Export Partners and Contacts from salesforce.com into a CSV (Comma Separated Variable) file for import into channelADMIN..

Exporting data from salesforce.com

The Data Loader tool will be used in order to export data from salesforce.com. If you have not downloaded this tool please go to page 7 to learn how to. Once the CSV file has been generated, it can then be imported into channelADMIN. There are two types of files that need to be imported and those are partners and contacts. You need both files to import into channelADMIN.

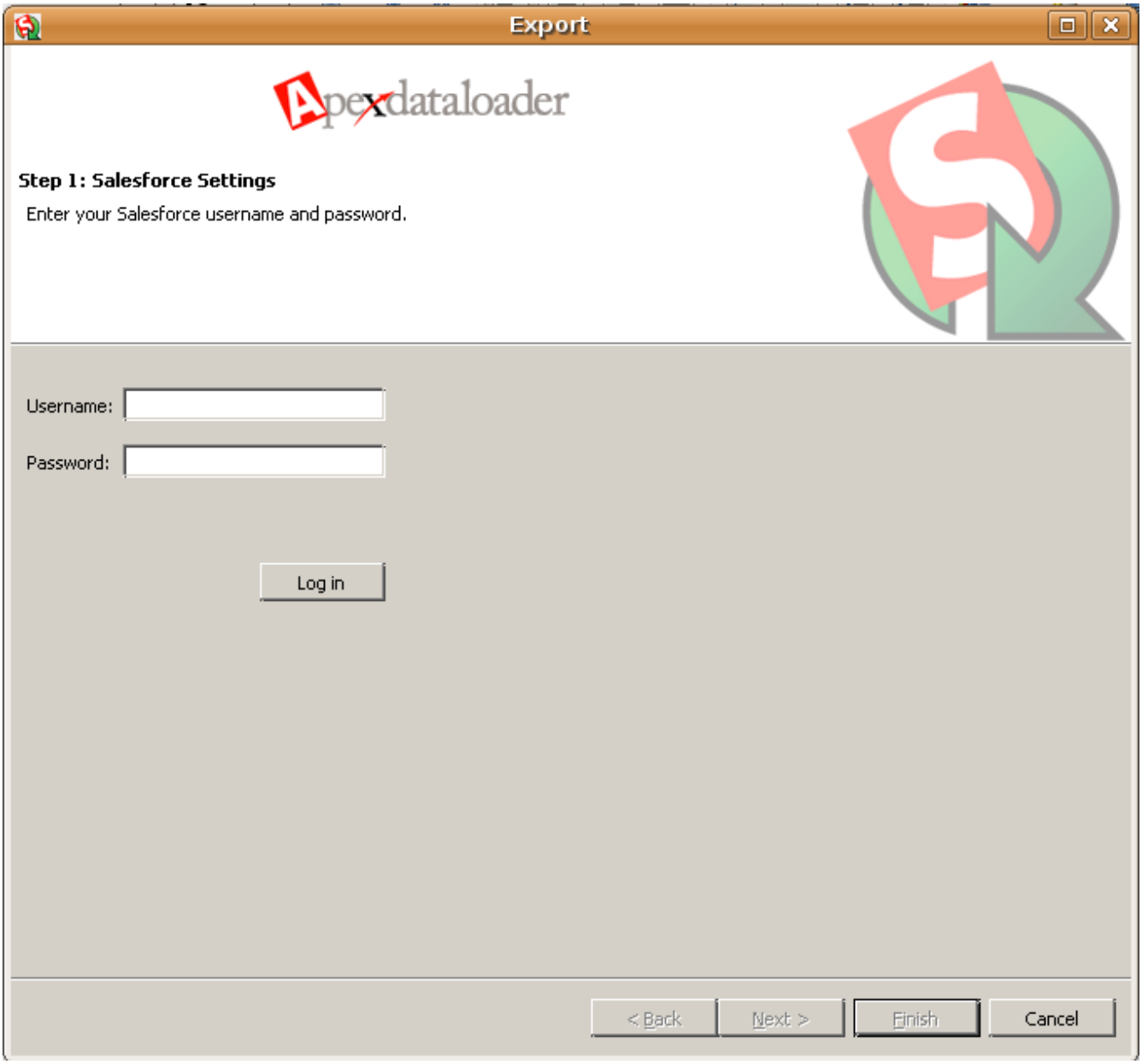
The Data Loader

Start the Data Loader tool by going to
Start->All Programs->salesforce.com->Apex Data Loader 14.0->Apex Data Loader 14

The following screen will appear.

