Business Intelligence Solution Providers
Specialized in creating talent resource pool

Getting Started with SalesForce CRM

SalesForce Developer Track Certification Preparation Guide II

Description:

BISP is committed to provide BEST learning material to the beginners and advance learners. In the same series, we have prepared a complete end-to end Hands-on Beginner’s Guide for SalesForce. The document focuses on basic keywords, Data Management Tools, Storage Data and API based tools. Join our professional training program and learn from experts.

History:

Version	Description Change	Author	Publish Date
0.1	Initial Draft	Chandra Prakash Sharma	10th Dec 2102
0.1	Review#1	Amit Sharma	10th Dec 2102

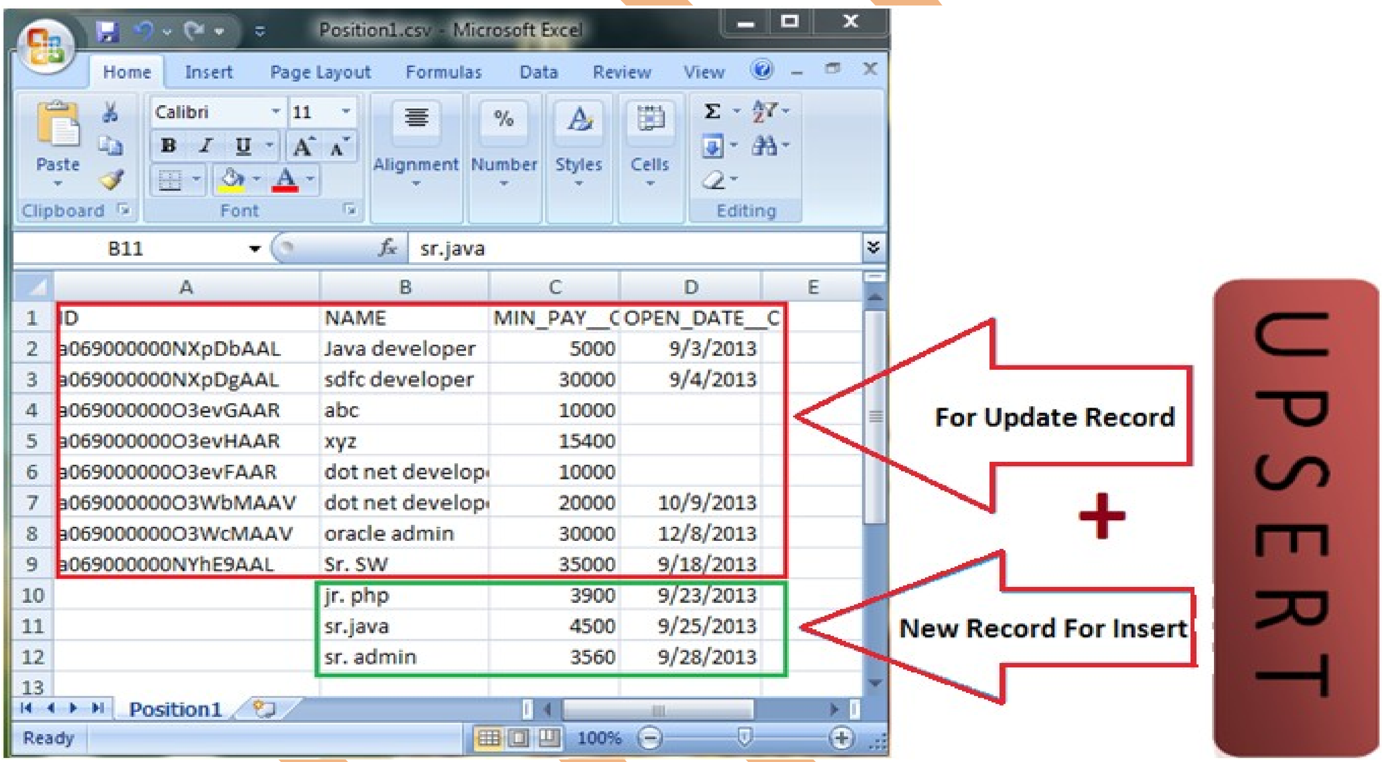
Contents

How To Use Upsert In SalesForce

Upsert use to Creates new records and updates existing records. In most cases, by using upsert() avoid creating unwanted duplicate records. Available in the API version 7.0 and later. You can process records for one more than object type in an create() or update() call, but all records must have the same object type in an upsert() call.

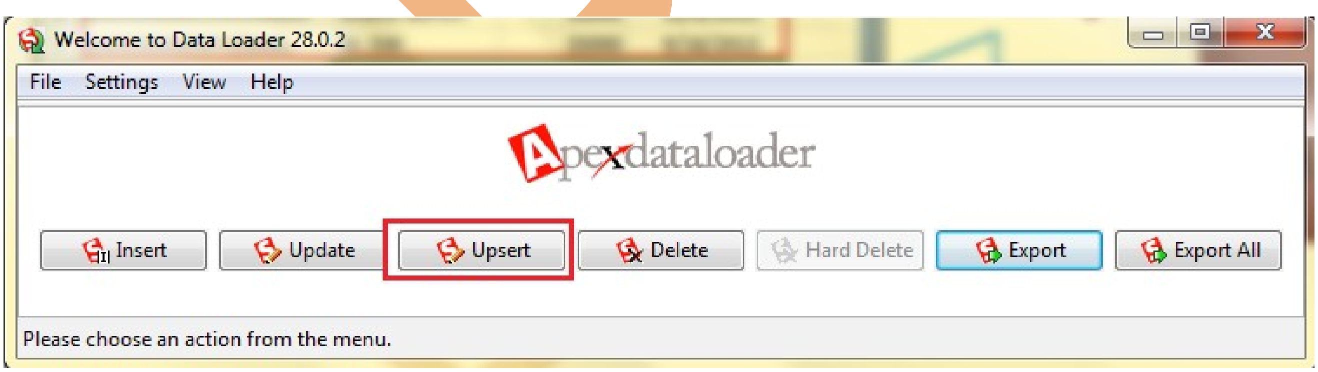
Upsert use in Data Loader :

You can see below .CSV file for uploading data. there is two type data fist is with id this data use for update data and second is new fresh data it is new record for insert in salesforce.com.



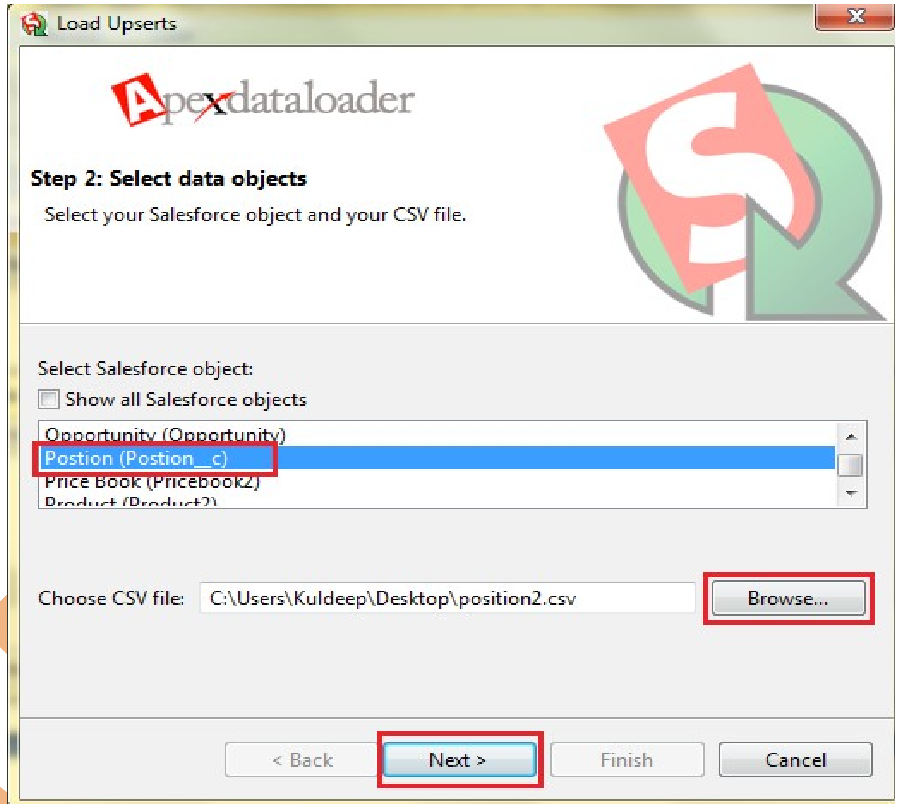
Step 1 :-

Open Data Loader on client machine then select **Upsert** button.

