



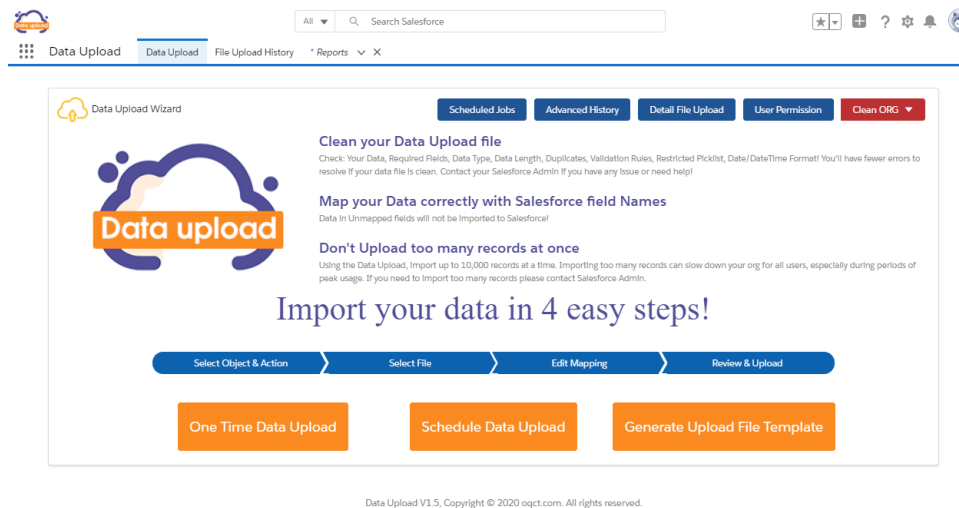
Data Upload 1.5V Guide

User Guide

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1. Introduction



Data Upload is an Salesforce App we created for non technical users to upload data/modify Salesforce data without relying on Salesforce Admin. Data Upload apps helps Salesforce Admin not to give the Data Loader access to users who does not need all the access, roll back the changes, audit all the user activity etc... All of your data are saved in your local ORG this helps the business not to worry about their data getting passed to third party servers. Its comply the GDPR and reduce the Data Leak.

Data Leak Issue

In case a user has access to Data Loader to import records to Salesforce, he can export all the data from the Objects. Our Data Upload App overcomes this data leak issue.

Wrong Data

A user can Insert/update the data to wrong Objects using the Data Loader Tool by Salesforce this brings allots of business problems, costs, and time, but our Data Upload app you can revert all the changes with a one click button.

Deletion is possible

A user can delete all the Data from the ORG if he intends to do by having the Data Loader access, our Data Upload app check the profile permission and you can give additional permission to make sure the user only import/update/delete the objects you set them.

API Access

The threat of data loss increases in case a user is granted API access. They can then connect to another API application and import/export data. Our app does not require API access.

An overview of issues arising with Data Import Tool (Salesforce)

The Data Import Tool (Salesforce) does not allow a user to import data to all Standard Salesforce Objects. There is no Delete operation, and in case a user imports wrong data, there is no data restore.

Prime Features of the Data Upload App

- The Data Upload App has been designed for admin and non-technical users. The operation is easy to understand and learn.
- One can import a number of csv or Excel files at the same time.
- Roll back feature allows a user to revert changes, in case wrong data is imported, updated or deleted.
- A user can schedule an upload.

Similarly, one can generate the import template, audit the logs of user activity and Update or Delete data without a Salesforce ID. One can resume Upload post halting.

Using a permission set is made possible with the Data Upload App. One can add or remove app functions, such as schedule, upload, or delete files for the user.

A user can generate or download a success report over Salesforce, for data operations such as Import/Update/Delete. These operations can be conductive over massive data sets. This defines the elaborate functionality of the Data Upload App.

No third party servers are involved.

Hence, the Data Upload App is the best App for you to give it to a user.

1.1. Data Upload feature

1. User friendly app for non-technical users
2. Upload 50,000 records
3. One Time Upload
4. Schedule Upload
5. Support, Windows and MAC's CSV, XLS, XLSX, ODS
6. Insert, Update, Insert and Update, Delete
7. Roll Back for Insert, Update, Insert and Update, Delete Roll back = Partial
8. Update matching: Salesforce.com ID, External ID
9. Works with Profile Permission + Data Upload App User Permission
10. Data Upload User Permission (Specify the Object, Delete, Roll back, Schedule Upload)
11. Auto field mappings
12. Generate Upload file (CSV, Excel)
13. View Upload Error logs online (Handy for admin)
14. View Success logs online
15. Download Upload Files (we only store upload file for small files, large files we don't store to save space in your Salesforce ORG)

16. Store all CSV, backups in your ORG (Comply GDPR)
17. Resume Uploads
18. Status of Uploads
19. Process Jobs on batch
20. Email Notification
21. View Audit Report
22. Export Audit Report to CSV
23. Filter
24. Admin Maintenance made easy (Delete Success and error files, Delete upload files, Delete backup Files, Stop Schedules, Audit)
25. Total Roll back file size: User * 250MB

At OQCT we are here to simplify users issue related to Salesforce, please email us the problems you have with data issue we love to build a solution for you in our app.

1.2. Requirement

Salesforce Edition:

Professional
Enterprise
Unlimited
Developer

Support: Salesforce Classic & Salesforce Lightning

Required: Chatter Enabled on the ORG, we are storing the backups on Chatter storage for each user.

Required: Enable Salesforce CRM Content (Setup > Salesforce CRM Content > "Enable" Enable Salesforce CRM Content > Click "Save")

Limitation: All Salesforce Limitation will apply, and Delete Request: If you choose delete action, you'll only be able to restore the parent records. Child records including attachments and files would depend on your recycle bin for their rollback.

File Storage Limit Per User (Salesforce Limitation)

Salesforce will change the storage limit and they are different for each ORG, please check this on your ORG or speak to your Salesforce Account Manager.

https://help.salesforce.com/articleView?id=overview_storage.htm&type=5

https://help.salesforce.com/articleView?id=overview_limits_general.htm&type=5

1.3. Pre-Warnings

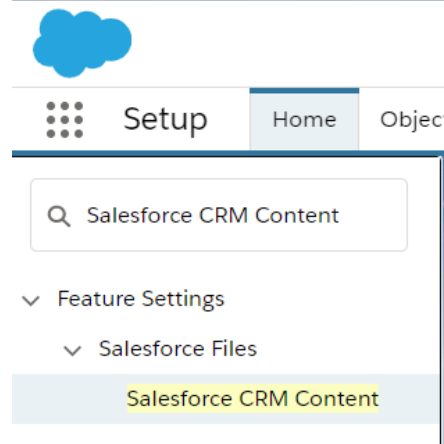
1) If a user delete a record using Data Upload app, we are only taking the backup for the parent/main object only, we don't take the backups for the Child objects, this is due to the complex of child objects can be on each org. In order to resolve this when a user or admin request for roll back, we check the "recycle bin" if we can find the record (Salesforce store delete records for 14 days) and restore, if we cant find the record on the recycle bin then we will Insert the backup data Parent Object Data.

2) User Permission: Data Upload App always checks the user profile permission when updating, inserting and deleting the records but however addition to this we have implemented a "Data Upload User App Permission" which you can give it to the user, this eliminate the worry of user uploading the data where they shouldn't.

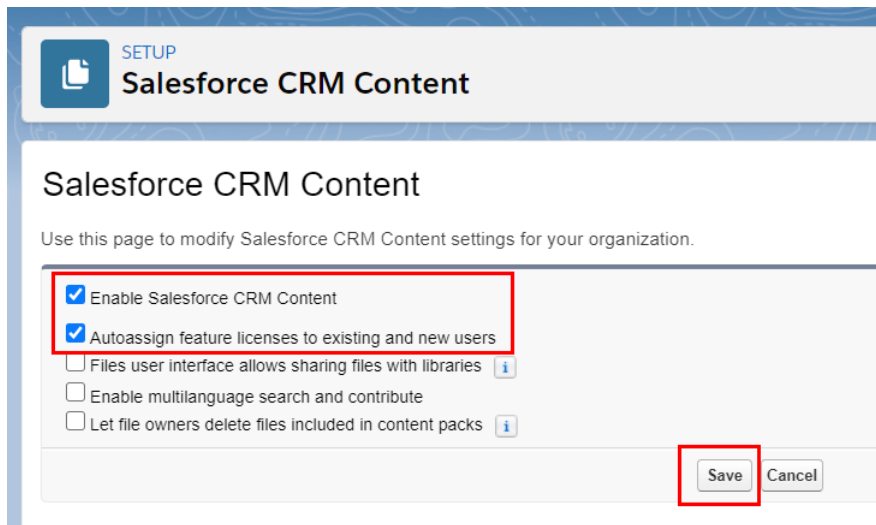
2. Post Install Instructions

1. Enable "Salesforce CRM Content"

1a) Go to Setup and Search for "Salesforce CRM Content"



1b) Click "Enable Salesforce CRM Content" and "Autoassign feature licenses to existing and new users" and Click "Save"



1c) For Admin User account enable - Salesforce CRM Content User ticked

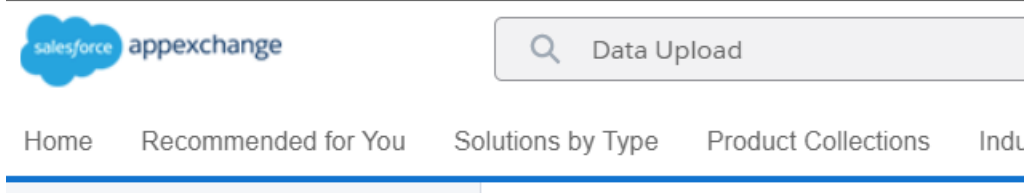
2. Chatter Enabled on the ORG, we are storing the backups on Chatter storage for each user. (Rewrite here)

Setup > Chatter settings > Enable

2.1. App Installation

1. Go to Salesforce App Exchange website "<https://appexchange.salesforce.com>"

2. Search for "Data Upload"



3. Install the App on your Sandbox Environment or Production Environment

4. Select the Group you would like to install the App, and click "Install"



Install Data Upload

By OQCT



☒ Install for Admins Only



☐ Install for All Users



☐ Install for Specific Profiles...



You're installing a Non-Salesforce Application that is not authorized for distribution as part of Salesforce's AppExchange Partner Program.

☒ I acknowledge that I'm installing a Non-Salesforce Application that is not authorized for distribution as part of Salesforce's AppExchange Partner Program.

Install
 Cancel

App Name	Publisher	Version Name	Version Number
Data Upload	OQCT	Data Upload Spring 2020	1.1 Release Notes

Description

Data Upload apps help Salesforce Admin not to give the Data Loader access to users who don't need full access. Rollback, Audit User Activity, Schedule Upload, No third-party servers. Comply GDPR Law!.

Additional Details [View Components](#)

5. Please allow few minutes for the App to install it to your ORG



Install Data Upload

By OQCT



Installing and granting access to admins Only...

App Name	Publisher	Version Name	Version Number
Data Upload	OQCT	Data Upload Spring 2020	1.1 Release Notes

Description

Data Upload apps help Salesforce Admin not to give the Data Loader access to users who don't need full access. Rollback, Audit User Activity, Schedule Upload, No third-party servers. Comply GDPR Law!.

Additional Details [View Components](#)

6. Sometimes you will see the screen like bellow, as mention here Salesforce will send an email once completed.



Install Data Upload

By OQCT



This app is taking a long time to install.
You will receive an email after the installation has completed.

Done

App Name	Publisher	Version Name	Version Number
Data Upload	OQCT	Data Upload Spring 2020	1.1

Description

Data Upload apps help Salesforce Admin not to give the Data Loader access to users who don't need full access. Rollback, Audit User Activity, Schedule Upload, No third-party servers. Comply GDPR Law!.

7. Once the app installed you will receive an email from "Support@emea.salesforce.com" with the Subject "Package Data Upload Install Successful"

Reply Reply All Forward

Mon 15/06/2020 11:27



support@emea.salesforce.com

Sandbox: Package Data Upload Install Successful

To Info OQCT

This message was sent with High importance.

Your request to install package "Data Upload Data Upload Spring 2020" was successful.

Organization: OQCT

User: Krrish Joy

Package: Data Upload

Some components, such as custom objects, custom report types, and workflow rules, must be activated using the package deploy process, before they are available to your organization.

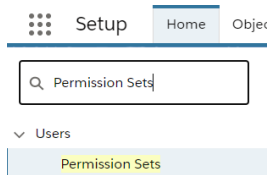
8. Setup > Installed Packages | you will be able to see the "Data Upload" app.

Installed Packages										
Action	Package Name	Publisher	Version Number	Namespace Prefix	Install Date	Limits	Apps	Tabs	Objects	AppExchange Ready
Uninstall Configure	Data Upload	OQCT Ltd	1.1	OQCT_DaUp	15/06/2020 11:26	✓	2	2	4	Not Passed
Description Data Upload app helps Salesforce administrators not to give the Data Loader access to users who don't need full access or API access and still need to...										

