Migrate (CSV, Excel, XML) Data from SFTP into Salesforce / Destination object(s)

Contents

Preparation :

1. Model File

2. SFTP Connection Parameters

3. Salesforce Object(s)

Model File :

A Model File is a file that contains the header information sometimes called the schema, let's take an example of a CSV data file

Customer Number	Customer Name	Contact Last Name	Contact First Name	phone	city	state	country	Emp Num
101	NZ Corps Company	Tom	Dick	45454545	Rotorua		New Zealand	
103	Atelier graphique	Schmitt	Carine	40.32.2555	Nantes		France	1370
112	Signal Gift Stores	King	Jean	7.03E+09	Las Vegas	NV	USA	1166
114	Australian Collectors, Co.	Ferguson	Peter	03 9520 4555	Melbourne	Victoria	Australia	1611
119	La Rochelle Gifts	Labrune	Janine	40.67.8555	Nantes		France	1370
121	Baane Mini Imports	Bergulfsen	Jonas	07-98 9555	Stavern		Norway	1504
124	Mini Gifts Distributors Ltd.	Nelson	Susan	4.16E+09	San Rafael	CA	USA	1165

to make a Model File from this Data file, Just copy the first row and create a new File with that copied header row.

In this case the Model File if it's called "account_model.csv" its contents will be

```
Customer Number,Customer Name,Contact Last Name,Contact First
Name,phone,city,state,country,Emp Num
```

The Model File is critical for Creating a connection and for Data Movement. This file acts as a schema for Trueloader to Sweep data from Multiple Data Files that contains the same header information.

A Model File can also be created from an Excel file.

for example, let's take an example of a Excel file that contains (2 Workbooks) namely "Contacts & Products)

Last Name	First Name	Address 1	Address 2	City	State	Zip	Country	Business Phone	Home Phone	Cell Phone	Birthday	Anniversary	Notes
Jones	Mary	567 Lincoln Way		Denver	CO	80002-0000	USA	(303) 000-0000	(303) 000-0000	(303) 000-0000	12/15/1950	10/05/1975	Children: John & Kim
Murphy	Tom	345 Sheperd Drive		Sacramento	CA	09420-6000	USA	(916) 000-0000	(916) 000-0000	(916) 000-0000	10/21/1980	01/21/2005	
Smith	John	123 Main	Apt. 2B	Nashville	TN	37201-0000	USA	(615) 000-0000	(615) 000-0000	(615) 000-0000	05/18/1977		