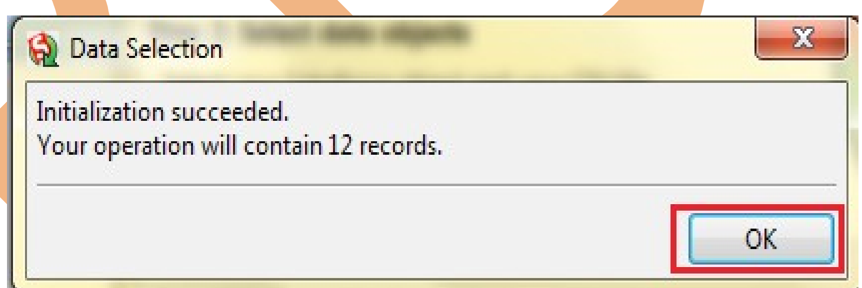


Step 2 :-

Select SalesForce Object Name, choose CSV file and click to Next button.

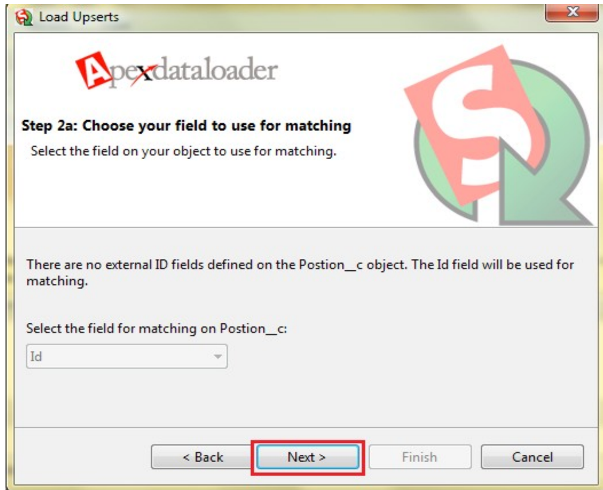


Then you got Message box Click to OK button.



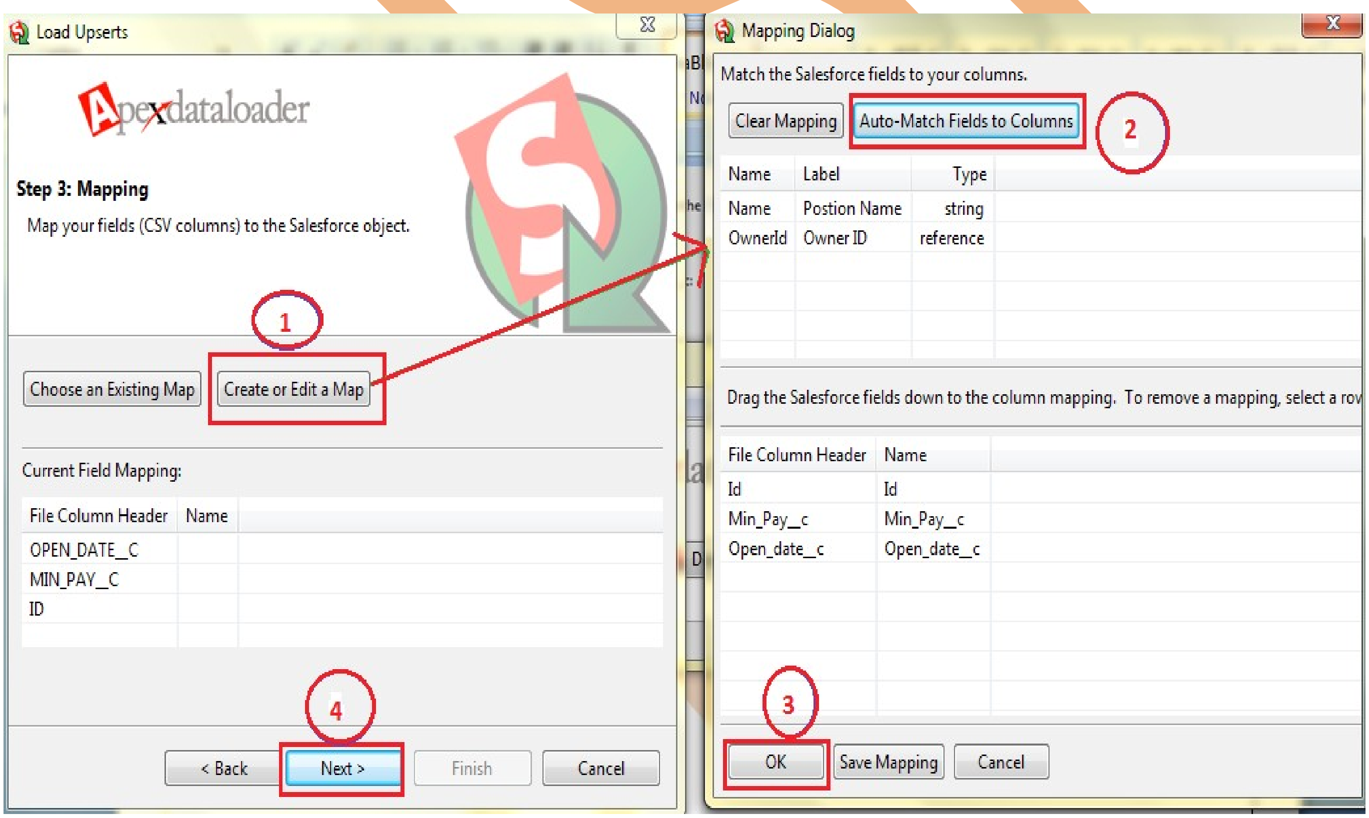
Step 3 :-

Click on the **Next** button.



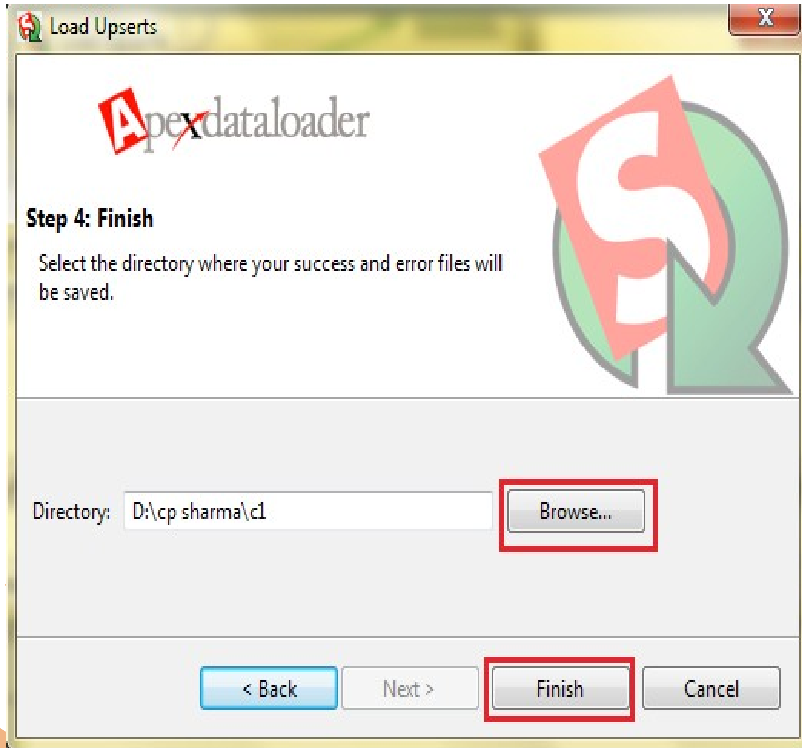
Step 4 :-

There you can see new window click on **Create or Edit a Map** button, then show new screen click on **Auto-Match Fields** to Columns and click to **OK** button after that click to **Next** button.



Step 5 :-

Click to **Browse** button and give any path for save Success or Error log file .
then click to **Finish** button.