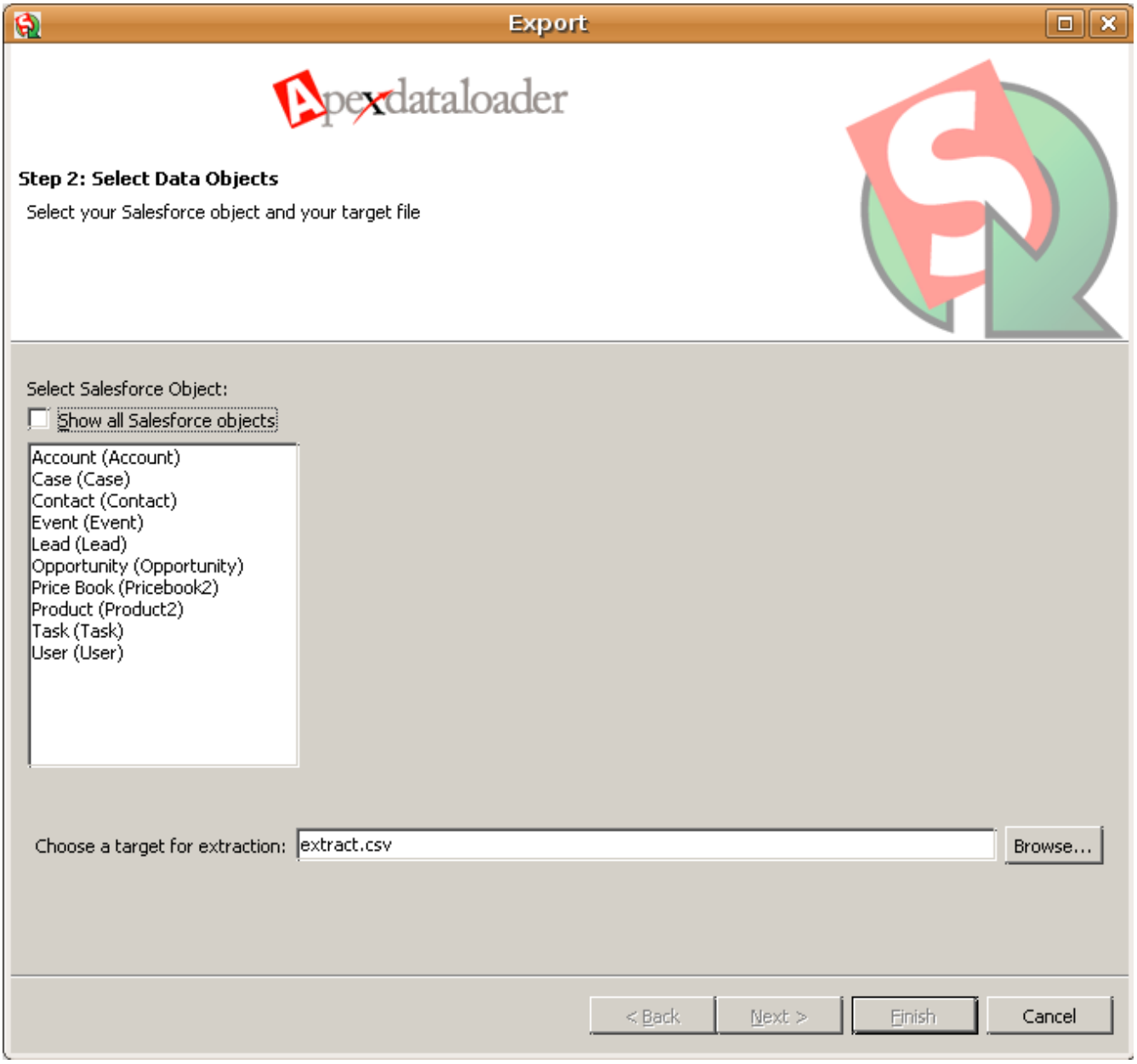
Click on the Export button

You will be prompted for your salesforce.com username and password. Enter your username and password and click on the Login button to login.



After you have successfully logged in, the Next button will become available. Once the Next button is available, click Next.

The following form appears to be able to select an object to export from.

