DemandTools Help

for the MassEffect Module

The MassEffect tool allows you to do a mass update of any salesforce updateable table from an excel, csv or access data source. The tool also allows you to do a mass insert of insertable salesforce tables such as Products, Accounts, Opportunities, Tasks, etc. The goal is to make bulk loading and bulk editing of your salesforce database a simple and fast task.

The potential uses of this tool are limitless but in most cases it is used to update critical information for several hundred (thousand) records that would take significantly longer if done via the salesforce user interface.

The first step in using the tool (for an update operation) is to gather the existing data from salesforce using the salesforce reports. When this information is exported it is important to create a tabular report and to export the **ID** field for each object in the export (**Contact ID** for contacts, **Account ID** for accounts and **Opportunity ID** for opportunities, etc). Once this information is exported you can bring it into excel or access and modify it to match your requirements.

If you want to use another field other than the "Id" field as a key you can simply right click on any of the other fields and set it as the new key field. This way if you have imported your own key into your salesforce data you can use this as your key for object updates.

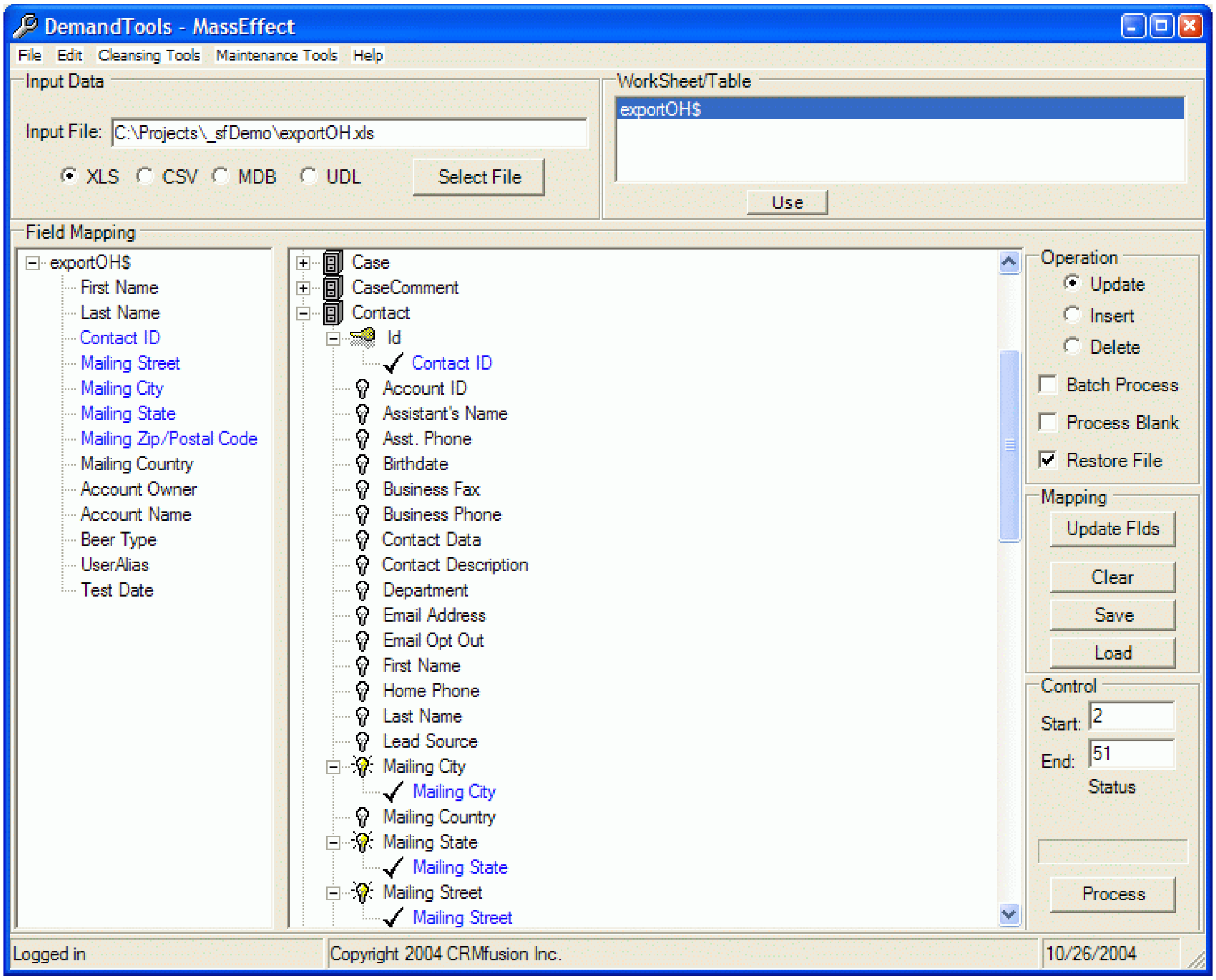
With the MassEffect tool you can:

