



# SKYVVA Integration Cloud App - Free Dataloder -

## **Use Case:**

Import Account Data into Salesforce with a csv-file and  
Manual Load Function

October 2016



## SKYVVA INTEGRATION CLOUD APP

FREE DATALOADER - TAKE DATA MIGRATION TO THE CLOUD...

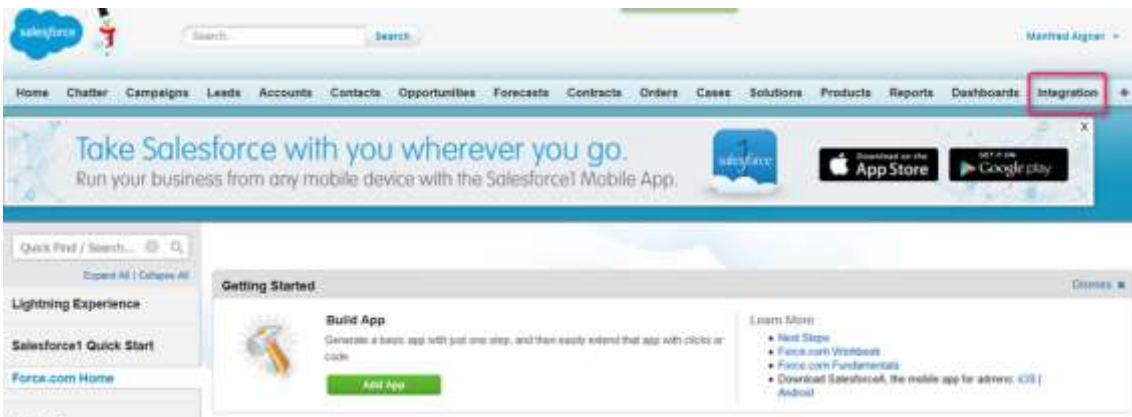
**SKYVVA's Free Dataloader** is part of the SKYVVA's Integration Cloud App and is a native force.com App. As a true Cloud Service data can be uploaded over the Web without the need to install any software or hardware. SKYVVA's Free Dataloader is perfectly suited for business analyst and administrator to manage the import of critical business information such as accounts, contacts, assets products, leads or orders in a timely manner without being reliant on limited IT resources.

Based on an intuitive (Salesforce Look & Feel) Web interface SKYVVA's Free Dataloader is very easy to configure (No Coding) and maintain. The Free Dataloader is installed as a tab 'Integration' directly in the Salesforce menu bar. Fields are mapped by a visual editor, data are transformed using a formula editor. All operations are executed in the familiar Salesforce Look & Feel. Business analysts or administrator get alerted about failure in the service and are enabled to resolute data transforming or process logic without IT help via a message board.

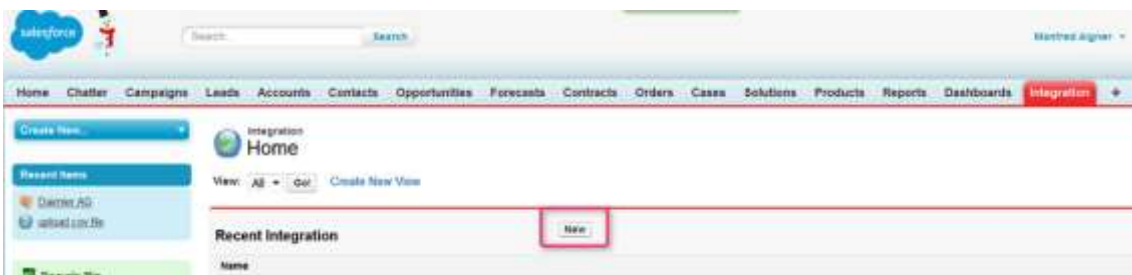
## Use case example: Import Account Data into Salesforce with a csv-file and Manual Load Function