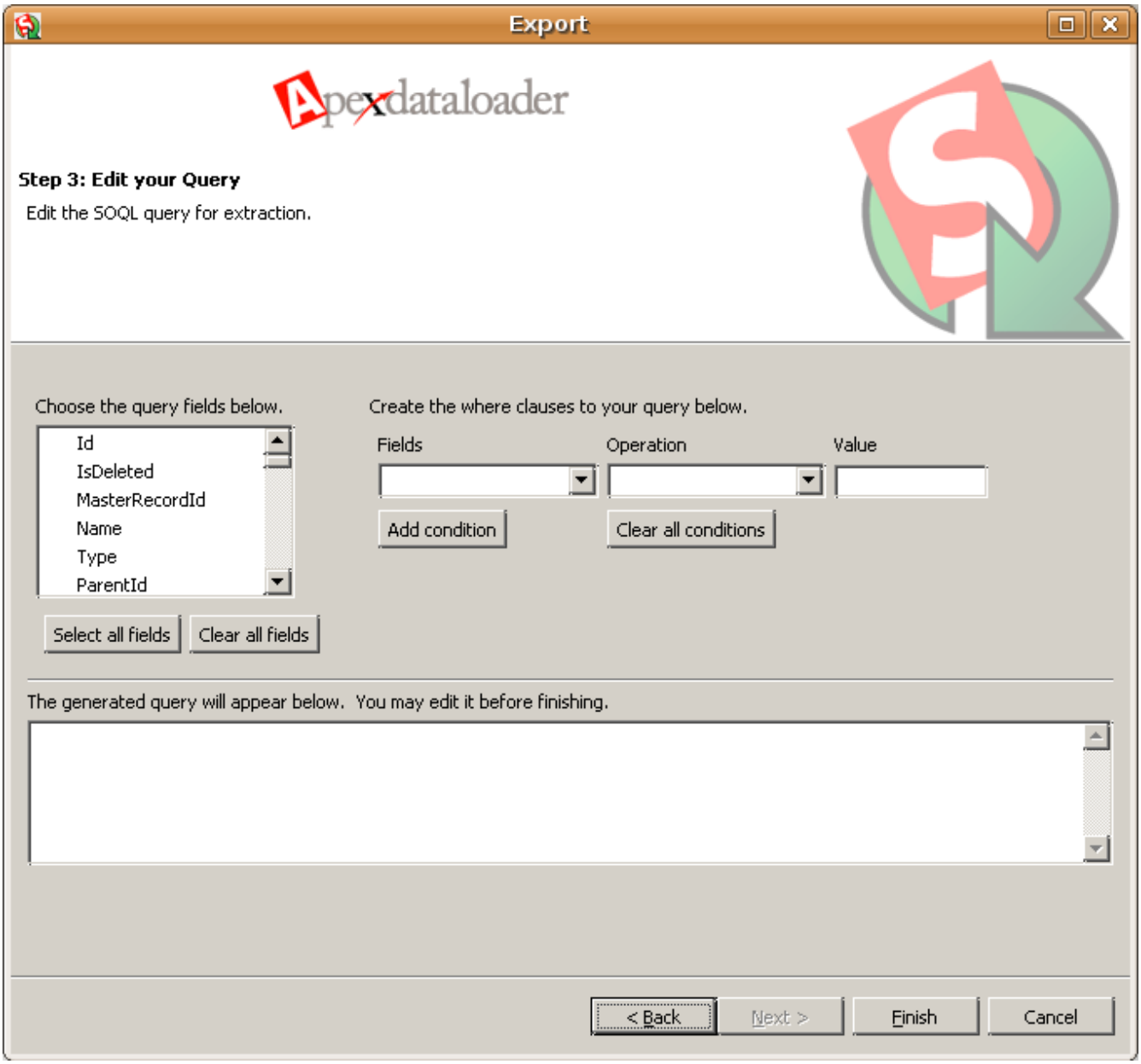


There are two files you can export from salesforce.com to import into channelADMIN.

Partner's File: Check the Account Object so that we can export these types of records.
Contact's File: Check the Contact Object so that we can export these types of records.

Also set the target csv file location and filename in the extraction edit box. You can click the Browse... button to select a different location other than the default location. You will need the location of the extract file so that we can import it into channelADMIN. Once the Account object is checked and the target has been set, click on the Next... button.

The following form will be displayed where you can select the field you want to export along with any other criteria.