Contacts | Products | Sheet3

sku	prodcust_name	short_desc	supplier	unit_price	quantity	active
FQ-6739-fz	Pleo Muscar	Acute infection fol tranfs,infusn,inject blood/products	Browsedrive	0.89	61	#####
XQ-3152-ds	PERIGIENE	Cannabis use, unspecified with intoxication delirium	Quimba	6.51	734	#####
CQ-9489-nf	Ortho Tri Cyclen	Complete lesion at T2-T6 level of thoracic spinal cord, subs	Quinu	6.66	399	#####
HO-8360-nz	Laura Mercier Tinted Moisturizer SPF 20 WALNUT	Nondisp fx of dist phalanx of l thm, subs for fx w malunion	Gigaclub	4.68	375	#####
MJ-5528-ze	TussiCaps	Other female pelvic inflammatory diseases	Kazu	2.51	628	#####
GO-9425-qd	Shopko Antibacterial Hand Sanitizer	Person injured in clsn betw car and hv veh, nontraf, sequela	Aimbo	9.25	581	#####
ET-7418-un	Fluconazole	Legal intervnt w injury by explosv shell, bystand injured	Buzzshare	2.99	285	#####
RF-6864-ze	Lorazepam	Unsp injury of deep palmar arch of left hand, init encntr	Mydo	4.89	704	#####
RJ-3955-fh	Meloxicam	Abnormal results of other function studies of eye	Devcast	3.51	243	#####
MC-5724-fy	Glyburide and Metformin	Disp fx of base of nk of unsp femr, 7thK	Thoughtblab	1.14	225	#####
QS-0524-ed	ESIKA	Other chondrocalcinosis, multiple sites	Digitube	2.71	112	#####
NR-2216-kd	PHOMA EXIGUA VAR EXIGUA	Pnctr w/o fb of l frnt wl of thorax w penet thor cav, subs	Rhyloo	4.61	498	#####
RS-3127-lg	Cough DM	Mosquito-borne viral fever, unspecified	Fadeo	9.47	96	#####
EO-1374-fs	Sunmark Assorted fruit	Infect/inflm react due to int fix of unsp bone of leg, sqla	Thoughtworks	4.08	152	#####
GS-0398-de	up and up tussin multi symptom cold	Poisoning by local anesthetics, accidental, sequela	Edgepulse	2.91	717	#####
SF-8874-af	Arnica Betula B	Major laceration of right external jugular vein	Feedfire	6.48	605	#####
CM-7906-lr	Ultracare Anesthetic	Occup of bus injured in collision w hv veh nontraf	Quamba	0.27	281	#####
YL-8879-zb	Water Oak	Inj cutan sensory nerve at shldr/up arm, right arm, subs	Yacero	3.27	494	#####
RS-1366-jo	GUINOT Skin Defense SPF 15 Face	Major laceration of unsp internal jugular vein, init encntr	Abatz	9.74	950	#####
QZ-2708-fv	tussin cough	Displ spiral fx shaft of rad, unsp arm, 7thJ	Feedfire	4.77	187	#####
HV-1720-sr	Viscum Quercus	Unsp inj intrns musc/fasc/tend l idx fngr at wrs/hnd lv,sqla	Skalith	3.07	733	#####
BL-4191-yz	CD DIORSKIN NUDE SKIN-GLOWING MAKEUP SUNSCREEN BROAD SPECTRUM SPF 15 030 Medium Beige	Displaced subtrochanteric fracture of right femur, init	Gigabox	7.2	192	#####
UL-6667-yg	Amoxicillin and Clavulanate Potassium	Transient retinal artery occlusion, right eye	Mynte	2.85	397	#####
MN-2533-ka	AURUM METALLICUM	Mech compl of cardiac electrode, initial encounter	Dynava	0.38	515	#####
DI-6262-ys	RECOMBINATE	Toxic effect of corrosive alkalis and alk-like substnc, acc	Quimba	6.11	977	#####
EG-9630-uk	TRAMADOL HYDROCHLORIDE	Laceration of blood vessels at forarm lv, right arm, sequela	Twimm	9.56	991	#####
YG-2865-wr	Lorazepam	Multiple endocrine neoplasia [MEN] syndromes	Kwimbee	7.15	165	#####
LE-9055-an	NHS HEADACHE	Disp fx of 4th metatarsal bone, r ft, 7thG	Roombo	4.74	751	#####
FH-9413-pl	Risperidone	Nondisp fx of pisiform, unsp wrist, subs for fx w malunion	Topicware	9.65	383	#####
YZ-9734-ly	Dexamethasone Sodium Phosphate	Unspecified retinal detachment with retinal break	Blogspan	6.35	864	#####
