

Guided Import

See exactly what a bulk data change will do before it does it, right inside Salesforce.

The screenshot shows the Salesforce Guided Import app interface. At the top, there's a header with the app name and a 'Build' button. Below the header, a summary bar displays four key metrics: 'Jobs In Progress' (5), 'Jobs With Errors' (1), 'Waiting for Approval' (0), and 'Records Imported' (0). The main content area is divided into three sections. The left section, 'My Recent Jobs', lists five jobs with their status and dates: 'Match Check' (Validation - Oct 10), 'IJ - 1331' (Staged - Oct 7), 'Demo Job' (Validation - Sep 11), 'Account Import 9-10' (Validation - Sep 10), and 'Test Import' (Import - Aug 24). The middle section, 'Needs Attention', shows a red warning icon next to 'Demo Job' with the text '4 rows with errors'. The right section, 'Waiting for Approval', states 'Nothing is waiting for approval.' Below this, a 'Reports' section lists six items: 'In Progress Import Jobs', 'Import Jobs with Errors', 'Pending Job Approvals', 'Templates Pending Approval', 'Jobs Due for Auto Delete', and 'Total Records Imported by Template'.

4

step guided wizard for CSV and Excel files

2

independent approval stages: template and job

5

languages: English, German, Spanish, French (CA), Portuguese (BR)

Admins build reusable templates against the live schema, then anyone on the team can import or update records from CSV or Excel through a **guided four-step wizard**. Nothing is saved until every row has been validated, updates show the **before and after**, and large files are processed safely in the background.

Let your team load data without handing them the keys

Every admin knows the request: someone from the business hands over a spreadsheet and asks you to just load it in. Data Loader and the API bypass field validation and leave little audit trail, so the work lands on the admin, or a bad file lands in production.

1

Prevent mistakes, not just undo them

Validation checks every row against the **live field rules** (required, type, picklist, length) and saves nothing. Updates show current and new values side by side.

2

Self-service that stays governed

Admins define templates once. Business users follow a locked-down wizard, so they can only write data that passes real validation.

3

Templates that never go stale

Templates are built from the object's live schema, so a renamed or changed field is never silently out of date.

4

Sign-off with a trail

Optional **approval for templates and for each import job**, with comments, preflight checklists and a validation-threshold gate.

5

Built for real volumes

Chunked, governor-limit-safe processing with automatic background fallback for large files and a job pipeline you can watch.

6

Fix errors surgically

Export only the failed rows, correct them, **load the corrections back into the same job** and import again. No starting over.

Without Guided Import

- Files go to the admin, who runs Data Loader and hopes
- A bad mapping overwrites records and the first clue is a user complaint
- No record of who approved a bulk change
- Large loads time out or fail half way with no clear row-level reason

With Guided Import

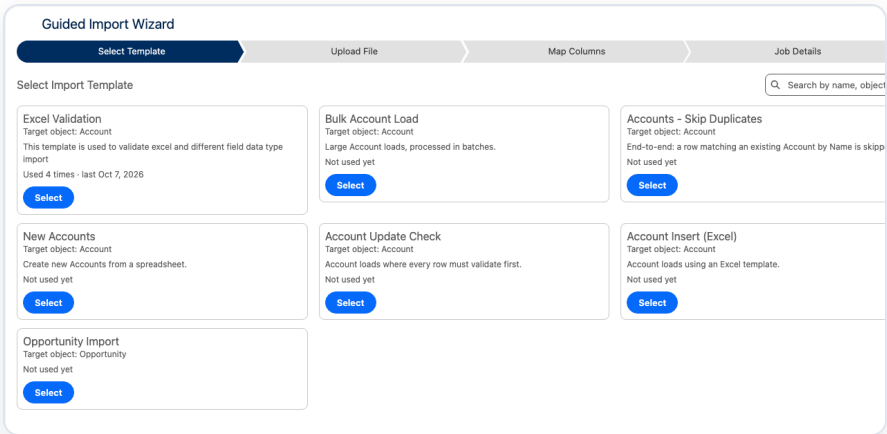
- Business users run their own imports through a guided wizard
- Validate first, review before and after values, then import
- Approvals, checklists and an import debrief are part of the job
- Row-level status and errors, background processing, export and reload