*Here is how it works and let's get started*

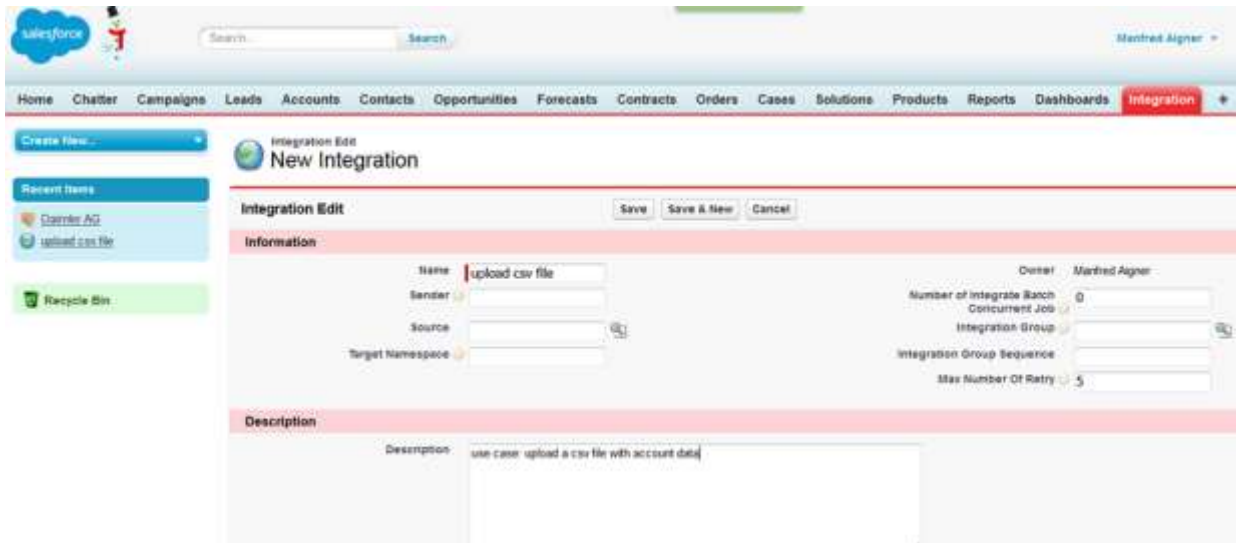
The first step is to create a new Integration to import our csv file.  
On the Menu Bar, you see the Integration tab -> click on Integration tab



Click on Integration tab and on 'New'



We give our Integration a name and a short description of the use case for this integration.

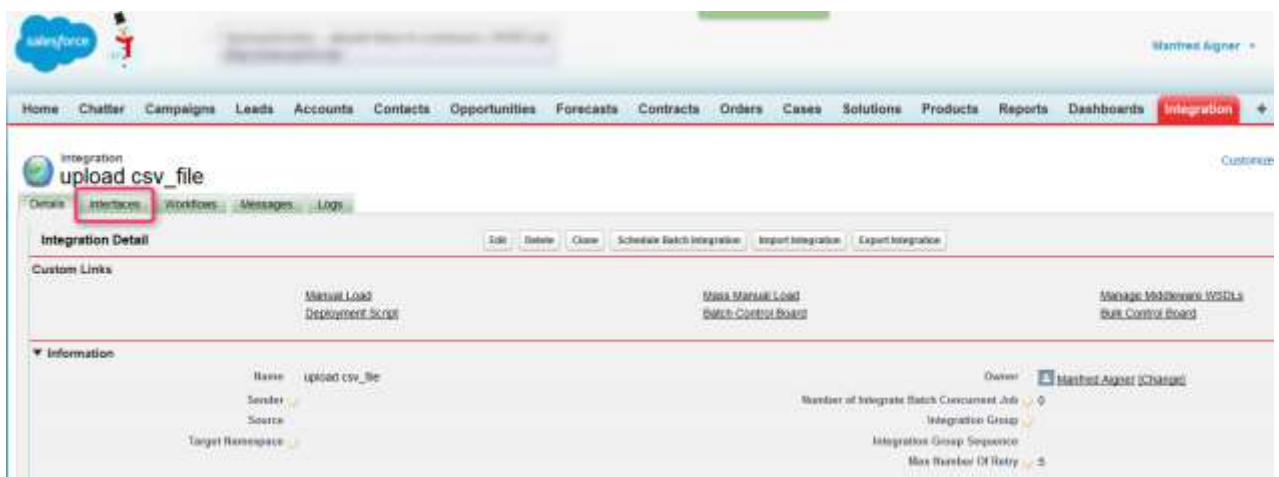


All other fields can remain as default...

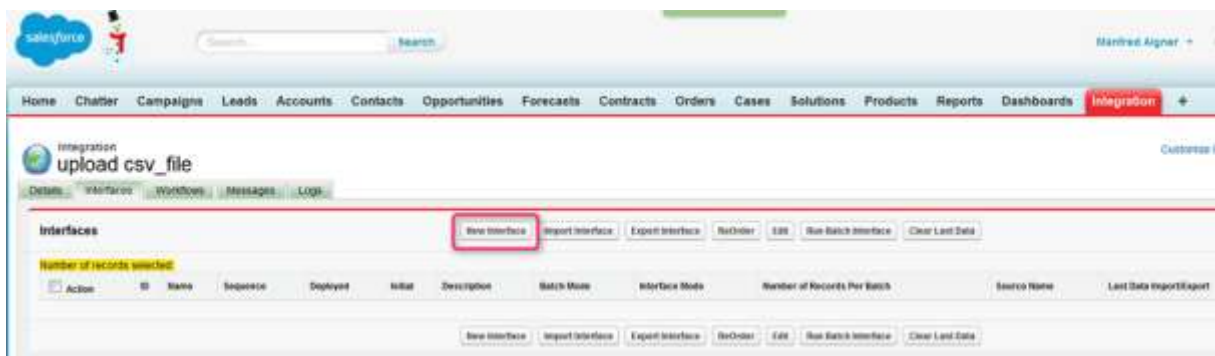
Click on 'Save' and we have created an Integration to upload our csv file.