SJ-6189-zy	Gum	Sltr-haris Type II physeal fx phalanx of unsp toe, 7thD	Eamia	3.86	655	#####
WK-3565-mw	Modafinil	Other specified injury of femoral artery, right leg	Realblab	5.22	725	#####
MX-5329-hp	EczeNil	Genitl trct and pelvic infct fol ectopic and molar pregnancy	Roodel	9.11	706	#####
ZT-0449-ab	TOLMETIN SODIUM	Burn of first degree of left palm, sequela	Npath	5.24	603	#####
VY-2209-ey	Infant Glycerin Laxative	Lennox-Gastaut syndrome, intractable, w/o status epilepticus	Zoombox	4.67	156	#####
AR-4430-py	IMITREX	Burn of second degree of left axilla, initial encounter	Rhynoodle	7.97	172	#####
PG-5835-nx	Treatment Set TS330717	Poisoning by sulfonamides, assault	Yotz	4.74	223	#####
AW-9079-rk	Colgate	Primary blast injury of descending colon, subs encntr	Edgeify	9.57	255	#####
UA-5823-wn	REFISSA	Displ bimalleol fx unsp low leg, 7thG	Blogspan	1.89	507	#####

Contacts | Products | Sheet3

to make a Model File, you just need to copy the First row (Header row) from both the workbooks and create a new Excel file with the copied contents.

In this case if the Model File is called "contact_plus_products.xlsx", its contents will be

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Last Name	First Name	Address 1	Address 2	City	State	Zip		Country	Business I	Home Pho	Cell Phon	Birthday	Anniversa	Notes
2														
3														
4														
5														
6														

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	A	B	C	D	E	F	G
1	sku	prodcust_	short_des	supplier	unit_price	quantity	active
2							
3							
4							
5							
6							

Contacts | **Products** | Sheet3

Do you know ? Trueloader can sweep data from multiple Excel Files, each containing multiple Workbooks that represents data to be exported to multiple destination objects.

SFTP Connection Parameters :

Host Name, Port Number, Username, Password, Primary Access Folder, File Pattern/

Primary Access Folder : This is the sftp sever path that contains the "Model and Data File(s)". for example "/usr/src/" .

File Pattern : The File format to read the Data File, you can also use wildcard like "*", for example "data*.csv"

Salesforce / Destination Object(s) :

This is the list destination Object(s) you should make a note of, The Source (SFTP) Datasets will be mapped (Transformed) to this Object(s).

Walkthrough :

Sample Data + Model Files :

The sample Data

Model File : " account_model.csv"

customerNumber,customerName,contactLastName,contactFirstName,phone,addressLine1,addressLine2,city,state,postalCode,country,salesRepEmployeeNumber,creditLimit

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	customerNumber	customerName	contactLastName	contactFirstName	phone	addressLine1	addressLine2	city	state	postalCode	country	salesRepEmployeeNumber	creditLimit

Data Files (5 CSV Files) : account_1.csv, account_2.csv, account_3.csv, account_4.csv, account_5.csv

Sample (account_1.csv)

customerNumber,customerName,contactLastName,contactFirstName,phone,addressLine1,addressLine2,city,state,postalCode,country,salesRepEmployeeNumber,creditLimit

101,NZ Corps Company,Tom,Dick,45454545,,,Rotorua,,,New Zealand,,

103,Atelier graphique,Schmitt,Carine ,40.32.2555,"54, rue Royale",,Nantes,,44000,France,1370,21000

