## **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.** 

Home Chatter Leads A	Accounts Contacts Lease	es Construction	Opportunities	Loans	Collateral (Vehicles)	Cases	Reports	Dashboards	Campaigns	Documen
Personal Setup  My Personal Information Email Information Desktop Integration My Chatter Settings	Weekly Export Data Export lets you prepar When an export is ready for for 48 hours, after which the	Service e a copy of all your download you will n e they are deleted	data in salesforce o eceive an email cor	com. From I ntaining a li	his page you can start th nk that allows you to down	e export pr load the fi	xcess manual e(5). The ex	illy or schedule il port files are also	Heip for the to run automati a available on th	cally. Is page
App Setup * Customize * Create * Develop * Develop * Deploy View Instaled Packages Cobrad Updates	None	1	Export Now	Schedule E	rpoqt					
Administration Setup  Administration Setup  Company Profile  Socurity Controls  Communication Templates  Translation Workbench  Data Management  Analytic Snaphdos Incon AccountsContacts	/									
Import Leads Import Solutions Import Custom Objects 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.

Schedule Data Export	ı.	Save Ca	ncel
Export File Encoding Include in export Replace carriage returns with spaces	ISO-8859-1 (General US	S & Western Eu Images, Docu	ropean, ISO-LATIN-1) + ments and Attachments
Schedule Data Export	Frequency	<ul><li>Weekly</li><li>Monthly</li></ul>	Recurs every week on Sunday Monday Tuesday Wednesday Thursday Friday Saturday
	Start	3/3/2011	[33/2011]
	End	4/3/2011	[3/3/2011]
	Preferred Start Time	-None	

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.

Select what type of information you would data for your export.	like to include in the export. The data types listed b	elow use the Apex API names. If you are not familiar with these names, select include a
RecordType	BusinessProcess	Contract
Approval	ContractContactRole	🖾 User
EntityHistory	E FieldHistory	EmailRoutingAddress
CrgWideEmailAddress	EmailDisclaimer	Campaign
CampaignMember	E Account	Contact
Elead	C Opportunity	AccountContactRole
OpportunityContactRole	C OpportunityHistory	CopportunityLineItem
OpportunityLineItemSchedule	C OpportunityCompetitor	Partner

Then click the **Start Export** button

Start Export		
Weekly Export Service		Help for this Page 🥹
Data Export lets you prepare a copy of all your When an export is ready for download you will for 48 hours, after which time they are deleted.	data in salesforce.com. From this page you can start the export pro receive an email containing a link that allows you to download the file	ocess manually or schedule it to run automatically. le(s). The export files are also available on this page
Next scheduled export: A data export is currently in progress for y	our 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.