The next step is to create the Interface for the Account Object.

We click on the Integration tab...



and the on 'New Interface' Button



We give our Interface a Name and change the Status to Deploy and choose in Source Name the proper SOBJect -> Account

The screenshot shows the 'Interface New' configuration form. The 'Name' field is set to 'Account Interface', 'Status' is 'Deployed', and 'Source Name' is set to 'Account'. A dropdown menu for 'Source Name' is open, showing a list of Salesforce objects with 'Account' selected. The 'Sequence' is set to '1'. The 'Adapter' and 'IStructure Repository' fields are empty. The 'Save' and 'Cancel' buttons are visible at the top and bottom of the form.

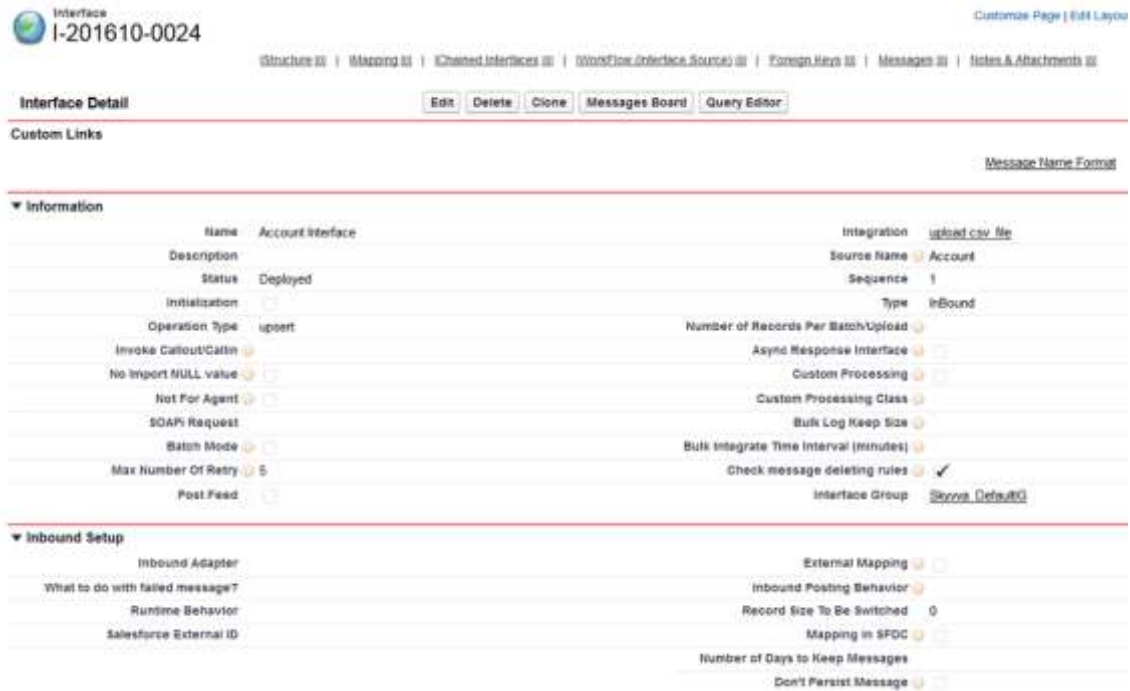
All other fields can remain as default...

