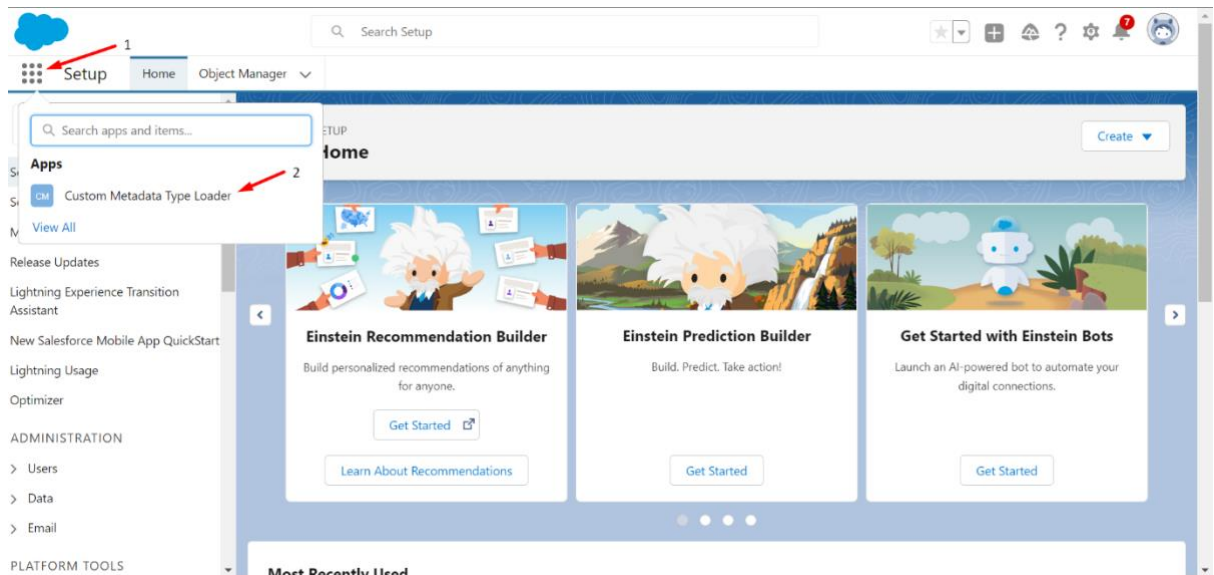
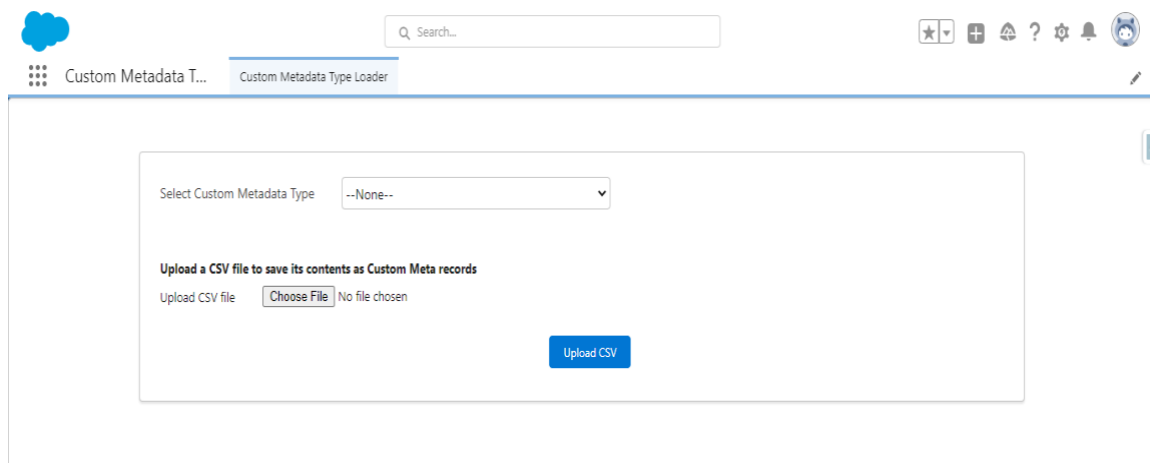


CUSTOM METADATA TYPE LOADER

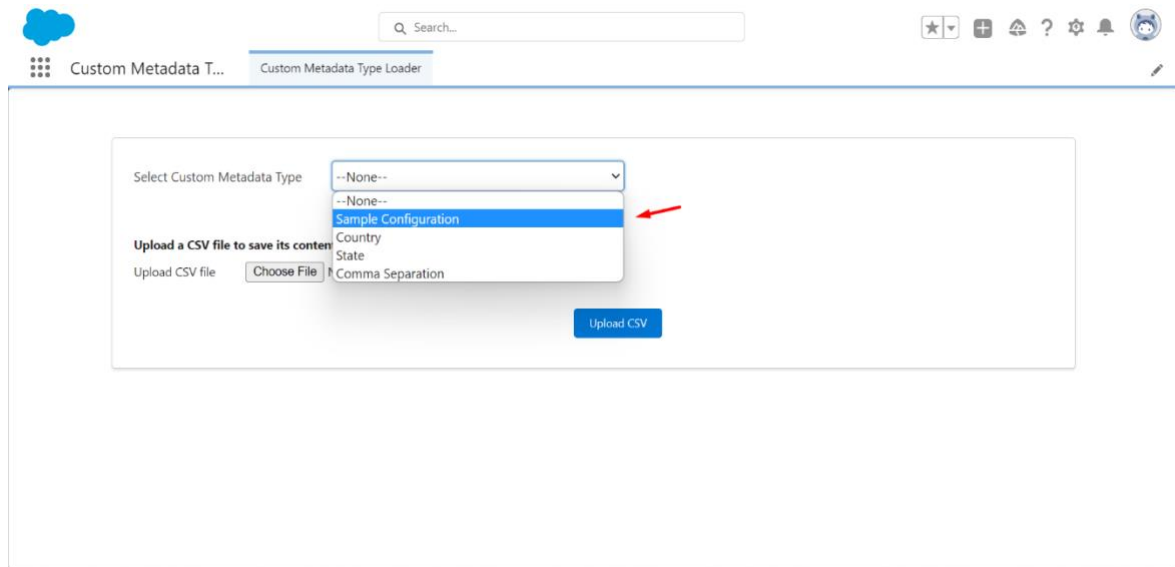
- Custom Metadata Type Loader is for uploading a CSV file for inserting a number of records into a custom metadata type.
- After login into the Salesforce, environment go to the **App Launcher** and click on **Custom Metadata Type Loader App**.



- 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.



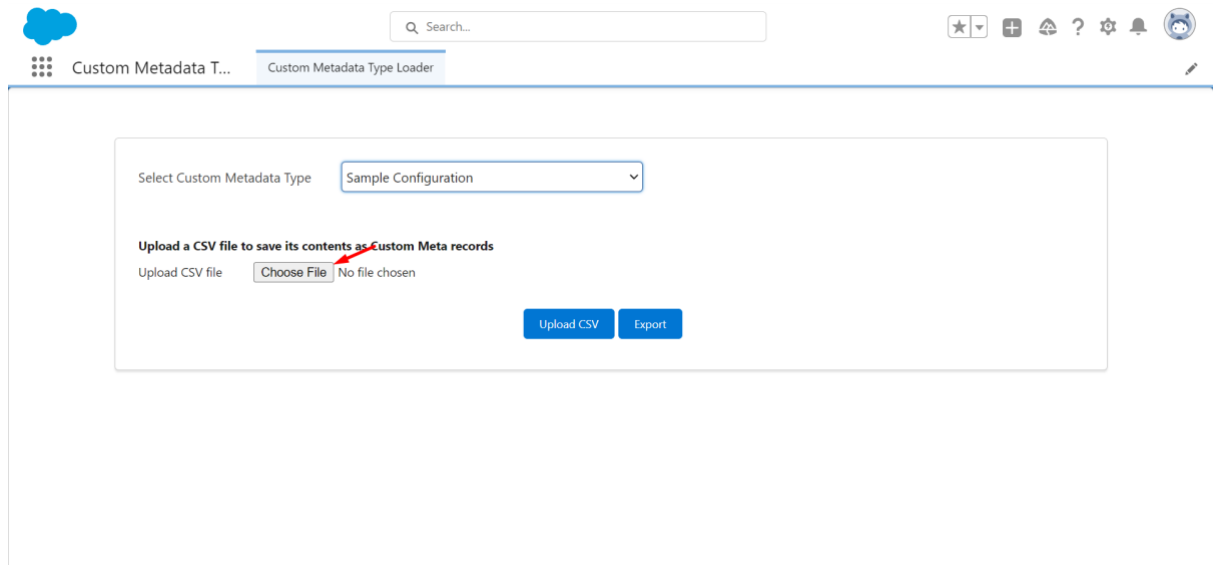
- In the **select custom metadata type** option, you'll be able to see all the custom metadata objects related to the respective environment as a dropdown. Click on the drop-down and select the custom metadata object where you wanted to insert records.