The following query is needed for importing data into channelADMIN. Please type the query below into the text area.:

Partner's File Query:

Select Name, Website, Id, IsDeleted, BillingStreet, BillingCity, BillingState, BillingPostalCode, BillingCountry, Industry, CreatedDate, CreatedById, LastModifiedDate, LastModifiedById FROM Account WHERE Type = 'Channel Partner / Reseller'

Contact's File Query:

Select AccountId, IsDeleted, LastName, FirstName, Salutation, Name, MailingStreet, MailingCity, MailingState, MailingPostalCode, MailingCountry, Phone, Fax, MobilePhone, HomePhone, OtherPhone, AssistantPhone, Email, Title, Department, CreatedDate, CreatedById, LastModifiedDate, LastModifiedById FROM Contact Where Account.Type = 'Channel Partner / Reseller'

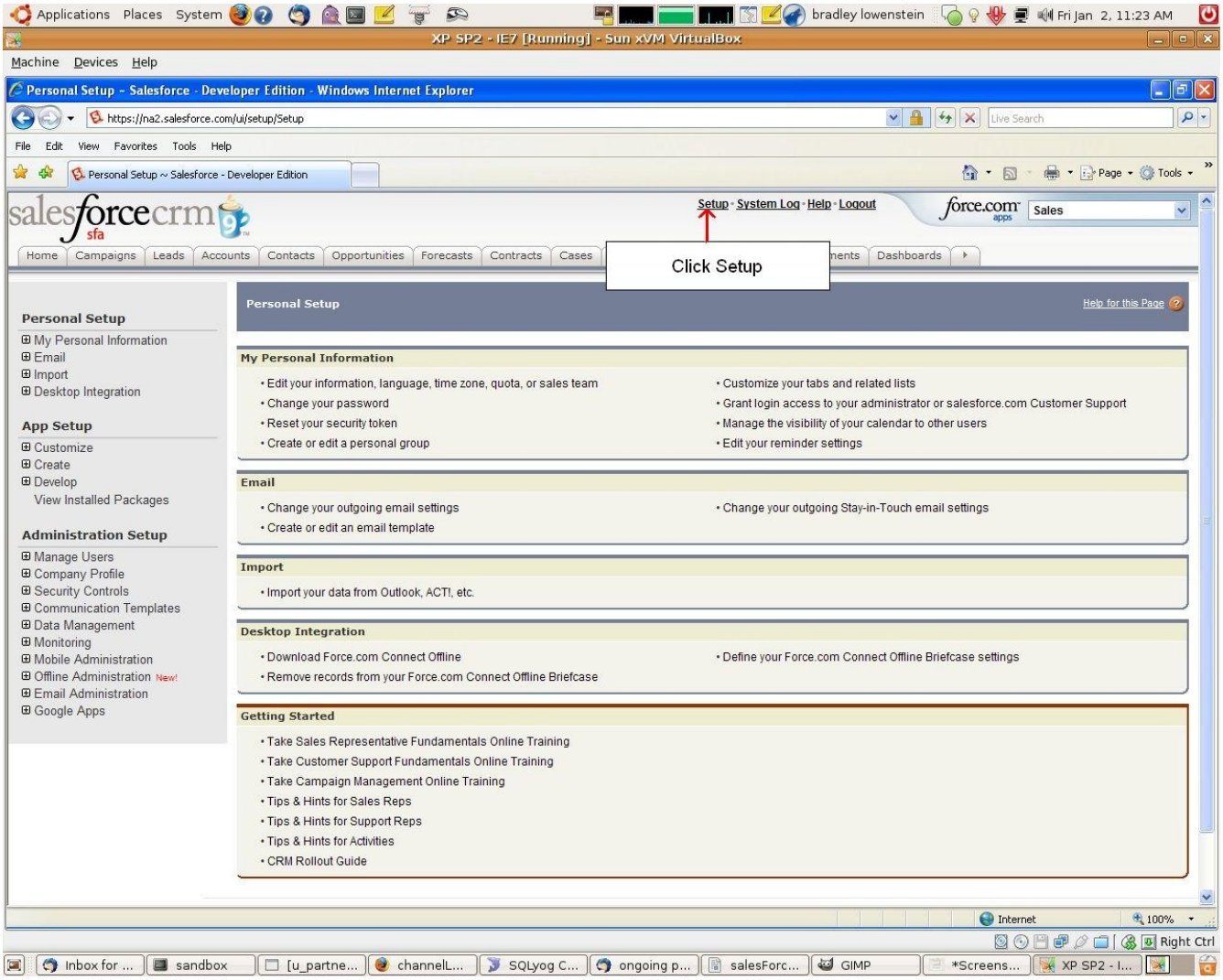
Once the query has been added to the text area, click on the Finish button. A confirmation dialog box will appear confirming that you want to export the data. Click Yes. During the extraction, a Progress Dialog box will appear displaying the progress of the export. Once the export has completed, a confirmation dialog box will appear where you can either view the records extracted from the object, or just click OK to close the dialog box. Once you click OK, both the export complete dialog box and the Progress Dialog box will close. You can then close the Data Loader by clicking on File->Exit