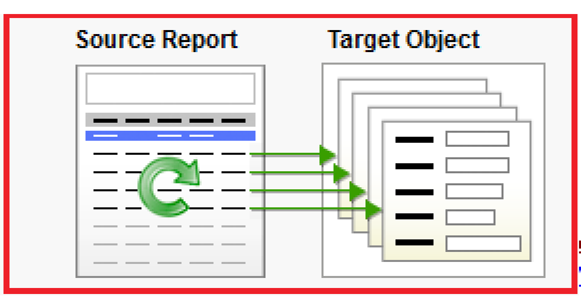
After that you receive one message window there you can see success or Error file,
Then click to ok button.

Data Management Tools

Analytic Snapshots

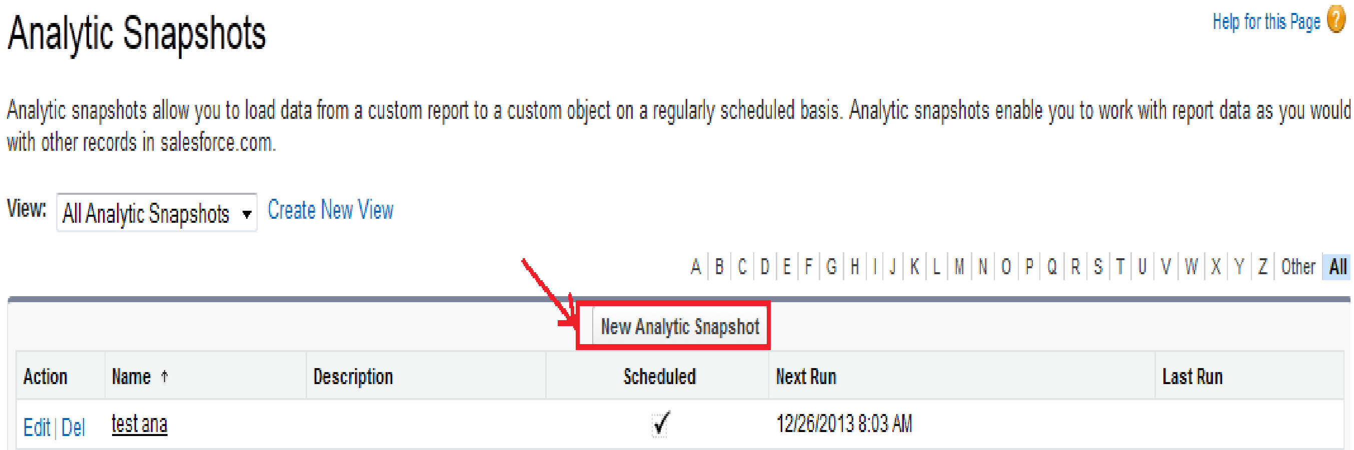
Analytic snapshots allow users to run reports and save the report results as records on custom objects.

- Running faster reports by reporting on data that is already summarized.
- Creating dashboards that refresh quickly by associating them with pre-summarized data.
- Sorting and filtering specific data summaries via list views.
- Viewing trends in data via custom object records.



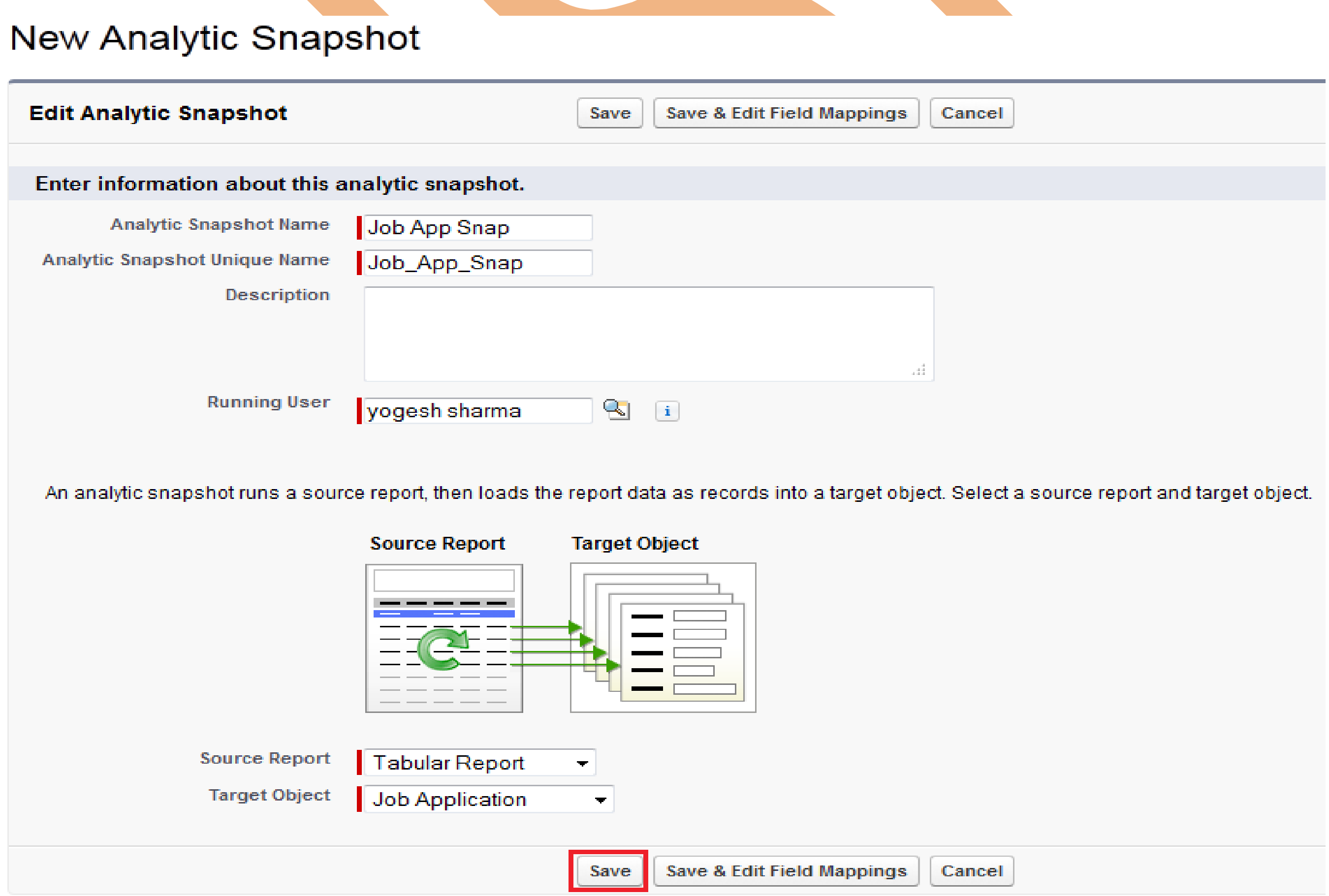
Step 1 :-

Click on **New Analytic Snapshot** button.



Step 2 :-

Fill all Mandatory field's and click to **Save** button.



Step 3:-

After then map the field click on **Edit** button in **Field Mapping**. then schedule analytic snapshot click on **Edit** button.

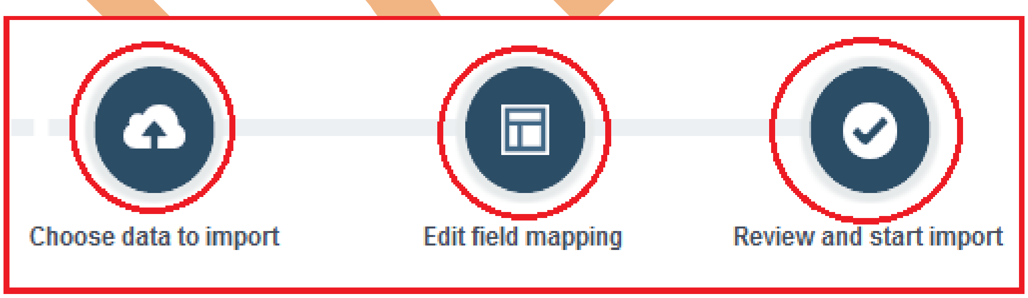
Data Import Wizard in SalesForce

The Data Import Wizard provides a GUI Interface, Easily import data on SalesForce. It is a web based tools.