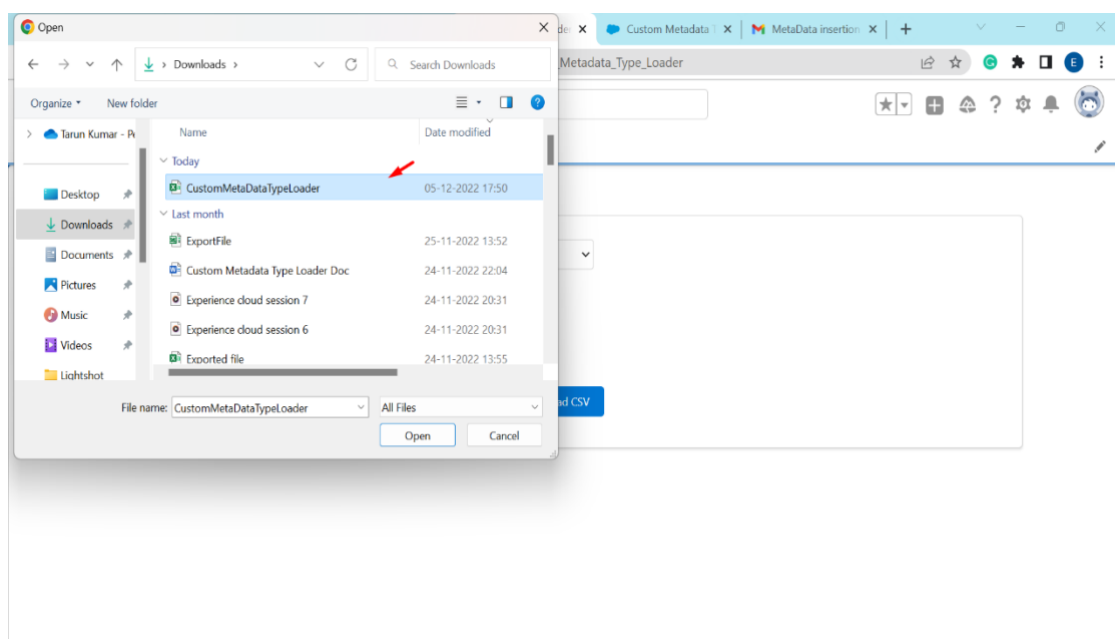
- After selecting the custom metadata type we have the option to upload the file.
- The file format should be in CSV while uploading.
- We need to be careful while preparing CSV files because in the Developer Name it will not take any **spaces and special characters**. **Instead of that, we need to give '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 CSV that file will look like the below picture.

	A	B	C	D
1	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				

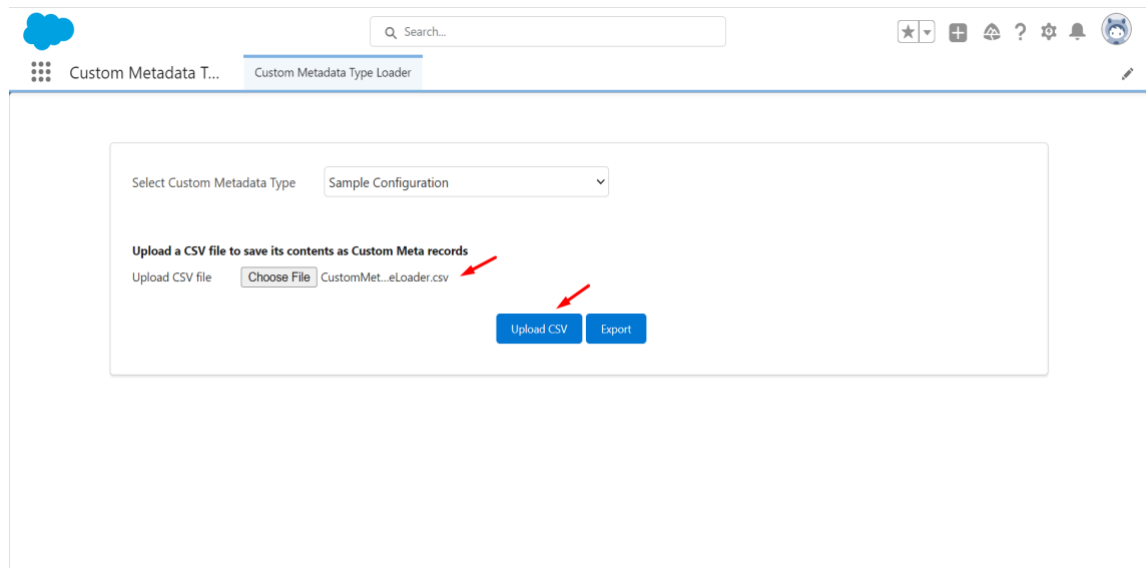
- After preparing the CSV file we have an option for uploading which is to **Choose file** beside the **Upload CSV File Text**.



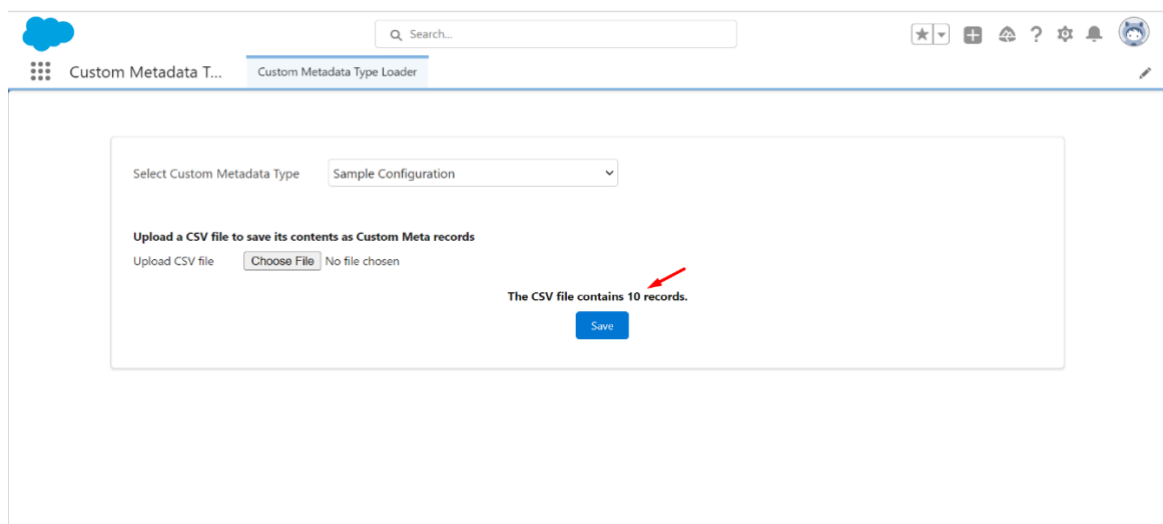
- Click on Choose file then the popup will be open for selecting the CSV file. Select the CSV file which you want to upload.



