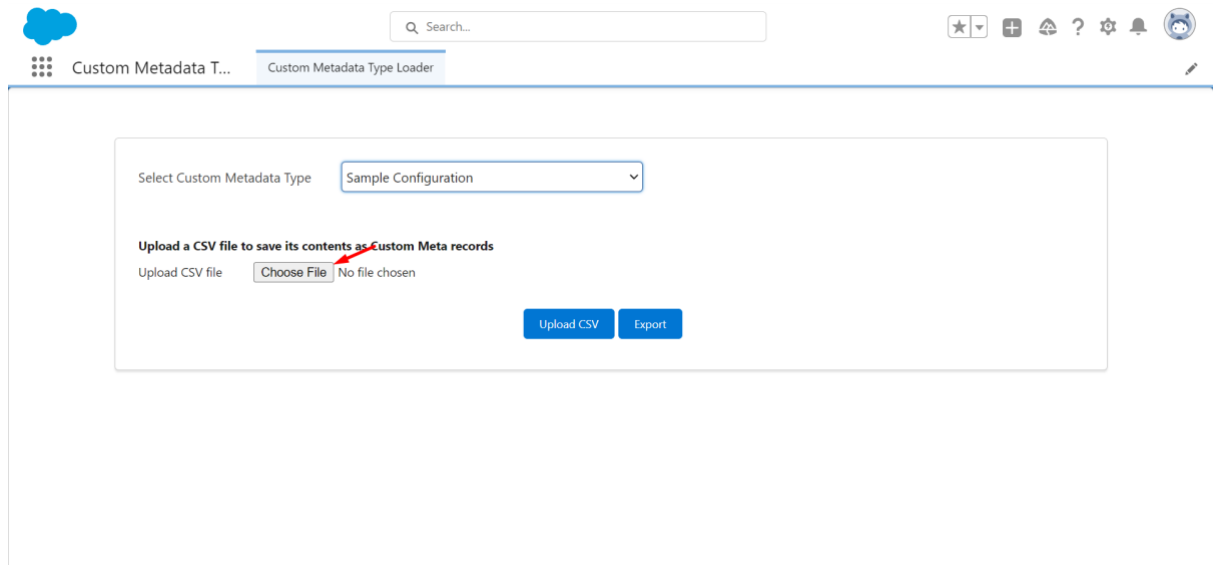


• In the **select custom metadata type** option, you'll be able to see all the custom metadata objects related to the respective environment as a dropdown. Click on the drop-down and select the custom metadata object where you wanted to insert records.
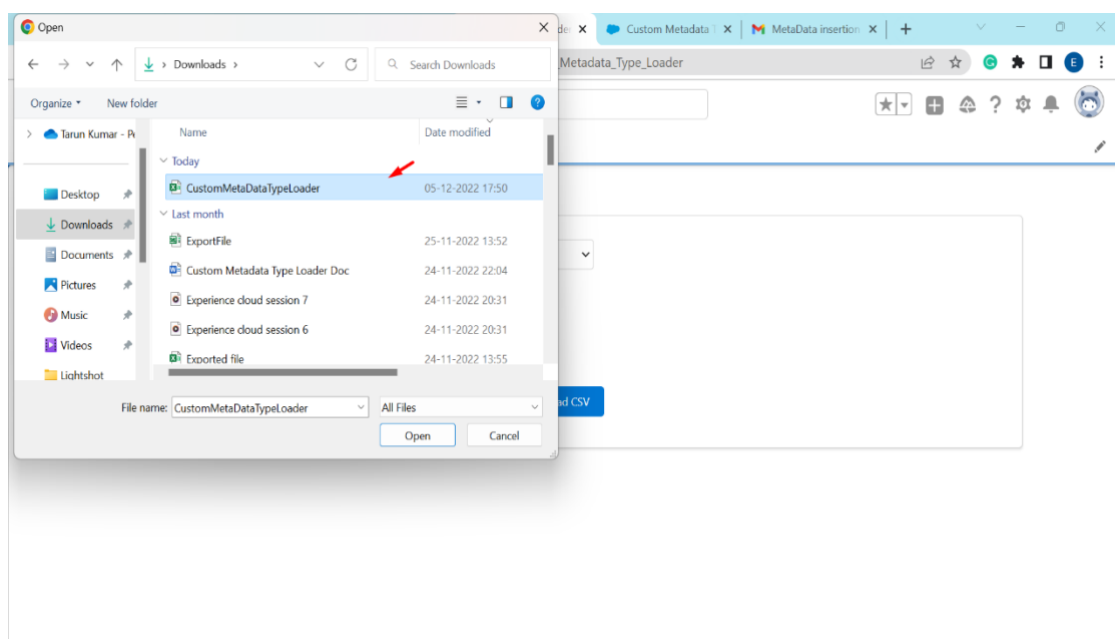
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- After selecting the custom metadata type we have the option to upload the file.
- The file format should be in CSV while uploading.
- We need to be careful while preparing CSV files because in the Developer Name it will not take any **spaces and special characters. Instead of that, we need to give 'underscore(_)'**
  **Example**: If the MasterLabel is **"Test 1"** then in  DeveloperName we need to be given like this **"Test_1".**
- You can import the **CSV** file upto **500 records** for each turn.
- After entering all the details in CSVthat file will look like the below picture.