112,Signal Gift Stores,King,Jean,7025551838,8489 Strong St.,,Las Vegas,NV,83030,USA,1166,71800

114,"Australian Collectors, Co.",Ferguson,Peter,03 9520 4555,636 St Kilda Road,Level 3,Melbourne,Victoria,3004,Australia,1611,117300

119,La Rochelle Gifts,Labrune,Janine ,40.67.8555,"67, rue des Cinquante Otages",,Nantes,,44000,France,1370,118200

121,Baane Mini Imports,Bergulfsen,Jonas ,07-98 9555,Erling Skakkes gate 78,,Stavern,,4110,Norway,1504,81700

124,Mini Gifts Distributors Ltd.,Nelson,Susan,4155551450,5677 Strong St.,,San Rafael,CA,97562,USA,1165,210500

125,Havel & Zbyszek Co,Piestrzeniewicz,Zbyszek ,(26) 642-7555,ul. Filtrowa 68,,Warszawa,,01-012,Poland,,0

128,"Blauer See Auto, Co.",Keitel,Roland,+49 69 66 90 2555,Lyonerstr. 34,,Frankfurt,,60528,Germany,1504,59700

129,Mini Wheels Co.,Murphy,Julie,6505555787,5557 North Pendale Street,,San Francisco,CA,94217,USA,1165,64600

131,Land of Toys Inc.,Lee,Kwai,2125557818,897 Long Airport Avenue,,NYC,NY,10022,USA,1323,114900

141,Euro+ Shopping Channel,Freyre,Diego ,(91) 555 94 44,"C/ Moralzarzal, 86",,Madrid,,28034,Spain,1370,227600

144,"Volvo Model Replicas, Co",Berglund,Christina ,0921-12 3555,Berguvsvägen 8,,Luleå,,S-958 22,Sweden,1504,53100

145,Danish Wholesale Imports,Petersen,Jytte ,31 12 3555,Vinbæltet 34,,Kobenhavn,,1734,Denmark,1401,83400

146,"Saveley & Henriot, Co.",Saveley,Mary ,78.32.5555,"2, rue du Commerce",,Lyon,,69004,France,1337,123900

148,"Dragon Souveniers, Ltd.",Natividad,Eric,+65 221 7555,Bronz Sok.,Bronz Apt. 3/6 Tesvikiye,Singapore,,79903,Singapore,1621,103800

151,Muscle Machine Inc,Young,Jeff,2125557413,4092 Furth Circle,Suite 400,NYC,NY,10022,USA,1286,138500

157,Diecast Classics Inc.,Leong,Kelvin,2155551555,7586 Pompton St.,,Allentown,PA,70267,USA,1216,100600

161,Technics Stores Inc.,Hashimoto,Juri,6505556809,9408 Furth Circle,,Burlingame,CA,94217,USA,1165,84600

166,Handji Gifts& Co,Victorino,Wendy,+65 224 1555,106 Linden Road Sandown,2nd Floor,Singapore,,69045,Singapore,1612,97900

Sample (account_5.csv)

```
customerNumber,customerName,contactLastName,contactFirstName,phone,addressLine1,addressLine2,city,state,postalCode,country,salesRepEmployeeNumber,creditLimit

458,"Corrida Auto Replicas, Ltd",Sommer,Martín ,(91) 555 22 82,"C/ Araquil, 67",,Madrid,,28023,Spain,1702,104600

459,Warburg Exchange,Ottlieb,Sven ,0241-039123,Walserweg 21,,Aachen,,52066,Germany,,0

462,FunGiftIdeas.com,Benitez,Violeta,5085552555,1785 First Street,,New Bedford,MA,50553,USA,1216,85800

465,"Anton Designs, Ltd.",Anton,Carmen,+34 913 728555,"c/ Gobelas, 19-1 Urb. La Florida",,Madrid,,28023,Spain,,0

471,"Australian Collectables, Ltd",Clenahan,Sean,61-9-3844-6555,7 Allen Street,,Glen Waverly,Victoria,3150,Australia,1611,60300

473,Frau da Collezione,Ricotti,Franco,+39 022515555,20093 Cologno Monzese,Alessandro Volta 16,Milan,,,Italy,1401,34800

475,West Coast Collectables Co.,Thompson,Steve,3105553722,3675 Furth Circle,,Burbank,CA,94019,USA,1166,55400

477,Mit Vergnügen & Co.,Moos,Hanna ,0621-08555,Forsterstr. 57,,Mannheim,,68306,Germany,,0

480,"Kremlin Collectables, Co.",Semenov,Alexander ,+7 812 293 0521,2 Pobedy Square,,Saint Petersburg,,196143,Russia,,0

481,"Raanan Stores, Inc","Altagar,G M",Raanan,+ 972 9 959 8555,3 Hagalim Blv.,,Herzlia,,47625,Israel,,0

484,"Iberia Gift Imports, Corp.",Roel,José Pedro ,(95) 555 82 82,"C/ Romero, 33",,Sevilla,,41101,Spain,1702,65700

486,Motor Mint Distributors Inc.,Salazar,Rosa,2155559857,11328 Douglas Av.,,Philadelphia,PA,71270,USA,1323,72600

487,Signal Collectibles Ltd.,Taylor,Sue,4155554312,2793 Furth Circle,,Brisbane,CA,94217,USA,1165,60300

489,"Double Decker Gift Stores, Ltd",Smith,Thomas ,(171) 555-7555,120 Hanover Sq.,,London,,WA1 1DP,UK,1501,43300

495,Diecast Collectables_1,Franco,Valarie,6175552555,6251 Ingle Ln.,,Boston,MA,51003,USA,1188,85100

496,Kelly Gift / Book Shop,Snowden,Tony,+64 9 5555500,Arenales 1938 3'A',,Auckland  ,,,New Zealand,1612,110000
```