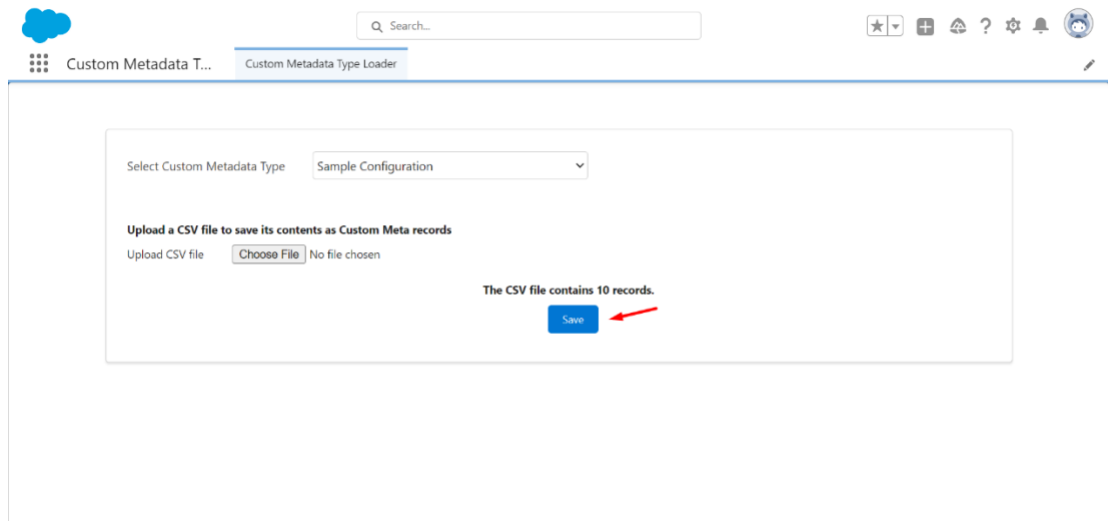
- After selecting the CSV file then beside the choose file option you can see your CSV file name and then click on the **Upload CSV** button.



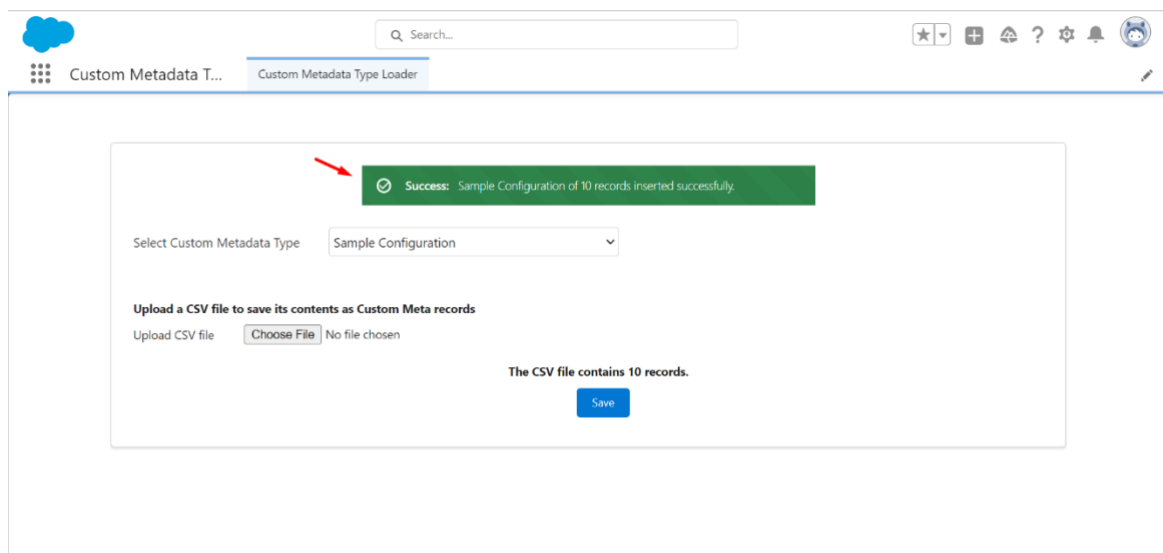
- After clicking on the Upload CSV button it'll show the count of the records in the text.



- 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.

Search Setup

Setup Home Object Manager

Q Custom Me

Custom Code

Custom Metadata Types

Didn't find what you're looking for? Try using Global Search.

Custom Metadata Types

All Custom Metadata Types

Custom metadata types enable you to create your own setup objects whose records are metadata rather than data. These are typically used to define application configurations that need to be migrated from one environment to another, or packaged and installed.

Rather than building apps from data records in custom objects or custom settings, you can create custom metadata types and add metadata records, with all the manageability that comes with metadata: package, deploy, and upgrade. Querying custom metadata records doesn't count against SOQL limits.

New Custom Metadata Type

Action	Label	Installed Package	Namespace Prefix	Visibility	API Name	Record Size	Description
Del Manage Records	Comma Separation			Public	Comma_Separation__mdt	191	
Del Manage Records	Country			Public	Country__mdt	161	
Manage Records	Sample Configuration	vamritech		Public	vamritech__Sample_Configuration__mdt	144	
Del Manage Records	State			Public	State__mdt	224	

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

Search Setup

Setup Home Object Manager

Q Custom Me

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Custom Metadata Types

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Custom Metadata Types

All Custom Metadata Types

Custom metadata types enable you to create your own setup objects whose records are metadata rather than data. These are typically used to define application configurations that need to be migrated from one environment to another, or packaged and installed.

Rather than building apps from data records in custom objects or custom settings, you can create custom metadata types and add metadata records, with all the manageability that comes with metadata: package, deploy, and upgrade. Querying custom metadata records doesn't count against SOQL limits.

New Custom Metadata Type

Action	Label	Installed Package	Namespace Prefix	Visibility	API Name	Record Size	Description
Del Manage Records	Comma Separation			Public	Comma_Separation__mdt	191	
Del Manage Records	Country			Public	Country__mdt	161	
Manage Records	Sample Configuration	vamritech		Public	vamritech__Sample_Configuration__mdt	144	
Del Manage Records	State			Public	State__mdt	224	

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

Search Setup

Setup Home Object Manager

Custom Me

Custom Code

Custom Metadata Types

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Custom Metadata Types

Sample Configurations

View: Custom Edit Create New View

Action	Label	Sample Configuration Name	Sample Code
Edit Del	Test_1	Test_1	10
Edit Del	Test_10	Test_10	100
Edit Del	Test_2	Test_2	20
Edit Del	Test_3	Test_3	30
Edit Del	Test_4	Test_4	40
Edit Del	Test_5	Test_5	50
Edit Del	Test_6	Test_6	60
Edit Del	Test_7	Test_7	70
Edit Del	Test_8	Test_8	80
Edit Del	Test_9	Test_9	90

New

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

Search Setup

Setup Home Object Manager

custom metadata

Custom Code

Custom Metadata Types

Didn't find what you're looking for? Try using Global Search.