Data Import Wizard provides a unified interface that's you import a number of standard SalesForce objects,

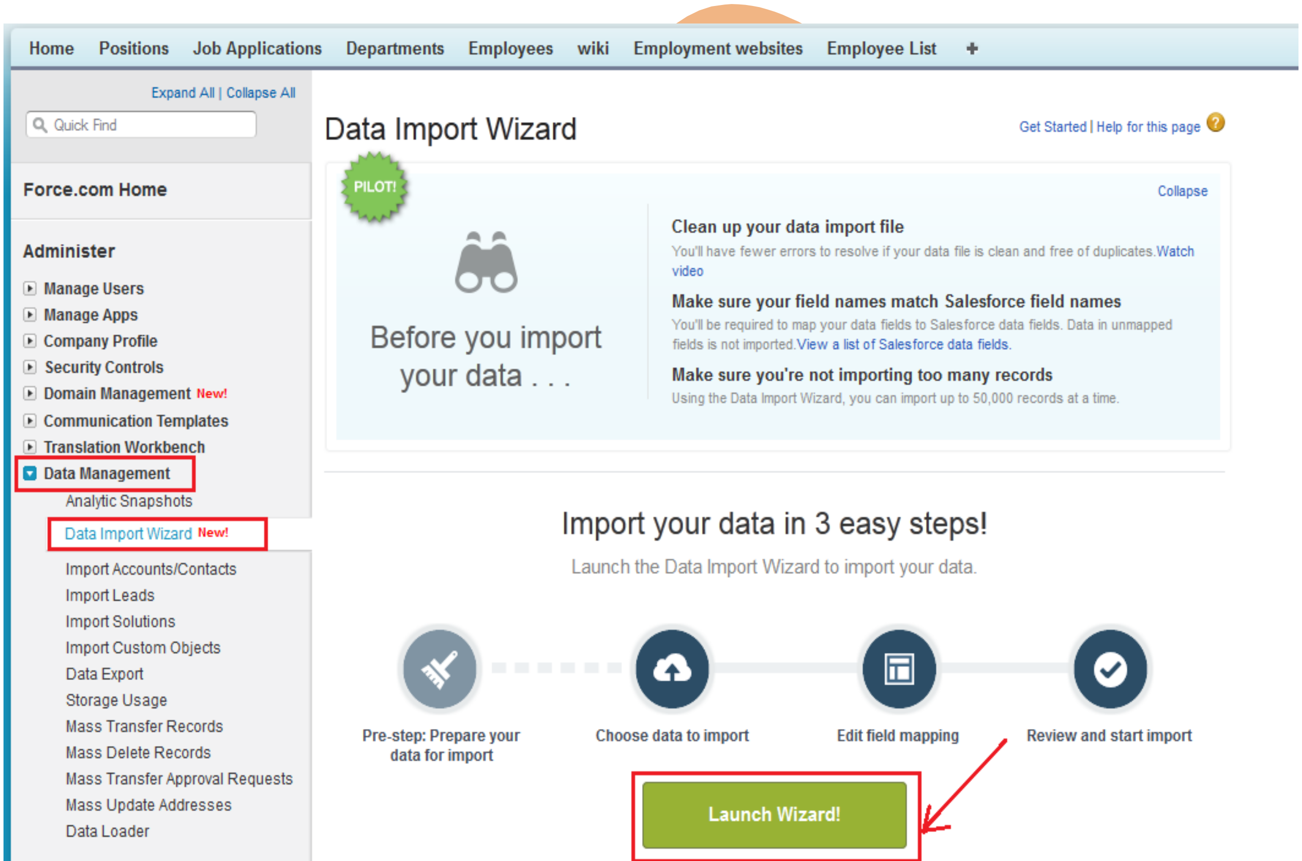
solutions, leads, contacts, and including accounts. The wizard also lets you import custom objects.

Import data in three easy steps



How To import data by Import Data Wizard

Click to **Setup** > **Data Management** > **Data Import Wizard** click on this link then you can see Data Import Wizard on this page go to down and see Launch Wizard! button click on this button.



Step 1 :-

After click on **Launch Wizard!** button, then you have seen new screen there is two option

1. Standard object 2. Custom object

- Click on **Custom Object** after then you can see custom object Tab list

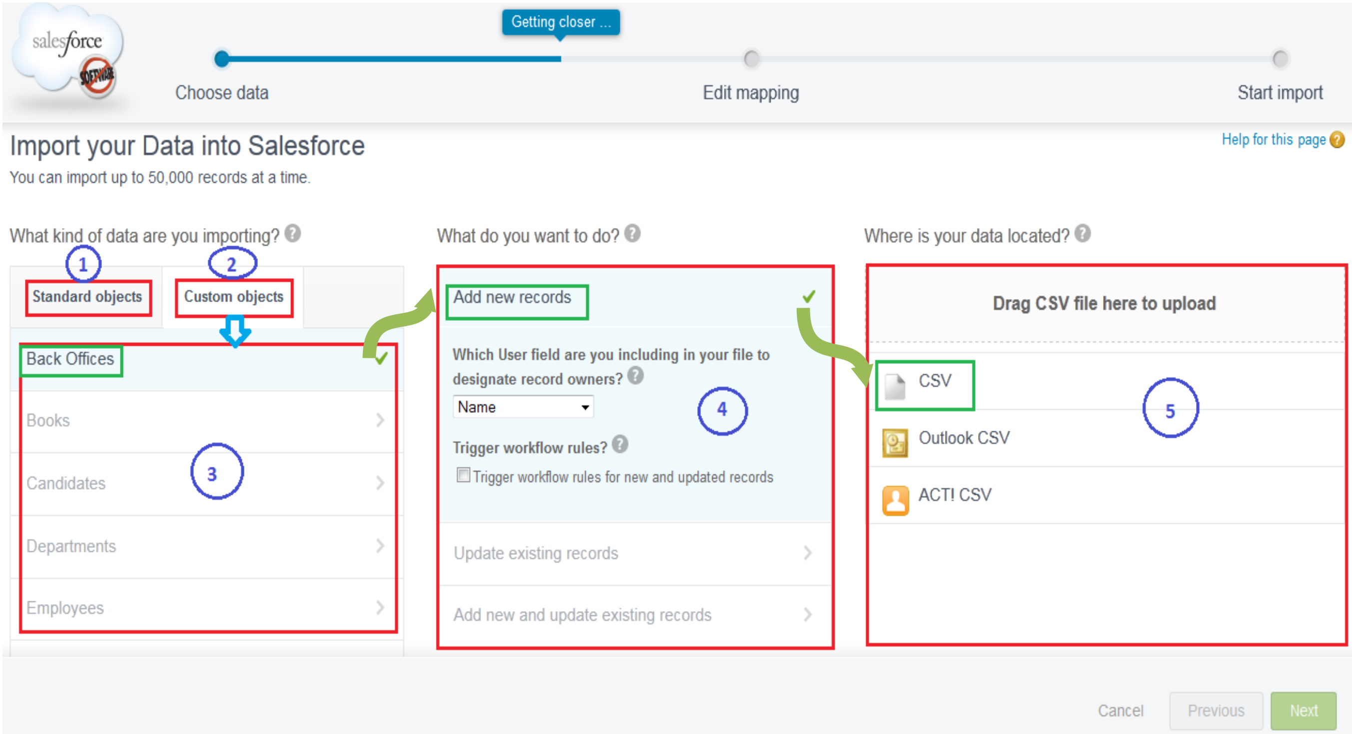
3. choose custom tab anyone.