- Update information from a CSV, XLS or MDB file into salesforce.com.
- Update from SQL Server using a UDL file.
- Update any salesforce.com table including Leads, Contacts, Accounts, Opportunities, Products, Users, etc.
- Insert new Tasks, Opportunities, and Events.
- Export the full contents of any table to a CSV file.
- Insert products and price books.
- Incorrectly imported data can be repaired

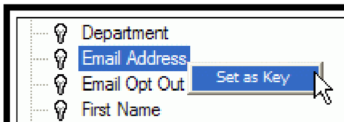
Once your data file is prepared you are ready to utilize the tool to update your salesforce database.

When you initially start the MassEffect tool it will load all of your available salesforce.com tables and cache the field names to disk so that it will load quickly on future loads. If you make changes to your salesforce.com fields (i.e. add new custom fields or objects) you can simple select the "Update Fields" button to reload your field data.

Shown below is the MassEffect tool for salesforce.com. On your account it would look different as it would show all of your custom fields and custom objects.

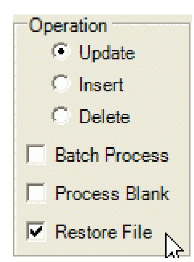


To use the tool you simple load a CSV, MDB, UDL, or XLS file and then select the worksheet (or table) that you will use for your insert or update. The tool will display the available columns from the data source in the left panel and you will see the objects that you can update in the right panel. Once you select if this is an import or update operation you simply drag and drop the field names in the data source to the matching field to update in salesforce.com. If you are doing an update operation you will need to give a "Key" field. By default this is the salesforce.com "Id" field but you can click on any field and set it to be your key field.



By right clicking over any field you can set that field as the key

If you are performing an update operation on your salesforce.com data and would like to create an undo file you can simply check the "Restore File" checkbox. This will cause your update to take longer but it will save a CSV file of your current data state for the fields that you are updating. To "Undo" an update you will simply load the saved CSV file and use the same mapping and reload your original data.