Custom Metadata Types

Sample Configuration

Sample Configuration Detail

Edit Delete Clone

Label Test_1

Sample Configuration Name Test_1

Sample Code 10

Created By Tarun Earle 11/22/2022, 4:14 AM

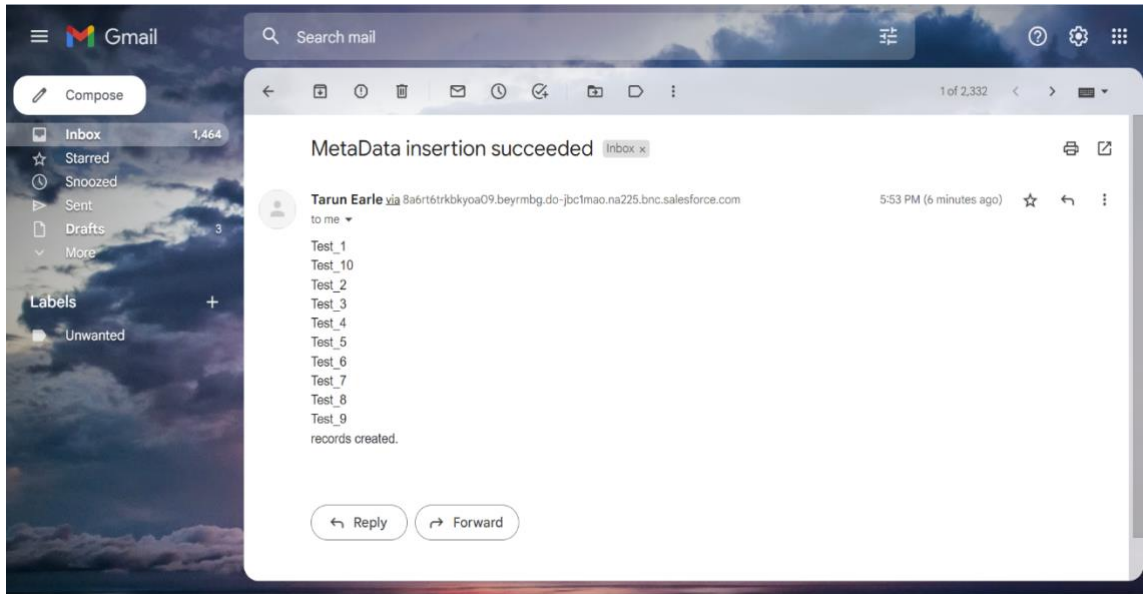
Last Modified By Tarun Earle 11/22/2022, 4:14 AM

Protected Component ☐

Namespace Prefix

Edit Delete Clone

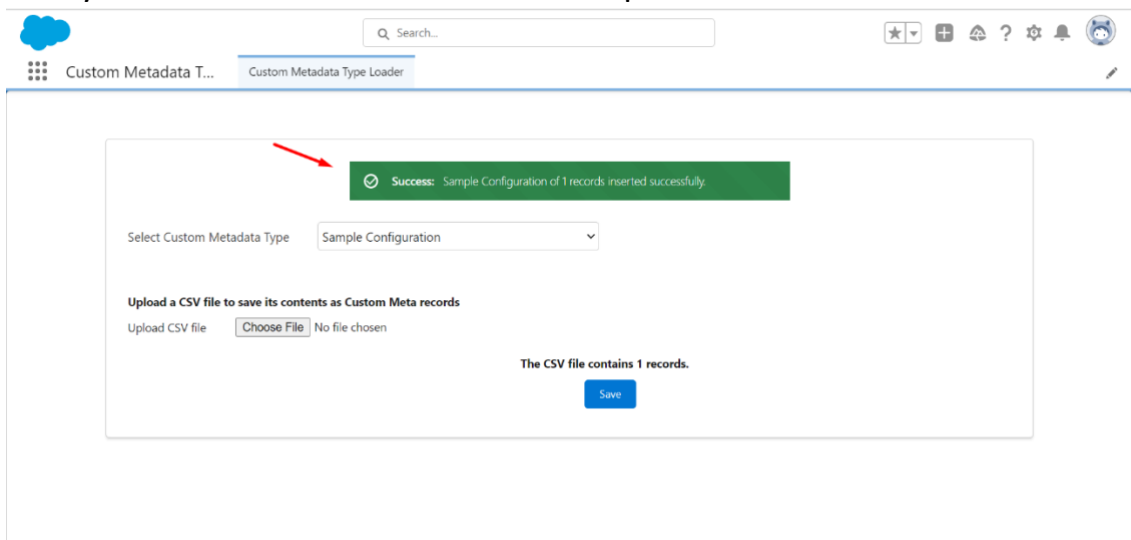
- You'll also receive an email after the successful processing of the records.



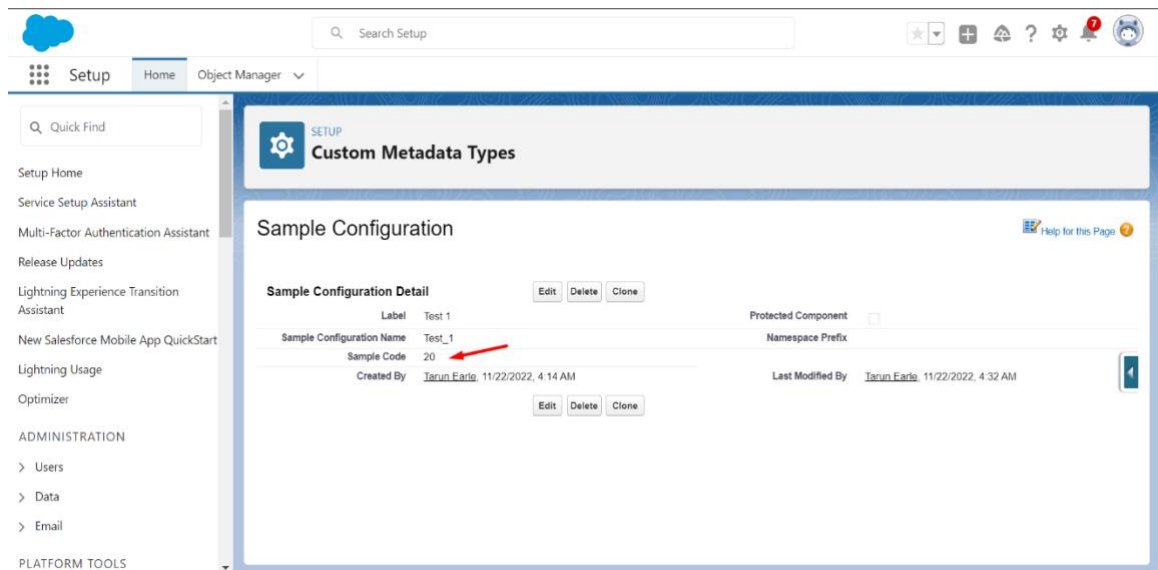
- We can update the record in already existing records in a custom metadata type.
- Based on the **DeveloperName** the tool will understand if the record already exists or not. If it is already present the record will get updated else the record get inserted.

	A	B	C	D	E	F	G
1	MasterLabel	DeveloperName	Vamritech_Sample_Code__c				
2	Test 1	Test_1	20				
3							

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



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



❖ Parent-Child Record Creation:

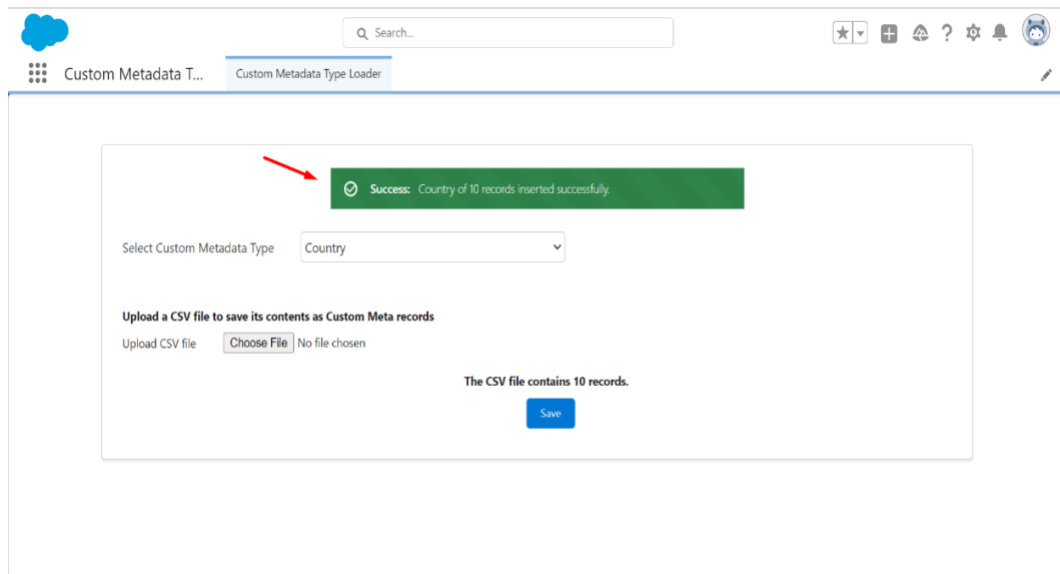
➤ **Parent Metadata Record Creation:**

- 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.