- After click on Custom Tab then you can see new list

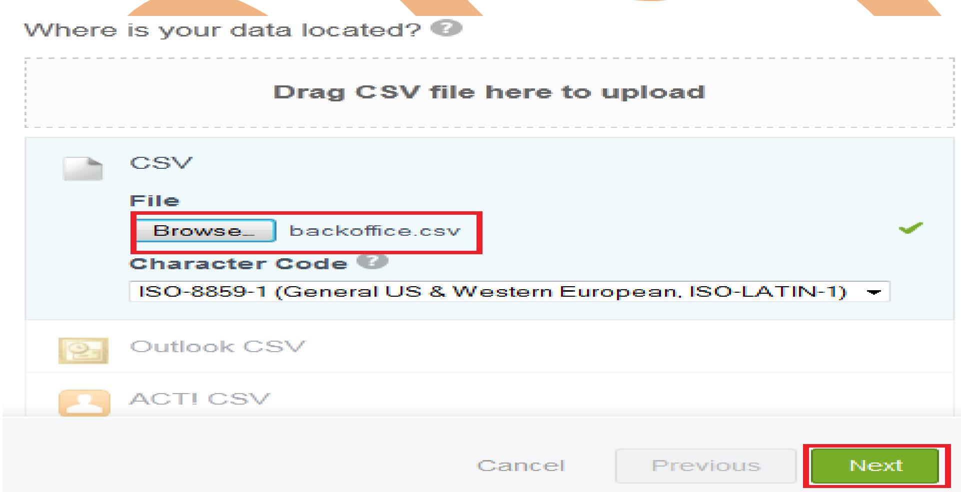
4. there is three option select any one, (For ex :- I will select Add new Record)

- After click on **Add new records link** you can see new list

5. There is three option select any one, (I will select CSV first option)

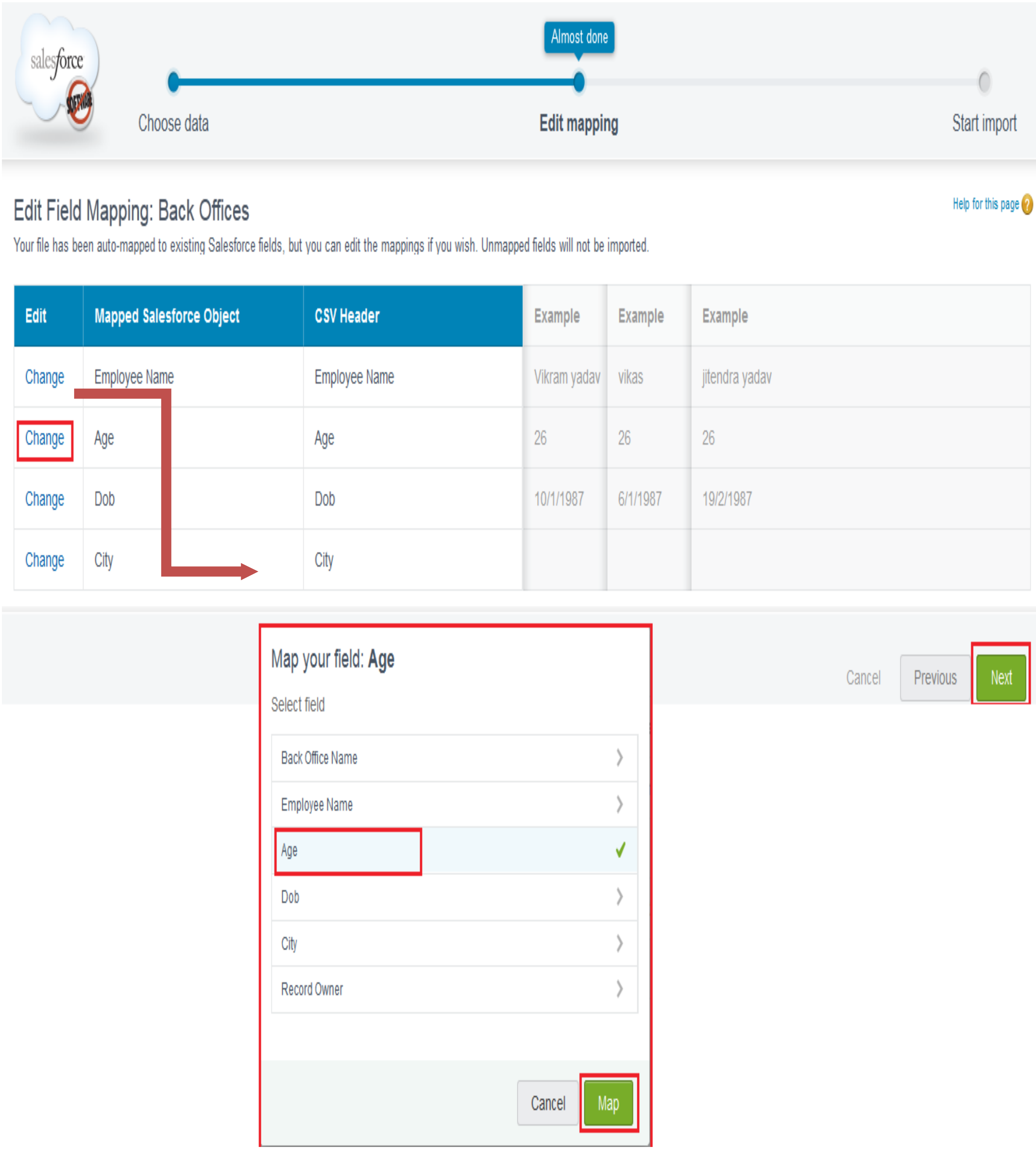


Then select CSV option and click to **Browse** button and select your .CSV file. and click to **Next** button.



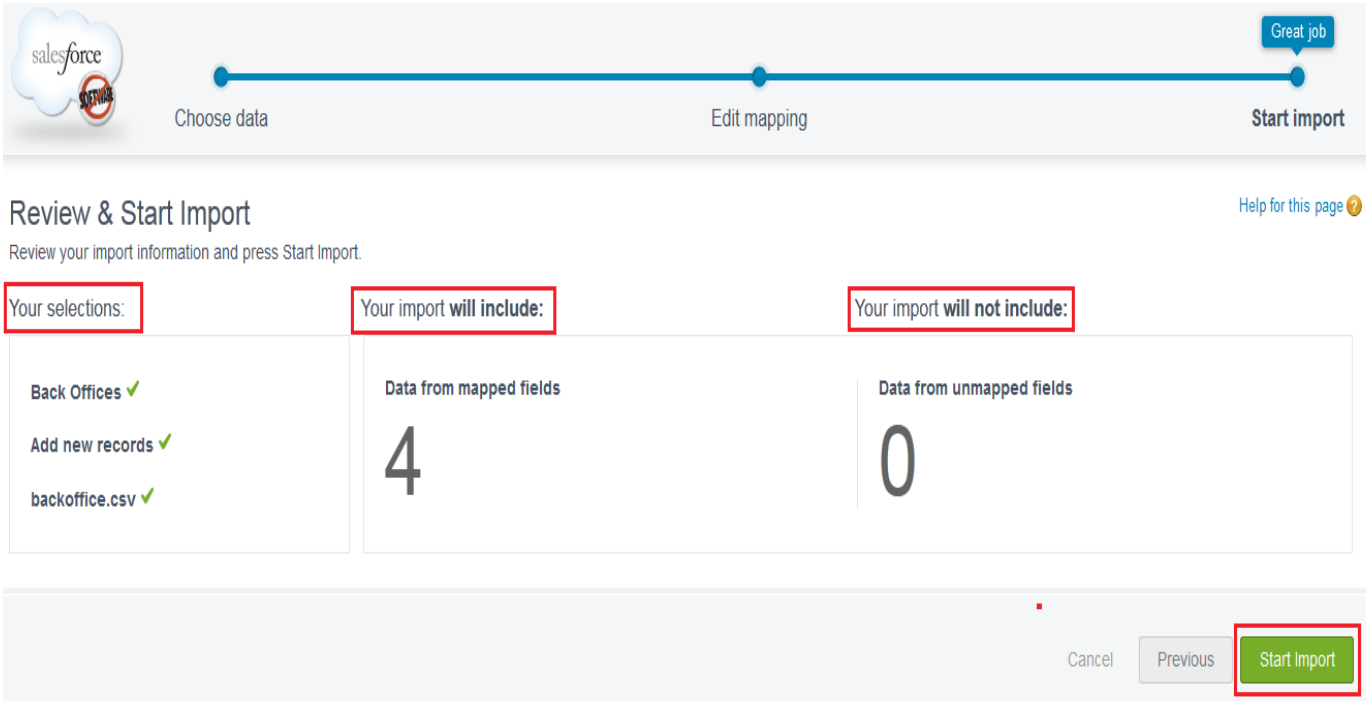
Step 2 :-

After Click to Next button Then you can see new page it called **Edit Mapping** page, if you want to mapped your fields ,if need to change mapped field click on **Change** link after that open new pop box select your mapped field and click to **map** button. Then you click on **Next** Button.


