



Salesforce Data Management and Reporting

Using the Power of Excel

CloudExtend Excel for Salesforce makes integration between Excel and Salesforce easy. Work entirely in Excel's fast and familiar interface to manage your data. Users can easily download data from multiple objects and report on them in Excel. With a single click users can also create new records or update existing records. Whether you're an admin managing pricebooks or an account executive managing opportunities, CloudExtend will enable you to save time and be more productive.

The screenshot displays the Microsoft Excel interface with the 'Company Budget' spreadsheet open. The ribbon shows 'File', 'Home', 'Insert', 'Formulas', 'Review', and 'View'. The 'Home' tab is active, showing the 'Calibri (Body)' font and size '11', along with bold, italic, and underline options. The spreadsheet grid is visible, with columns A through F and rows 1 through 13. On the right side, the 'CloudExtend for Salesforce' add-in is displayed as a floating window. The window has a blue header with the CloudExtend logo and a close button. The main content area is white and contains three sections: 'Mass update Salesforce Data' (with a list icon), 'Productivity gains' (with a clock icon), and 'Secure & Realtime' (with a lock icon). Each section has a brief description of the feature. At the bottom of the window, there is a 'CONTINUE' button and a link to 'Learn about CloudExtend Excel for Salesforce'. The footer of the window shows '© Celigo, Inc.' and a 'Help' link. The overall background of the slide features a blue and green abstract pattern.

Manage your Salesforce data directly in Excel

What CloudExtend Excel for Salesforce Does for You



Upsert thousands of records in seconds

Create and update multiple related Salesforce Objects simultaneously.



Fast & Easy Updates without Dataloader

Turn complex mass updates into 3 easy steps and save hours every day.



Flexible Editing

Export your objects as related tables and leverage the power of Excel to gain insight.



Filter Your Exports

Use our built in data filter or your SOQL to get just the data you want.



Work Smarter

With one click see and edit your entire pricebook in Excel. Use Excel formulas to make changes and see them in Salesforce.



Security Integration

CloudExtend inherits Salesforce security settings, eliminating the need to manage security for another platform separately.

The screenshot shows a Microsoft Excel spreadsheet titled 'Company Budget' with columns A through F and rows 1 through 13. The ribbon includes File, Home, Insert, Formulas, Review, and View. The formula bar shows 'fx'. Overlaid on the right is the 'CloudExtend for Salesforce' interface, which has a 'Create a template' button and a list of record types: Account, Account Contact Role, Account Team Member, Action Link Group Template, Action Link Template, Additional Directory Number, Announcement, Apex Class, Apex Email Notification, Apex Test Result, Apex Test Result Limit, Apex Test Run Result, Apex Test Suite, Apex Trigger, Appointment Dependency, Asset, and Asset File. The interface also shows a progress indicator with steps 1, 2, and 3.

CloudExtend template builder supports all Salesforce Objects