WHAT IT DOES

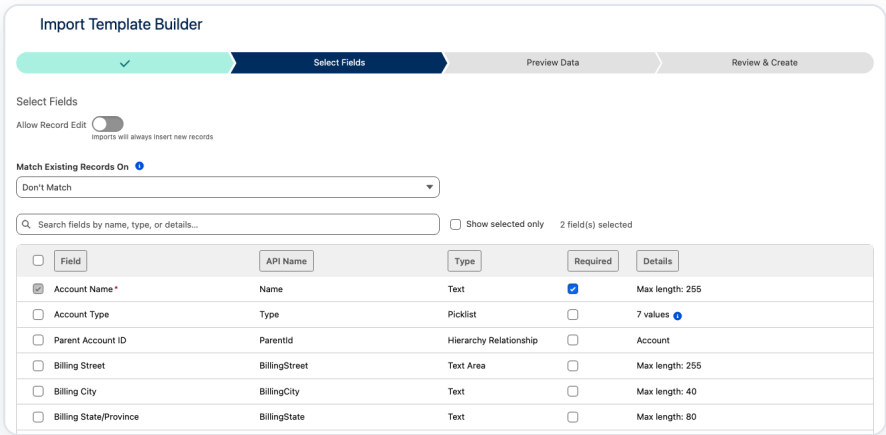
From spreadsheet to Salesforce, in a guided path

A guided four-step wizard

Choose a template, upload a CSV or Excel file, map the columns and confirm the details. Anyone can follow it, and the template decides what is allowed.



Step 1: choose the template.



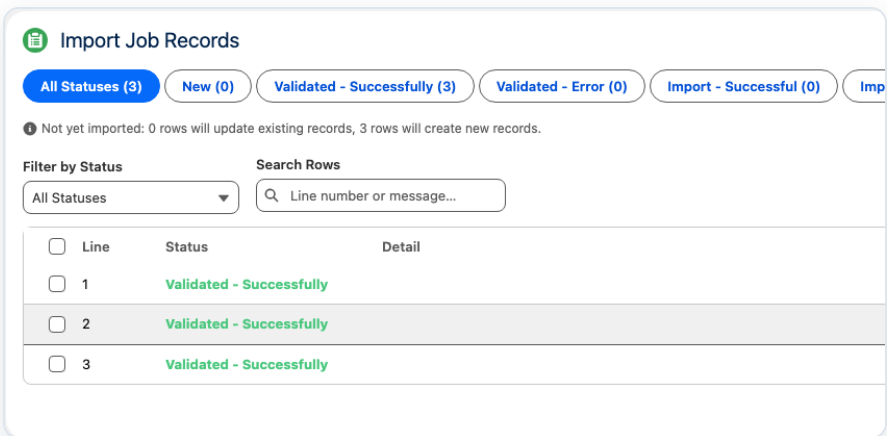
The Template Builder.

Templates built from the live schema

Admins pick the object and fields in the Template Builder, set match rules and allow updates, and preview real data before saving.

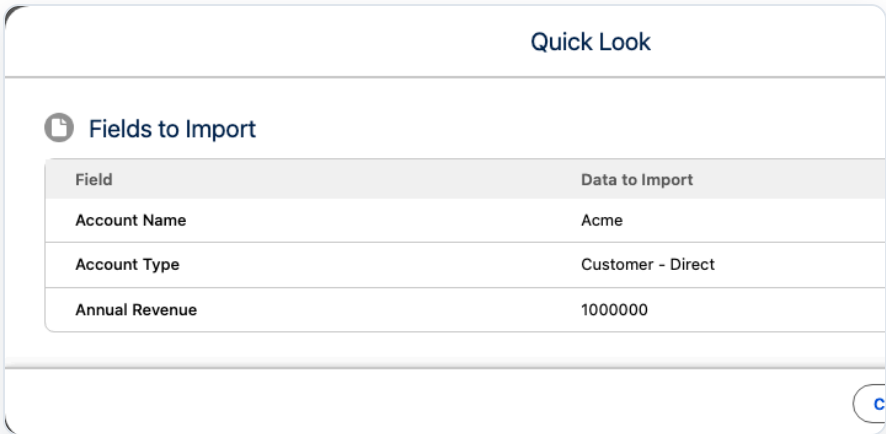
Validate before anything is saved

Run Validate on every row, or just some. Rows that pass are marked, rows that fail say exactly which field and why. Nothing is committed until you import.



A validated job with row status.