We click on 'Save' and created our Account Interface

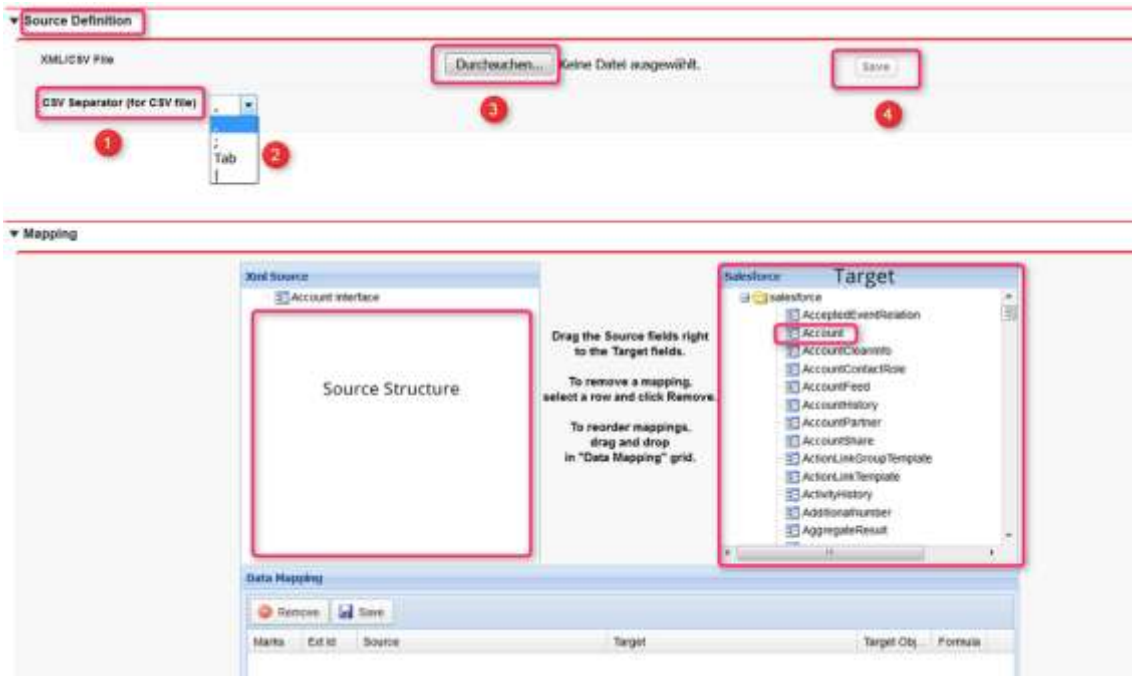
The screenshot shows the Salesforce Integration interface. The 'Integration' tab is selected, and the 'upload csv\_file' integration is active. The 'Interfaces' section shows a table with the following data:

Active	ID	Name	Sequence	Deployed	Initial	Description	Batch Mode	Interface Mode	Number of Records Per Batch	Source Name	Last Data Import/Export
<input checked="" type="checkbox"/>	001610-0024	ACCOUNT INTERFACE	1	✓				Synchronous		Account	

We click on the 'Account Interface' link and see the Interface Details.

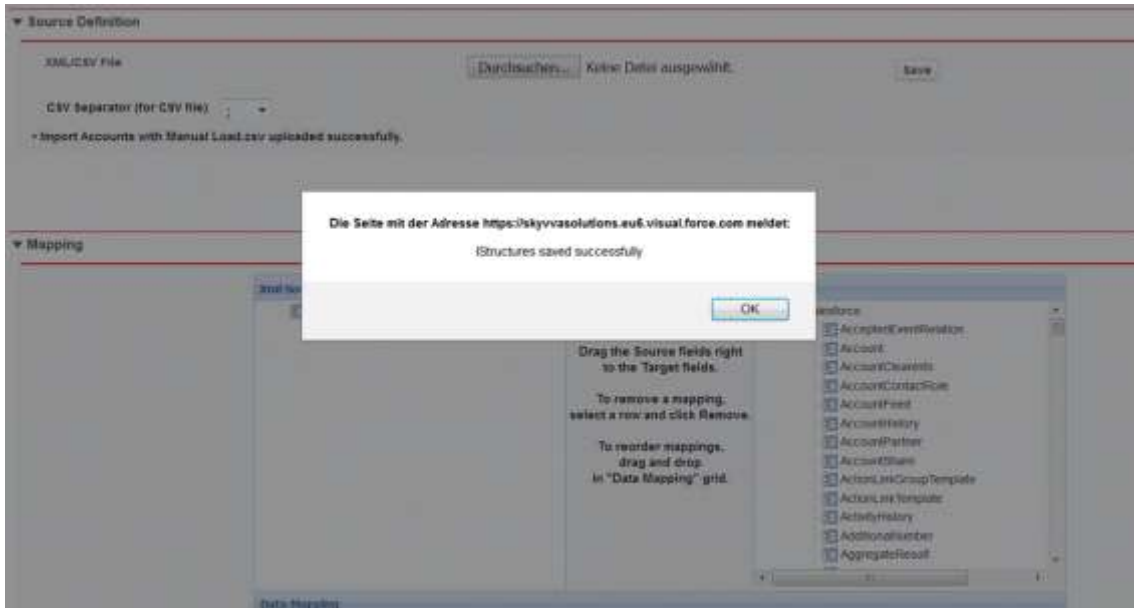


To create the Account structure we choose our CSV Separator (2) in 'Source Definition' Area and click on Search (3) and choose your csv file to upload and then click on 'Save' (4).

