

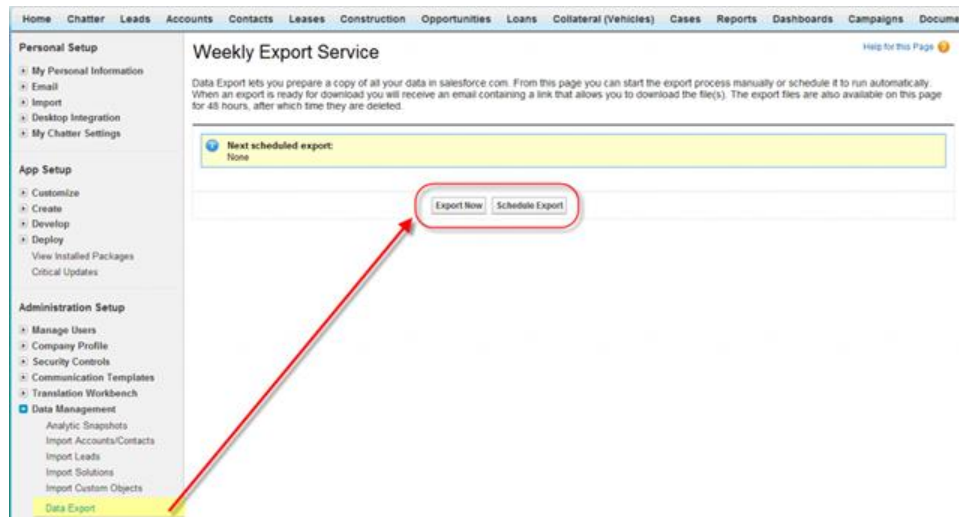
Exporting Data from Salesforce

(updated December, 2022)

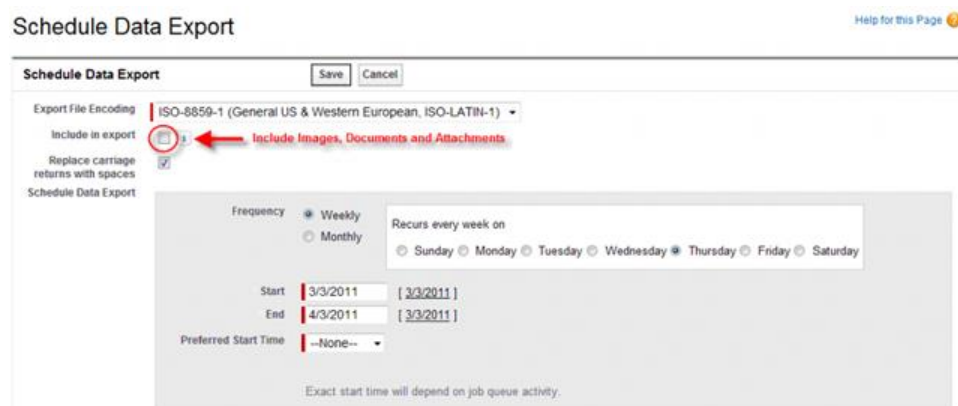
Salesforce makes it simple to export all your data by using the Data Export feature.

Typically, you only need to export the **Campaign, Opportunity, Contact, and Account** files. This export process will include your relevant gift, donor, campaign, and contact data.

To extract all your data in Salesforce, you need to go to: **Setup > Administration Setup > Data Management > Data Export**.



Note: You will have the option of exporting your data now or scheduling the job. You should choose to export your data now. The screenshot below shows the option to include Documents, Images and Attachments which you should keep for your records.



Note: If you scroll down on this screen you will see the option to export all your data, or subsets. You should choose to export all your data to ensure you have a back-up. However, for data conversion you will only use FOUR objects: Account, Campaign, Contact, and Opportunity.

Exported Data

Select what type of information you would like to include in the export. The data types listed below use the Apex API names. If you are not familiar with these names, select Include all data for your export.

<input checked="" type="checkbox"/> Include all data	<input type="checkbox"/> RecordType	<input type="checkbox"/> BusinessProcess	<input type="checkbox"/> Contract
<input type="checkbox"/> Approval	<input type="checkbox"/> ContractContactRole	<input type="checkbox"/> User	<input type="checkbox"/> EmailRoutingAddress
<input type="checkbox"/> EntityHistory	<input type="checkbox"/> FieldHistory	<input type="checkbox"/> Campaign	<input type="checkbox"/> Contact
<input type="checkbox"/> OrgWideEmailAddress	<input type="checkbox"/> EmailDisclaimer	<input type="checkbox"/> AccountContactRole	<input type="checkbox"/> OpportunityLineItem
<input type="checkbox"/> CampaignMember	<input type="checkbox"/> Account	<input type="checkbox"/> Partner	
<input type="checkbox"/> Lead	<input type="checkbox"/> Opportunity		
<input type="checkbox"/> OpportunityContactRole	<input type="checkbox"/> OpportunityHistory		
<input type="checkbox"/> OpportunityLineItemSchedule	<input type="checkbox"/> OpportunityCompetitor		

Then click the **Start Export** button



Weekly Export Service

[Help for this Page](#)

Data Export lets you prepare a copy of all your data in salesforce.com. From this page you can start the export process manually or schedule it to run automatically. When an export is ready for download you will receive an email containing a link that allows you to download the file(s). The export files are also available on this page for 48 hours, after which time they are deleted.

Next scheduled export:
A data export is currently in progress for your organization.

[Export Now](#) [Schedule Export](#)

Your export has been queued. You will receive an email notification when it is completed.

Note: When an export is ready for download you will receive an email containing a link that allows you to download the file(s).

Following the link in the email will take you back to the Export Page where a file will be waiting.

Salesforce creates a zip archive of CSV files. Exports typically finish within 24 hours of submission.