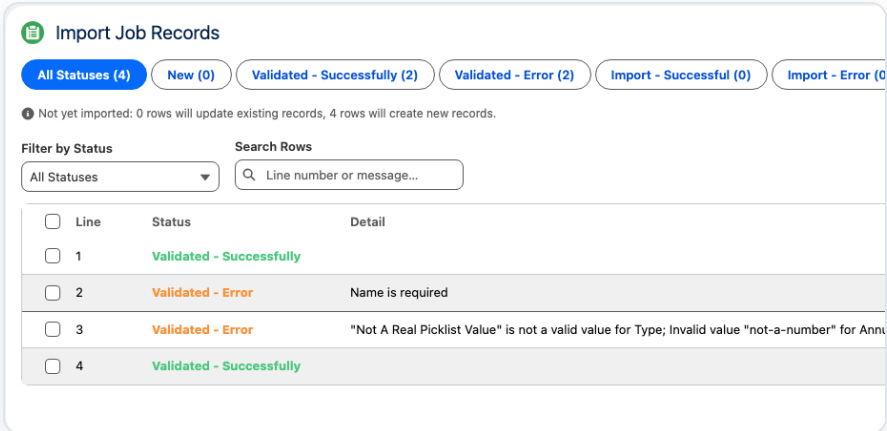
Control for admins, confidence for users



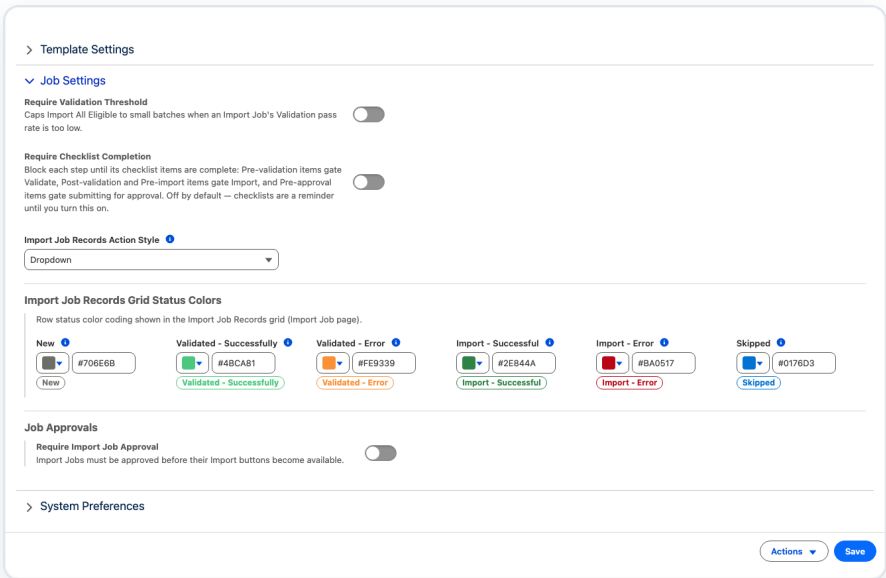
Quick Look on a row.

Fix errors without starting over

Filter to the failed rows, export them, correct the file and reload it into the same job. Results can be exported with status columns for sharing.



Rows with errors, ready to correct.



Job settings in the Settings tab.

Look inside any row

Quick Look shows a row's values field by field. For a template that updates existing records it also puts the record's current values next to the new ones, so a bad mapping is caught before it overwrites anything.

Control the whole thing from one page

Org-wide settings cover validation thresholds, checklist gates, approvals, batch size, retention and the colours of row status. Settings can be exported and imported between orgs.

HOW IT WORKS

Up and running in four steps

1. Build a template

An admin picks an object and fields, sets matching and approvals, and previews real data.

2. Upload a file

A user chooses the template and uploads a **CSV or Excel** file, then maps the columns.

3. Validate and review

Check every row, read the errors, compare before and after for updates.

4. Approve and import

Submit for approval if required, then import. Export the results or reload corrections.

Who it is for

- **RevOps and Salesforce admins.** stop being the bottleneck for every list, cleanup and territory change.
- **Sales and marketing operations.** load their own lists safely, with approval where policy needs it.
- **Migration and cleanup projects.** large files, clear row-level errors and an audit trail.

Built for trust

- **Native to Salesforce.** No external ETL tool and nothing to install outside your org.
- **Validation from the platform itself,** so it follows field type, required-ness, picklist values and length as they change.
- **Three permission sets:** Admin, User and Read Only, plus configurable approval flows.
- **In-app Administrator and User guides** in five languages.

Everything included

- | | |
|---|--|
| ✓ CSV and Excel (.xlsx) files | ✓ Minimum validation threshold per template |
| ✓ Reusable import templates from live schema | ✓ Chunked and background processing for large files |
| ✓ Insert, and update by Salesforce Id | ✓ Export results; reload corrections into the same job |
| ✓ Lookup match fields and duplicate-rule checks | ✓ Home page with jobs, approvals and reports |
| ✓ Validate without saving; import eligible rows | ✓ Configuration export and import |
| ✓ Before and after Quick Look for updates | ✓ Admin, User and Read Only permission sets |
| ✓ Template approval and import job approval | ✓ In-app guides in five languages |
| ✓ Import checklists and an import debrief | |

Try it with one of your own files

Guided Import is built, tested and documented. Ask for a walk-through with a template for your most-loaded object.