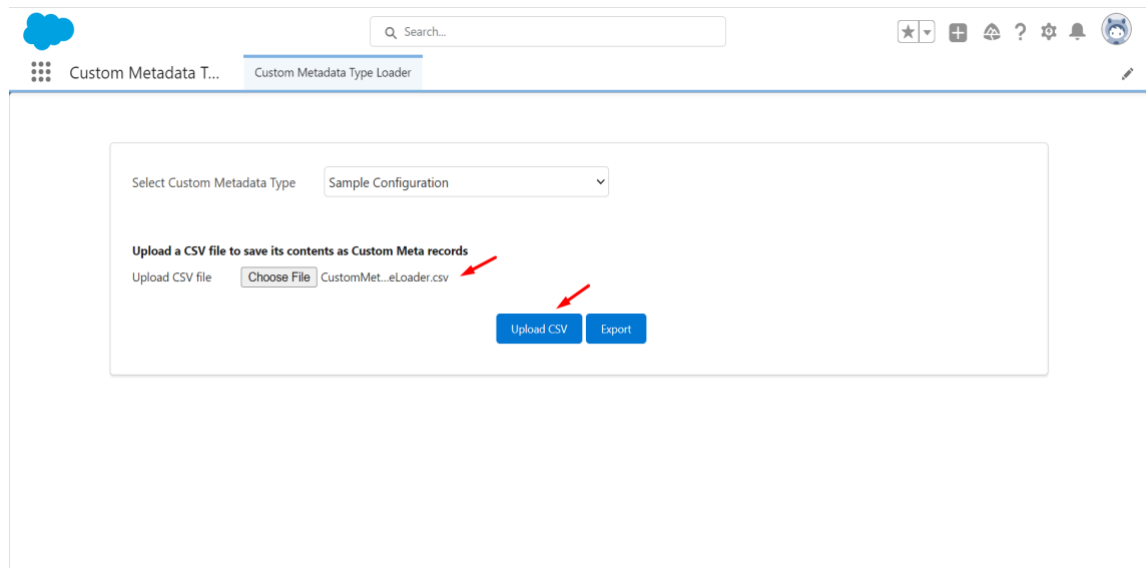| | A | B | C | D |
|---|---|---|---|---|
| | MasterLabel | DeveloperName | Vamritech_Sample_Code__c | |
| 2 | Test 1 | Test_1 | 10 | |
| 3 | Test 2 | Test_2 | 20 | |
| 4 | Test 3 | Test_3 | 30 | |
| 5 | Test 4 | Test_4 | 40 | |
| 6 | Test 5 | Test_5 | 50 | |
| 7 | Test 6 | Test_6 | 60 | |
| 8 | Test 7 | Test_7 | 70 | |
| 9 | Test 8 | Test_8 | 80 | |
| 10 | Test 9 | Test_9 | 90 | |
| 11 | Test 10 | Test_10 | 100 | |
| 12 | | | | |

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- After preparing the CSV file we have an option for uploading which is to **Choose file** beside the **Upload CSV File Text.**
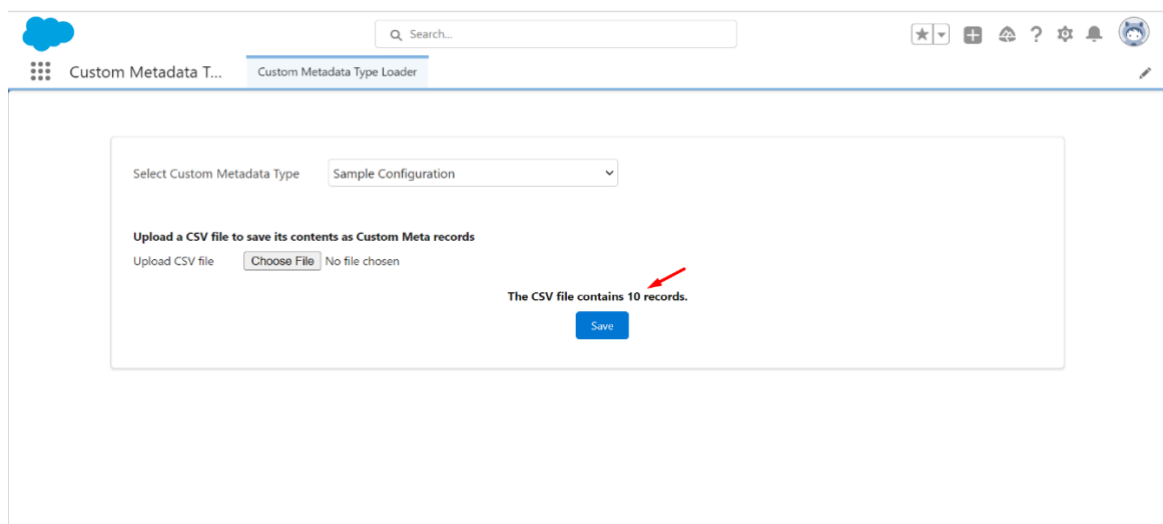