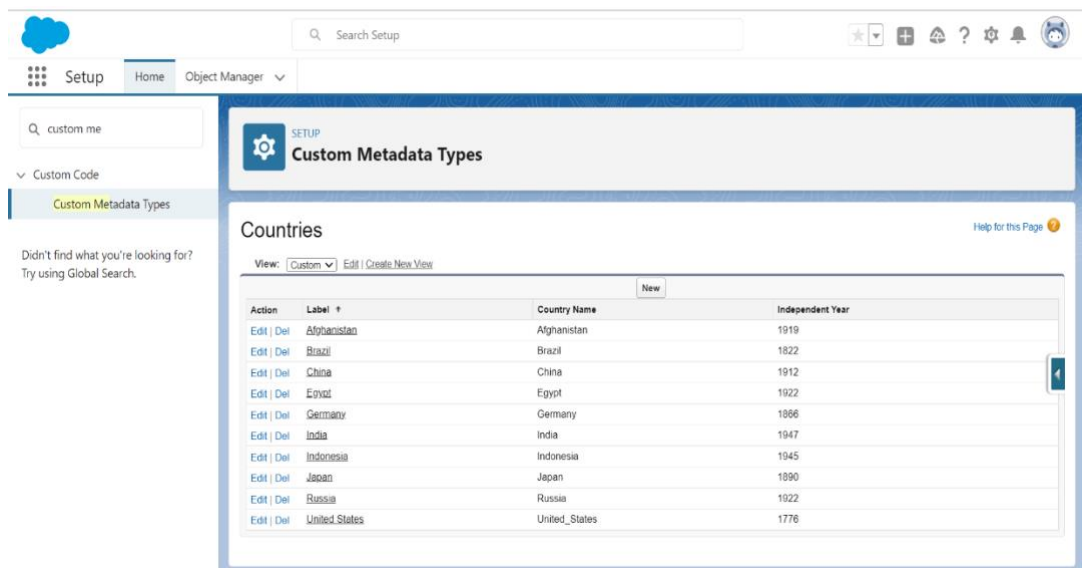
	A	B	C	D	E
1	MasterLabel	DeveloperName	Independent_Year__c		
2	India	India	1947		
3	United States	United_States	1776		
4	Indonesia	Indonesia	1945		
5	China	China	1912		
6	Brazil	Brazil	1822		
7	Russia	Russia	1922		
8	Japan	Japan	1890		
9	Egypt	Egypt	1922		
10	Germany	Germany	1866		
11	Afghanistan	Afghanistan	1919		
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.



➤ **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.

119					
	A	B	C	D	E
1	MasterLabel	DeveloperName	Number_of_Capitals__c		
2	Telangana	Telangana	1		
3	Andhra Pradesh	Andhra_Pradesh	1		
4	Washington	Washington	1		
5	Gorontalo	Gorontalo	1		
6	Shandong	Shandong	1		
7	Amazonas	Amazonas	1		
8	Altai	Altai	1		
9	Chubu	Chubu	1		
10	Brandenburg	Brandenburg	1		
11	Suhag	Suhag	1		
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.

The screenshot shows the Salesforce Custom Metadata Type Loader interface. At the top, there is a search bar and navigation icons. Below the navigation bar, the page title is "Custom Metadata T..." and the sub-header is "Custom Metadata Type Loader". A green success message box with a checkmark icon and the text "Success: State of 10 records inserted successfully." is displayed. Below this, there is a dropdown menu labeled "Select Custom Metadata Type" with "State" selected. Underneath, the text "Upload a CSV file to save its contents as Custom Meta records" is followed by an "Upload CSV file" button and the text "No file chosen". At the bottom, it says "The CSV file contains 10 records." and a "Save" button.

- 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.

Search Setup

Setup Home Object Manager

custom me

Custom Code

Custom Metadata Types

Didn't find what you're looking for? Try using Global Search.

Custom Metadata Types

States

View: Custom Edit Create New View

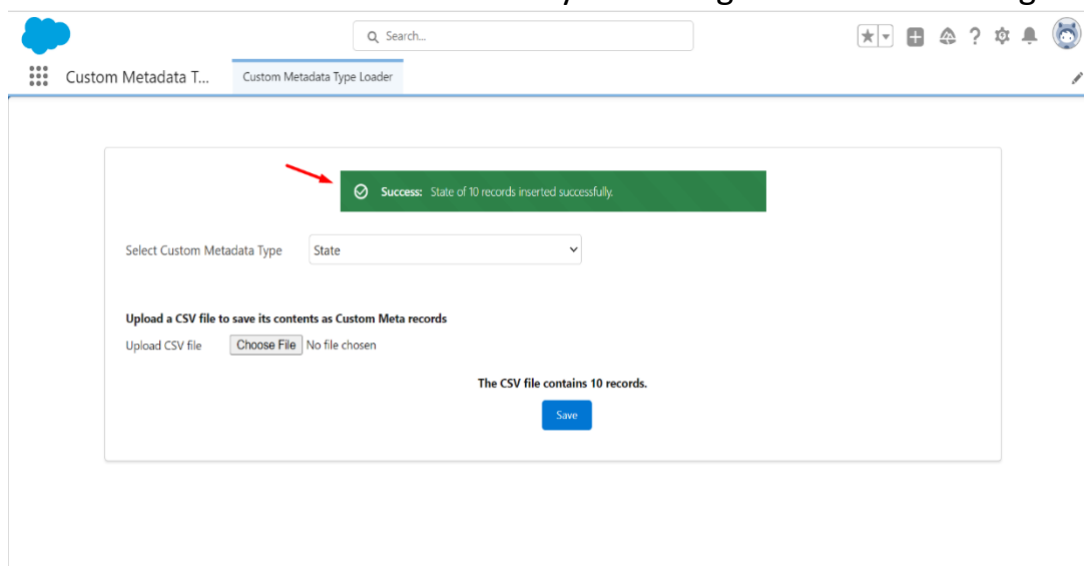
Action	Label	State Name	Number of Capitals	Parent
Edit Del	Altai	Altai	1	
Edit Del	Amazonas	Amazonas	1	
Edit Del	Andhra Pradesh	Andhra Pradesh	1	
Edit Del	Brandenburg	Brandenburg	1	
Edit Del	Chubu	Chubu	1	
Edit Del	Gorontalo	Gorontalo	1	
Edit Del	Shandong	Shandong	1	
Edit Del	Suhag	Suhag	1	
Edit Del	Telangana	Telangana	1	
Edit Del	Washington	Washington	1	

➤ Child with Parent Record Creation:

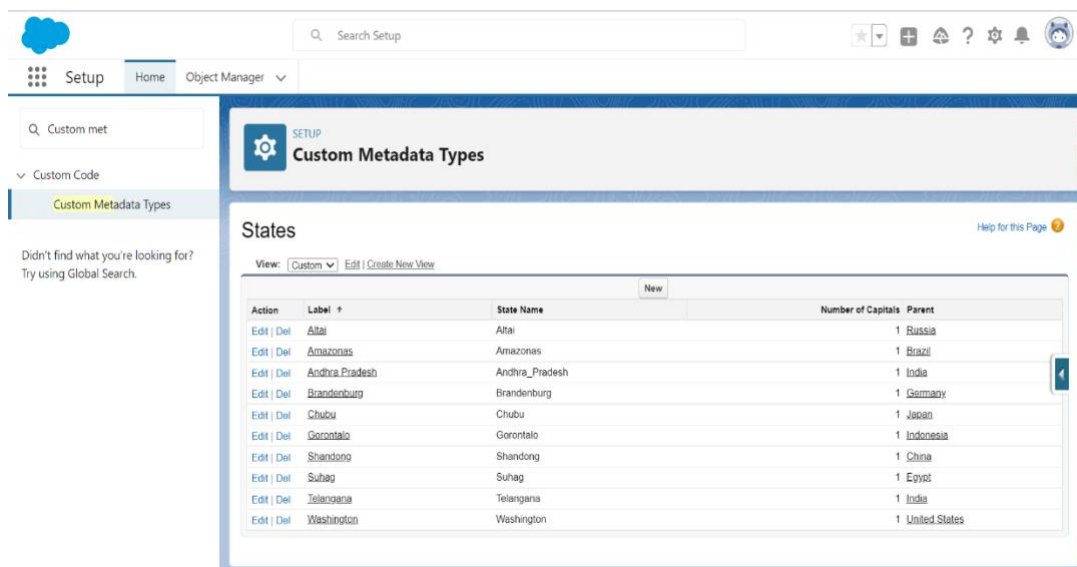
- Let's create a **State__mdt** Custom metadata Type Record with a Lookup field.
- In this we are going to add a parent to this metadata record.
- In the Lookup field we need to give the **DeveloperName** of the Parent Custom Metadata Type Record.
- Here is the prepared CSV file for inserting the **State__mdt**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

D16					
	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.



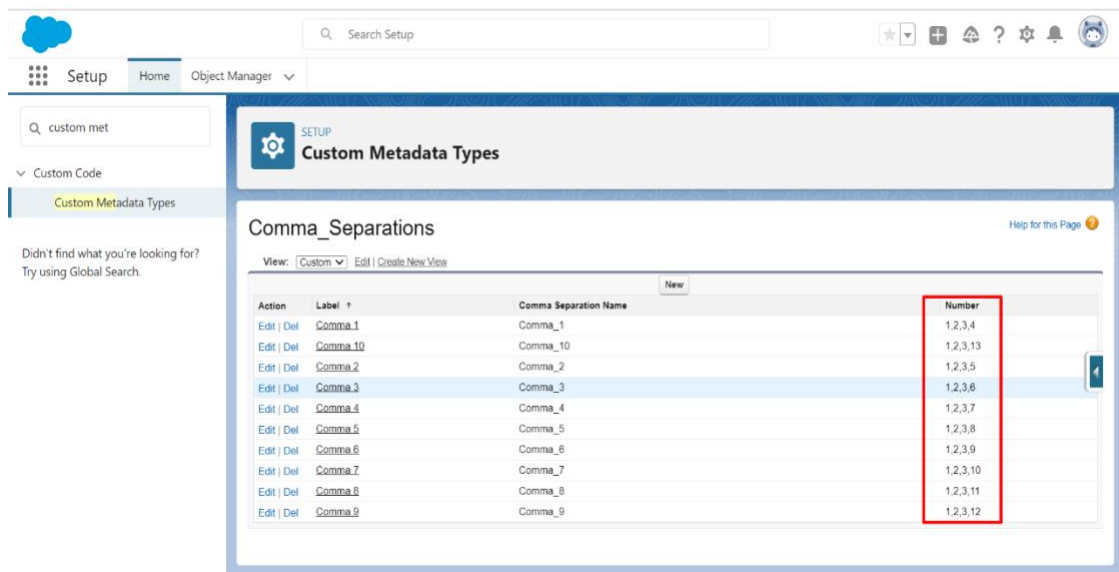
- We can insert the metadata records with the **comma separation** values. Please prepare the CSV file like the below picture. **Eg: 1,2,3,4**

	A	B	C
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.

The screenshot shows the Salesforce Custom Metadata Type Loader interface. At the top, there is a search bar and navigation icons. Below the navigation bar, the page title is "Custom Metadata T..." and the sub-header is "Custom Metadata Type Loader". A green success message box with a checkmark icon and the text "Success: Comma Separation of 10 records inserted successfully." is displayed. Below this, there is a dropdown menu labeled "Select Custom Metadata Type" with "Comma Separation" selected. Underneath, there is a section titled "Upload a CSV file to save its contents as Custom Meta records" with a file upload area showing "Upload CSV file" and "Choose File" button, and the text "No file chosen". At the bottom, it says "The CSV file contains 10 records." and a "Save" button.

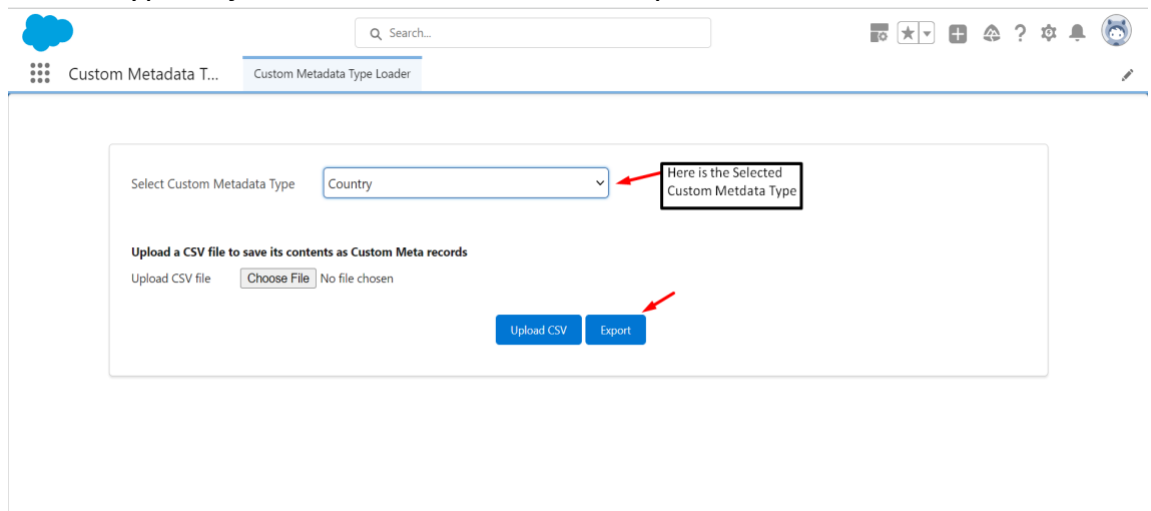
- For checking that go to setup → Click on Home → In the quick find box search custom metadata type → then you will navigate to the page where you can see all the metadata objects → click on the metadata object where you uploaded records using custom metadata loader there you can see all the records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