2.2. Step-1

Assign permission set named "DataUpload Admin Permission" to the admins of the ORG. This permission set grants full access on our custom object, fields, tabs, pages and metadata types. Follow these steps:

a) Under Setup, search for 'Permission Set'



b) Click the permission set named 'DataUpload Admin Permission'

Permission Sets

On this page you can create, view, and manage permission sets.

In addition, you can use the SalesforceA mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play: [iOS](#) | [Android](#)

All Permission Sets | [Edit](#) | [Delete](#) | [Create New View](#)

Action	Permission Set Label	Description	License
Clone	CRM User	Denotes that the user is a Sales Cloud or Service Cloud user.	CRM User
Clone	DataUpload Admin Permission	This permission set grants permission for application, tab, visualforce pages...	
Clone	DataUpload User Permission	This permission set grants permission for apps, tabs, vf pages, objects (R...	
Del Clone	FieldHistoryDeletePermission		
Clone	Sales Cloud User	Denotes that the user is a Sales Cloud user.	Sales User
Del Clone	Sales User		
Clone	Salesforce CMS Integration Admin	Gives the admin data access and the permissions to integrate Salesforce C...	Cloud Integration User
Clone	Salesforce Console User	Enable Salesforce Console User	Sales Console User
Clone	Standard Einstein Activity Capture	Access to Standard Einstein Activity Capture	Standard Einstein Activity Capture User

c) Click on 'Manage Assignments'

SETUP

Permission Sets

Permission Set
DataUpload Admin Permission

[Clone](#)
[Manage Assignments](#)

Permission Set Overview

Description	This permission set grants permission for application, tab, visualforce pages, apex classes, objects and field permission. This permission set is to be assigned to System Administrator users in the org	API Name	DataUpload_Admin_Permission
License		Namespace Prefix	OQCT_DaUp
Session Activation Required	☐	Created By	Krishna Joy, 15/06/2020 12:33
Last Modified By	Krishna Joy, 15/06/2020 12:33		

Apps

Assigned Apps
Settings that specify which apps are visible in the app menu

Assigned Connected Apps
Settings that specify which connected apps are visible in the app menu

Object Settings
Permissions to access objects and fields, and settings such as tab availability

App Permissions
Permissions to perform app-specific actions, such as "Manage Call Centers"

Apex Class Access
Permissions to execute Apex classes

Visualforce Page Access
Permissions to execute Visualforce pages

d) Click on 'Add Assignment'

Assigned Users
DataUpload Admin Permission
[« Back to: Permission Set](#)

[Click here](#)

[Add Assignments](#) [Remove Assignments](#)

Full Name ↑	Alias	Username	Last Login
No records to display.			

[Add Assignments](#) [Remove Assignments](#)

e) Select the users that you want to assign the permission set and click 'Assign'

Assign Users
All Users
View: [All Users](#) [Edit](#) [Create New View](#)

[Assign](#) [Cancel](#)

☐ Action	Full Name ↑	Alias	Username
☐ Edit	Chatter Expert	Chatter	chatty_00d0c0000000xyrua2.2qzkchcd1laa@chatter.salesforce.com
☒ Edit Login	Joy, Krrish	KJoy	info@oqct.com.staging

[Assign](#) [Cancel](#)

f) Click on Done

Assignment Summary
DataUpload Admin Permission

[Done](#)

✓ Permission set DataUpload Admin Permission has been assigned to 1 user.

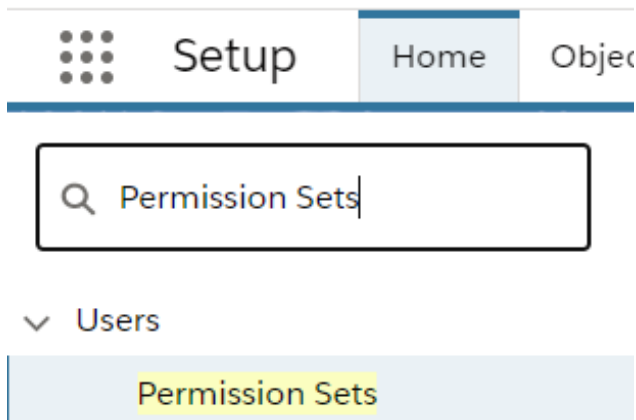
Full Name	Username
Krrish Joy	info@oqct.com.staging

[Done](#)

2.3. Step-2

Assign permission set named "DataUpload User Permission" to the non-admins of the ORG who will be using the application. This permission set grants 'Read-Only access' on our custom object & fields and would also give visibility to tabs, some of the pages and Metadata types to the users. Follow these steps:

a) Under Setup, search for 'Permission Set'



b) Click the permission set named 'DataUpload User Permission'

Permission Sets

On this page you can create, view, and manage permission sets.

In addition, you can use the SalesforceA mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play: [iOS](#) | [Android](#)

All Permission Sets [Edit](#) [Delete](#) [Create New View](#)

Action	Permission Set Label	Description	License
Clone	CRM User	Denotes that the user is a Sales Cloud or Service Cloud user.	CRM User
Clone	DataUpload Admin Permission	This permission set grants permission for application, tab, visualforce pages...	
Clone	DataUpload User Permission	This permission set grants permission for apps, tabs, vf pages, objects (Rea...	
Del Clone	FieldHistoryDeletePermission		
Clone	Sales Cloud User	Denotes that the user is a Sales Cloud user.	Sales User
Del Clone	Sales User		
Clone	Salesforce CMS Integration Admin	Gives the admin data access and the permissions to integrate Salesforce C...	Cloud Integration User
Clone	Salesforce Console User	Enable Salesforce Console User	Sales Console User
Clone	Standard Einstein Activity Capture	Access to Standard Einstein Activity Capture	Standard Einstein Activity Capture User

c) Click on 'Manage Assignments'

Permission Set
DataUpload User Permission

[Find Settings...](#) [Clone](#) [Manage Assignments](#)

Permission Set Overview

Description	This permission set grants permission for apps, tabs, vf pages, objects (Read Only) and fields (Read Only). This permission set is to be assigned to the normal users in the org who want to use the app but should not change any data related to the app.		API Name	DataUpload_User_Permission
License		Namespace Prefix	OQCT_DaUp	
Session Activation Required	☐	Created By	Krish.Joy, 15/06/2020 12:34	
Last Modified By	Krish.Joy, 15/06/2020 12:34			

d) Click on 'Add Assignment'

Assigned Users
DataUpload User Permission
[« Back to: Permission Set](#)

A

[Add Assignments](#) [Remove Assignments](#)

Full Name ↑	Alias	Username	Last Login	Role
No records to display.				

[Add Assignments](#) [Remove Assignments](#)

e) Select the users that you want to assign the permission set and click 'Assign'

Assign Users
All Users
View: [All Users](#) [Edit](#) [Create New View](#)

[Assign](#) [Cancel](#)

☐ Action	Full Name ↑	Alias	Username
☐ Edit	Chatter Expert	Chatter	chatty.00d0c0000000xyrua2.2qzkchcd1laa@chatter.salesforce.com
☐ Edit Login	Joy, Krrish	KJoy.	info@ogct.com.staging
☒ Edit	Test User	utest	krrish.joy@outlook.com.staging

[Assign](#) [Cancel](#)

f) Click on Done

Assignment Summary
DataUpload User Permission

 Permission set DataUpload User Permission has been assigned to 1 user.

[Done](#)

Full Name	Username
User Test	krrish.joy@outlook.com.staging

[Done](#)

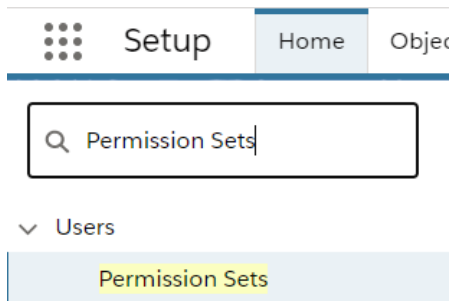
e) Open each Admin User account from Setup and Enable "Salesforce CRM Content User"

Debug Mode	☐	i
High-Contrast Palette on Charts	☐	i
Mobile User	☒	i
Salesforce CRM Content User	☒	
Receive Salesforce CRM Content Email Alerts	☐	
Receive Salesforce CRM	☐	

2.4. Step-3

For admins to view files uploaded by other users, they should be assigned 'Query All Files' permission via permission set. Follow these steps:

- a) Under Setup, search for 'Permission Set'



- b) Create a new Permission set with following details (You can use any name for the permission set):

Label: DataUpload ViewAllFiles Permission

API Name: DataUpload_ViewAllFiles_Permission

Description: The permission set grants admin access to view files uploaded by other users

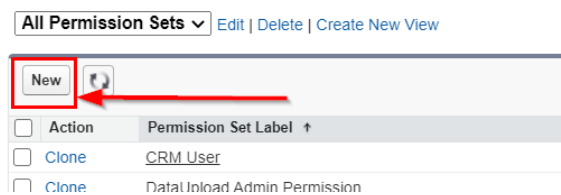
Session Activation Required: False (Leave the checkbox unchecked)

License: None

Permission Sets

On this page you can create, view, and manage permission sets.

In addition, you can use the SalesforceA mobile app to assign permission



Permission Set
Create

Save Cancel

Enter permission set information

Label DataUpload ViewAllFiles Permission
API Name DataUpload_ViewAllFiles_Permission
Description The permission set grants admin access to view files uploaded by other users
Session Activation Required ☐

Select the type of users who will use this permission set

Who will use this permission set?
-Choose '--None--' if you plan to assign this permission set to multiple users with different user and permission set licenses.
-Choose a specific user license if you want users with only one license type to use this permission set.
-Choose a specific permission set license if you want this permission set license auto-assigned with the permission set.
Not sure what a permission set license is? [Learn more here.](#)
License --None--

Save Cancel

c) Once the permission set is created, go to 'App Permissions'.

Permission Set
DataUpload ViewAllFiles Permission

Find Settings... Clone Delete Edit Properties Manage Assignments

Permission Set Overview
Description The permission set grants admin access to view files uploaded by other users
License
Session Activation Required
Last Modified By [Krish Jey](#), 15/06/2020 14:42
API Namespace
Create

Apps
Assigned Apps
Settings that specify which apps are visible in the app menu
Assigned Connected Apps
Settings that specify which connected apps are visible in the app menu
Object Settings
Permissions to access objects and fields, and settings such as tab availability
App Permissions
Permissions to perform app-specific actions, such as "Manage Call Centers"
Apex Class Access
Permissions to execute Apex classes
Visualforce Page Access
Permissions to execute Visualforce pages
External Data Source Access
Permissions to authenticate against external data sources
Settings that apply to Salesforce apps, such as Sales, and custom apps built on the Lightning Platform
[Learn More](#)

d) Edit the permission and under 'Content' section, give permission on 'Query All Files' and "save" the changes and Confirm the changes again by Clicking "Save"

Permission Set

DataUpload ViewAllFiles Permission

[Permission Set Overview](#) > **App Permissions** ▼

App Permissions

▼ Call Center

Permission Name	Enabled	Description
Agent Initiated Outbound Messaging	☐	Initiate messaging with customers.
Edit Case Comments	☐ i	Edit their own case comments but not o
Import Solutions	☐ i	Import solutions for the organization.
Manage Business Hours Holidays	☐ i	Create, edit, and delete business holid

▼ Content

Permission Name	Enabled	Description
Manage Content Permissions	☐	Create, edit, and delete library permissions in Salesforce CRM Content.
Manage Content Properties	☐ i	Create, edit, and delete custom fields in Salesforce CRM Content.
Manage record types and layouts for Files	☐ i	Create, edit, and delete content types in Salesforce CRM Content..
Manage Salesforce CRM Content	☐ i	Create, edit, and delete libraries and library memberships.
Query All Files	☒ i	Allows View All Data users to SOQL query all files in the org.
View Content in Portals	☐	View Salesforce CRM Content from a portal.

