

Comparison of Key Features of Both Excel Connectors

Feature	XL-Connector 365	Coefficient
Direct Connection to Salesforce	✓	✓
Direct Connection to Salesforce	Excel, for Google Sheets Xappex offers a separate app G-Connector.	Excel, Google Sheets

Data Import

Feature	XL-Connector 365	Coefficient
Picklists support	✓	—
Dynamic queries based on workbook content	✓	—
Automatic Excel data table creation	✓	—
Multiple queries per sheet	✓	—
Data can be placed anywhere on the sheet	✓	—
Protected sheet support	✓	—
The last run timestamp is written to the custom cell	✓	—
Query All	✓	—
SOSL (Salesforce Object Search Language) support	✓	—
User-defined chained execution of any number of reports/queries	✓	—
Customizable Reports	Yes (Add/Remove columns, preserve formulas)	Yes (Add/Remove columns, preserve formulas)

Data Export (Excel to Salesforce)

Feature	XL-Connector 365	Coefficient
Full Upsert support, including upsert of child records by parent record External Id.	✓	—
Mass Delete/Undelete support	✓	—
Constant mappings support	✓	—
Full Owner Change Options support	✓	—
Load empty values support	✓	✓
Bypass Salesforce native duplicate check	✓	—
Batch size support	✓	✓
User-defined chained execution of any number of export/import operations	✓	—
SOQL Query Support	Yes (Point-and-click interface)	Yes (Point-and-click interface)

Refresh data

Feature	XL-Connector 365	Coefficient
Refresh data in all worksheets with a single click	✓	—
Different refresh modes (overwrite, append, new sheet)	✓	—
Forced recalculation of formulas on refresh	✓	—
Forced recalculation of pivot tables on refresh	✓	—
Two-Way Data Integration	Yes (Push data back to Salesforce)	Yes (Push data back to Salesforce)
Data Synchronization	Scheduled syncs at intervals up to every 5 minutes, with no limits	Limited refreshes per plan

Admin Tools

Feature	XL-Connector 365	Coefficient
Convert IDs (15 digit to 18 digit)	✓	—
Merge Records	✓	—
Convert Leads (To Account, Contact and opportunity)	✓	—
Data Filtering and Sorting	Yes (Complex filters linked to Excel cells)	Yes (Custom filters and sorting options)
Bulk Data Operations	Yes (Update, insert, delete records)	Yes (Update, insert, delete records)
Automation	Yes (Automate data loads and report generation)	Yes (Automate reports, set notifications)
Error Handling and Logging	Yes (Detailed logs, data validation)	Yes (Error logs, data validation)
User Notifications	✓	Yes (Slack and email notifications)
Security and Compliance	Yes (Data stays within Excel and Salesforce)	Yes (Data remains in the cloud)
User-Friendly Interface	Yes (Intuitive and easy to navigate)	Yes (Clean, informative interface)
Advanced Data Manipulation	Yes (Leverage Excel functions like VLOOKUP)	Yes (Utilize spreadsheet functions)
Custom Notifications	—	Yes (Custom notifications for data changes)
Installation Process	Simple (Add-in from Excel Store)	Simple (Add-on from Google Workspace or Office Store)