The file is now ready to be imported into channelADMIN.

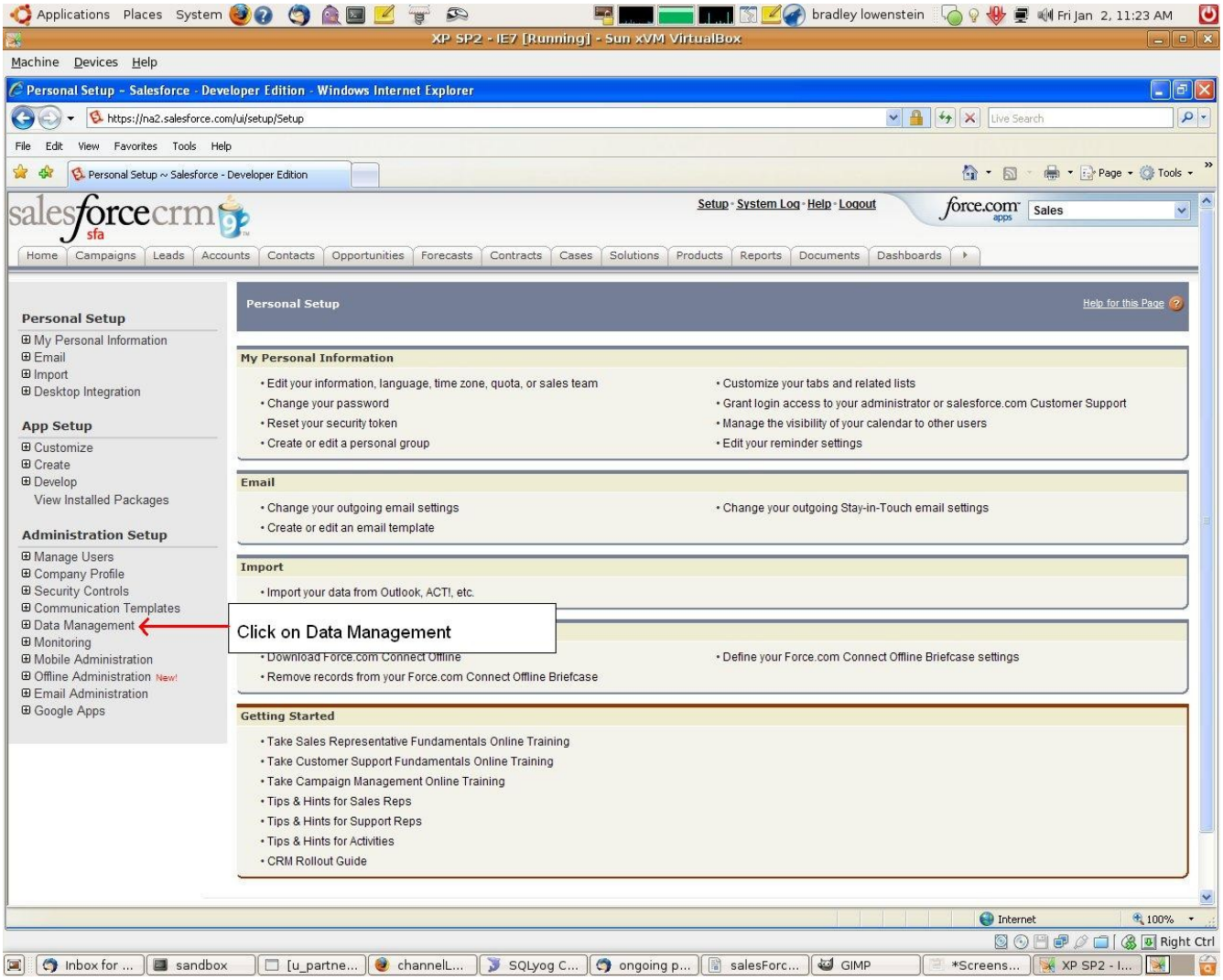
Installing the Data Loader

If the Data Loader has not been installed onto your computer, the following steps will outline how to download and install the Data Loader.