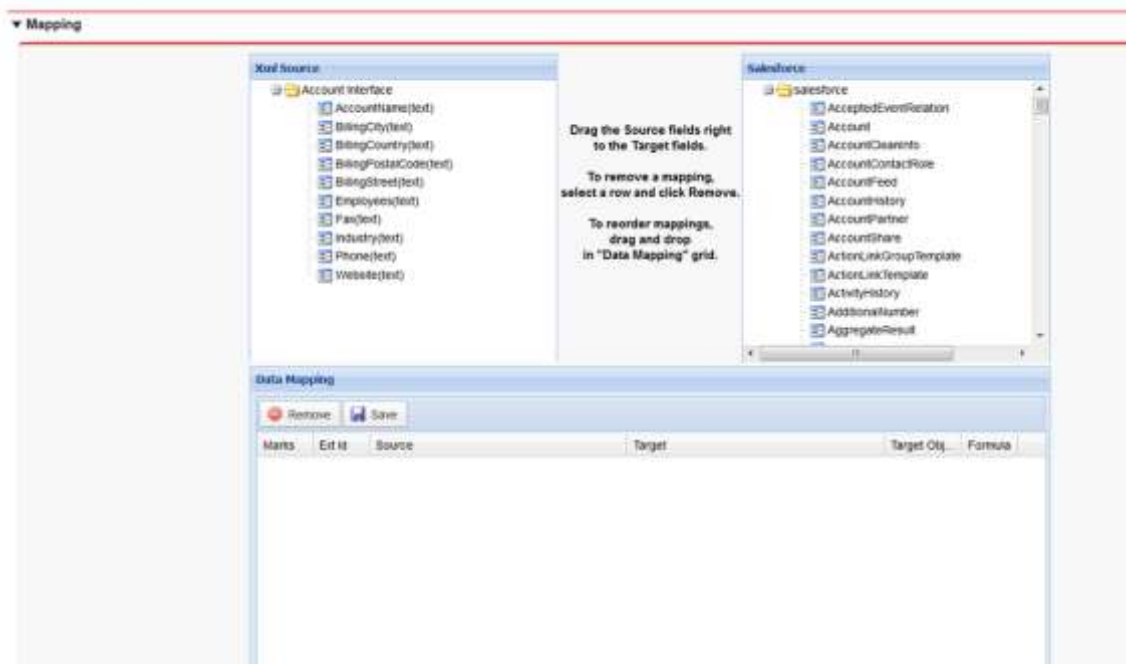


After you have saved the uploaded csv file you get the message that our upload was successful and click on 'OK'.





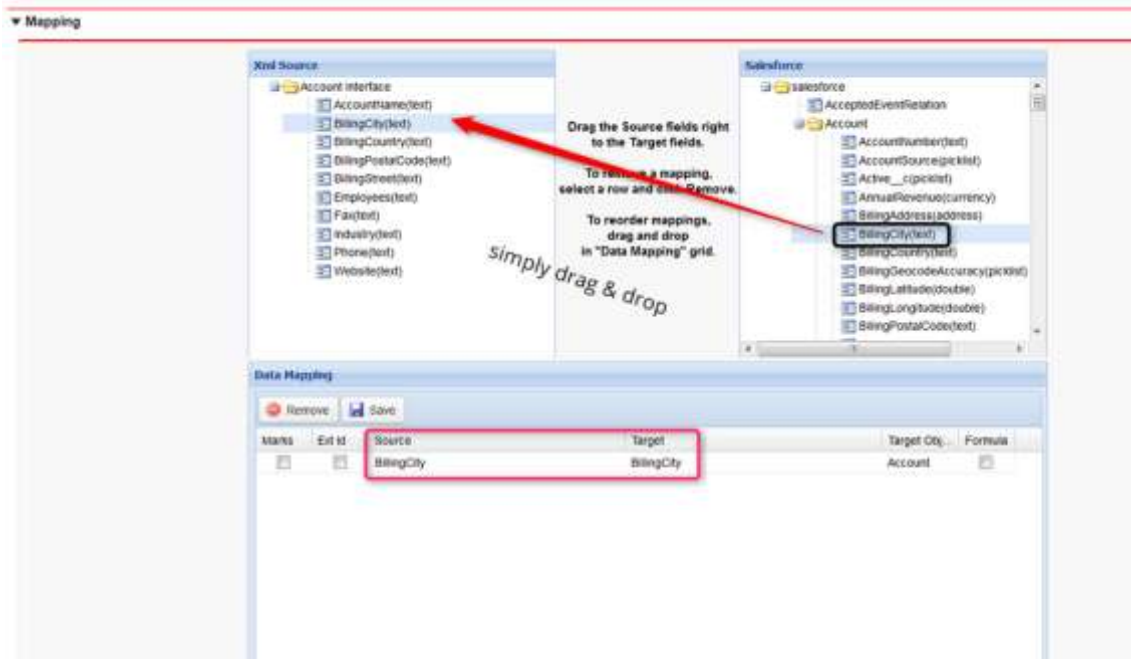
We see now our account structure with the automatically generated account fields.