Permission Set

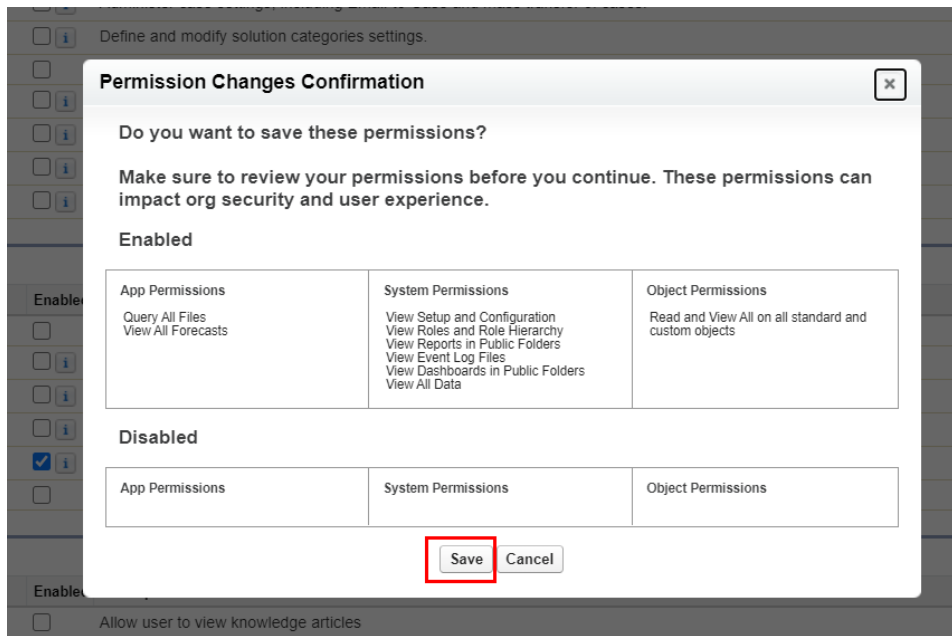
DataUpload ViewAllFiles Permission

[Permission Set Overview](#) > **App Permissions** ▼

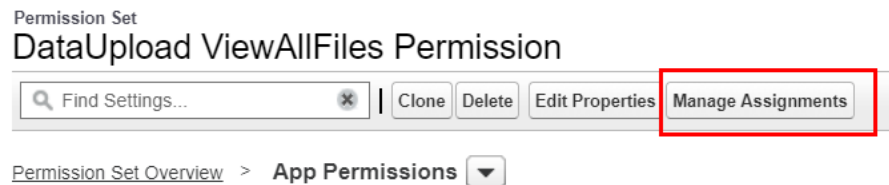
App Permissions

▼ Call Center

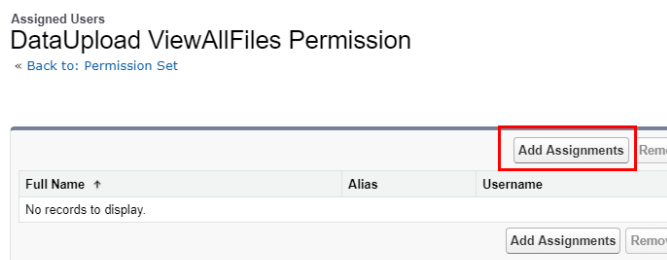
Permission Name	Enabled	Description
Agent Initiated Outbound Messaging	☐	Initiate messaging with customers.
Edit Case Comments	☐ i	Edit their own case comments but not othe
Import Solutions	☐ i	Import solutions for the organization



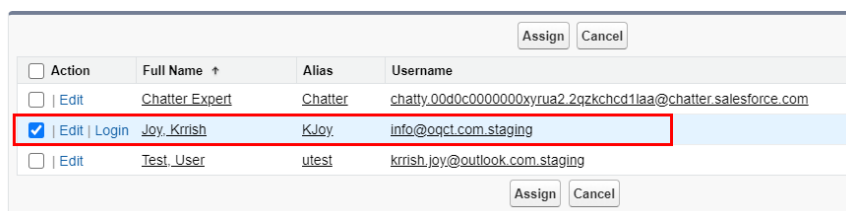
e) Click on 'Manage Assignments'



f) Click on 'Add Assignment'



g) Select the Admin users that you want to assign the permission set and click 'Assign'



h) Click on "Done"

DataUpload ViewAllFiles Permission

✓ Permission set DataUpload ViewAllFiles Permission has been assigned to 1 user.

Done

Full Name	Username
Krrish Joy	info@oqct.com.staging

Done

2.5. Step-4

The application will send emails after the process and for this make sure that your org's Email Deliverability Access Level settings is set to 'All Emails'. Follow these steps:

- a) Under setup, search for 'Deliverability'

Setup Home Objec

Q Deliverability

▼ Email

Deliverability

- b) Make sure the access level is set to 'All Emails' and Click "Save"

Deliverability

Configure the settings on this page to improve your organization's email deliverability. Some emails sent through Salesforce or email relay only.

Deliverability Save

Access to Send Email (All Email Services)

Access level: All email ▼

Bounce Management (Salesforce or Email Relay Only)

When Bounce Management is activated and a user sends an email to an invalid email address, the

☒ Activate bounce management

☐ Show bounce alert next to all instances of the email address ⓘ

☐ Return bounced emails to sender ⓘ

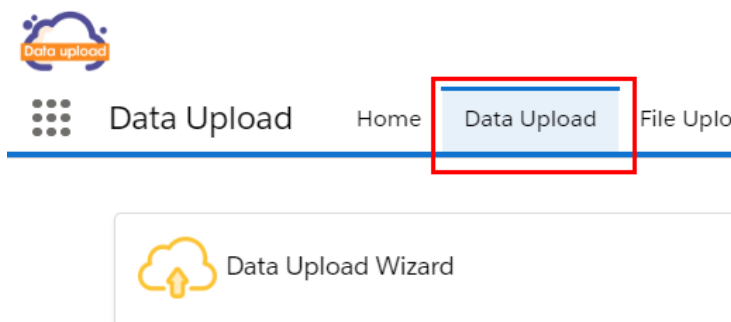
2.6. Step-5

A library named 'Data Upload' is created if you take any action on the tab 'Data Upload'. And the currently logged-in user will be added as a member with permission 'Library Administrator'. If you wish to add other members to library so that the files uploaded by them will be stored in their appropriate folder, thus easy to find out, you can go to that library and add members as minimum 'Author' access:

WARNING: If you add users to the 'Data Upload' library, they'll be able to see each other's uploaded files

To add members to library, follow these steps:

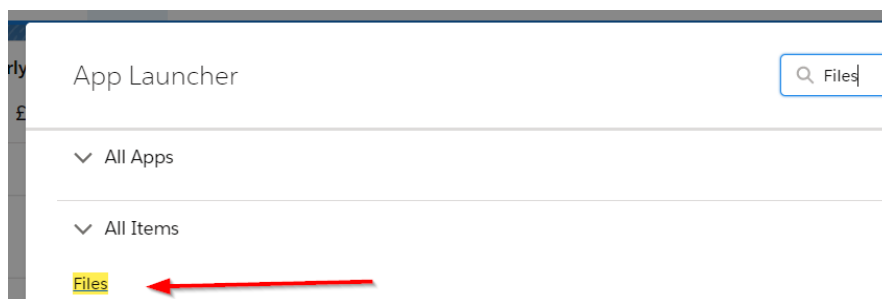
- a) In Lightning, first go and open "Data Upload" app



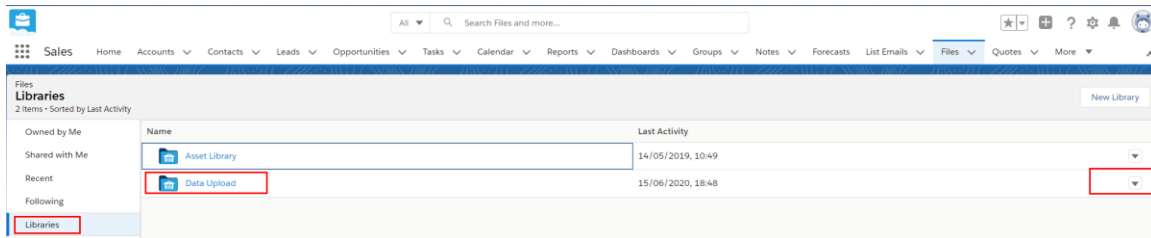
- b) click "One Time Data Upload" , This Action will create the Folder Structure for you in your ORG!



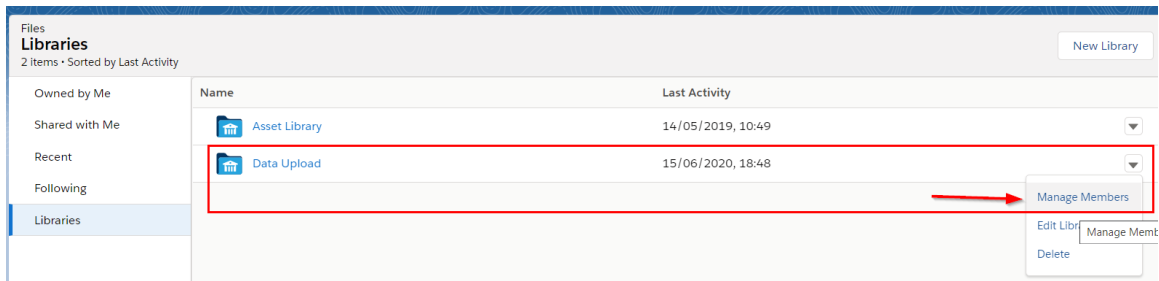
- a) In lightning, Open 'Files'



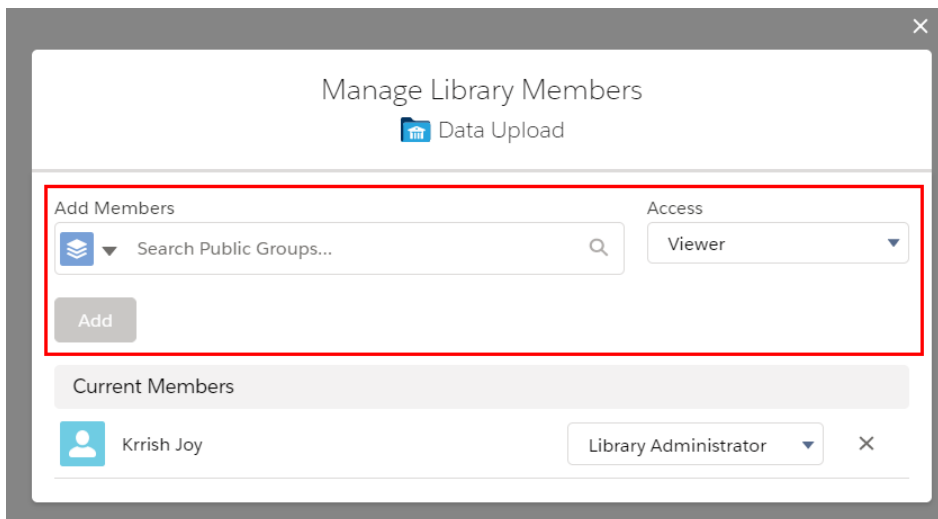
- b) Go to Libraries and select 'Data Upload'



c) On the top-right corner, click 'Manage Members'



d) Select the Admin Users that you want to add to the library, choose an appropriate library permission (For normal users, Author permission would do) and click 'Add'

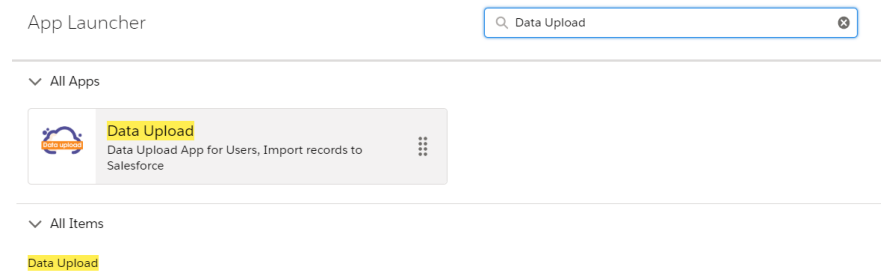


2.7. Step-6

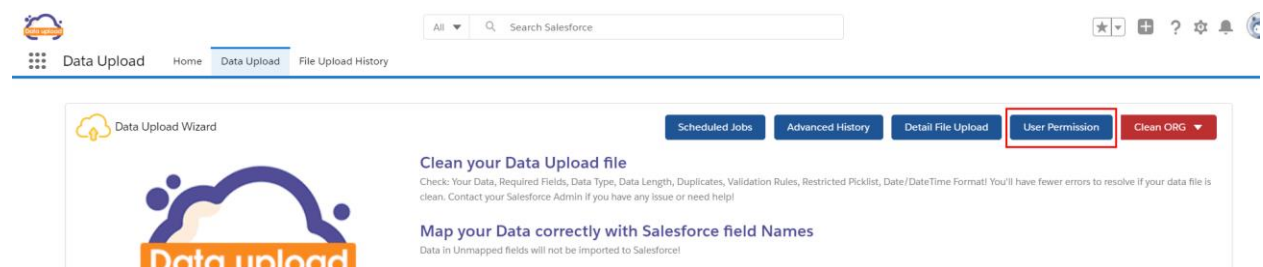
After assigning the appropriate User Permission Set to the User, Admin needs to create the "App User Permission" within the "Data Upload" App, this options gives the Admin extra security to

control the Objects and Additional features they want to enable for the User. For that, follow these steps:

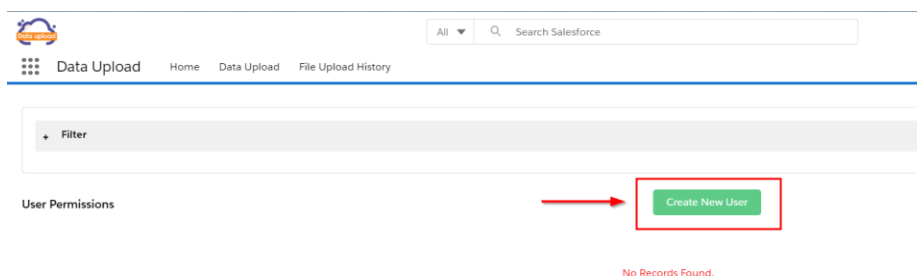
a) Launch the application "Data Upload"



b) On the top-right corner click on the button named "User Permission"



c) Click on "Create New User" and fill the details as follow:



User: [Select the User whom you want to allow to upload files using our application]

Objects Accessible (API): [Pick the names of the object for which you want to grant permission to upload files to the aforementioned user]

Tip: You can copy the list of API Names of the selected objects from the 'Enter Objects' tab, if you want to give permissions to upload against the same objects for other users and paste it under 'Enter Objects' tab when creating those users

Delete Record Permission: ['Checked' if you want users to delete their uploaded files to clean up the org, otherwise 'Unchecked'. This option is always available for admins of the org.]