SFTP screen shot

Make the SFTP Connection :

1. Enter into your Trueloader Environment
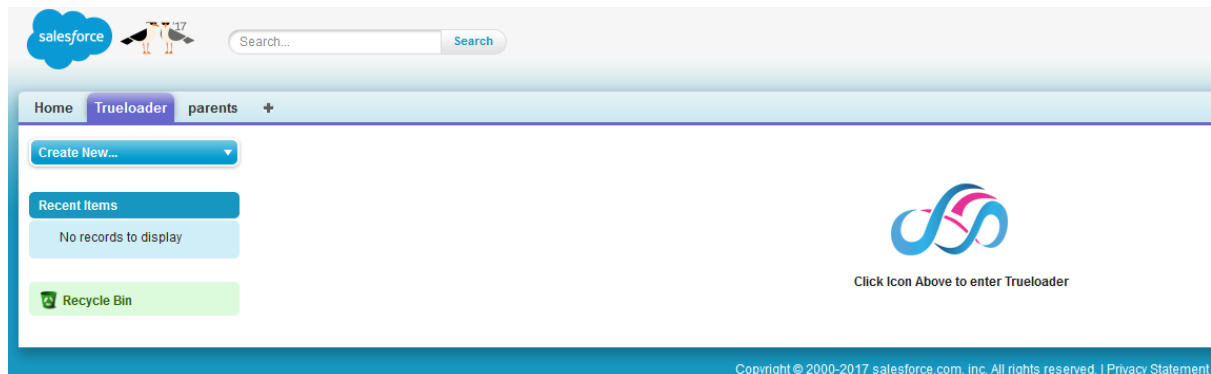
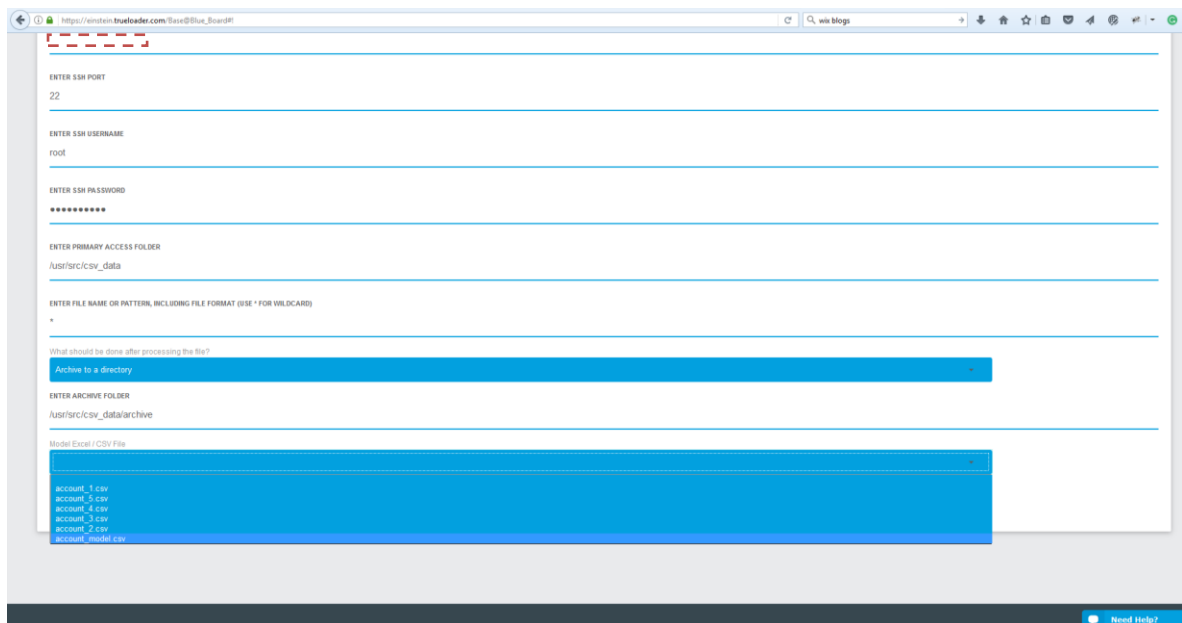2. Click "Create Connections" , and Select "Excel / CSV"
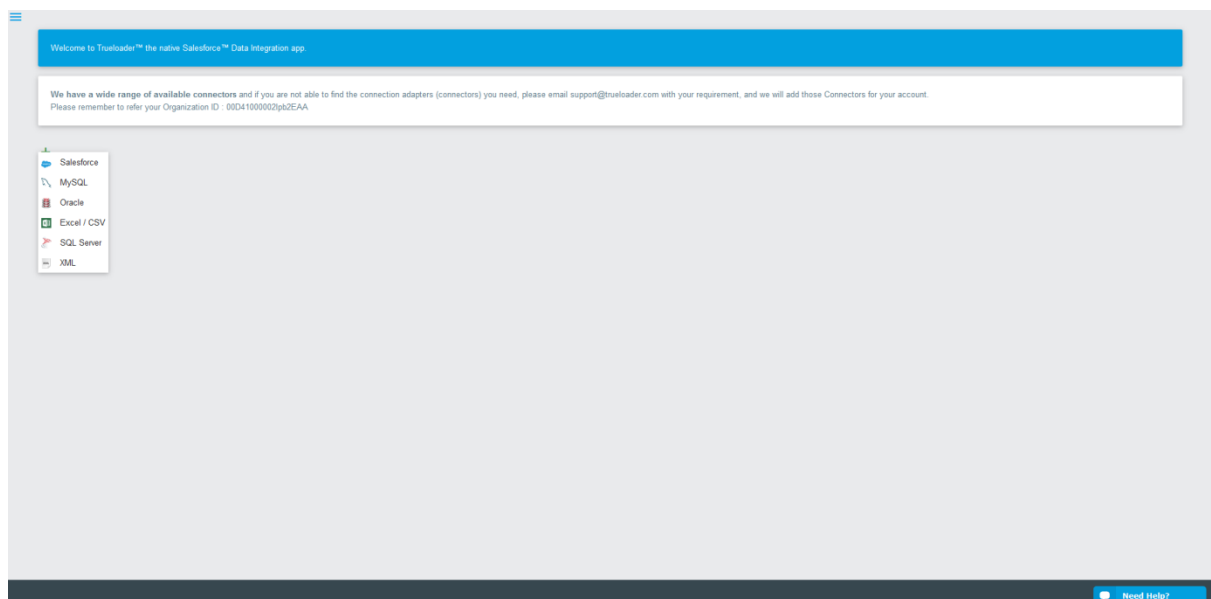
3. Click "SFTP " and provide the Input parameters.