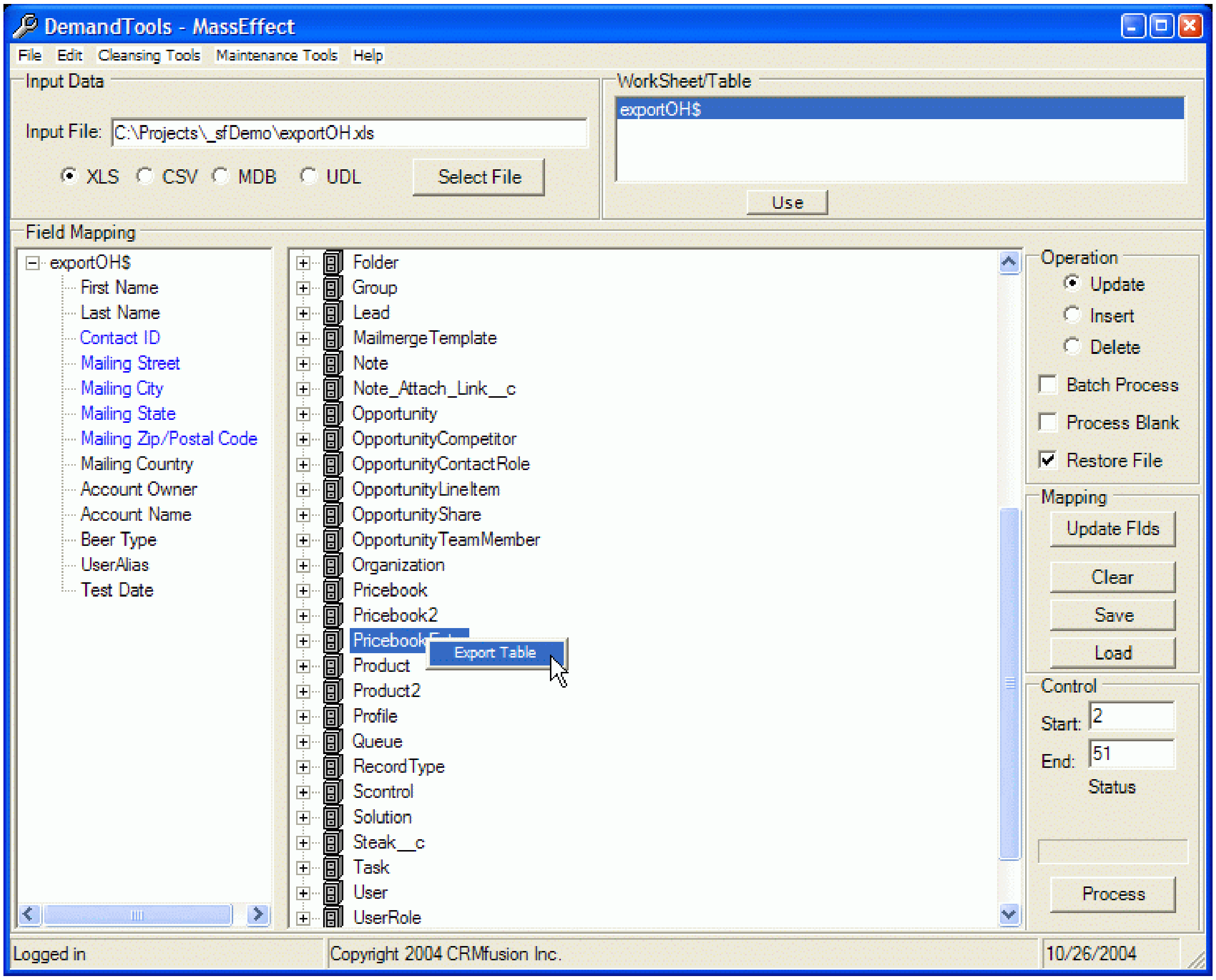
Select restore file if you want to be able to undo any update changes

If you are doing a large import or update you can select to use a "Batch Process." By using this the updates and inserts are up to 15 times faster than in non-batch mode. If you are inserting objects in "Batch" mode the tool will also create a CSV file (same name as the input data with a unique number plus .CSV extension) of the created salesforce.com Id's. The only issue with working in "Batch" mode is that the error reporting is not as good as non-Batch mode.

When you are ready to update or insert your data you simply press the "Process" button and the data is sent to salesforce.com. If there are any errors in the update/insert you will be informed and the application will save a text file of the error.

If this is going to be a repetitive update/import you can save your mapping so that the next time you simply load the data source, load the mapping and press the "Process" button.

If you would like to export the contents of any one of the tables accessible by the DemandTools you can simple right click on the table name and the export data dialog box will appear . This is a great way to find the Id fields of the users and roles or to simple export data for reporting.



The DataExport dialog box allows you to chose the fields that will be exported plus select if you want all objects exported or just the ones based on a specific conditions. You build the conditions by selecting the field name and setting the criteria. Picklist and Owner fields are shown as checkboxes and if you want to use an OR type condition (BillingState = OR or WA) you simply separate the items with a comma. The data from salesforce will be retrieved at up to 100 records per second but will depend on current internet traffic.