- Click on Choose file then the popup will be open for selecting the CSV file. Select the CSV file which you want to upload.
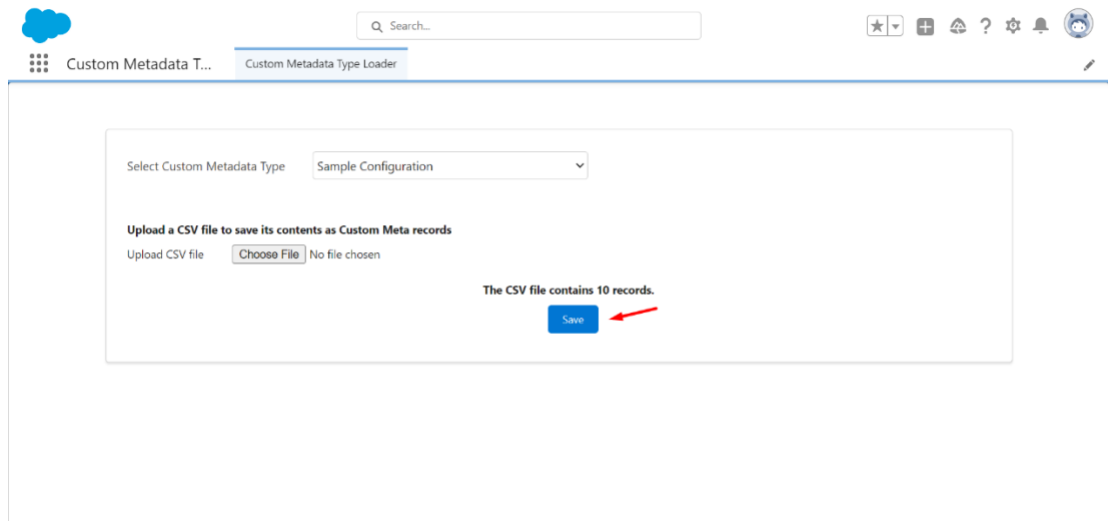


- After selecting the CSV file then beside the choose file option you can see your CSV file name and then click on the **Upload CSV** button.
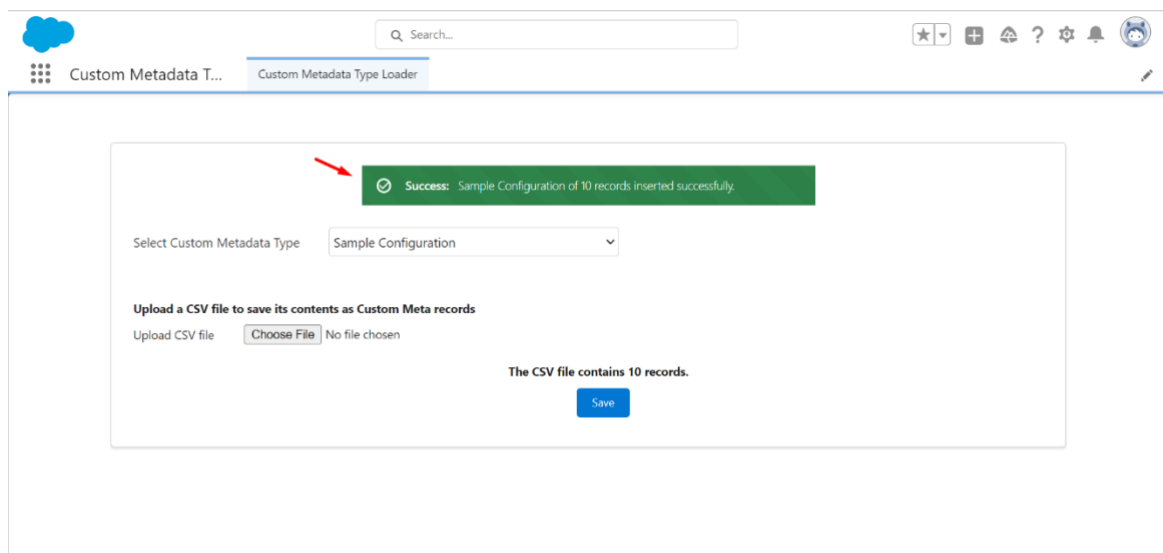
- After clicking on the Upload CSV button it'll show the count of the records in the text.



- Now click on the "**Save**" button to proceed to insert records into your selected metadata object.

- After clicking on Save, records will be inserted into the metadata object which you have chosen. You will get one success message on the screen like the below picture.



- Now open your custom metadata there you can see all the inserted records.
- For checking that go to setup → Click on Home → In the quick find box search custom metadata type→ then you will navigate to the page where you can see all the metadata objects →click on the metadata object where you uploaded records using custom metadata loader there you can see all the records which are in your CSV file.

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- And then click on the manage records side of the custom metadata name and you can see the inserted records.



- After clicking on manage records, we can see the inserted records from the uploaded CSV file.

- Now open the custom metadata record by clicking on the label.



- You'll also receive an email after the successful processing of the records.

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- 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 else the record get inserted.



- Now you can upload the updated CSV file to your custom metadata type and you can see the record is whether updated or not.