Almost done
Choose data
Edit mapping
Start import
Edit Field Mapping: Back Offices
Help for this page
Your file has been auto-mapped to existing Salesforce fields, but you can edit the mappings if you wish. Unmapped fields will not be imported.
Edit
Mapped Salesforce Object
CSV Header
Example
Example
Example
Change
Employee Name
Employee Name
Vikram yadav
vikas
jitendra yadav
Change
Age
Age
26
26
26
Change
Dob
Dob
10/1/1987
6/1/1987
19/2/1987
Change
City
City
Cancel
Previous
Next
Map your field: Age
Select field
Back Office Name
Employee Name
Age
Dob
City
Record Owner
Cancel
Map

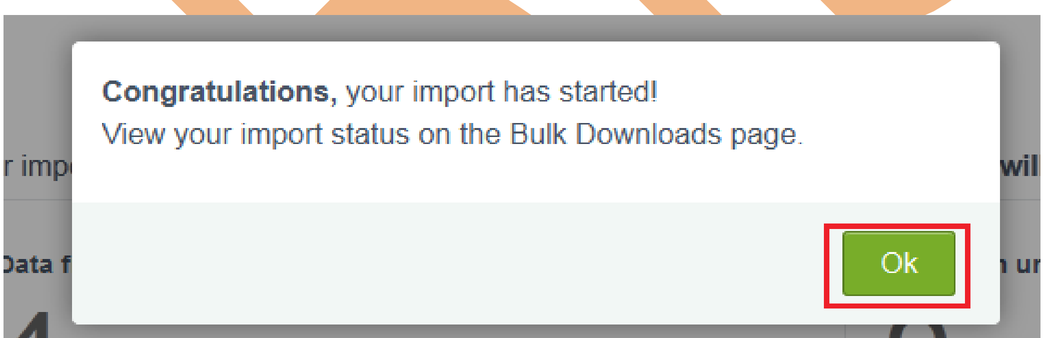
Step 3 :-

After that you can see, your selections list, your import will include, and mapping list. After then click on **Start import** button.

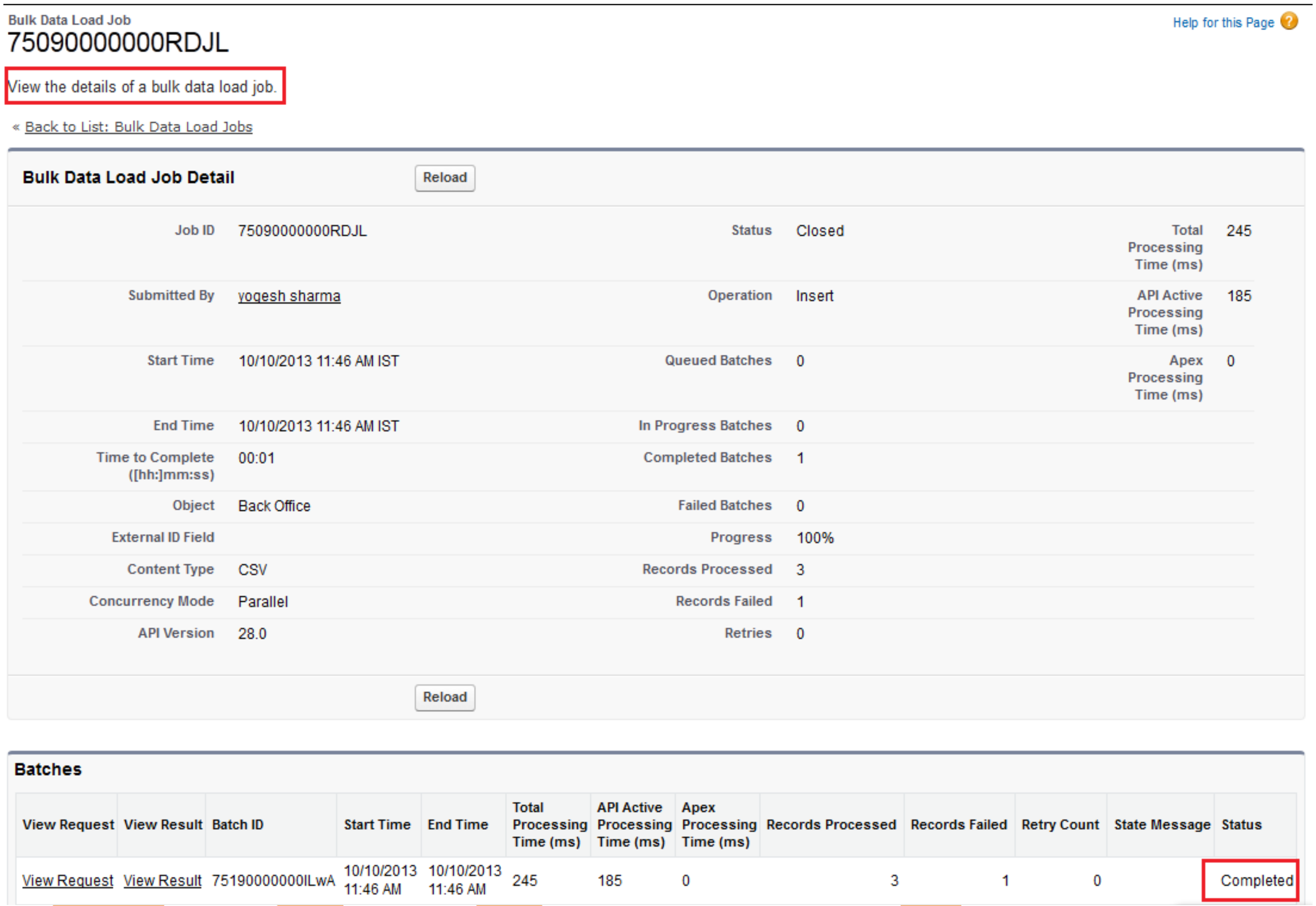


Step 4 :-

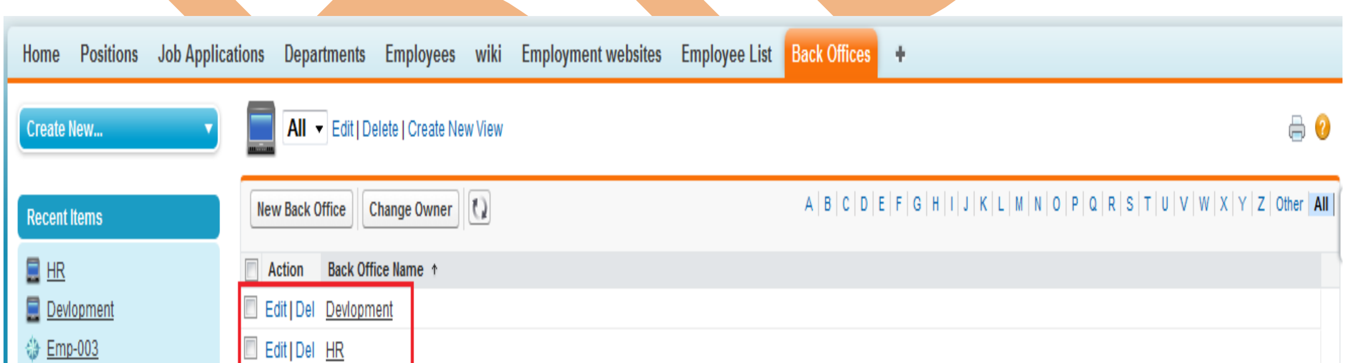
After Click on Start import button then you can see Message box click on Ok button



After click on ok button then you can see new screen for related View the details of a bulk data load job, there you can see all information about uploaded file and you can all show check status.



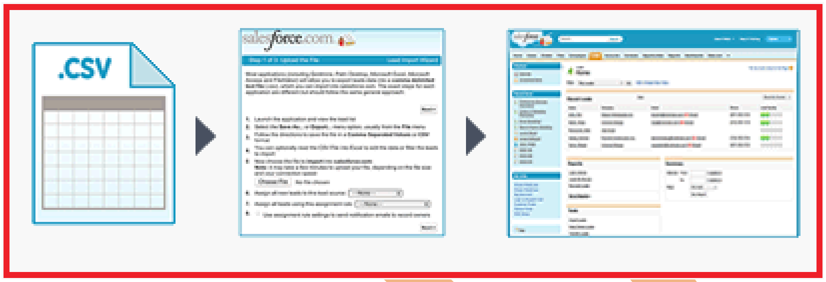
If you want see your recodes Click on Custom Tabs(Ex :- Back offices) and click to Go button, you can see that bellow.