Account fields in Source

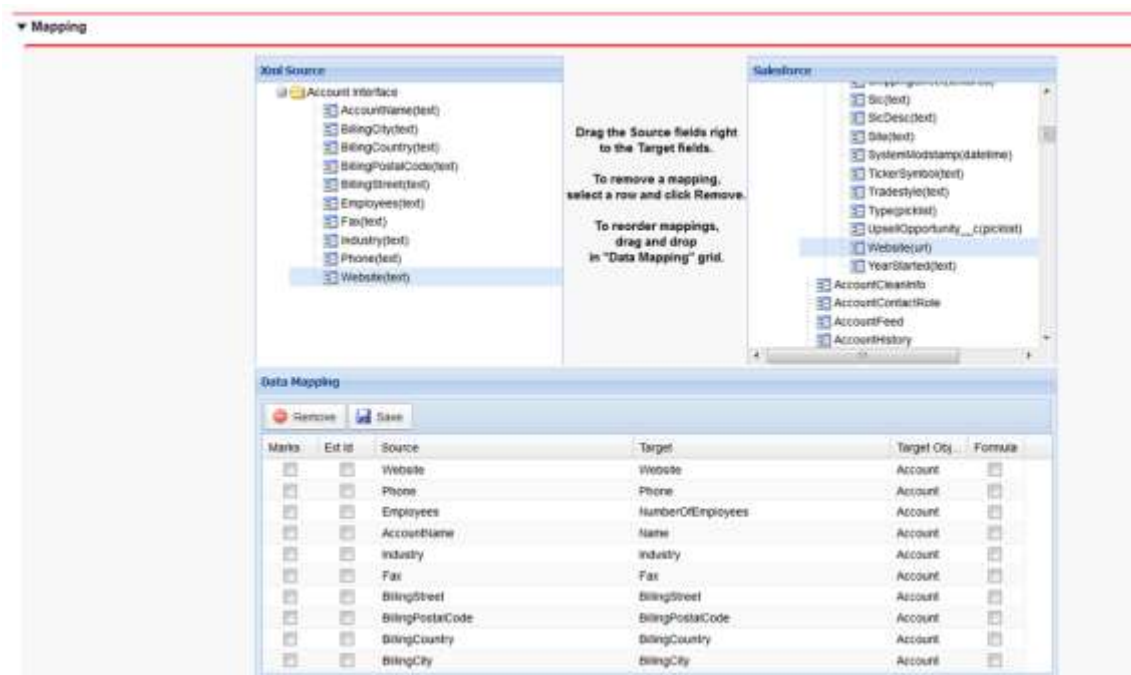
Now we can start with our data mapping.

This simply goes with drag & drop and we start with the Billing City for example.



Simply drag & drop

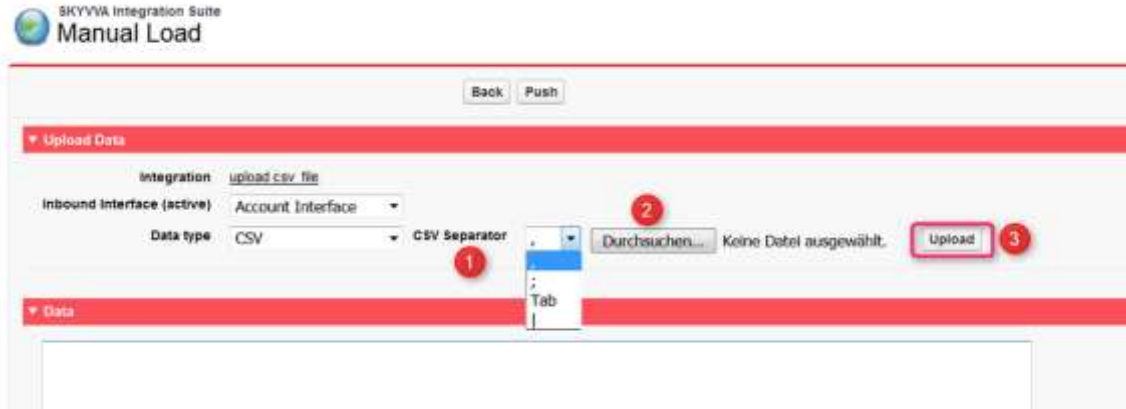
Finished the data mapping with Account fields...



**Note:** for each object, it is required to have an External Id field which is to be used for synchronization with external system. This external id field must be unique in order to avoid duplicate records on each object.