   3.1. Enter Name for the Connection
   3.2. Enter SFTP Hostname, Port, Username and Password
   3.3. Provide the Primary Access Folder (in this case its "/usr/src/csv_data")
   3.4. Enter the Filename pattern (in this case "*")
   3.5. What should be done after processing the File? Options - "Do Nothing , Archive to a directory , Delete the File" ,

For this guide its "Archive to a directory" . You should see a new Textbox that appears once this option is selected "Enter Archive Folder" (try to toggle between options for this textbox to appear) , and provide the Archive folder information , In this case its "/usr/src/csv_data/archive".

4. Once all the information is provided "*Click* on the Dropdown List for Model Excel/CSV file", if the input parameters are all correct , then you should see a List of Files listed from the Primary Access Folder.
   Select the Model File (In this case its "account_model.csv"

5. If you receive any error, please make sure that you have provided all the input parameters required to make a sftp connection and to select the Model file.

6. Once the Model File is Selected , *Click* "Submit" for Trueloader to create the SFTP connection.

Start creating the Transformation :

1. Click on the Navigation Menu and select "Create a transformation ( )
2. Under "Configure Source" , choose the Connection - SFTP connection just created.
3. Under "Choose Source Objects" , Select (*double click*) the unique-ID generated for "IN-BUILT OBJECTS"
   3.1. You can also choose "Process All" for IMPLICIT OBJECTS, to extract all the Datasets , this will be useful for extracting datasets from multiple workbooks from a Excel Source.
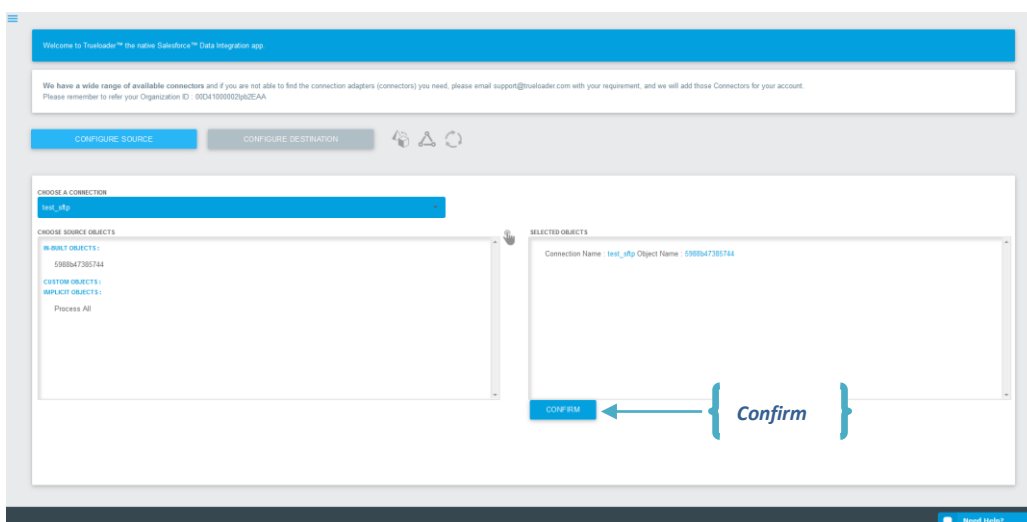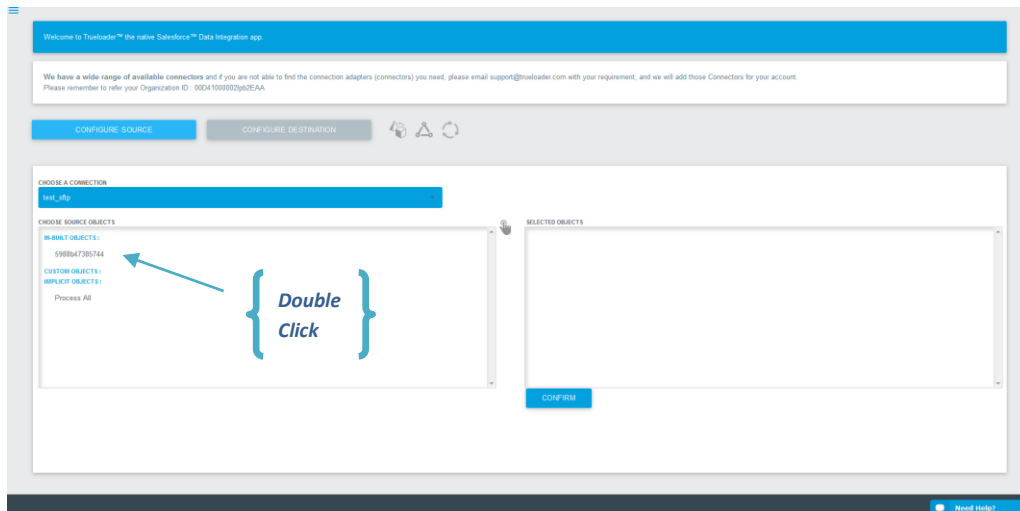
4. Once "Confirmed" the screen will be change to "Configure Destination"
   4.1. A List of all Datasets extracted from the Source(s) will be generated.
   Note : You can configure every Dataset to move data into various destination object(s).
5. In this case, one Dataset will be generated, *Click* "Configure (🔧)