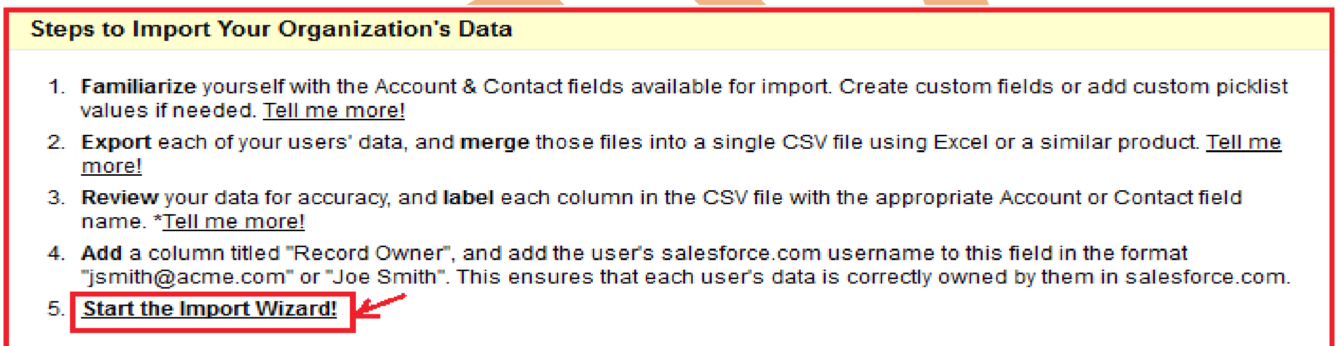


Note :- All so send link on mail by Salesforce.com.

Import Wizard for Accounts/Contacts

Use this wizard to import accounts and contacts for multiple users in your organization. You must be a salesforce.com administrator to use this wizard.

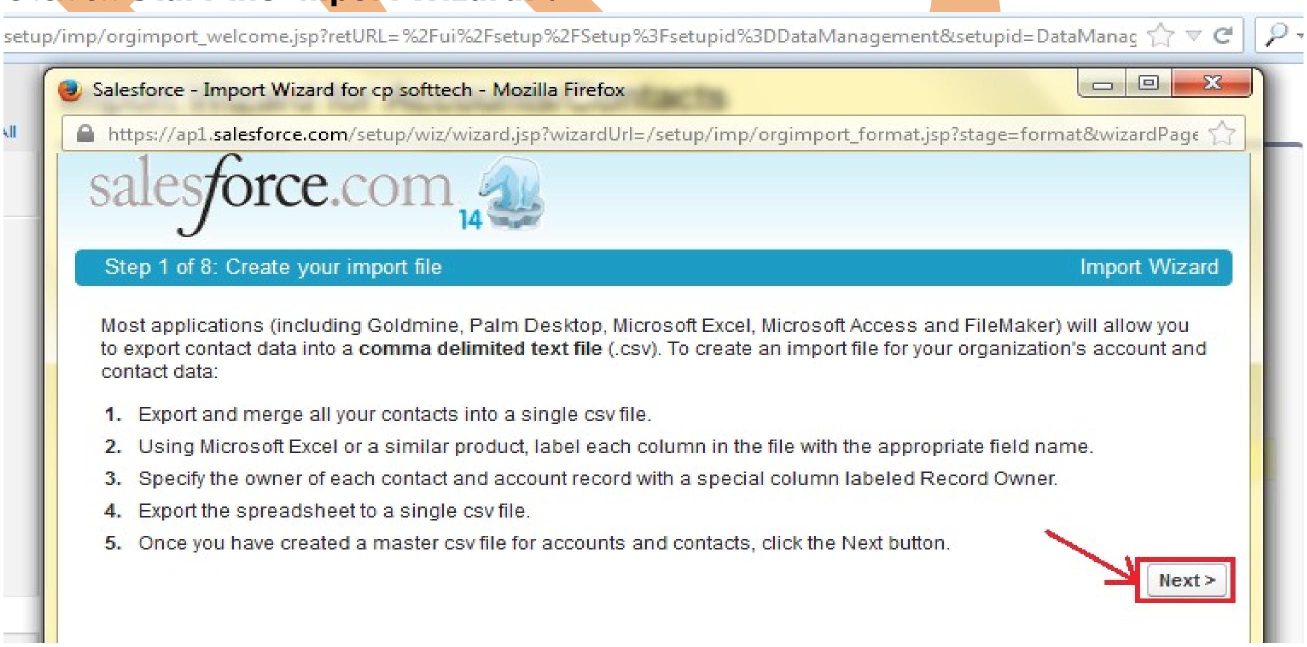




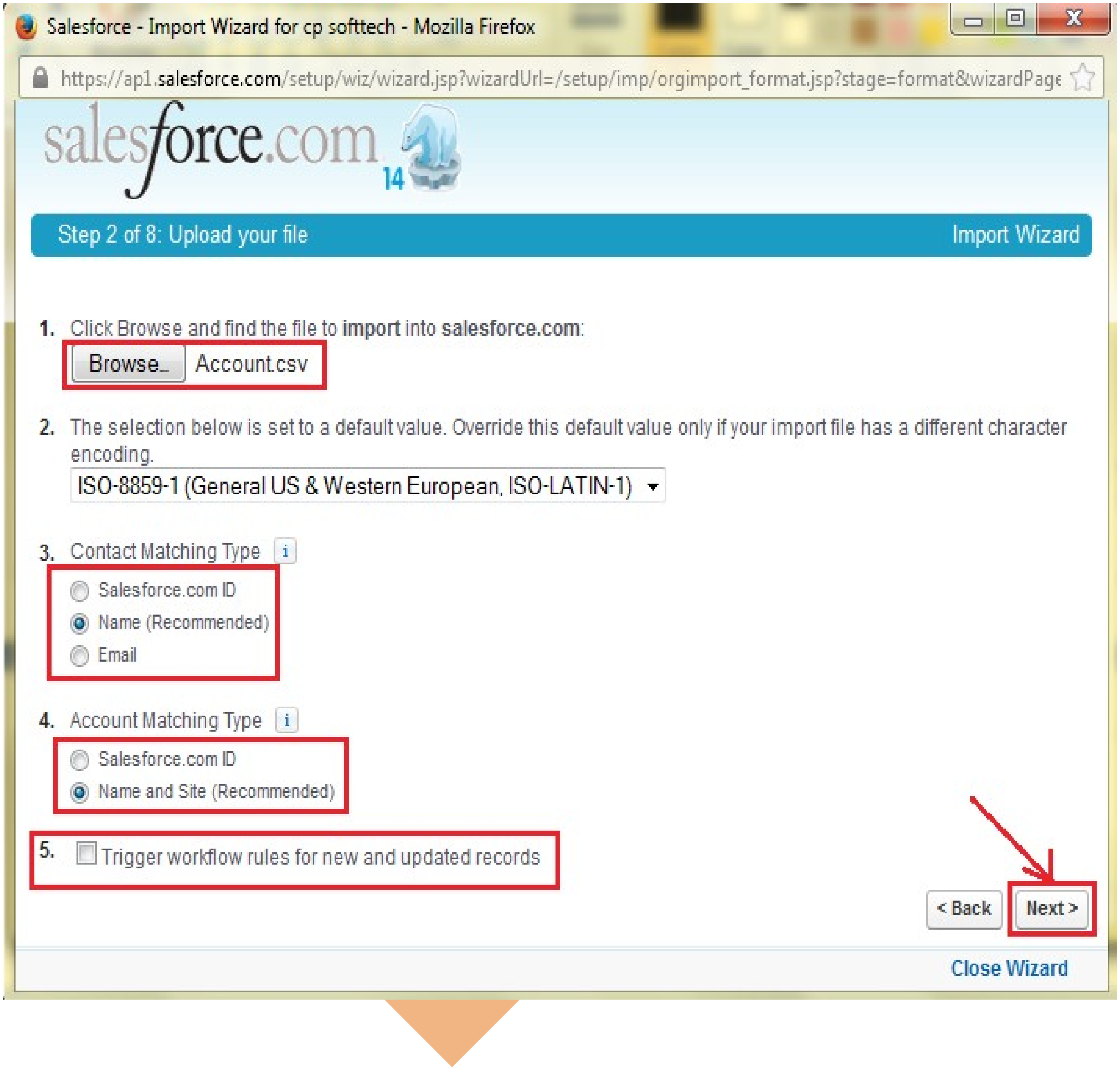
Steps to Import Your Organization's Data

1. **Familiarize** yourself with the Account & Contact fields available for import. Create custom fields or add custom picklist values if needed. Tell me more!
2. **Export** each of your users' data, and **merge** those files into a single CSV file using Excel or a similar product. Tell me more!
3. **Review** your data for accuracy, and **label** each column in the CSV file with the appropriate Account or Contact field name. *Tell me more!
4. **Add** a column titled "Record Owner", and add the user's salesforce.com username to this field in the format "jsmith@acme.com" or "Joe Smith". This ensures that each user's data is correctly owned by them in salesforce.com.
5. **Start the Import Wizard!**

Click on **Start the Import Wizard!** .