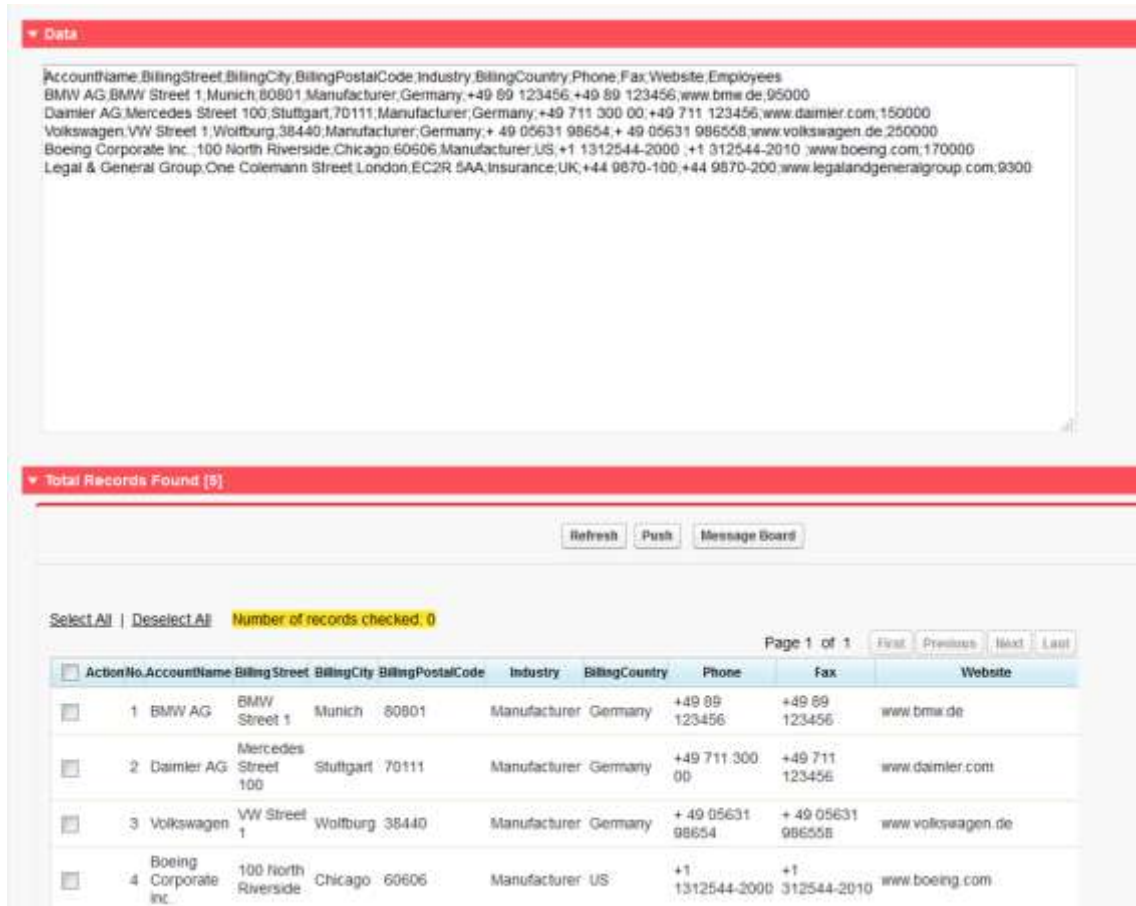




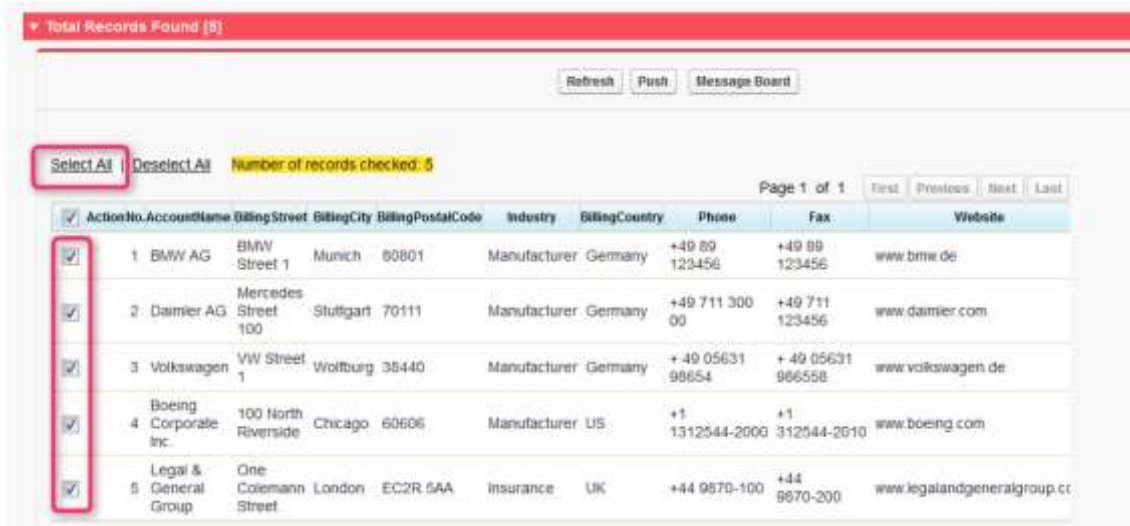


Upload Data

In the Data area we see the structure of our csv file and in 'Total Records Found' below you can choose which data you want to upload.