6.
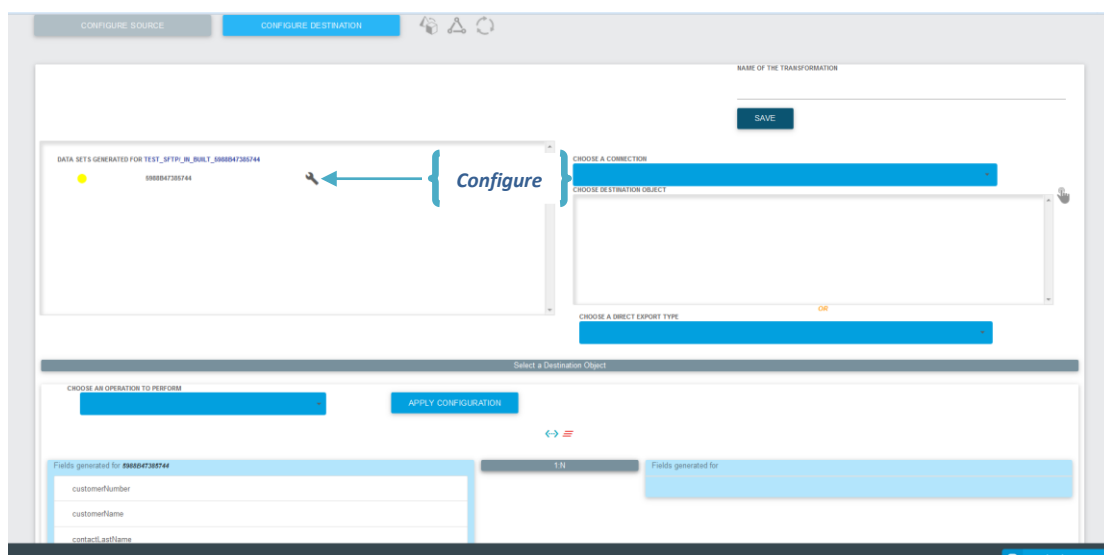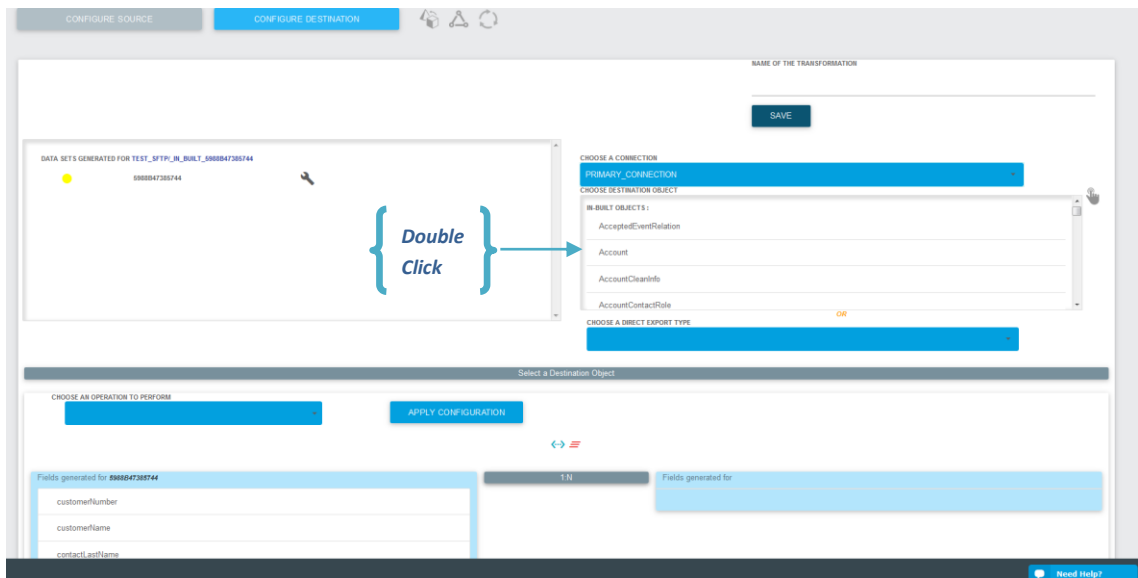
7. The list of Source Fields and Destination Field will be generated, and they are ready to be mapped for transformation from the left (source) to the right (destination).
8. *Scroll down* to Map.
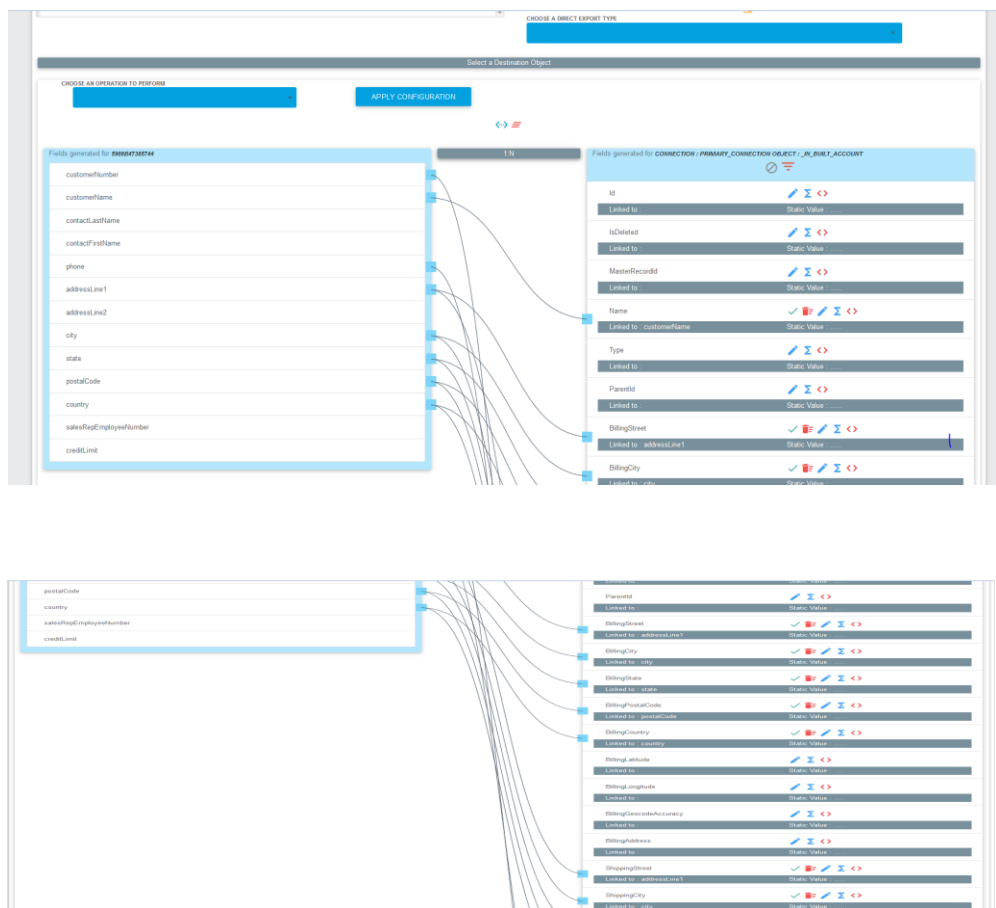
Note : You can do, One-to-Many or Many-to-One mapping.

9. Once all the necessary fields are mapped, *scroll up* to "Choose an Operation to Perform"
   9.1. Strict - Export Data that only complies to the "Based On condition(s)"
   9.2. Use All - Update/ Create every data that comes from the Source Dataset.

9.3. Soft Delete - Soft Delete (changes flag) data that complies to the "Based On condition(s)"

9.4. Soft Delete - Hard Delete data that complies to the "Based On condition(s)"

In this case, Choose "Use All" as it will honor all the data that comes from the Source dataset.