Delete Upload File Permission: ['Checked' if you want users to use 'Delete Records' action on both one time and scheduled upload process (Users will be able to delete records only if they have appropriate permission via profile or permission set). This option is always available for admins of the org.]

Rollback Permission: ['Checked' if you want users to rollback their actions (it could be any action- Add New Records, Update Existing Records, Add new and Update Existing Records or Delete Records). This option is always available for admins of the org.]

Schedule Upload Permission: ['Checked' if you want users to use schedule upload functionality, otherwise 'Unchecked'. This option is always available for admins of the org.]

Create New User Permission

User
User Test 🔍 Select the User

Objects Accessible (API)

Select Objects Enter Objects

Available Objects

- Case Team Member Role
- Category Data
- Chatter Invitation
- Chatter Message Thread
- Company Data
- Conference Number
- Contact Point Type Consent
- Contract
- Contract Contact Role
- Customer Data
- Data Use Legal Basis
- Data Use Purpose
- Document

Selected Objects

- Account
- Contact

User got the permission to these Objects

Select the Objects, you want this user to Upload data to the ORG

Delete Upload File Permission: ☐

Delete Record Permission: ☒ Give additional permission to the User if needed

Rollback Permission: ☐

Schedule Upload Permission: ☒

Cancel Save

d) Click "Save" to save the settings for the user. Now this user can use the "Data Upload" application under his/her constraints

Data Upload Home Data Upload File Upload History

Filter

User Permissions

Create New User Delete User(s) Export User(s)

Success: User Settings Saved Successfully

	Edit	User	Objects Assigned	Delete Upload File Permission	Delete Record Permission	Rollback Permission	Schedule Upload Permission
☐	☒	User Test	Account, Contact	☐	☒	☐	☒

Page 1 of 1

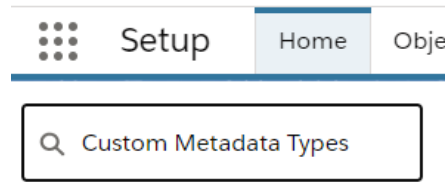
e) If you would like to change the permission for this user anytime come back to this "User Permission" and find the User and click Edit and amend the changes and Save!

3. App Configuration

3.1. Global configuration

Data Upload app has been configured for the best performance, admin or developer does not need to change any of the configuration, but however for any reason if you would like to know where our configuration exist or if you would like to change it for any reason, please follow this:

1. Setup and Search/Open "Custom Metadata Types"



Custom Code

Custom Metadata Types

2. Look for Label as "Data Upload Configuration" and click on "Manage Records"

All Custom Metadata Types

[Help for this Page](#)

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 metadata, you can create custom metadata types and add metadata records, with all the manageability that comes with metadata: package

Click "Manage Records"

New Custom Metadata Type							
Action	Label	Installed Package	Namespace Prefix	Visibility	Api Name	Record Size	Description
Manage Records	Data Upload Configuration	Data Upload	OQCT_DaUp	Public	OQCT_DaUp__Data_Upload_Configuration__mdt	2572	The default configurations used in Data Upload App

3. Click on the "Default Configuration"

Data Upload Configurations

[H](#)

View: All Create New View			Click		New
Action	Label ↑	Data Upload Configuration Name		Namespace Prefix	
Edit	Default Configuration	Default_Configuration		OQCT_DaUp	

4. Change the "Necessary Settings here".

Warning! Avoid changing the "File Splitting Offset Value"

Data Upload Configuration (Managed)

This Data Upload Configuration is managed, meaning that you may only edit certain attributes. [Display More Information](#)

Data Upload Configuration Detail

[Edit](#)
[Clone](#)

▼ App Settings

Converted File Name	DU-Converted-
RecordList File Name	DU-RecordList-
Info File Name	DU-infoFile-
Conversion Error Report Name	DU-ConversionErrorReport-
Backup File Name	DU-BackupUpdate-
Error Report File Name	DU-ErrorReport-
Success Report File Name	DU-SuccessReport-
Rollback Error Report File Name	DU-Rollback-ErrorReport-
Rollback Success Report File Name	DU-Rollback-SuccessReport-
Create Original File	☒
Create Backup	☒
Create Error Report	☒
Create Success Report	☒
Store Error & Success Original Data	☒
File Splitting Offset	500,000
Send Admin Email Alerts	☐

▼ Not Required

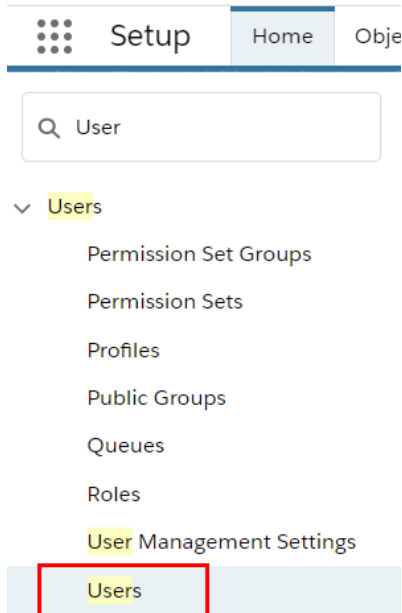
Label	Default Configuration	Protected Component	☐
Data Upload Configuration Name	Default_Configuration	Namespace Prefix	OQCT_DaUp
Created By	Krishna Joy, 15/06/2020, 12:33	Last Modified By	Krishna Joy, 15/06/2020, 12:33

[Edit](#)
[Clone](#)

Name	Value	Config for
<u>DaUp_BackUpFileName</u>	Backup-	Backup File Name
<u>DaUp_FileInfo</u>	FileInfo	File Info Name
<u>DaUp_ConversionErrorReportName</u>	ConversionErrorReport-	Convert error file name
<u>DaUp_ConvertedFileName</u>	Converted-	Original File converted file name
<u>DaUp_ErrorReportFileName</u>	ErrorReport-	Upload Error File name
<u>DaUp_RecordListName</u>	RecordList-	List name
<u>DaUp_SuccessReportFileName</u>	SuccessReport-	Success File name
<u>DaUp_CreateSuccessReport</u>	TRUE	Enable / Disable Success Report
<u>DaUp_CreateBackUp</u>	TRUE	Create Backups for Roll back
<u>DaUp_CreateErrorReport</u>	TRUE	Enable / Disable Error Report
<u>DaUp_CreateOriginalFile</u>	TRUE	Save Original file upload, it will only store small size upload
<u>DaUp_OffsetFileSplit</u>	500000	CSV character check to split files for late file upload
<u>DaUp_ErrorSucessOrignalData</u>	TRUE	Show Original Data on Success and Error file
<u>DaUp_RollbackErrorReportFileName</u>	Rollback-ErrorReport-	Roll back error report file name
<u>DaUp_RollbackSuccessReportFileName</u>	Rollback-SuccessReport-	Roll back success report file name
<u>DaUp_SendAdminEmailAlerts</u>	your@email.com	Email notification to Salesforce Admin for user uploads. If admin would like to know every time user upload data to the ORG enter here the Salesforce Admin Team Mailbox Email ID!

3.2. Assign App to New Admin

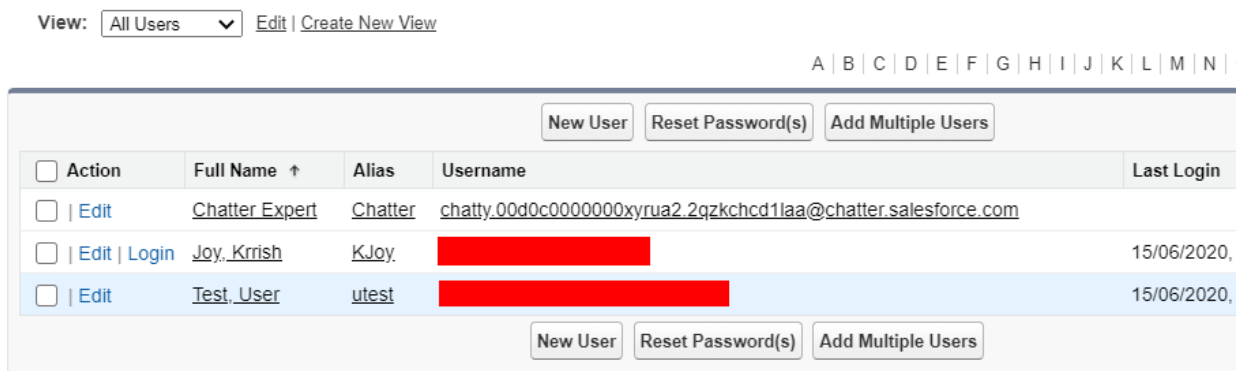
1. Go to Setup and Search for "Users" and Click on the "Users"



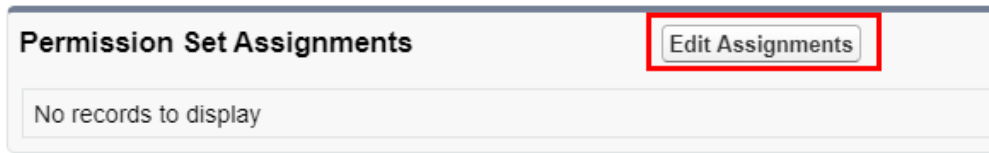
2. Click on the User "Full Name" you want to give the "Data Upload" App
All Users

On this page you can create, view, and manage users.

In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your n

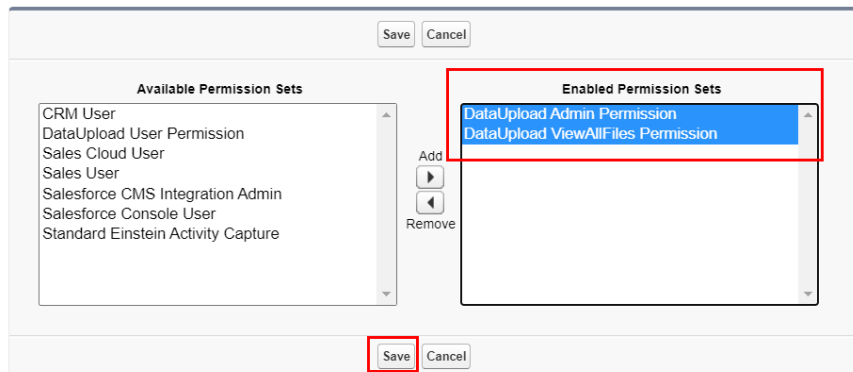


3. On the User Page Section: "Permission Set Assignments", Click on the "Edit Assignments"

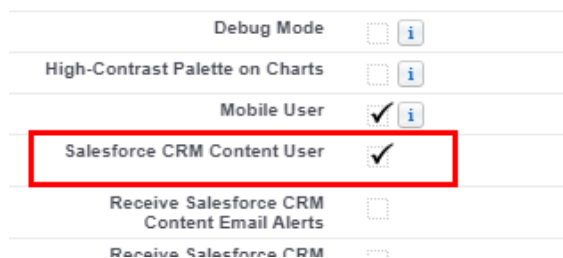


4. on the "Available Permission Sets" Select the "DataUpload Admin Permission" and ""DataUpload ViewAllFiles Permission" and Click "Add" to "Enabled Permission Sets" and click "Save"

Permission Set Assignments
Krrish Joy

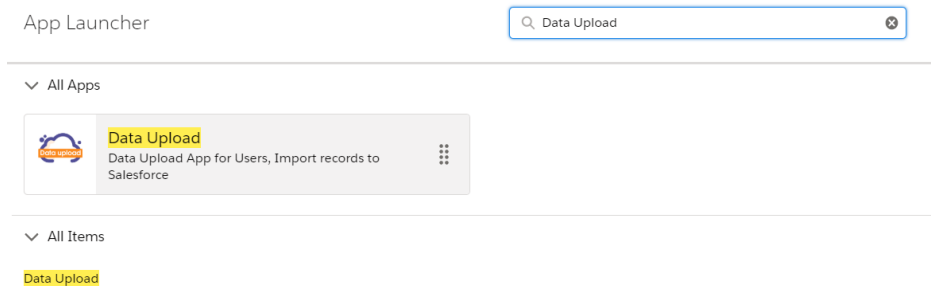


5. Open Admin User account page from Setup and Enable "Salesforce CRM Content User"

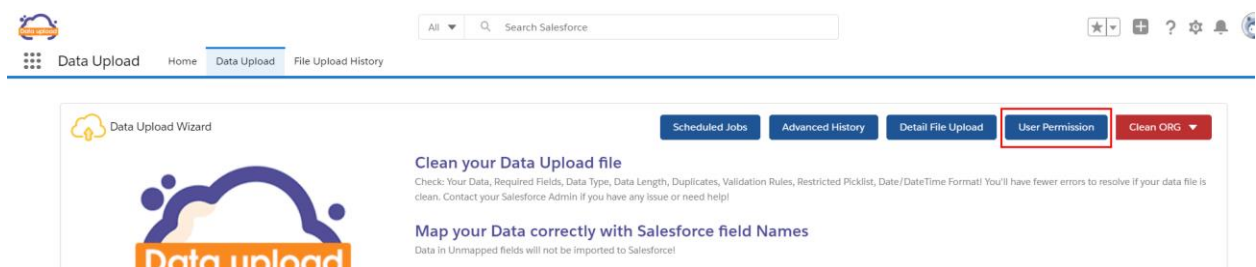


6. Now, we need to give "App User Permission" within the "Data Upload" App, this options gives the Admin extra security to control the Objects and Additional features they want to enable for the User. For that, follow these steps:

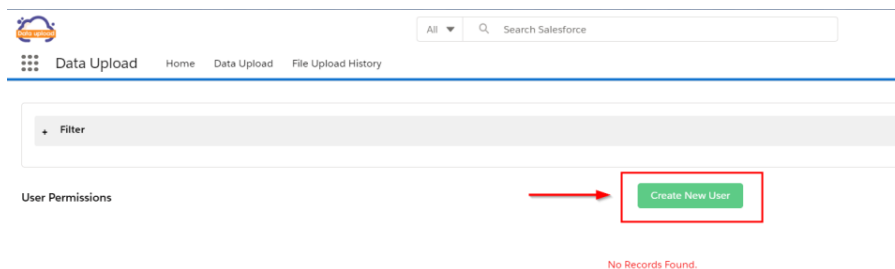
a) Launch the application "Data Upload"



b) On the top-right corner click on the button named "User Permission"



c) Click on "Create New User" and fill the details as fol



User: [Select the User whom you want to allow to upload files using our application]

Objects Accessible (API): [Pick the names of the object for which you want to grant permission to upload files to the aforementioned user]

Tip: You can copy the list of API Names of the selected objects from the 'Enter Objects' tab, if you want to give permissions to upload against the same objects for other users and paste it under 'Enter Objects' tab when creating those users

Delete Record Permission: ['Checked' if you want users to delete their uploaded files to clean up the org, otherwise 'Unchecked'. This option is always available for admins of the

org.]

Delete Upload File Permission: ['Checked' if you want users to use 'Delete Records' action on both one time and scheduled upload process (Users will be able to delete records only if they have appropriate permission via profile or permission set). This option is always available for admins of the org.]

Rollback Permission: ['Checked' if you want users to rollback their actions (it could be any action- Add New Records, Update Existing Records, Add new and Update Existing Records or Delete Records). This option is always available for admins of the org.]

Schedule Upload Permission: ['Checked' if you want users to use schedule

=====

=====

otherwise 'Unchecked'. This option is always available for admins of the org.]

The screenshot shows the 'Create New User Permission' dialog box. It has a 'User' field with 'User Test' and a magnifying glass icon. Below it is the 'Objects Accessible (API)' section with 'Select Objects' and 'Enter Objects' tabs. The 'Available Objects' list includes: Case Team Member Role, Category Data, Chatter Invitation, Chatter Message Thread, Company Data, Conference Number, Contact Point Type Consent, Contract, Contract Contact Role, Customer Data, Data Use Legal Basis, Data Use Purpose, and Document. The 'Selected Objects' list contains 'Account' and 'Contact'. Below these lists are four permission checkboxes: 'Delete Upload File Permission' (unchecked), 'Delete Record Permission' (checked), 'Rollback Permission' (unchecked), and 'Schedule Upload Permission' (checked). At the bottom are 'Cancel' and 'Save' buttons. Red annotations with arrows point to: the magnifying glass icon (labeled 'Select the User'), the 'Selected Objects' list (labeled 'User got the permission to these Objects'), the 'Available Objects' list (labeled 'Select the Objects, you want this user to Upload data to the ORG'), the 'Delete Record Permission' checkbox (labeled 'Give additional permission to the User if needed'), and the 'Save' button.

- d) Click "Save" to save the settings for the user. Now this user can use the "Data Upload" application under his/her constraints

Page 1 of 1

1 - 2 of 2

e) If you would like to change the permission for this user anytime come back to this "User Permission" and find the User and click Edit and amend the changes and Save!

3.3. Assign App to New User

1. Go to Setup and Search for "Users" and Click on the "Users"

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

2. Click on the User "Full Name" you want to give the "Data Upload" App

All Users

On this page you can create, view, and manage users.

In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your n

View: All Users [Edit](#) | [Create New View](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N |

New User Reset Password(s) Add Multiple Users

☐ Action	Full Name ↑	Alias	Username	Last Login
☐ Edit	Chatter Expert	Chatter	chatty.00d0c0000000xyrua2.2qzkchcd1laa@chatter.salesforce.com	
☐ Edit Login	Joy, Krrish	KJoy		15/06/2020,
☐ Edit	Test User	utest		15/06/2020,

New User Reset Password(s) Add Multiple Users

3. On the User Page Section: "Permission Set Assignments", Click on the "Edit Assignments"

Permission Set Assignments Edit Assignments

No records to display

4. on the "Available Permission Sets" Select the "DataUpload User Permission" and Click "Add" to "Enabled Permission Sets" and click "Save"

Permission Set Assignments
User Test

Save Cancel

Available Permission Sets

- CRM User
- DataUpload Admin Permission
- DataUpload User Permission**
- DataUpload ViewAllFiles Permission
- Sales Cloud User
- Sales User
- Salesforce CMS Integration Admin
- Salesforce Console User
- Standard Einstein Activity Capture

Add Remove

Enabled Permission Sets

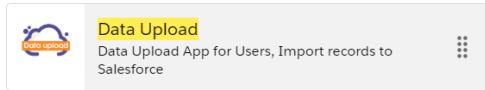
- None--

Save Cancel

5. Now, we need to give "App User Permission" within the "Data Upload" App, this options gives the Admin extra security to control the Objects and Additional features they want to enable for the User. For that, follow these steps:

a) Launch the application "Data Upload"

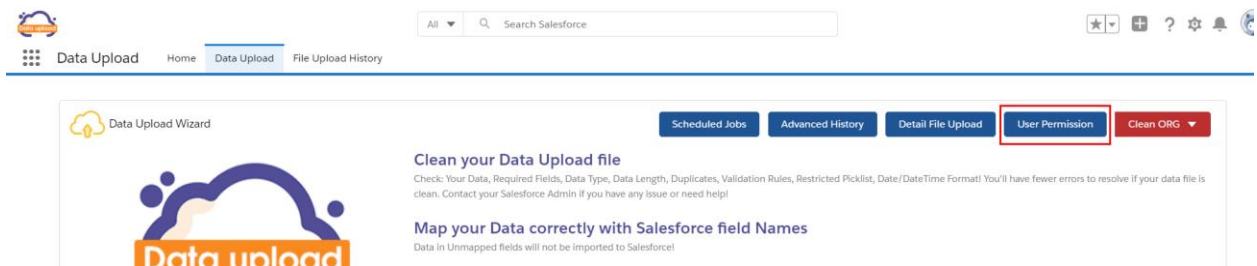
All Apps



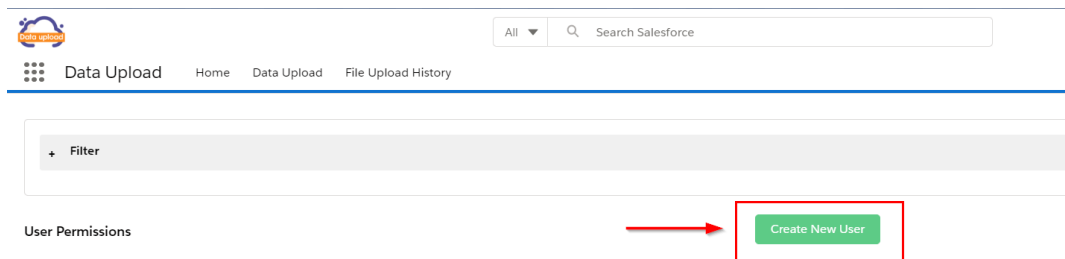
All Items

Data Upload

b) On the top-right corner click on the button named "User Permission"



c) Click on "Create New User" and fill the details as follow:



User: [Select the User whom you want to allow to upload files using our application]

Objects Accessible (API): [Pick the names of the object for which you want to grant permission to upload files to the aforementioned user]

Tip: You can copy the list of API Names of the selected objects from the 'Enter Objects' tab, if you want to give permissions to upload against the same objects for other users and paste it under 'Enter Objects' tab when creating those users

Delete Record Permission: ['Checked' if you want users to delete their uploaded files to clean up the org, otherwise 'Unchecked'. This option is always available for admins of the org.]

Delete Upload File Permission: ['Checked' if you want users to use 'Delete Records' action on both one time and scheduled upload process (Users will be able to delete records only if they have appropriate permission via profile or permission set). This option is always available for admins of the org.]

Rollback Permission: ['Checked' if you want users to rollback their actions (it could be any action- Add New Records, Update Existing Records, Add new and Update Existing Records or Delete Records). This option is always available for admins of the org.]

Schedule Upload Permission: ['Checked' if you want users to use schedule upload functionality, otherwise 'Unchecked'. This option is always available for admins of the org.]

The screenshot shows the 'Create New User Permission' dialog box. It has a title bar and a main content area. At the top, there's a 'User' field with 'User Test' and a search icon. A red box labeled 'Select the User' points to the search icon. Below this is the 'Objects Accessible (API)' section. It has a 'Select Objects' tab and an 'Enter Objects' input field. The 'Available Objects' list on the left includes: Case Team Member Role, Category Data, Chatter Invitation, Chatter Message Thread, Company Data, Conference Number, Contact Point Type Consent, Contract, Contract Contact Role, Customer Data, Data Use Legal Basis, Data Use Purpose, and Document. The 'Selected Objects' list on the right contains 'Account' and 'Contact'. A red box labeled 'User got the permission to these Objects' points to the 'Selected Objects' list. Another red box labeled 'Select the Objects, you want this user to Upload data to the ORG' points to the 'Selected Objects' list. Below the object lists are four permission checkboxes: 'Delete Upload File Permission' (unchecked), 'Delete Record Permission' (checked), 'Rollback Permission' (unchecked), and 'Schedule Upload Permission' (checked). A red box labeled 'Give additional permission to the User if needed' points to the 'Delete Record Permission' checkbox. At the bottom right, there are 'Cancel' and 'Save' buttons. A red box labeled 'Save' points to the 'Save' button.

- d) Click "Save" to save the settings for the user. Now this user can use the "Data Upload" application under his/her constraints

The screenshot shows the Salesforce Data Upload app interface. At the top, there's a navigation bar with the app logo, a search bar, and various utility icons. Below the navigation bar, there's a filter bar. The main content area is titled "User Permissions" and contains three buttons: "Create New User", "Delete User(s)", and "Export User(s)". A green success message box states "Success: User Settings Saved Successfully". Below this is a table with columns: "Edit", "User", "Objects Assigned", "Delete Upload File Permission", "Delete Record Permission", "Rollback Permission", and "Schedule Upload Permission". The table has one row for "User Test" with "Account, Contact" assigned. The "Delete Upload File Permission" and "Delete Record Permission" columns have checkboxes, while "Rollback Permission" and "Schedule Upload Permission" have checkmarks. At the bottom, there's a pagination bar showing "Page 1 of 1" and navigation controls.

e) If you would like to change the permission for this user anytime come back to this "User Permission" and find the User and click Edit and amend the changes and Save!

4. How to

4.1. How to Upload data to Salesforce using Data Upload ?

1. **NOTE: Check your Data Upload File:**

Your Data, Required Fields, Data Type, Data Length, Duplicates, Validation Rules, Restricted Picklist, Date/DateTime Format! You'll have fewer errors to resolve!

2. Open "Data Upload" Salesforce App

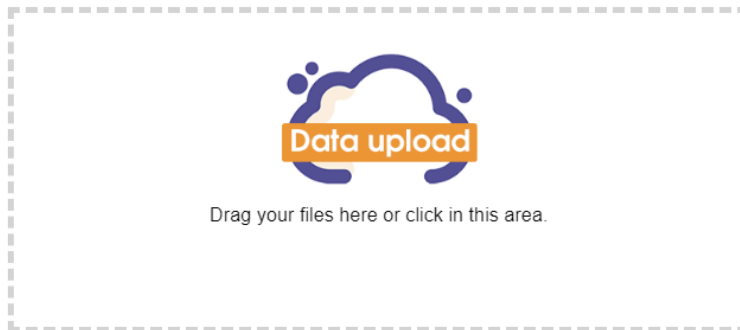
3. Click "One Time Data Upload"

One Time Data Upload

4. Select the Action you want to perform and the Object and Click "Next"

The screenshot shows the "One-Time Data Upload" form. It has a title "One-Time Data Upload" and a subtitle "Select the object and the action that you would like to carry forward". There's a checkbox for "Show All Objects". Below this is a "Select Action" section with a dropdown menu showing "Add New Records". A red arrow points from a red box labeled "Select the Action" to this dropdown. Below that is a "Select Object" section with a dropdown menu showing "-None-". A red arrow points from a red box labeled "Select the Object" to this dropdown.

