

Data Sync Pro

#Data Loader: Data Import & Migration

The data loader that runs entirely inside your org — configured once with transformation, embedded in Lightning, run with one click.



The Salesforce Data Loading Challenges

1

Data Leaves the Platform

Data files and credentials are handed to third-party services. The data can be intercepted in transit or at rest, and credentials can be compromised.

2

No Real Transformation

Most loaders map field-to-field. Reshaping, lookups, dedupe, and business rules have to happen in spreadsheets before the file is ever uploaded.

3

Same Wizard, Every Time

Every load means re-picking the object, action, and field mapping. Same load, same steps, every time.

4

Hand-Managed Log Files

Success and error CSVs are tracked by hand — easily lost, renamed, or forgotten. No reliable audit trail.

5

No Lightning Integration

Loaders can't run from a Lightning page — no record context. Parent Ids get hard-coded into data files.

6

Not for Business Users

Installs, wizards, mappings with transformations — running a loader is tech-heavy. Not something business users can pick up and do.

Anatomy of a Loader

Configure once, load anytime through the native LWC, with every run logged in Salesforce.

Executable: Contact Import

#Data Loader · Object: Contact

INPUT

CSV upload — 875,247 rows

SCOPING

Active__c == TRUE && NOT(IS_BLANK(Email))

MATCH

Match on Email

MAPPING

LOWER(Email)

BLANK_VALUE(LeadSource, "Web")

VLOOKUP(Account.Name → AccountId)

ACTION

Upsert Contact

Why this matters

Stays on the platform

Upload the CSV directly to the LWC. Processed inside Salesforce — never handed to a third-party service.

Scope, not pre-clean

Filter rows from the input — skip blanks, duplicates, or inactive records — without pre-cleaning the file.

Flexible Match Keys

Match on a single field or use a formula like VLOOKUP to handle multi-field or more complex logic.

Powerful transformation

170+ functions for logic, strings, dates, math, lookups, regex, roll-ups, masking — extend with Apex when needed.

Logged, replayable, reversible

Every action writes Execution records — track what ran, re-execute failed rows, or revert what went wrong.

Native, Reusable, Admin-Owned Loaders.

1

Stays on the Platform

Runs entirely inside the org — built on Lightning Web Components and Apex. No installs, no exports, no third-party credentials in the path. Data never leaves Salesforce.

2

Powerful Transformation

170+ functions for text, numbers, dates, logic, and lookups — extensible with custom Apex. No more Excel pre-cleaning before every load.

3

One-Click Re-Run

Configure the object, match, mapping, and action once. Re-run with one click — no wizard, no re-mapping, same loader, every time.

4

Audit at Scale

Execution logs — detailed down to each batch — are stored as related records on the Executable. Track every run, re-execute failed rows, or revert what went wrong.

5

Embedded in Lightning

Place a Data Loader on any Data List or Action Button so users load data right from the Lightning page — already in the record's context, no hard-coded parent Ids.

6

Admin-Built, Anyone-Run

An admin configures the Executable once; anyone with access can run it — point, upload, go. No IT skills, no help-desk ticket.

#Data Loader Features

Native, reusable loaders with built-in transformation — configured once, run by anyone with access, audited at scale.

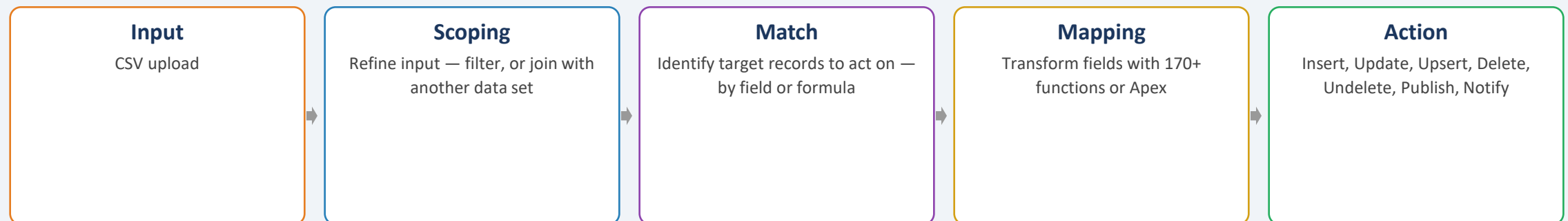
How It Works

- **Configured as Executable** — a Salesforce record holds the full configuration of the load — shareable across users, deployable across orgs, governed by permissions.
- **Reusable & Embedded** — load CSV files anytime from the Data Loader, driven by the Executable's configuration; accessible from Lightning.
- **Powerful Transformation** — 170+ built-in functions covering logic, strings, dates, math, lookups, regex, roll-ups, masking, and more — extend with Apex for tailored transformations.
- **Audited & Re-playable** — every load writes related Execution records with input, output, and errors — troubleshoot, re-execute, or revert.

Key Features

- **CSV Upload**
- **Scope Filters**
- **Match by Field or Formula**
- **170+ Built-In Transformation Functions**
- **Insert, Update, Upsert, Delete, Undelete, Publish, Notify**
- **Cross-Org Target Action**
- **Record Sharing & Access Permissions**
- **Execution Records with Replay**
- **Embeddable in Lightning Pages**
- **Bulk API**
- **Serial Mode**

Five Declarative Stages — Input, Scoping, Match, Mapping, Action.



Why #Data Loader

100%

Stays in Salesforce

No data or credentials leave the org

170+

Built-in Functions

Logics, strings, dates, math, lookups, regex, rollups, masking, and more

100%

Audited

Every run logged, replayable, reversible

1

Build Once, Run Anytime

No repeated wizard. Anyone — including business users — can run it

De-Risk Your Data Loads

No third-party service in the path, no CSV on a laptop. Security and compliance reviews shrink to nothing.

Powerful Transformations

Reshape, enrich, and validate data in flight — ensuring records arrive clean, consistent, and business-ready at the destination.

Trust What You Loaded

Every load has a Salesforce record showing what ran, who ran it, and what happened. Troubleshoot or revert from one place.

Inside Lightning

Built once, the loader runs with a click for anyone with access. The loader can also live in Lightning pages — business users start a load right where they work.