Do you know ? Complex Filtrations can be applied on the Mapped values, using

a) JavaScript / JQuery script
*b) Applying Native Functions*

Do you know ? You can Apply condition(s) called the "BasedOn Condition(s)" , while doing the transformation . This will be useful for Update process.
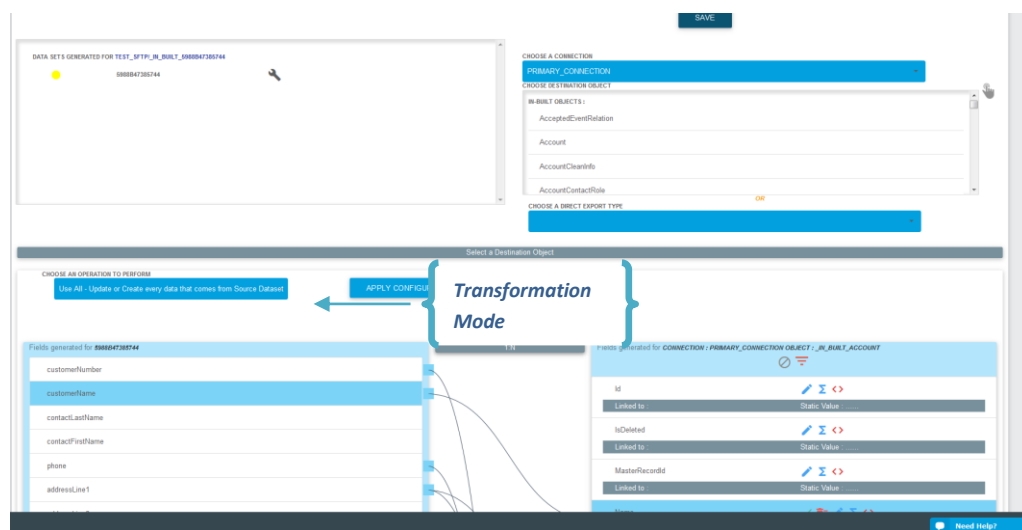
10. *Click* "Apply Configuration"

Note : You should see a Notification for Successful configuration and a "Check Mark" (✓) against the Dataset that was configured .

11. Provide a Name for the Transformation and *Click* "Save"
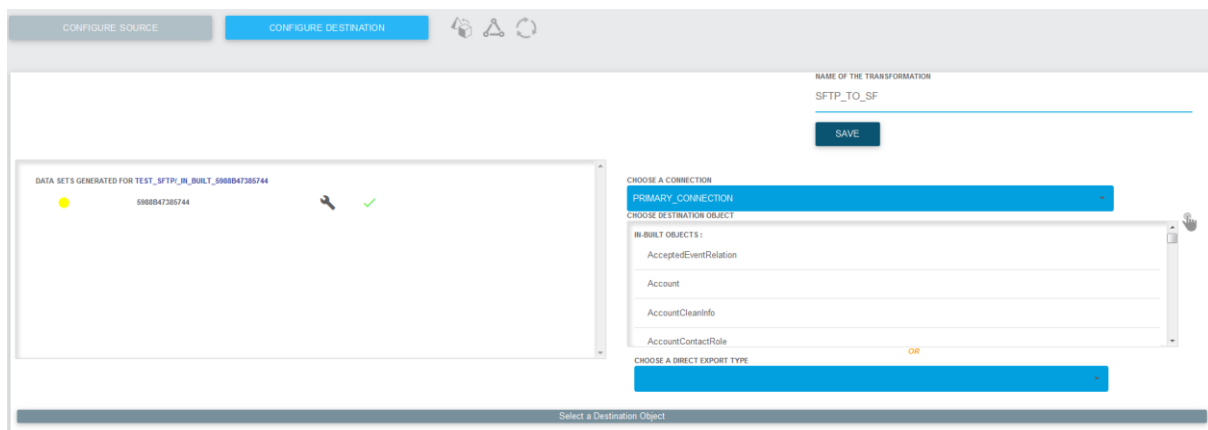
12. A List of All the "transformation" will be displayed, under Manager Transformations (△)
13. The Transformation can be Deployed, Edited, Deleted or configured.

    13.1.   Deploy Transformation(☁) , Allows a transformation to be deployed , where it can be executed (run) , synced, and scheduled.

    13.2.   Edit Transformation, where you can Edit the Source and Destination, as well Re-Configure the Datasets (including mapping, applying conditions and filtrations).

    13.3.   Delete Transformation.

    13.4.   Configure Transformation, where you can configure Notifications (SMS & Email) and configure "Operating Parameters" like connection polling, error tolerance and more.

14. Deploy the Transformation

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15. *Click* on "Manage Deployments" from the Navigation Menu, and a list of all the Transformations deployed will the there.

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    15.1.   Schedule (🕐) : Schedule to execute (run) the Transformation based on the Timezone and time you set.

        ==Note : Make sure to Verify / Set your timezone under Settings (⚙) under Navigation Menu==.

    15.2.   Schedule Status (📅): Check the Status of the Schedule.

    15.3.   Log History (🕘) : Check the Detailed Log on every Run.

    15.4.   Data Output (📑) : List of all the Data output, for Direct export of Source Datasets into CSV or XML output.

    15.5.   Run Integration Now (▶) : Manually trigger / run the execution of the Transformation.

    15.6.   Sync (∞) : Automatically start the Syncing process, which will make the Execution of the Transformation run in a time frequency.

16. You will receive a SMS/ Email notification (if configured) once the Transformation is executed, and you can check the Log History (🕘) .

        ==Note : Please send email to support@trueloader or contact your Account Manager if you need any type of support / assistance.==