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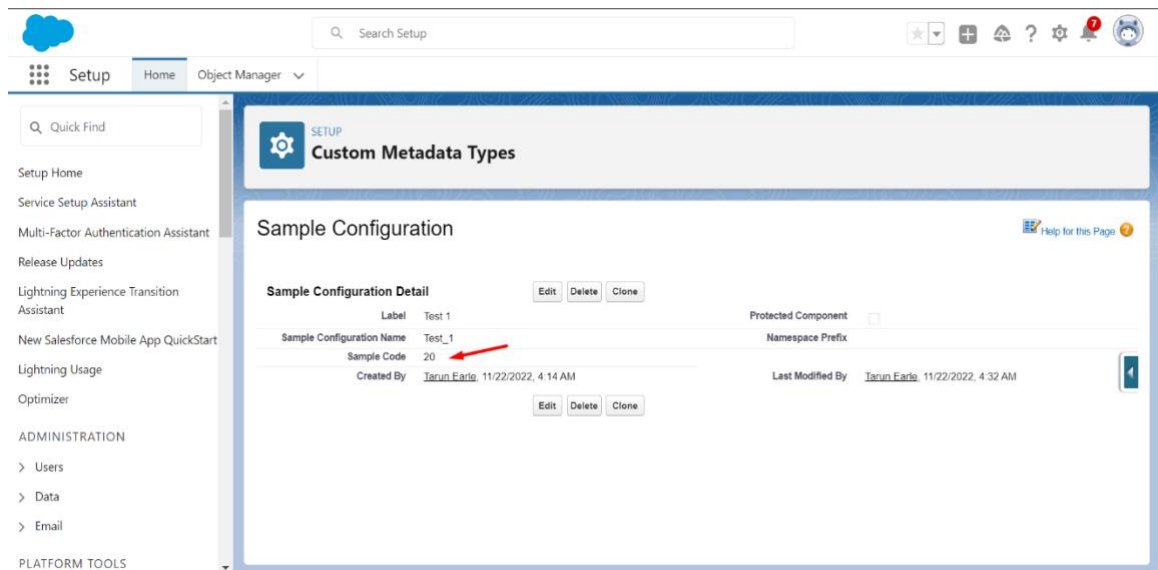- Here is the updated record of the custom metadata type.



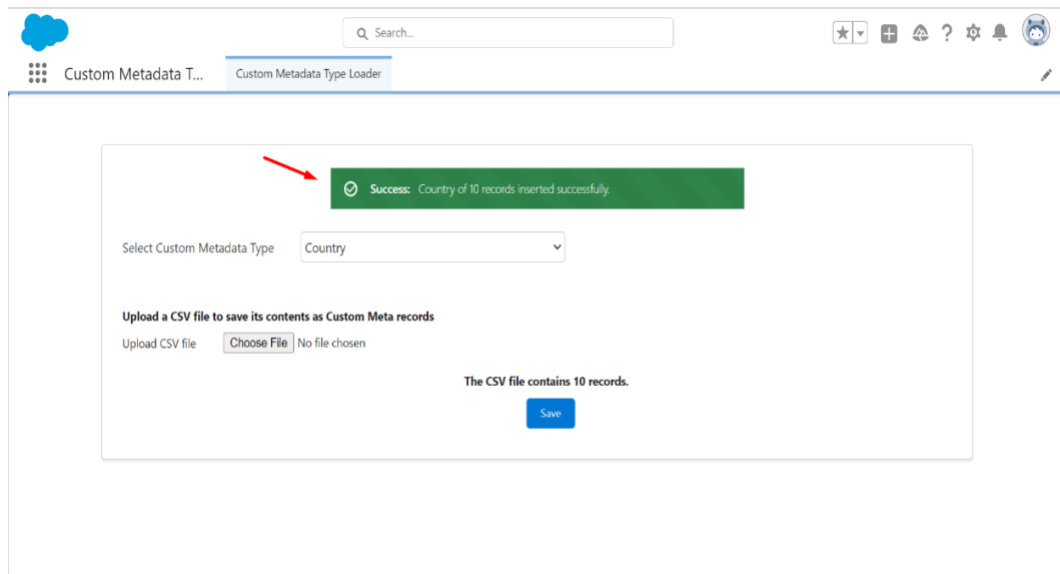## ❖ Parent-Child Record Creation:

> *Parent Metadata Record Creation:*
  - Let's create a Parent Record. In this scenario, I'm taking **Country__mdt** as a Parent Custom Metadata Type and **State__mdt** as a Child Custom Metadata Type.
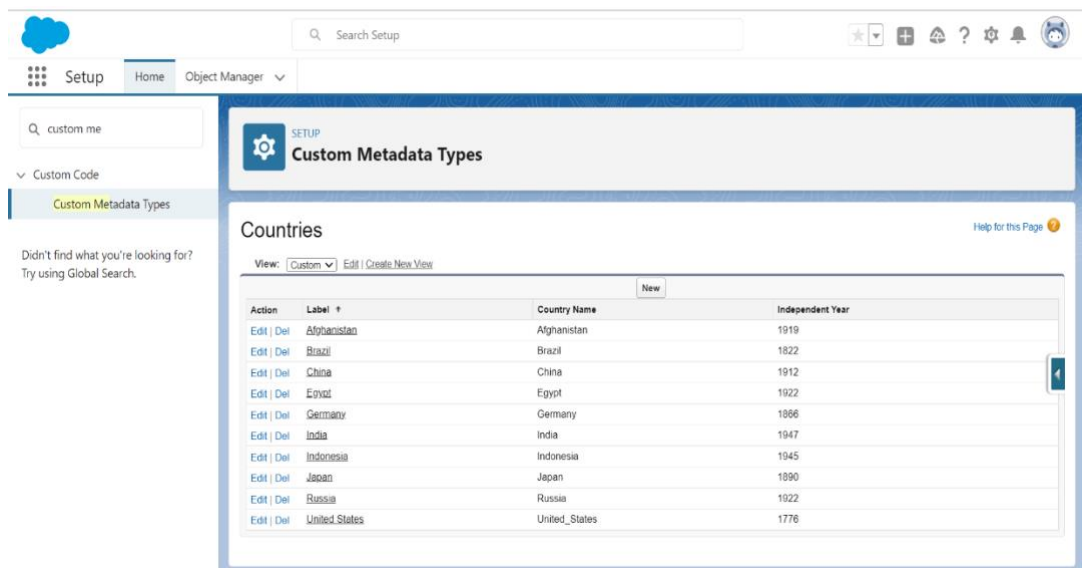  - Here is the CSV file I prepared for the **Country__mdt** record creation.