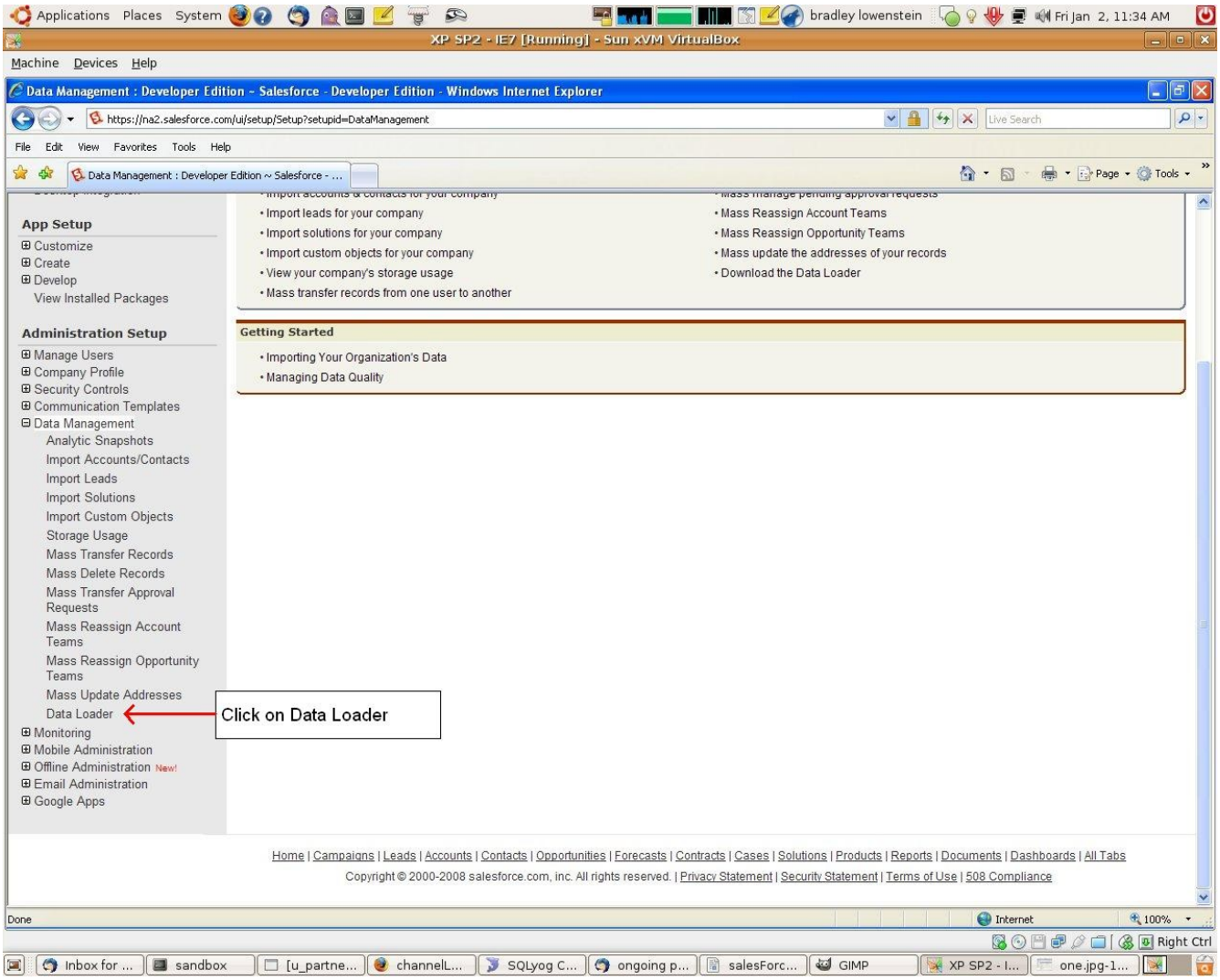
Login to salesforce.com using your username and password. Once logged in, click on Setup in the top middle of the screen as shown below:



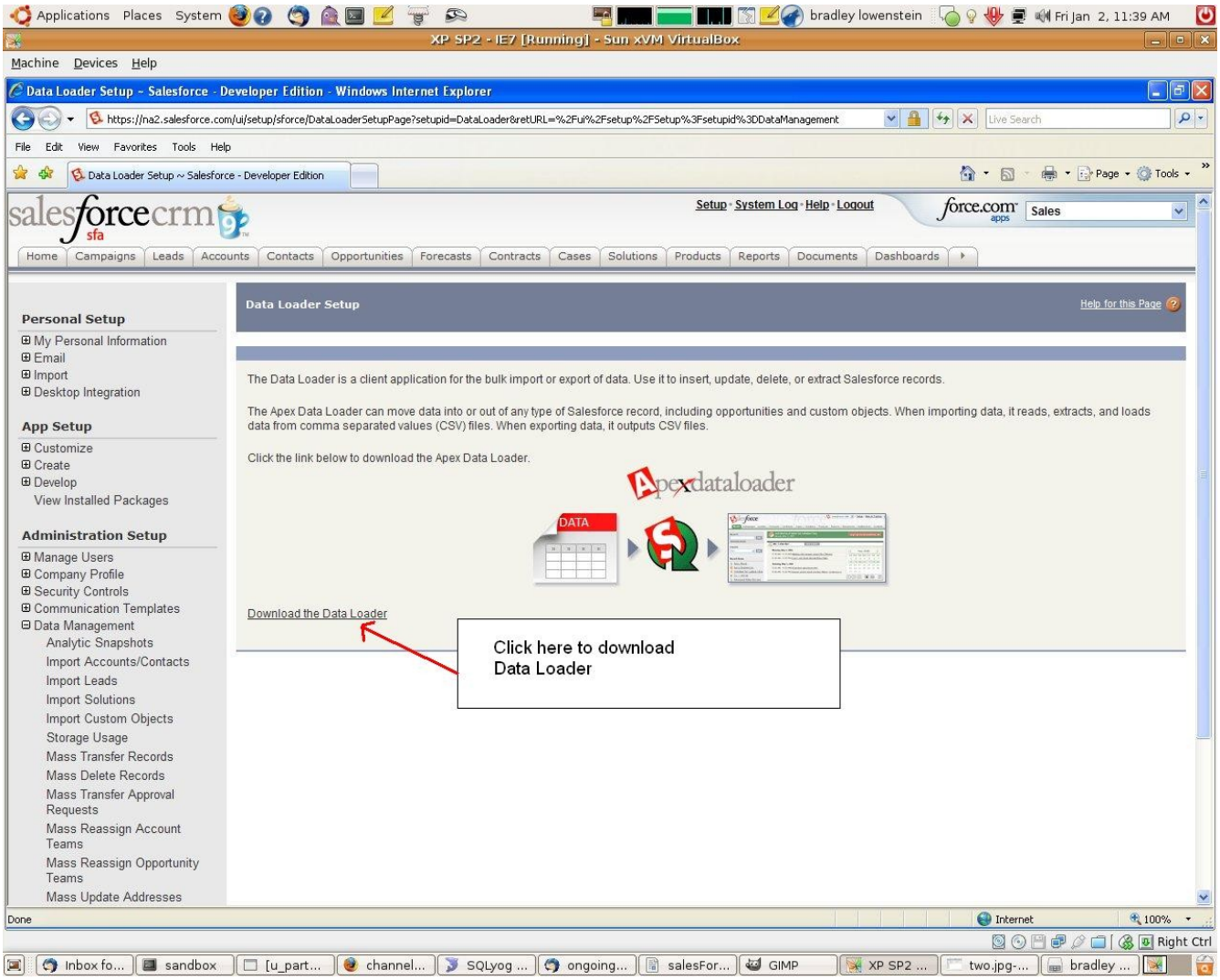
Click on Data Management as shown below:



Click on Data Loader as shown below:



Click on Download the Data Loader as shown below:



A dialog box will appear for you to save the Data Loader install file. Save the file to a location on your hard disk. When the Data Loader has completed downloading, install the Data Loader following the on-screen instructions. Once the installation has completed, follow the steps above on how to export data from salesforce.