

Exporting Data with the Apex Data Loader

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Overview

There are many reasons to export data from your Salesforce org. You may be doing a backup, you may want to send the data somewhere, or you may be cleaning up your data. This article will show you how you can use Salesforce Apex Data Loader to export data from individual objects in your database.

! **IMPORTANT:** *Using the Data Loader, you can only export data from one object at a time.*

If you're interested in exporting or backing up all of your data, consider using the built-in Salesforce functionality instead. This can be found in Salesforce Setup under **Administration Setup | Data Management | Data Export**. Check out this article (</articles/Resource/maintaining-an-effective-salesforce-backup>) for tips on backing up all of your data.

Setup—Before You Begin

Make sure that you have the Data Loader installed on the computer you will use to export. For detailed information, see Considerations for Installing Data Loader (https://help.salesforce.com/apex/HTViewHelpDoc?id=installing_the_data_loader.htm&language=en_US) in the Salesforce Help & Training.

Once the Data Loader is installed, verify that you can log in.

1. Select **Password Authentication**.

2. Enter your Salesforce username and password.
3. If you are logging in to a Production environment, the **Salesforce Login URL** should be `https://login.salesforce.com`. If you are logging in to a Sandbox environment, the **Salesforce Login URL** should be `https://test.salesforce.com`.
4. Click **Log in** and when you see that you have logged in successfully, click **Next**.

Step 1: Log In

Log in to the Salesforce org that you're importing to or exporting from.

A screenshot of the Salesforce login interface. At the top, there are two radio buttons: "OAuth" (unselected) and "Password Authentication" (selected). Below these are three input fields: "Username:" with a cursor in the box, "Password:" with an empty box, and "Salesforce Login URL:" with the text "https://login.salesforce.com" inside. To the right of the URL field is a "Log in" button. At the bottom of the form are four buttons: "< Back", "Next >", "Finish", and "Cancel".

Export Your Data

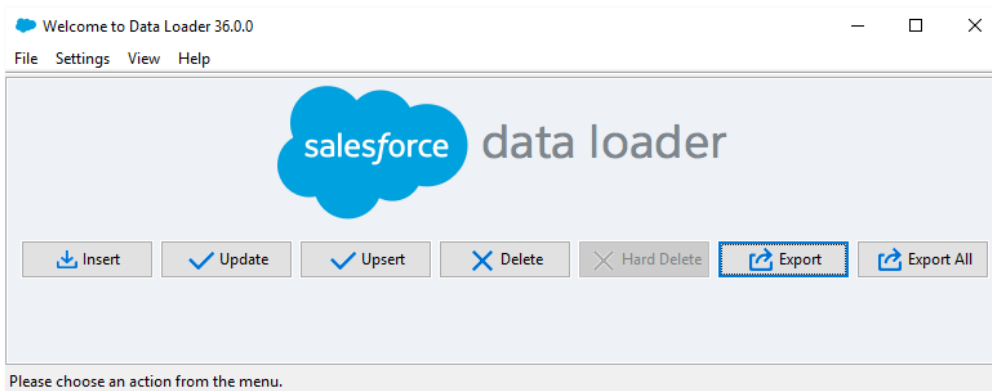
Exporting your data with the Data Loader is a multi-step process. Follow these steps:

1. Choose which data to export
2. Select the object whose data to export and where to save the data

3. Choose the fields to export and set criteria
4. Export the data

Choose which data to export

When exporting data with the Data Loader, you can choose to Export or Export All. If you want to include items from your recycle bin, select **Export All**. Otherwise, select **Export**.




Select the object whose data to export and where to save the data

1. Select the object whose data you want to export. If you don't see the object listed, click the **Show all Salesforce objects** checkbox to see a more detailed list. You can also type in the first letter of the object to go down to that section instead of scrolling.
2. Click **Browse...** to select the folder where you want to save the extracted records. Specify the type of file by typing in `.csv` at the end of your desired file name.
3. Click **Next**.

Export

Step 2: Select Data Objects
Select your Salesforce object and your target file



Select Salesforce Object:
☐ Show all Salesforce objects

Account (Account)

Address (npsp__Address__c)

Address Verification Settings-DEPRECATED (npsp__Address_Verification_Settings__c)

Affiliation (npe5__Affiliation__c)

Affiliations Settings (npe5__Affiliations_Settings__c)

Allocations Settings (npsp__Allocations_Settings__c)

Apsona item (apsona__apsona_item__c)

Batch (npsp__Batch__c)

Batch Data Entry Settings (npsp__Batch_Data_Entry_Settings__c)

Choose a target for extraction:

< Back

Next >

Cancel

Finish

Choose the fields to export and set criteria

Now that you've told Data Loader what object data you want and where you want to save it, you can set some criteria for exactly what to export.