  - Now we can upload the file for inserting the record into Custom Metadata Type.

- If the record is inserted successfully then we got a success message.



- For checking that go to setup → Click on Home → In the quick find box search custom metadata type→ then you will navigate to the page where you can see all the metadata objects →click on the metadata object where you uploaded records using custom metadata loader there you can see all the records which are in your CSV file.



> ## Child Record Creation:
- Let's create a **State__mdt** Custom Metadata Type Record.
- Here is the prepared CSV File for **State__mdt** Custom Metadata Type.

- Now we can upload the file for inserting the record into Custom Metadata Type.
- If the record is inserted successfully then we got a success message.



- For checking that go to setup → Click on Home → In the quick find box search custom metadata type→ then you will navigate to the page where you can see all the metadata objects →click on the metadata object where you uploaded records using custom metadata loader there you can see all the records which are in your CSV file.

> ➢ *Child with Parent Record Creation*:
> • Let's create a **State__mdt** Custom metadata Type Record with a Lookup field.
> • In this we are going to add a parent to this metadata record.
> • In the Lookup field we need to give the **DeveloperName** of the Parent Custom Metadata Type Record.
> • Here is the prepared CSV file for inserting the **State__mdt** Record.



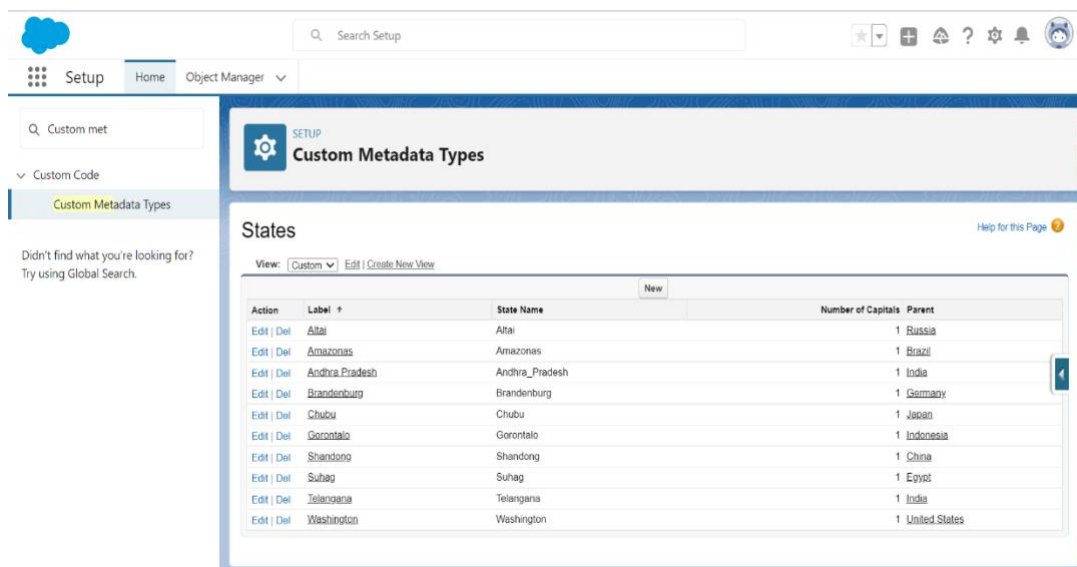| | A | B | C | D | E |
|---|---|---|---|---|---|
| 1 | MasterLabel | DeveloperName | Number_of_Capitals__c | Parent__c | |
| 2 | Andhra Pradesh | Andhra_Pradesh | 1 | India | |
| 3 | Telangana | Telangana | 1 | India | |
| 4 | Washington | Washington | 1 | United_States | |
| 5 | Gorontalo | Gorontalo | 1 | Indonesia | |
| 6 | Shandong | Shandong | 1 | China | |
| 7 | Amazonas | Amazonas | 1 | Brazil | |
| 8 | Altai | Altai | 1 | Russia | |
| 9 | Chubu | Chubu | 1 | Japan | |
| 10 | Brandenburg | Brandenburg | 1 | Germany | |
| 11 | Suhag | Suhag | 1 | Egypt | |
| 12 | | | | | |

- Now we can upload the file for inserting the record into Custom Metadata Type.
- If the record is inserted successfully then we got a success message.



- For checking that go to setup → Click on Home → In the quick find box search custom metadata type→ then you will navigate to the page where you can see all the metadata objects →click on the metadata object where you uploaded records using custom metadata loader there you can see all the records which are in your CSV file.
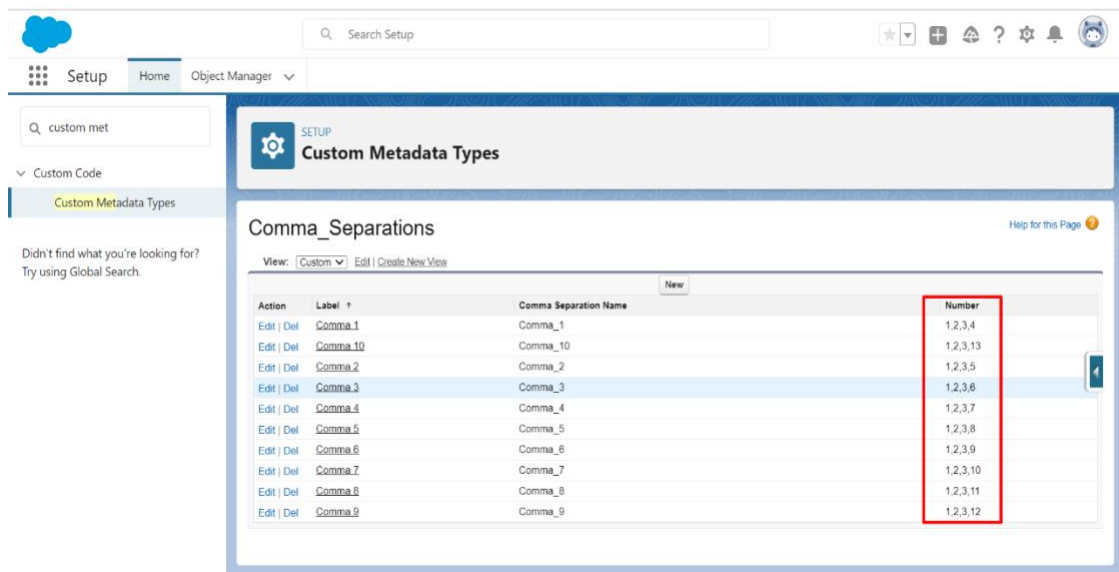
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- We can insert the metadata records with the **comma separation** values. Please prepare the CSV file like the below picture.  **Eg: 1,2,3,4**