5. Drag and drop your Upload file inside the box if not click inside the middle box area and select the upload file.



6. Click "Upload" button, (this will upload the files to the ORG), note if the upload file is big we will split the files and store it on the ORG but however this process will take time depend on the Client PC and the Salesforce Server time.



7. Once the file is Uploaded to the Salesforce ORG, the "Next" button will appear "Green", Click **"Next"** to continue the process.



8. At this stage, the Data Upload app will automatically Map all the fields if the "CSV Header" and the "Salesforce API" name is same, the status will be changed to "Mapped". If you would like to change the mapping, you just need to select the new field. The app will also check if theirs any required fields on this Object and let you know in Red Box on the top. Any UnMapped data will not be imported to Salesforce. Once you done the Field Mapping click **"Save Mapping"** this will save your Data Mapping. Click **"Next"** to continue the process.

Progress bar: Select Object & Ac... | Select File | **Edit Mapping** | Review & Upload | Finish

Edit Field Mapping
Your file has been auto-mapped to existing fields. You can edit the mapping, unmapped fields will not be imported*

Object: Contact
Action: Add New Records

Required Fields: Last Name

Status	CSV Header	Fields Mapping (Only fields with Read/Write Permission can be mapped)
Mapped	FNAME	First Name
Mapped	LNAME	Last Name
UnMapped	CELL	-None-
Mapped	EMAIL	Email
Mapped	SALUTATION	Salutation
Mapped	TITLE	Title

Buttons: Back | Clear | **Save Mapping** | Next

9. Data Preview Stage: At this stage, you can preview the Data before importing it to Salesforce, however you will be able to view 100 records. You also have options to Edit these 100 records inline, double click on the data and you will be able to Edit it. Once you are happy with the Data, Click **"Insert"** this will import your data to Salesforce in a Queue. Once the import/update is done you will receive a an email from the system confirming the upload success and error. You can also track this job in "File Upload History".

Select Object & Act...
Select File
Edit Mapping
Review & Upload
Finish

Preview Records
Your file may contain more than 100 records, you'll only be able to edit first 100 records

Object: Contact
Action: Add New Records
X

Email	First Name	Title	Last Name	Salutation
jdodge@testexample.com	Test1	SVP of Sales	LastName1	Mr.
ssnith@testexample.com	Test2	Senior Sales Rep	LastName2	Ms.
gdapper@testexample.com	Test3	Director of Healthcare	LastName3	Dr.
jdodge2@testexample.com	Test4	EVP of Sales	LastName4	Mr.
jjones@testexample.com	Test5	Senior Sales Rep	LastName5	Mrs.
dragonr@testexample.com	Test6	Senior Member of Medical Staff	LastName6	Dr.
curious@testexample.com	Test7	Janitor	LastName7	Mr.
black@testexample.com	Test8	Sales Rep	LastName8	Ms.
wblake@testexample.com	Test9	CEO	LastName9	Mr.

Back
Insert

10. Once the import/update is done you will receive a an email from the system confirming the upload success and error. You can also track this job in "File Upload History".

Select Object & Act...
Select File
Edit Mapping
Review & Upload
Finish

Success:
 The process has been initiated. You'll be mailed when the process is completed.

Start New Data Upload

File Upload History

4.2. How to Upload data to Salesforce using Data Upload - Schedule Data Upload?

NOTE: Check your Data Upload File:

Your Data, Required Fields, Data Type, Data Length, Duplicates, Validation Rules, Restricted Picklist, Date/DateTime Format! You'll have fewer errors to resolve!

2. Open "Data Upload" Salesforce App

3. Click "Schedule Data Upload"

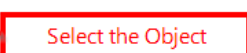


4. Select the Action you want to perform and the Object and Click "Next"

 **Schedule Data Upload**
Select the object and the action that you would like to carry forward

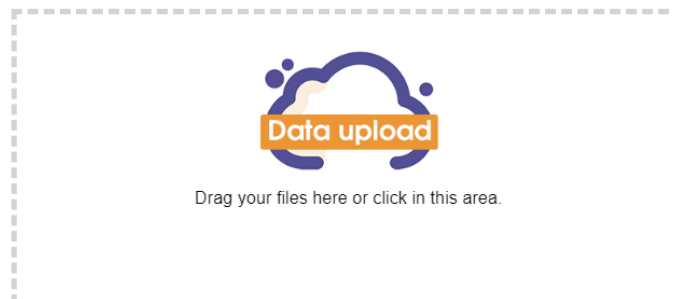
Show All Objects ☐

Select Action
Add New Records   Select the Action

Select Object
Account   Select the Object

 Next

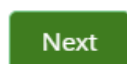
5. Drag and drop your Upload file inside the box if not click inside the middle box area and select the upload file.



6. Click "Upload" button, (this will upload the files to the ORG), note if the upload file is big we will split the files and store it on the ORG but however this process will take time depend on the Client PC and the Salesforce Server time.



7. Once the file is Uploaded to the Salesforce ORG, the "Next" button will appear "Green", Click **"Next"** to continue the process.



8. At this stage, the Data Upload app will automatically Map all the fields if the "CSV Header" and the "Salesforce API" name is same, the status will be changed to "Mapped". If you would like

to change the mapping, you just need to select the new field. The app will also check if theirs any required fields on this Object and let you know in Red Box on the top. Any UnMapped data will not be imported to Salesforce. Once you done the Field Mapping click "**Save Mapping**" this will save your Data Mapping. Click "**Next**" to continue the process.

Edit Field Mapping
Your file has been auto-mapped to existing fields. You can edit the mapping, unmapped fields will not be imported*

Object: Account
Action: Add New Records

Required Fields: Account Name

Status	CSV Header	Fields Mapping (Only fields with Read/Write Permission can be mapped)
Mapped	Name	Account Name
Mapped	Type	Account Type
Mapped	BillingStreet	Billing Street
Mapped	BillingCity	Billing City
Mapped	BillingState	Billing State / Province
Mapped	BillingPostalCode	Billing Zip / Postal Code
Mapped	BillingCountry	Billing Country
Mapped	BillingLatitude	Billing Latitude
Mapped	BillingLongitude	Billing Longitude

Back Clear Save Mapping Next

9. Select the Files you want to Schedule the Upload and click Next

Select file to schedule
Select the files that you want to schedule for upload

Available Files

AccountData.csv

Schedule Files

Back Next

10. Select the Date and Time you want this CSV to upload to the ORG and Enter the Job Name for this Upload.

* NOTE the upload need to be in the future of 5 minute!

Select Obj...
Select File
Edit Mapping
Select Files ...
Select Sche...
Review And...
Finish

Schedule Upload
Select Date and Time for Scheduling your file for upload

* Start Date and Time
17/06/2020 14:15

* Job Name
Test Account

Back
Next

11. Check the Schedule Upload Summary detail and if you are happy click "Schedule Insert"

Select Obj...
Select File
Edit Mapping
Select Files ...
Select Sche...
Review And...
Finish

Schedule Upload
Select Date and Time for Scheduling your file for upload

Object Name:- Account
Action:- Add New Records
Job Name:- Test Account

Cron Pattern:- 0 15 14 17 6 ? 2020
Start Date:- 17/06/2020, 14:15

Back
Schedule Insert

12. You have successfully Schedule the Job!

Data Upload
Data Upload
File Upload History

Select Obj...
Select File
Edit Mapping
Select Files ...
Select Sche...
Review And...
Finish

Success:
The process is scheduled, you'll be informed on completion by an email

Start New Data Upload
File Upload History

13. Your Schedule Job is in the queue, up on the completion you will receive an email.

☐	Roll Back	Files Upload	Progress	Step No	Files Download	Successful	Failed	Object Name	Action	Import Status	Upload Date Time ▲	Uploaded By
☐		DUFU-00000003	Scheduled	6	AccountData.csv	0	0	Account	Add New Records	Scheduled	17/06/2020, 13:56	Krish Joy

4.3. How to create a user permission for Data Upload ?

Data Upload v1.5

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Information: Data Upload App works with the Profile Permission! + Data Upload App User Permission.

1. Create the user account in Salesforce and assign a profile and permission for this User Account!

2. Go to > Data Upload App > User Permission >

User Permission

5. Click > "Create New User"

Create New User

4. Select the User, enable the additional user permissions for this user, and select/enter the Objects you want this user to Upload Data to (user must have access to these objects in their profile) and Click "Save".

The screenshot shows the 'Create New User Permission' interface. Red arrows and boxes highlight key steps: 'Select the User Account' points to the 'User' search field; 'Allow this user to delete their CSV upload Files' points to 'Delete Upload File Permission'; 'Allow this user to Delete records using Data Upload App' points to 'Delete Record Permission'; 'Allow this user to Roll Back' points to 'Rollback Permission'; 'Allow this user to use Schedule Upload function' points to 'Schedule Upload Permission'; 'Select the Objects you want this User to Upload Data and click Add. OR You can Enter the API name of the Objects by selecting the tab "Enter Objects"' points to the 'Select Objects' section; and 'Click Save' points to the 'Save' button at the bottom right.

5.1. How to change a user permission ?

Information: Data Upload App works with the Profile Permission! + Data Upload App User Permission.

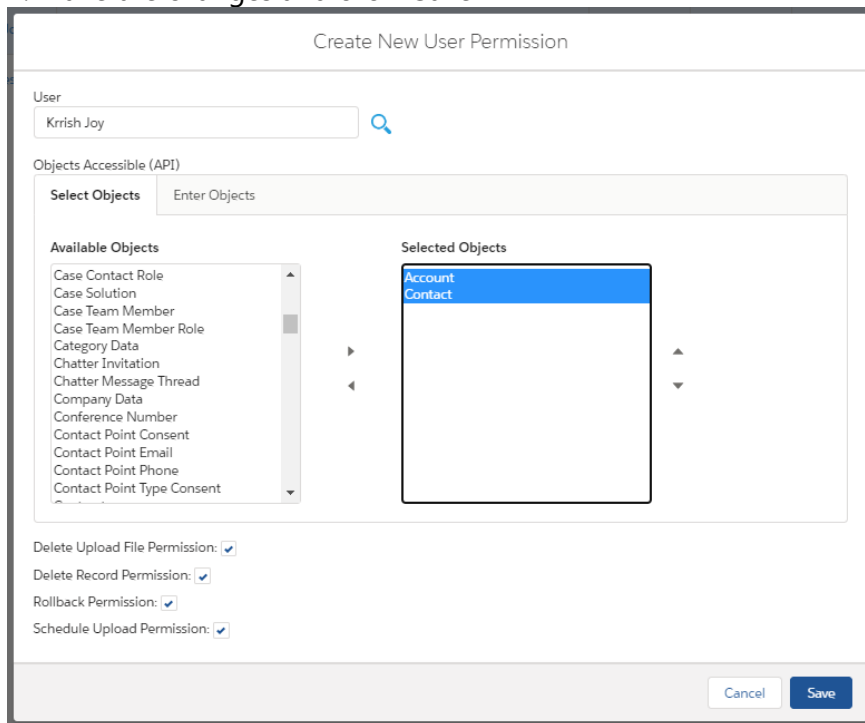
1. Go to Data Upload App > Click "User Permission"

2. Find the User on the list, or use the Filter

3. Click "Edit" next to the User

☐	Edit	Data Upload User Id	User	Objects Assigned
☐		DU-User-00000024	User1 test	Account, Campaign, Contact
☐		DU-User-00000021	Krrish Joy	Account, HR__c

4. Make the changes and click "Save"



5.2. How to Roll Back Changes

You can do Roll Back for Insert, Update, Insert and Update. For Delete Roll Back we are rely on Salesforce Recycle bin to restore fully, but however we are backup the parent object its self, if the parent account/record has a child records or attachments we are not backing it up, this is due to Salesforce limitation. So the Roll back for Delete will check if the record is on recycle bin, if it is in the recycle bin you will be able to roll back (undelete) using the app, if theirs no record found on the recycle bin we will create that record for you with out the attachments or child records.

In order to do a Roll Back:

1. Admin > Data Upload > Advanced History > Select the Job > and click on "Roll Back"

1b) On Data Upload App Click "Advanced History"

Advanced History

1c) From the "Advanced History" find the Upload Job you want to "Roll Back". In order to find the upload Job we have given more information, Uploaded by, Date and time, Object, Filter ...