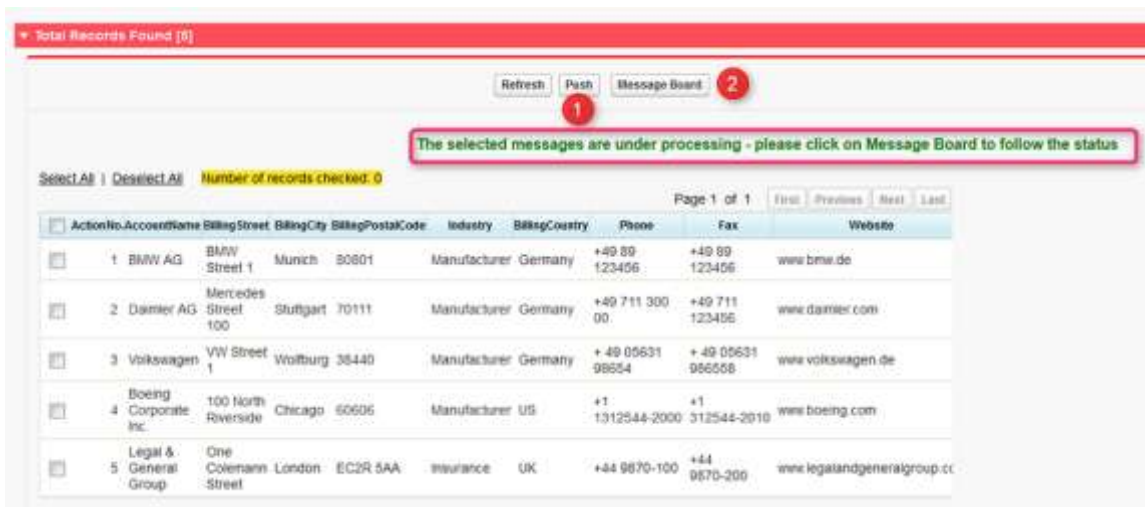


You can select only a few records or Select All



Select records

After you have selected the records click on 'Push' Button (1) to upload the data into Salesforce and you get the message that the upload process started. We click on the 'Message Board' Button (2) and come to the Message Board.



Message Board

On the Message Board page you will find a short overview about your storage usage (1). Below in the 'Filters' (2) area you can search for different criteria e.g. Integration Name, Interface Name, Message Status or by Date.

**Storage Usage**

Storage Type	Used	Limit	Percent Used
Data Storage	5.0 MB	1.5 MB	20%
File Storage	20.0 MB	110 MB	25%

**Filters**

Integration Name: upload\_csv\_file  
Interface Name: All interfaces  
Message Name: [Empty]  
Message Status: --None--  
Message Content Status: [Empty]  
Maximum Of Records: [Empty]

Creation Date: [24.10.2016 14:21]  
To: [24.10.2016 14:21]  
Sent By: [Empty]  
Message Direction: --None--

**Messages**

Integration Message Report

Total Number of Records: 4 **Number of records selected: 3**

Action	Message Name	Type	Target	Status	Related To	Comment	Creation Date	Modification Date
<input type="checkbox"/>	RM2016-10-24 14:07:52 793000	Inbound	Account Interface	Successful	Related To	Modification of Account	24/10/2016 02:07:52 PM	24/10/2016 02:07:53 PM
<input type="checkbox"/>	RM2016-10-24 14:07:52 793001	Inbound	Account Interface	Successful	Related To	Modification of Account	24/10/2016 02:07:52 PM	24/10/2016 02:07:53 PM

Status - Successful

In the 'Message) area (3) you see the status of the uploaded records with the Status 'green' which means the upload was successful and is completed.

You can jump into a Message by click on a 'Message Name'

**Messages**

Integration Message Report

Total Number of Records: 5 **Number of records selected: 0**

Action	Message Name	Type	Target	Status	Related To	Comment
<input type="checkbox"/>	RM2016-10-24 14:07:52 793000	Inbound	Account Interface	Successful	Related To	Modification of Account
<input type="checkbox"/>	RM2016-10-24 14:07:52 793001	Inbound	Account Interface	Successful	Related To	Modification of Account
<input type="checkbox"/>	RM2016-10-24 14:07:52 793004	Inbound	Account Interface	Successful	Related To	Modification of Account
<input type="checkbox"/>	RM2016-10-24 14:07:52 793003	Inbound	Account Interface	Successful	Related To	Modification of Account
<input type="checkbox"/>	RM2016-10-24 14:07:52 797002	Inbound	Account Interface	Successful	Related To	Modification of Account

Message Name

You see in Message Detail the Account field name and its content.



Now we have finished our Integration to import Account Data into Salesforce with a csv-file.

Please don't hesitate to reach out to us with any questions or requests.



## Contact Us

Contact Info	Address
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