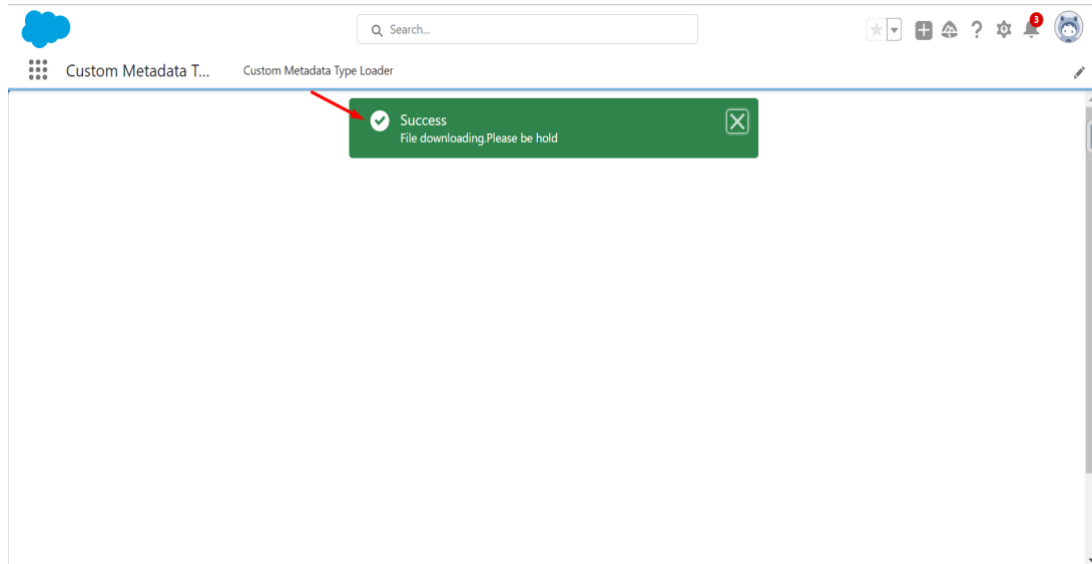
➤ Export Functionality:-

The Export button's functionality is used for exporting all Field API Names and records related to our selected custom metadata type.

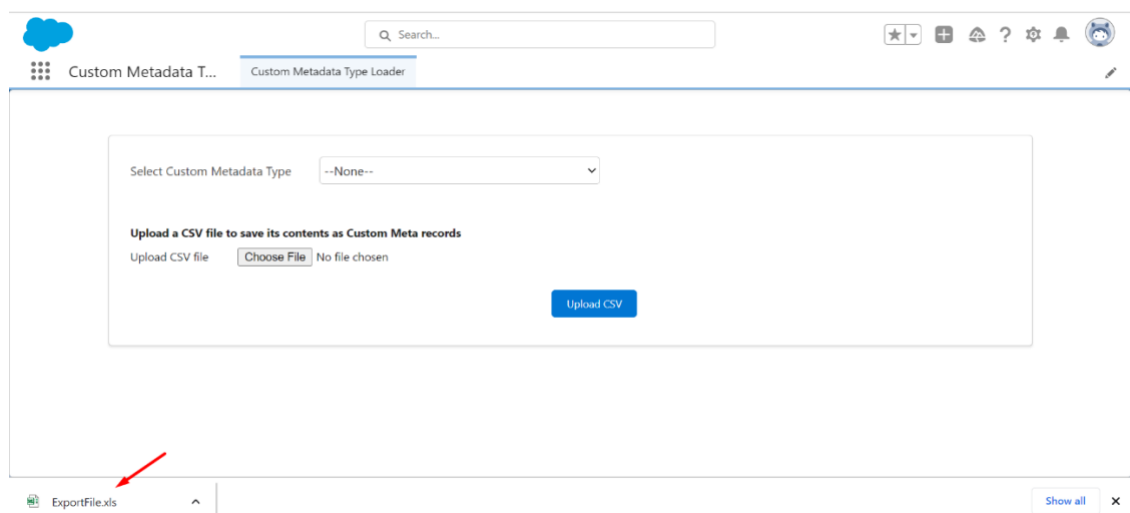
- You can export up to 9000 records as long as the export size is less than 15MB.
- As shown in the screenshot below, you need to select the Custom Metadata Type object and then click on the Export button.



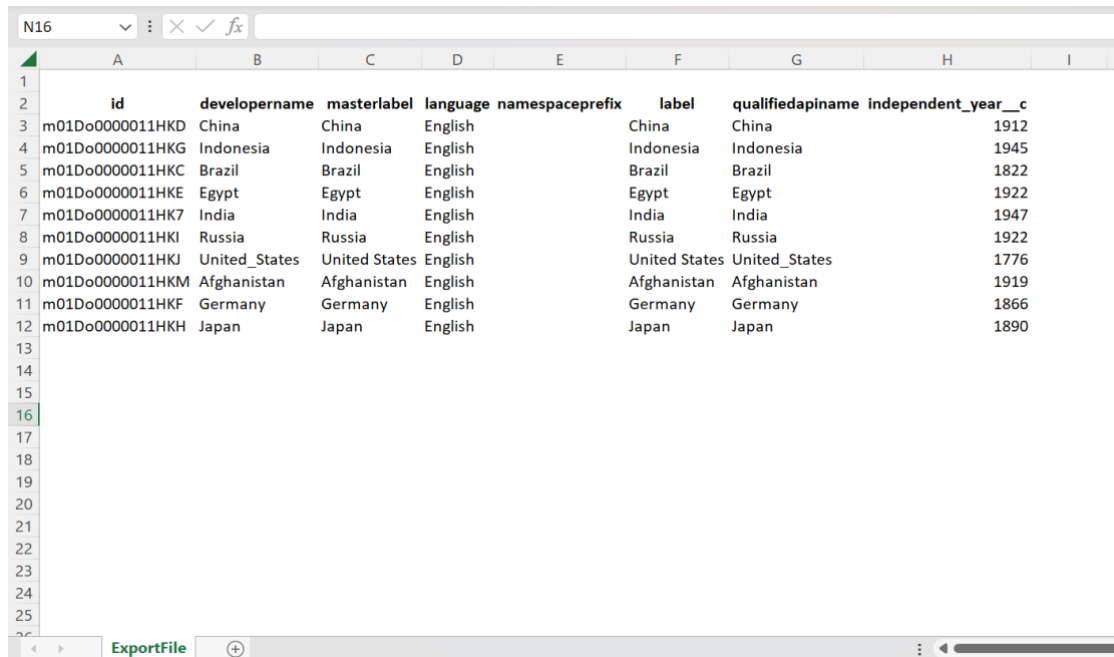
- As soon as you click on the Export button, the file will start downloading, and you will receive a success toast message. It may take some time to complete the download, so please wait patiently.



- 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.