+ Filter

Advanced User Upload History

Delete Files

Restore All Files

Detail File Upload

Export Audit

User Permission

☐	Roll Back	Files Upload	Action	Step No	Progress	Import Status	Uploaded By	Upload Date Time	Object Name	Files Download
☐		DUFU-00000001	Add New Records	4	Failed	Failed	Krrish Joy	16/06/2020, 19:44	Account	AccountData.csv
☐	Roll Back	DUFU-00000000	Add New Records	4	Completed	Completed	User Test	16/06/2020, 18:23	Account	AccountData.csv

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Next

1d) If a "Roll Back" is available for the upload job you will see a "Roll Back" Click on this link, the Roll back job will start, up on the completion of the Roll back, you will receive a email stating the Roll back confirmation and also the Rollback Status will change to "Completed"

☐	Roll Back	DUFU-00000000	Add New Records	4	Rollback Status
					Not Started
					Not Started

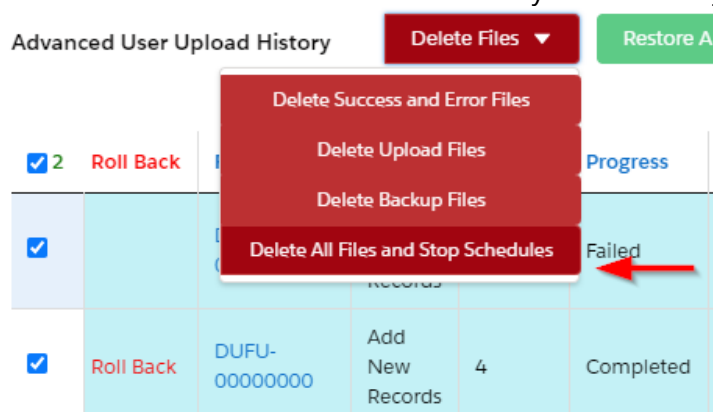
6. Admin Maintenance

As a Admin for Data Upload, you will need to do Weekly/Monthly maintenance this is due to Salesforce has storage limitation and we store all the backups in your org. We advice admin to keep all the "Backup files, Success and error files and upload files" for two to three weeks and delete all the unwanted job files from your ORG, this will eliminate the Salesforce Storage limitation.

1) We have designed our app Admin Friendly, admin verify if all the upload is success and if theirs any concern with the stake holder / business. And then go to:

Data Upload > Advanced History > Select the Jobs > and press "Delete All Files and Stop Schedules"

This will delete all the files related to the job and stop any schedules on the system. At this stage all the files will be deleted and moved to your ORG Recycle Bin.

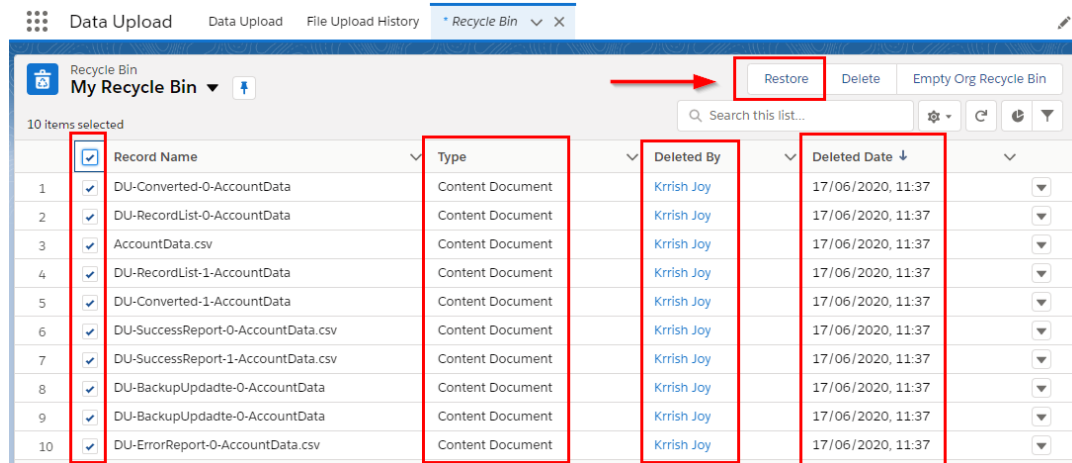


2) If for any reason admin want to restore this job backups and roll back after "Accident Delete" : if the backups are not deleted from the "Recycle bin" you will be able to restore the files with one button and roll back.

☐ 0	Roll Back	Files Upload	Action	Step No	Progress	Import Status	Uploaded By
☐		DUFU-00000001	Add New Records	4	Failed	Failed	Krrish Joy
☐		DUFU-00000000	Add New Records	4	Completed	Completed	User Test

"Roll Back" option is not available due to Job's Files have been deleted.

Go to the Recycle Bin and Restore all the files based on the Deleted Date and Time and the User, (Type: Content Document)



3) Now go back to "**Data Upload > Advanced History > (Deleted Job ID)**" " You will see the "Roll back" option enabled back for this Accident Delete Job. *(NOTE: If you accidentally delete the Upload Job backups files and if the files are still in your Recycle bin you can restore the files and Roll back if needed!

☐ 0	Roll Back	Files Upload	Action	Step No	Progress	Import Status	Uploaded By
☐		DUFU-00000001	Add New Records	4	Failed	Failed	Krrish Joy
☐	Roll Back	DUFU-00000000	Add New Records	4	Completed	Completed	User Test

6.1. Clean ORG

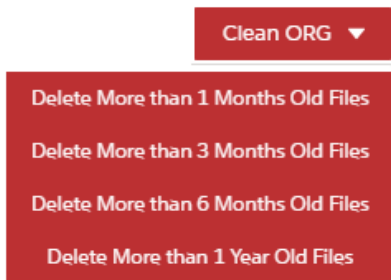
Its very important you keep your ORG Clean, when a user upload files using our App we create multiple files on the ORG so we can bring the missing feature the Salesforce don't offer. Which mean if you don't keep your ORG clean within our APP you will have allot of files which will take unnecessary space on the ORG.

To do this we have designed a new feature within our App call "Clean ORG" and "Delete Files"

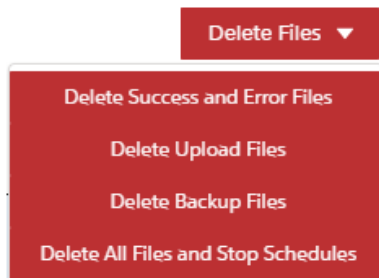


1) "Clean ORG" is designed for Monthly Operation, for example "Delete all the back up files more than 1 month Old" this will delete all the back up files more than 1 month old from today's date.

In order to keep the ORG Clean, Admin just need to make sure the business does not have any data that need to be restored, and click "Clean ORG" and select the option they want to take Action, and the ORG will be cleaned and repeat the process each month.



2) "Delete Files", this feature is designed to delete Single Upload Jobs backups or you can select multiple jobs together which you think you don't need the backups anymore and click the Action you want to take.



6.2. Allow Users to Delete their Backup Files

Addition to this, you can also give the user to "Delete the backup files", this options comes in handy for a Team Leaders who know what they are doing and Admin does not need to get involved with their uploads which save the time.

1) To do this: Data upload > User Permission > Edit/Create User> Enable "Delete Upload File Permission" and press "Save"

Create New User Permission

User:

Objects Accessible (API)

Select Objects:

Available Objects:

- Access
- Account Contact Relationship
- Account Contact Role
- Account Partner
- Address
- Announcement
- Apex Test Queue Item
- App Analytics Query Request
- Asset
- Asset File
- Asset Relationship
- Associated Location
- Attachment

Selected Objects:

- Account

☒ Delete Upload File Permission
☐ Delete Record Permission
☐ Rollback Permission
☐ Schedule Upload Permission

2) On the Tab Click "File Upload History" > Select the File Upload (Job) > And click "Delete All Files and Stop Schedules". At this stage the files will be moved to recycle bin, admin will be able to restore the files if admin did not empty the recycle bin manually and if its less than 14 days.

Data Upload **File Upload History**

	Roll Back	Files Upload	Progress	Step No	Files Download	Successful	Failed	Object Name	Action	Import
☐		DUFU-00000001	Failed	4	AccountData.csv	0	1,000	Account	Add New Records	Failed

6.3. Allow Users to Roll Back

You can Allow Users to Roll Back if they make any mistakes also, or you can give this feature to Manager or Team Leader the people who know what they are doing with their Data and Admin Does not have to get involved and saves time.

1) To do this: Data upload > User Permission > Edit/Create User> Enable "Rollback Permission" and press "Save"

User Permissions Create New User Delete User(s) Export User(s)

☐	Edit	User	Objects Assigned	Delete Upload File Permission	Delete Record Permission	Rollback Permission	Schedule Upload Permission
☐		Krrish Joy	Account	☒	☒	☒	☐
☐		User Test	Account	☒	☐	☐	☐

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Edit / Create the User

Create New User Permission

User

User Test

Objects Accessible (API)

Select Objects

Enter Objects

Available Objects

Access
Account Contact Relationship
Account Contact Role
Account Partner
Address
Announcement
Apex Test Queue Item
App Analytics Query Request
Asset
Asset File
Asset Relationship
Associated Location
Attachment

Selected Objects

Account

Delete Upload File Permission: ☐
Delete Record Permission: ☐
Rollback Permission: ☒
Schedule Upload Permission: ☐

Cancel

Save

2. Now if the user go to Data Upload > File Upload History they will see the Roll Back option will appear.

3. Anytime you can change this settings, if you don't want to give the Roll back permission to this user go back to "User Permissions" and find the user and "Edit" the User and Untick "Rollback Permission"

7. Audit

In Data Upload we know how much is your Data is worth for the business, and we know how much times its takes for the Admin and Developer teams to investigate the Data issues. Keeping this in mind we have build a object called "Detail File Upload" this Object will have all the relevant information you need related to the Upload or the Action the user is taking within the "Data Upload" App.

So If you want to find out "User A", All the upload they have done using our App,
If you want to find out all the deletion happen you can
All the Delete or Update Salesforce ID
Etc.. many more useful information can be retrieve for the Audit purpose.

1) To view the Audit go to: Data Upload > Detail File Upload
Here you will be able to see the Jobs, started date and time, user etc ..

[Detail File Upload](#)



All








Data Upload

Data Upload

File Upload History



File Upload

DUFU-00000000

New Contact

New Opportunity

New Lead

Details

One Time Upload Detail

Files Upload	DUFU-00000000	Step No	4
Uploaded By	User Test	Total Files Processed	2
Object Name	Account	Upload Files Found	YES
Action	Add New Records	Total Backup Files	2
Record Type	One Time Upload	Total Overall Files	10
File Names	AccountData.csv	Total Backup File Size	67.96 KB
File Download Links	AccountData.csv	Overall Total File Size	1.43 MB
Original Upload File Size	253.92 KB	Rollback Status	Not Started
Import Status	Completed		
Progress	Completed		
ProcessStatus	Completed		
Successful	993		
Failed	7		
Record Age	New Record		
Owner	 User Test		

Audit

User Name	User Test
Upload Date Time	16/06/2020, 18:23
User Action	Add New Records
Uploaded Object	Account
Roll Back Status	Not Started
Fields Inserted / Updated	Name, Type, BillingStreet, BillingCity, BillingState, BillingPostalCode, BillingCountry, BillingLatitude, BillingLongitude, ShippingStreet, ShippingCity, ShippingState, ShippingPostalCode, ShippingCountry, ShippingLatitude, ShippingLongitude, Website, Industry, NumberOfEmployees, Description
Updated Record(s) - Id_1	
Updated Record(s) - Id_2	
Deleted Record(s) - Id_1	
Deleted Record(s) - Id_2	

System Information

File Upload Results (2)

New

Download Report	Upload Result	Records Failed	Records Succeed	
DUFUR-00000003	Succeeded	0	101	▼
DUFUR-00000004	Partially Succeeded	7	892	▼
View All				

Files (5)

Add Files

AccountData.csv

17 Jun 2020 • 254KB

DU-Converted-0-AccountData

17 Jun 2020 • 31KB

DU-Converted-1-AccountData

17 Jun 2020 • 268KB

DU-RecordList-0-AccountData

17 Jun 2020 • 63KB

DU-RecordList-1-AccountData

17 Jun 2020 • 537KB

[View All](#)

File Upload History (6+)

Date	Field	User	Original Value	New Value	
16/06/2020, 18:26	Failed	User Test	0	7	▼
16/06/2020, 18:26	Successful	User Test	101	993	▼
16/06/2020, 18:26	Import Status	User Test	In Progress	Completed	▼
16/06/2020, 18:25	Failed	User Test		0	▼
16/06/2020, 18:25	Successful	User Test		101	▼
16/06/2020, 18:25	Failed	User Test		0	▼
View All					

Data Upload Delete Audits (6+)

New

Data Upload Delete Audit Name	Action	User	Date-Time	
DUFUD-00000000	Delete RecordList File(s)	User Test	16/06/2020, 18:25	▼
DUFUD-00000001	Delete RecordList File(s)	User Test	16/06/2020, 18:25	▼
DUFUD-00000006		Krrish Joy	17/06/2020, 11:37	▼
DUFUD-00000007	Delete Converted File(s)	Krrish Joy	17/06/2020, 11:37	▼
DUFUD-00000008	Delete RecordList File(s)	Krrish Joy	17/06/2020, 11:37	▼
DUFUD-00000009		Krrish Joy	17/06/2020, 11:46	▼
View All				

2) you can also use Data Upload > "Advanced History" for Audit purpose.

[Advanced History](#)

3) To Export the Audit report: Data Upload > Advanced History > Select all the Jobs > "Export

Audit" and Save.