1. Select the fields you want from the **Choose the query fields below** list. Notice that as you add fields, the SOQL query at the bottom changes. You can also manually update the SOQL query if you are familiar with that language.
2. If you want to filter the results, use the fields listed under **Create the where clauses to your query below**. The first is a list of fields, the second is the operator, and the third is the value.
 - If the field is a Picklist field, then the Value field displays available values for you to select from.
 - If the field is not a Picklist field, you can enter a Value and it will use that to filter.
 - Keep in mind that ID fields require the Salesforce ID and not text. For example, you enter the 15 character Record Type ID and not the name of the Record Type.

Step 3: Edit your Query
Edit the SOQL query for extraction.



Choose the query fields below.

☒ Name
☒ Type
☐ RecordTypeId
☐ ParentId

Select all fields Clear all fields

Create the where clauses to your query below.

Fields	Operation	Value
Type	equals	

Add condition Clear all conditions

The generated query will appear below. You may edit it before finishing.

Select Id, Name, Type FROM Account

Individual
Household
Academic (Business)
Academic (Development)
Prospect (Business)
Prospect (Development)
Contractor/Vendor
Donor (Development)
Foundation (Business)
Foundation (Development)
Funding Vehicle
Funding Vehicle (Business)
Corp/Business (Business)
Corp/Business (Development)
Government (Business)
Government (Development)
Grant Source (Business)
Media (Business)
Media (Development)
Nonprofit (Business)
Nonprofit (Development)
Military (Business)
Other/Consultant

< Back Next > Finish Cancel

3. Once you've entered filter criteria, click **Add Condition**. You'll see the SOQL query change below. If you create another filter and click **Add Condition**, the second filter is added to the query.


Tip: When you add multiple criteria, the SOQL query will automatically add it as 'AND'. If you want to change this to 'OR', simply manually change the SOQL query by replacing the 'AND' with an 'OR'.

Export

×

Step 3: Edit your Query

Edit the SOQL query for extraction.



Choose the query fields below.

☒ BillingState

☒ BillingPostalCode

☒ BillingCountry

☐ BillingLatitude

Select all fields

Clear all fields

Create the where clauses to your query below.

Fields

Operation

Value

BillingCity

equals

Berkeley

Add condition

Clear all conditions

The generated query will appear below. You may edit it before finishing.

Select Id, Name, RecordTypeId, BillingStreet, BillingCity, BillingState, BillingPostalCode, BillingCountry FROM Account WHERE RecordTypeId = '01261000000dcB3' BillingCity = 'Berkeley'

< Back

Next >


Finish

Cancel

Export the data

1. Once your filters are set up, click **Finish** to begin exporting your data.

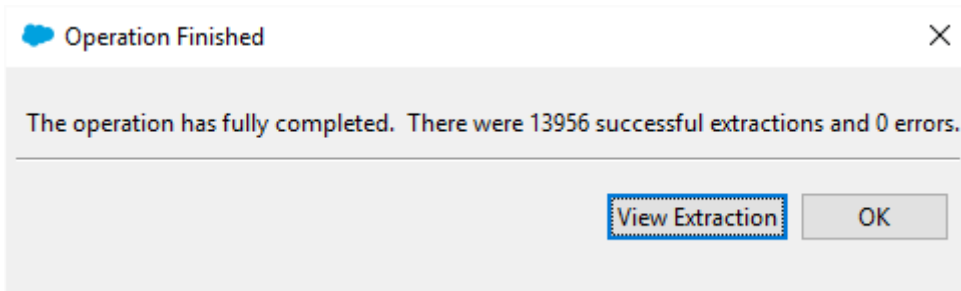
Progress Information

 Extracting

Processed 5,000 of 13,956 total records. Rate: ...onds. There are 5,000 successes and 0 errors.

Cancel

2. Click **View Extraction** to view the export.



3. Click **Open in External Program** to view the data in a common spreadsheet application.

If you encounter any issues that you're unsure of, or just have a general question about the Data Loader, visit the Data Import group (https://success.salesforce.com/_ui/core/chatter/groups/GroupProfilePage?g=0F9300000009ROU) in the Salesforce Success Community.



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