| | A | B | C |
|---|---|---|---|
| D18 | | | fx |
| | A | B | C |
| 1 | MasterLabel | DeveloperName | Number___c |
| 2 | Comma 1 | Comma_1 | 1,2,3,4 |
| 3 | Comma 2 | Comma_2 | 1,2,3,5 |
| 4 | Comma 3 | Comma_3 | 1,2,3,6 |
| 5 | Comma 4 | Comma_4 | 1,2,3,7 |
| 6 | Comma 5 | Comma_5 | 1,2,3,8 |
| 7 | Comma 6 | Comma_6 | 1,2,3,9 |
| 8 | Comma 7 | Comma_7 | 1,2,3,10 |
| 9 | Comma 8 | Comma_8 | 1,2,3,11 |
| 10 | Comma 9 | Comma_9 | 1,2,3,12 |
| 11 | Comma 10 | Comma_10 | 1,2,3,13 |
| 12 | | | |

- Now we can upload the file for inserting the record into Custom Metadata Type.
- If the record is inserted successfully then we got a success message.
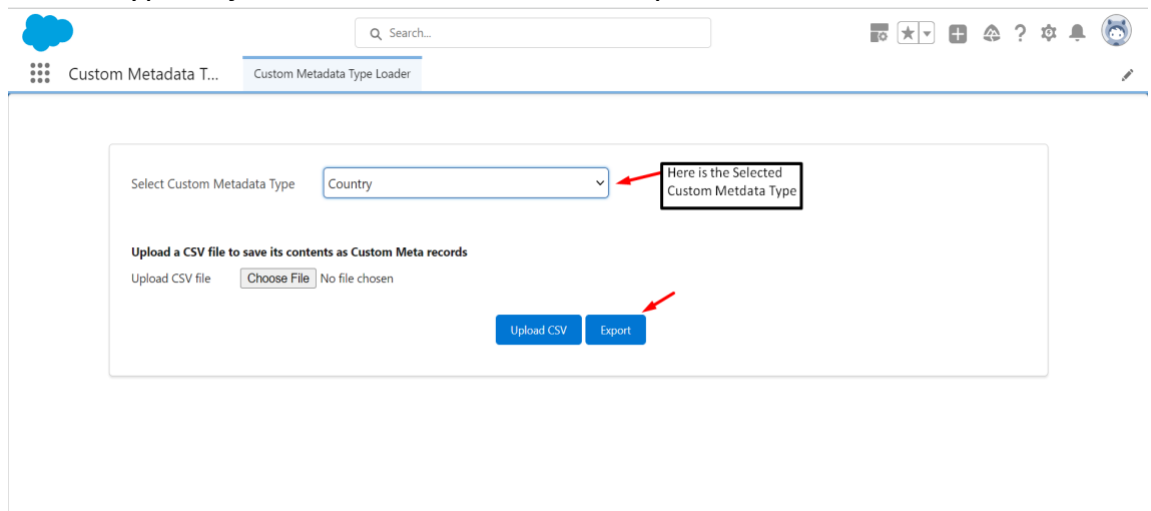


- For checking that go to setup → Click on Home → In the quick find box search custom metadata type→ then you will navigate to the page where you can see all the metadata objects →click on the metadata object where you uploaded records using custom metadata loader there you can see all the records which are in your CSV file.
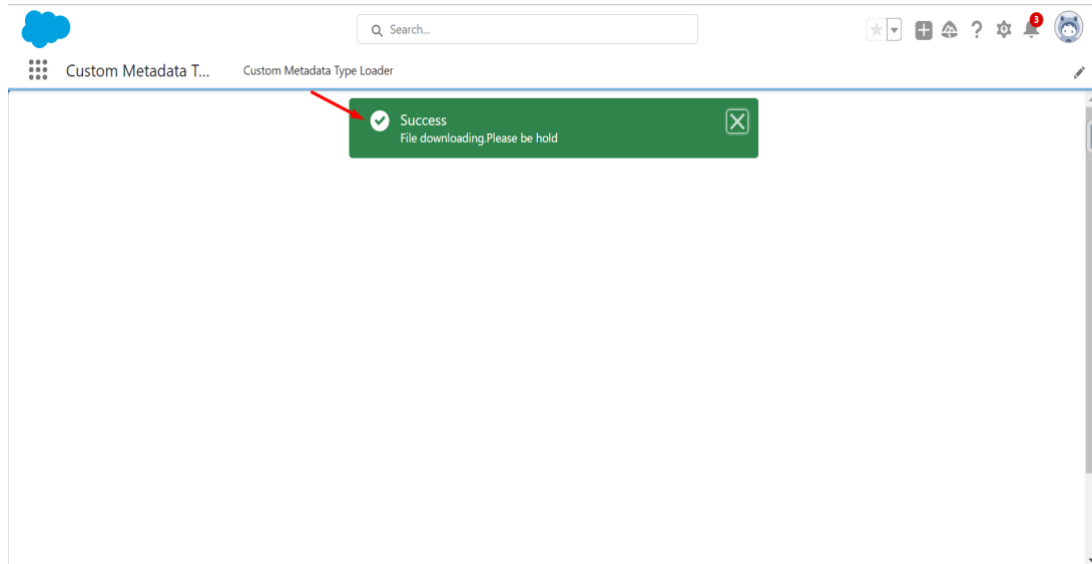
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## ➢ Export Functionality:-