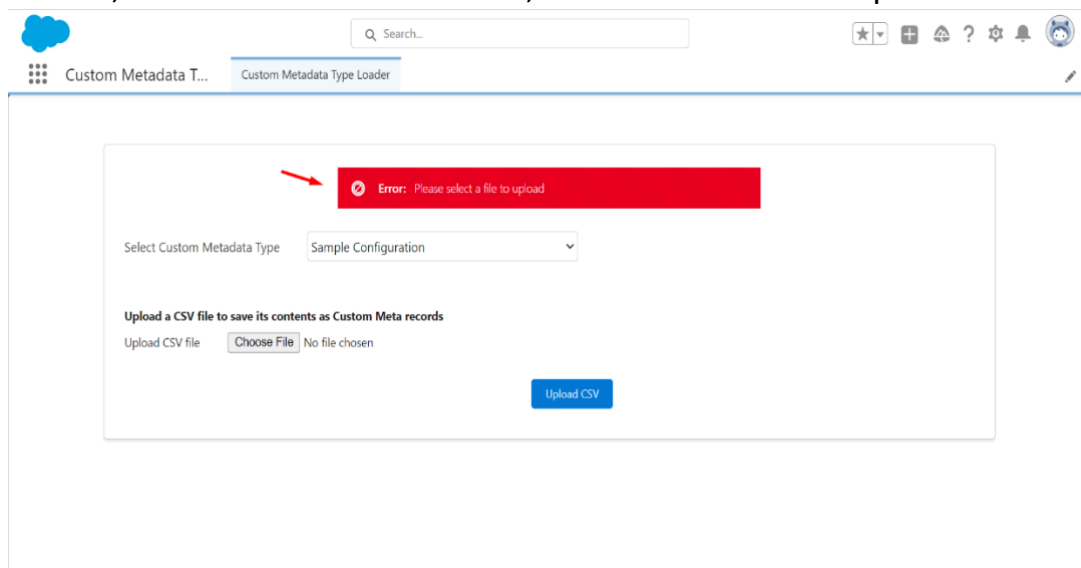


	A	B	C	D	E	F	G	H	I
1									
2		id	developername	masterlabel	language	namespaceprefix	label	qualifiedapiname	independent_year_c
3	m01Do0000011HKD	China	China	English		China	China		1912
4	m01Do0000011HKG	Indonesia	Indonesia	English		Indonesia	Indonesia		1945
5	m01Do0000011HKC	Brazil	Brazil	English		Brazil	Brazil		1822
6	m01Do0000011HKE	Egypt	Egypt	English		Egypt	Egypt		1922
7	m01Do0000011HK7	India	India	English		India	India		1947
8	m01Do0000011HKL	Russia	Russia	English		Russia	Russia		1922
9	m01Do0000011HKJ	United_States	United States	English		United States	United_States		1776
10	m01Do0000011HKM	Afghanistan	Afghanistan	English		Afghanistan	Afghanistan		1919
11	m01Do0000011HKF	Germany	Germany	English		Germany	Germany		1866
12	m01Do0000011HKH	Japan	Japan	English		Japan	Japan		1890
13									
14									
15									
16									
17									
18									
19									
20									
21									
22									
23									
24									
25									

- 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.



Custom Metadata T... Custom Metadata Type Loader

Search...

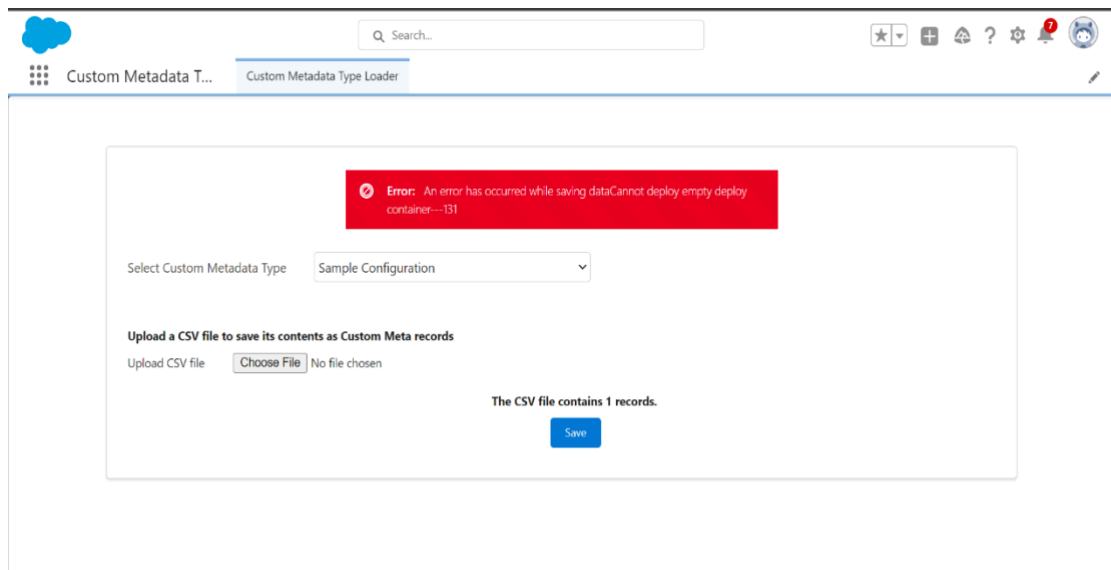
Select Custom Metadata Type: Sample Configuration

Upload a CSV file to save its contents as Custom Meta records

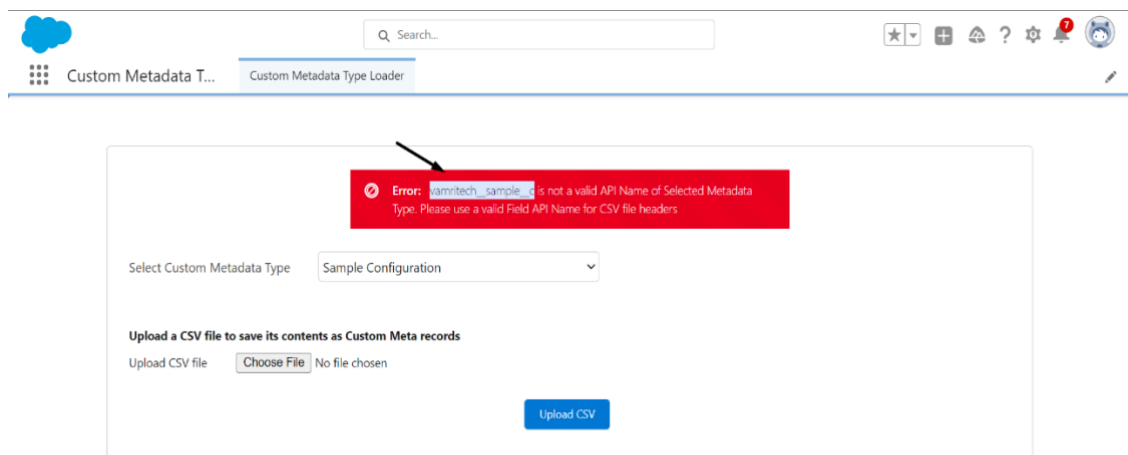
Upload CSV file: Choose File No file chosen

Upload CSV

- 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.



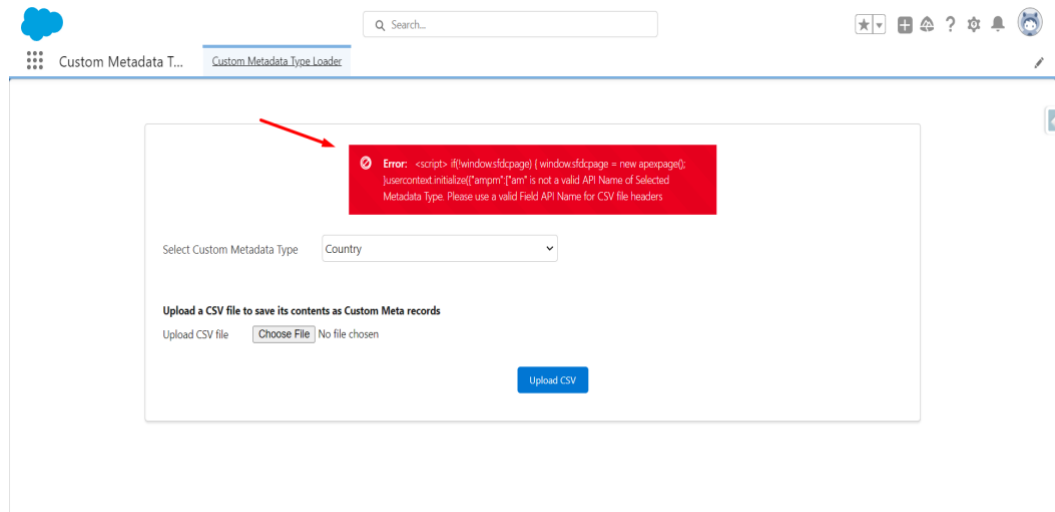
- Here is the CSV file containing incorrect field API Names.

	A	B	C	D
1	MasterLabel	DeveloperName	vamritech__Sample__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				

- 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.

The screenshot shows the 'Custom Metadata Type Loader' interface. At the top, there is a search bar and navigation icons. Below the header, the 'Custom Metadata Type' is set to 'Sample Configuration'. A red error banner at the top of the main content area reads: 'Error: masterlabel is not a valid API Name of Selected Metadata Type. Please use a valid Field API Name for CSV file headers'. Below the error, there is a section titled 'Upload a CSV file to save its contents as Custom Meta records'. It includes a file upload area with a 'Choose File' button and the text 'No file chosen'. At the bottom right of this section is an 'Upload CSV' button.

- 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.