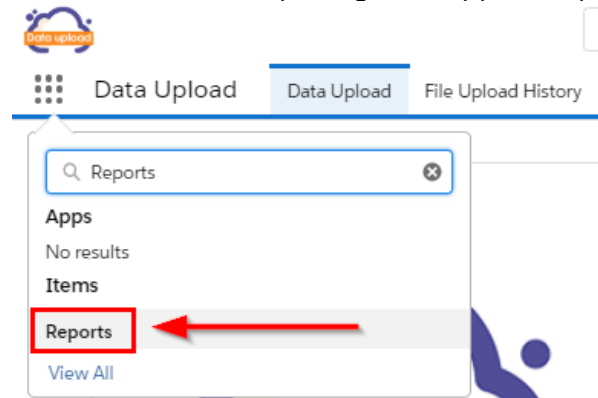
The screenshot shows the 'Data Upload' interface. At the top, there are tabs for 'Data Upload' and 'File Upload History'. Below the tabs is a 'Filter' section with various input fields: 'User' (text input), 'Object Name' (dropdown), 'Job Type' (dropdown), 'Import Status' (dropdown), 'Upload File Found' (dropdown), and 'Job Date/Time' (date range). There are 'Search' and 'Clear' buttons. Below the filter section is a row of action buttons: 'Delete Files', 'Restore All Files', 'Detail File Upload', 'Export Audit' (highlighted with a red box), 'User Permission', and 'Clean ORG'. Below the buttons is a table titled 'Advanced User Upload History'.

☐	Roll Back	Files Upload	Action	Step No	Progress	Import Status	Uploaded By	Upload Date Time	Object Name	Files Downlo
☐		DUFU-00000002	Add New Records	2	Resume	File Not Received	User Test	17/06/2020, 13:03	Account	

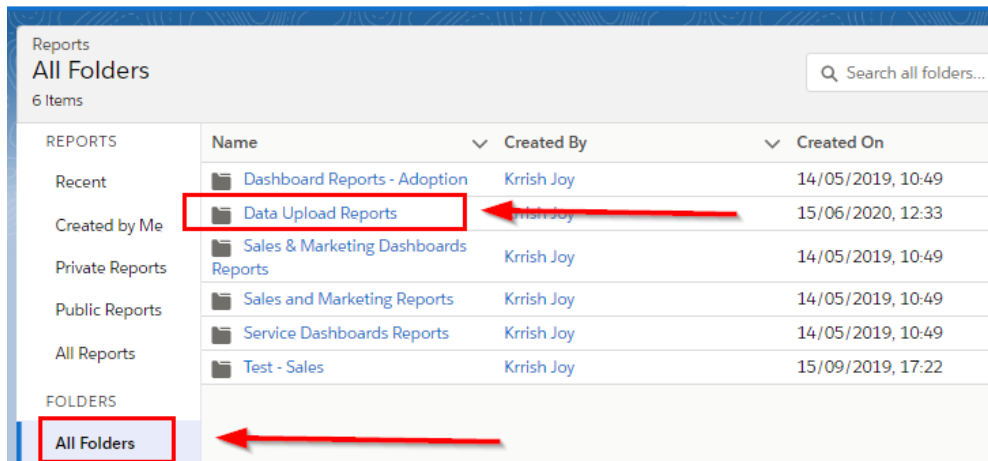
7.1. Reports

Data Upload comes with 4 Salesforce Reports, you can use these reports to Maintain your ORG, or use it for Audit purpose also.

1) To access these reports go to "Apps > Reports "



2) from the Reports, Click "All Folders " and open the "Data Upload Reports"



3. Data Upload Reports Folder has 1 Admin Files/Storage Report and 3 User Uploads which will help for admin to audit the data or for report purpose.

Name	Description	Folder	Created By	Created On
Data Upload - Last 60 Days User Uploads	Data Upload - Last 60 Days User Uploads	Data Upload Reports	Krrish Joy	15/06/2020, 12:33
Data Upload - Last 90 Days User Uploads	Report for Data Upload Last 90 Days	Data Upload Reports	Krrish Joy	15/06/2020, 12:33
Data Upload - Current Month Uploads	Report for Data Upload - Current Month User Uploads	Data Upload Reports	Krrish Joy	15/06/2020, 12:33
Data Upload - Admin Files/Storage Report	Data Upload - Admin Files/Storage Report	Data Upload Reports	Krrish Joy	15/06/2020, 12:33

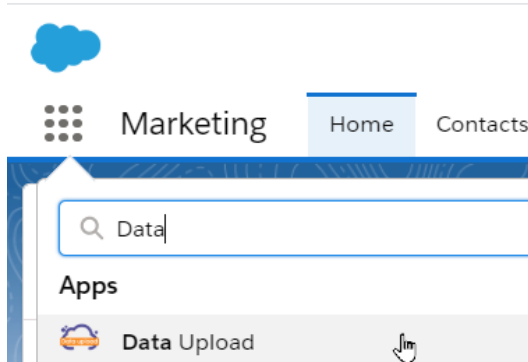
8. App Uninstall

At OQCT we are here to support our customers and partner with Salesforce and our app related issues, or any feature missing from our app.

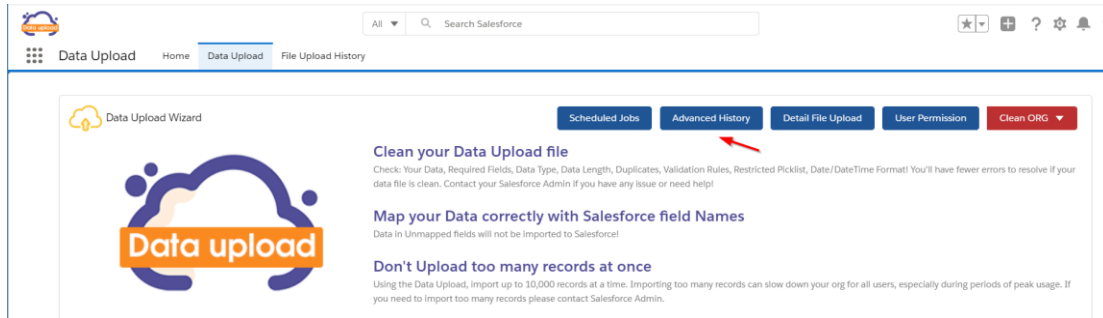
If you like to Uninstall the "Data Upload" app for any reason, please follow this setup:

Important: Before deleting the App, we need to delete all the Backup files, Report files etc..

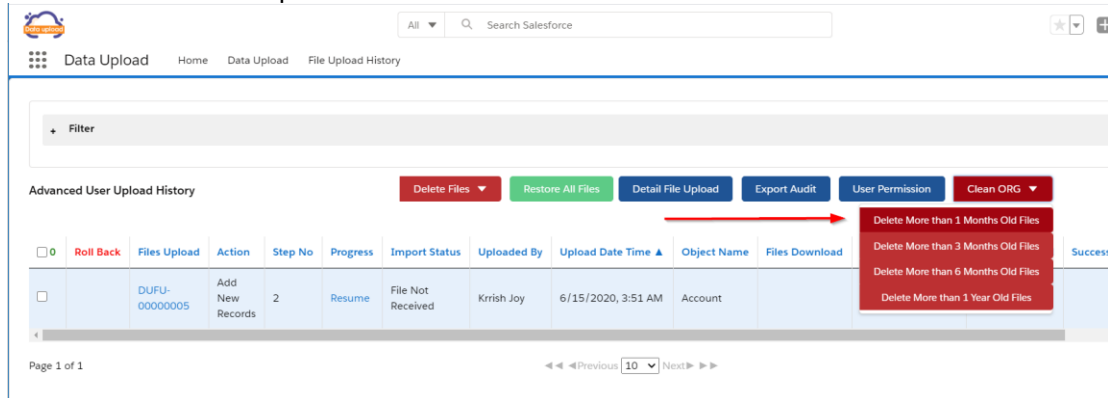
1. App "Data Upload"



2. On the Data Upload App, Click on the "Advanced History".



3. From the Advanced History page Select "Delete More than 1 months Old Files" , this will delete all the " Backup files" more than 1 month old!



4. Now select all the jobs within a month and Click "Delete Files" and Select "Delete All Files and Stop Schedules" , this will delete all the Backup files, Success and Error Files and reports from your ORG!



All ▼
Search Salesfo


Data Upload
Home
Data Upload
File Upload History

+ Filter

Advanced User Upload History

Delete Files ▼
Restore

☒ 1	Roll Back	Files Upload	Action	Step No	Loaded By
☒		DUFU-00000005	Add New Records	2	on Joy

Delete Success and Error Files
Delete Upload Files
Delete Backup Files
Delete All Files and Stop Schedules

5. Now we have deleted all the Files related to "Data Upload" app and ready to "Uninstall" the App.

6. GO to "Setup" and Search for "Installed Packages" and Open the "Installed Packages" page.




Setup
Home
Object

Apps
Packaging

Installed Packages

7. Find the "Data Upload and Click on "Uninstall" link.

Installed Packages

On AppExchange you can browse, test drive, download, and install pre-built apps and components right into your salesforce.com environment. [Learn More about Installing Packages](#)

Apps and components are installed in packages. Any custom apps, tabs, and custom objects are initially marked as "In Development" and are not deployed to your users. This allows you to test and customize before deploying. You can deploy the components individually using the other features in setup or as a group by clicking Deploy.

Depending on the links next to an installed package, you can take different actions from this page.

To remove a package, click **Uninstall**. To manage your package licenses, click **Manage Licenses**.

Click "Uninstall"

Action	Package Name	Publisher	Version Number	Namespace Prefix	Install Date	Limits	Apps	Tabs	Objects
Uninstall	Salesforce.com CRM Dashboards Description Salesforce.com CRM Dashboards	salesforce.com	1.0		2/3/2020, 7:22 AM	☒	0	0	0
Uninstall	Knowledge Base Dashboards & Reports Description This package provides reports and dashboards that help you monitor your knowledge base.	Salesforce Knowledge	1.23	SK	2/3/2020, 7:22 AM	☐	0	0	0
Uninstall Configure	Data Upload Description Data Upload app helps Salesforce administrators not to give the Data Loader access to users who don't need full access or API access and still need to...	OQCT Ltd	1.1	OQCT_DaUp	2/17/2020, 9:05 PM	☒	2	2	4

8. Read all the info and check everything and Select the option you want and Click "Yes, I want to uninstall this package and permanently delete all associated components" and Click "Uninstall"

Uninstalling a Package

Uninstalling this package will:

- Permanently delete all components in this package (listed below)
- Permanently delete all customizations you have made to these components
- Permanently delete all data that you have created for all custom objects in this package (listed below)
- Permanently delete any reports, views, and custom tabs based on the custom objects in this package
- Permanently delete any relationships and related lists associated with the custom objects in this package

When you uninstall a package, by default, all its data as well as related notes and attachments are automatically saved as an export file. This file is available for 48 hours in case you need to recover the data. To reload the data, import the export file manually and recreate any relationships between objects. Some components can't be recreated and others require special treatment. You can also prevent the package data from being exported by selecting the appropriate radio button below. [Tell me more](#)

Action	Name	Parent Object	Type
	Schedule Upload	File Upload	Record Type
	One Time Upload	File Upload	Record Type
	File Upload_Record_Page		Lightning Page
	Data Upload_Lightning_UtilityBar		Lightning Page
	Data Upload - Admin Files/Storage Report		Report

Custom Object Data

Custom Object	Records (Approximate)
Data Upload Configuration	0
Data Upload Delete Audit	36
File Upload Result	10
File Upload	5
Data Upload User	3

☒ Save a copy of this package's data for 48 hours after uninstall
☐ Do not save a copy of this package's data after uninstall

☒ Yes, I want to uninstall this package and permanently delete all associated components

[Uninstall](#)

9. On the Installed Packages page, you will see the Uninstall Status.

Installed Packages

Help for this Page 

On AppExchange you can browse, test drive, download, and install pre-built apps and components right into your salesforce.com environment. [Learn More about Installing Packages.](#)

Apps and components are installed in packages. Any custom apps, tabs, and custom objects are initially marked as "In Development" and are not deployed to your users. This allows you to test and customize before deploying. You can deploy the components individually using the other features in setup or as a group by clicking Deploy.

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To remove a package, click **Uninstall**. To manage your package licenses, click **Manage Licenses**.



Installed Packages										
Action	Package Name	Publisher	Version Number	Namespace Prefix	Install Date	Limits	Apps	Tabs	Objects	AppExchange Ready
Uninstall	Salesforce.com CRM Dashboards	salesforce.com	1.0		14/05/2019 10:49	✓	0	0	0	Not Applicable
	Description Salesforce.com CRM Dashboards									
Uninstall	 Salesforce.Connected Apps	Salesforce.com	1.7	sf_com_apps	18/09/2019 15:59	✓	0	0	0	Not Passed
	Description This package contains Connected Applications for all the officially supported Salesforce client applications such as Touch, Salesforce for Outlook, Sa...									
Uninstalled Packages										
Action	Package Name	Namespace		Expiration Date		Uninstall Status		Uninstall Date		
Del	Data Upload (Version Name Data Upload Spring 2020)	OQCT_DaUp		17/06/2020 12:15		Uninstall Complete		15/06/2020 12:15		

9. Contact us



Company: OQCT Limited

Tel: +44 208 133 3880

Website: www.oqct.com

Email: support@oqct.com

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