The Export button's functionality is used for exporting all Field API Names and records related to our selected custom metadata type.
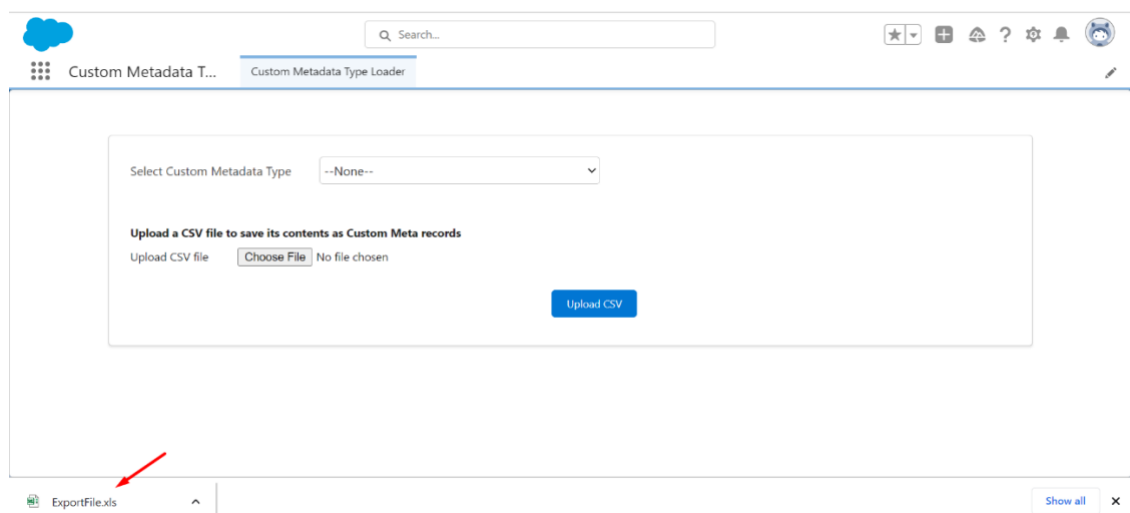
- You can export up to 9000 records as long as the export size is less than 15MB.
- As shown in the screenshot below, you need to select the Custom Metadata Type object and then click on the Export button.
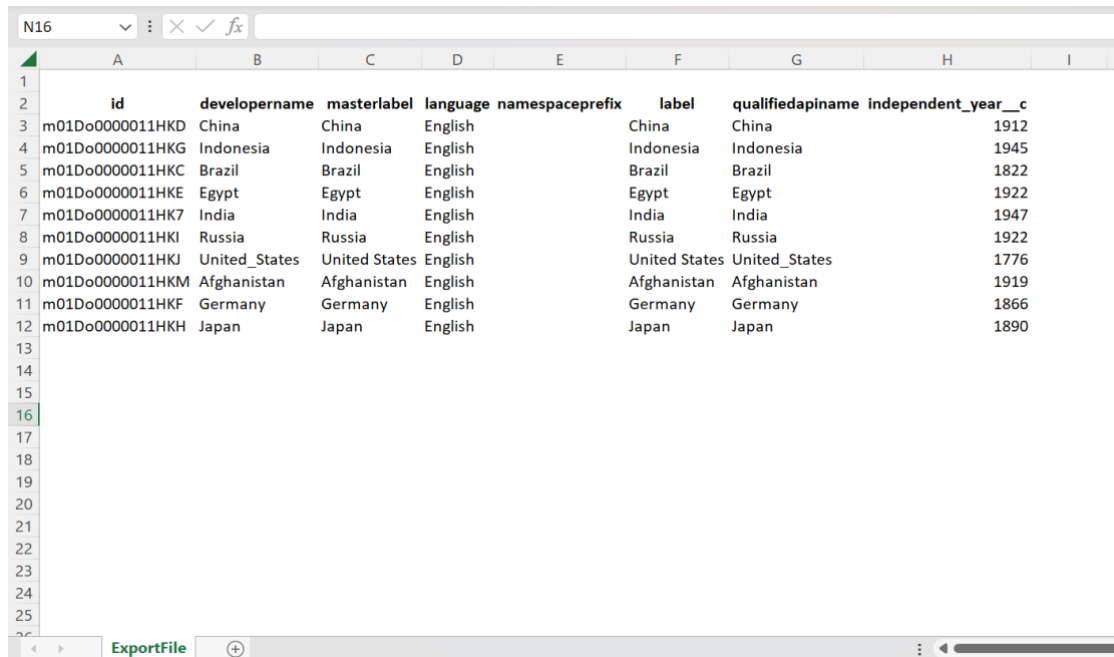
- As soon as you click on the Export button, the file will start downloading, and you will receive a success toast message. It may take some time to complete the download, so please wait patiently.



- After receiving the success toast message, it will automatically redirect to the Custom Metadata Type Loader tab, but it may take some time to complete the redirection.

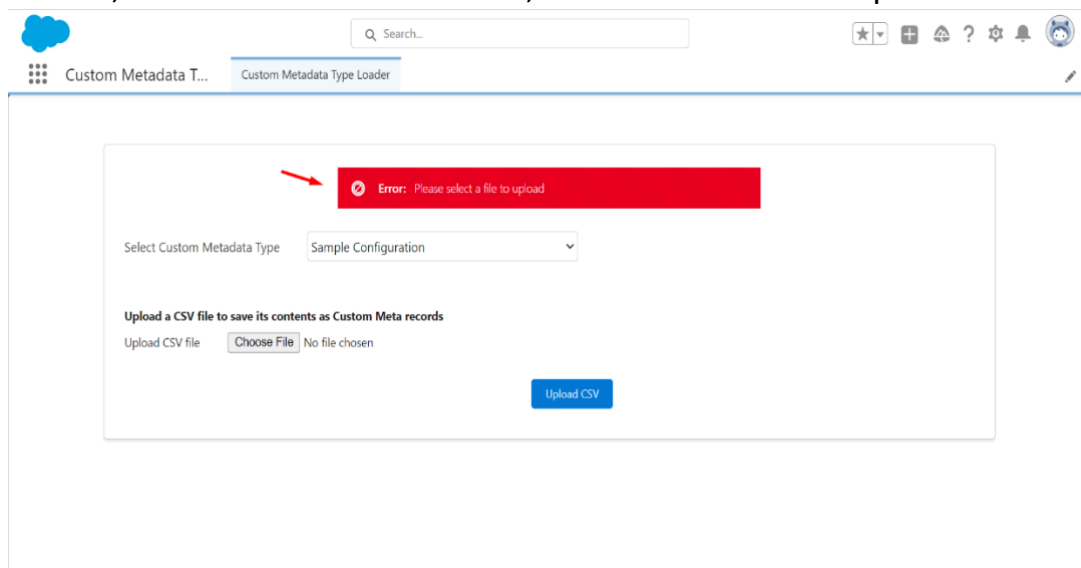- After downloading the file, the file will appear as shown in the picture below.



- Now, you can customize this file, change the file type to CSV (Comma delimited), and click on save.
- After saving the file, close it, then reopen the saved file and save it again. After that, you will be able to import the CSV file.

## ➢ Errors:-

- If you haven't selected any file and you try to click on the 'Upload CSV' button, it will throw an error, as shown in the picture below.

- In metadata, there must be at least one custom field; otherwise, it will throw an error, as shown in the picture below.



- If you have entered the API names of the fields incorrectly in the CSV file, it will also throw an error, as shown in the picture below.
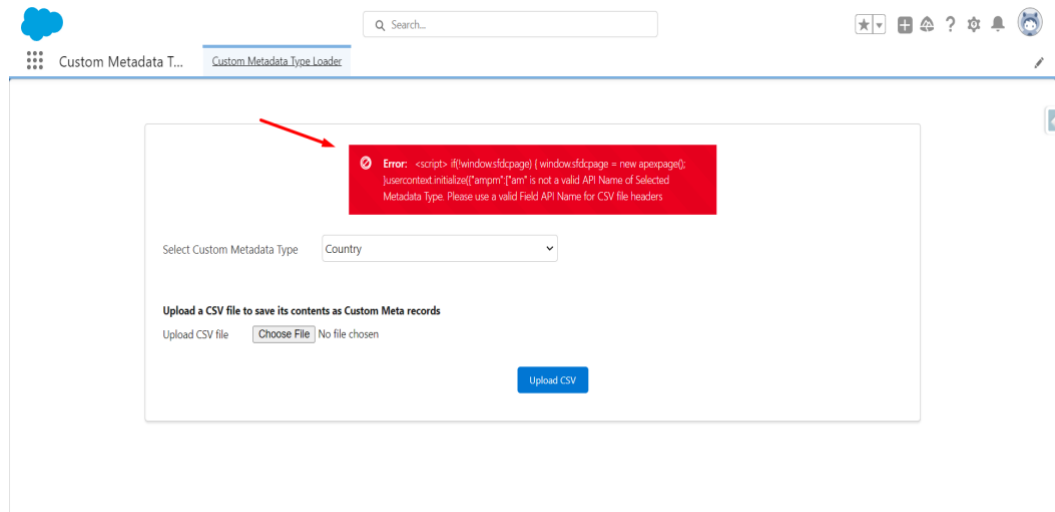


- Here is the CSV file containing incorrect field API Names.

- You need to be careful when saving the file, whether it's in CSV (Comma delimited) format or not.
- If you have saved the file in CSV UTF-8 format, it will throw an error like the one shown in the picture below, indicating that the 'MasterLabel' API Name is not valid.
- Not only 'MasterLabel,' but any value you have in the first column header will also trigger an error.



- After downloading the file using the Export button, if you attempt to upload the same downloaded file without changing the file format to CSV (Comma delimited), you will encounter the error shown below.

- The error you receive when exporting the metadata records related to your custom metadata type object indicates that if the file is not being downloaded, your metadata records storage has exceeded the 15 MB organization limit.
- The error looks like the picture below.