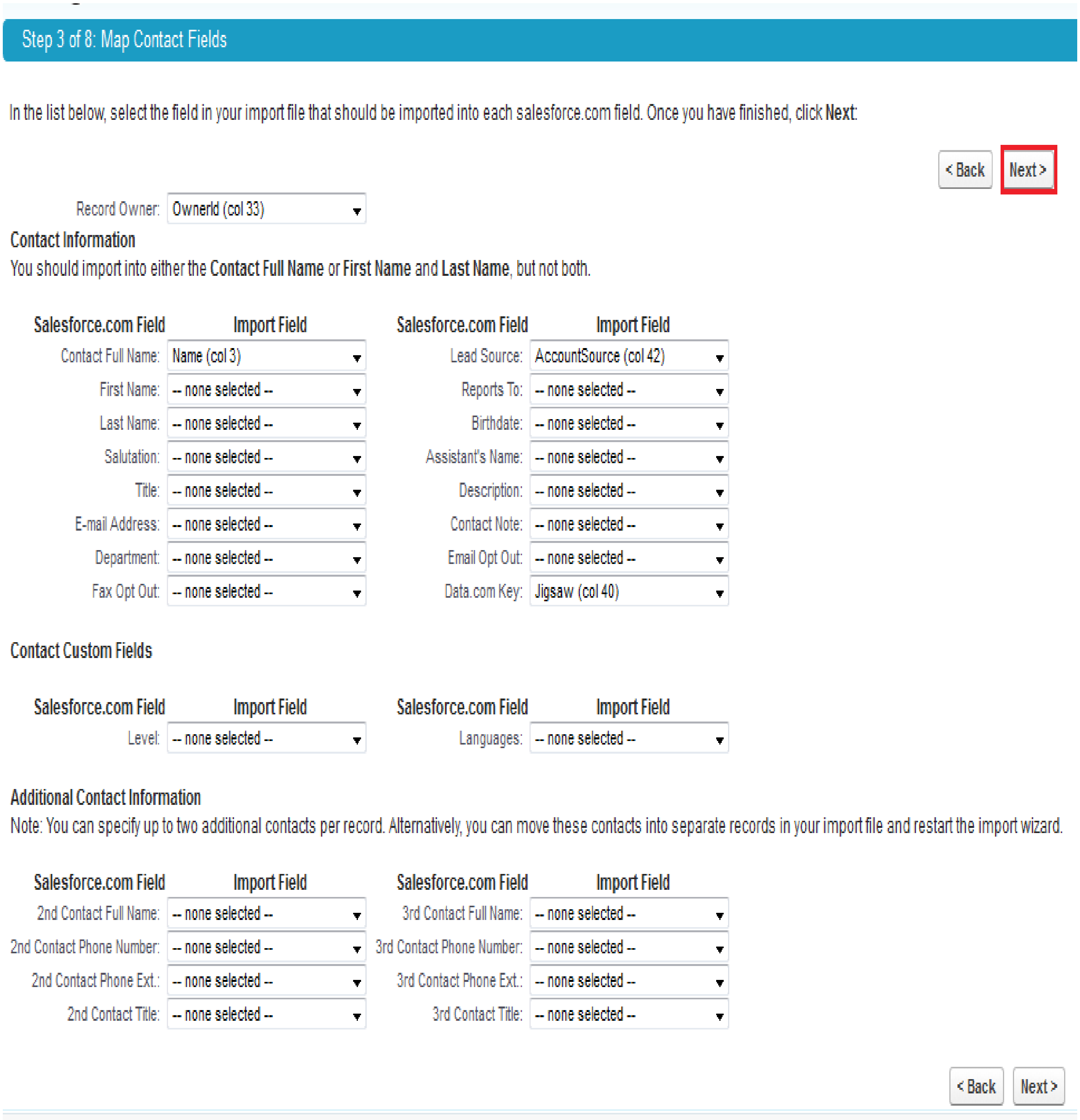


Step 2 :- Browse .CSV file select contact matching type, Account Matching type. if need to trigger update checked trigger workflow rules.



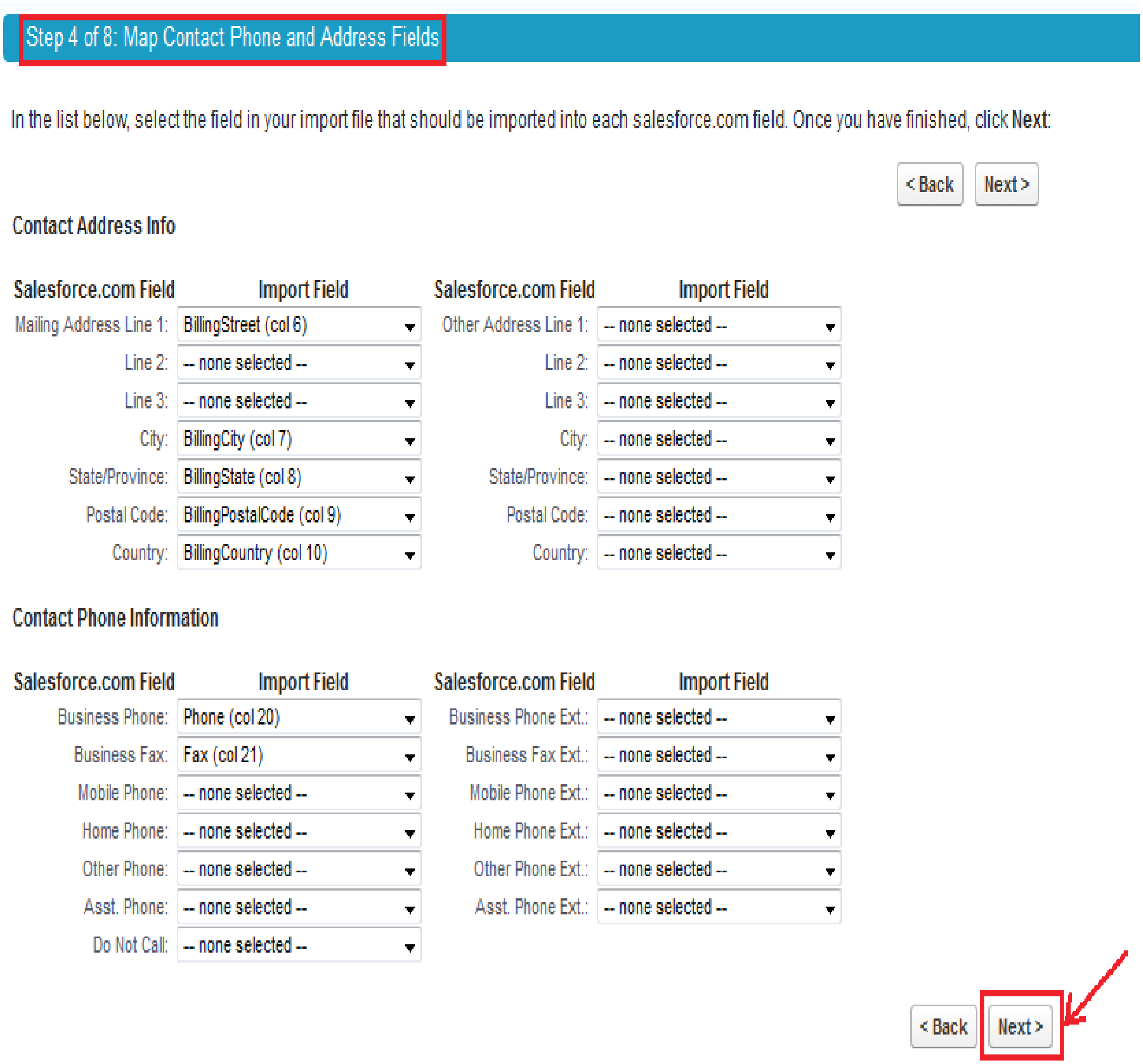
Step 3 :-

If need to map contact fields map all fields and click to **Next** button.



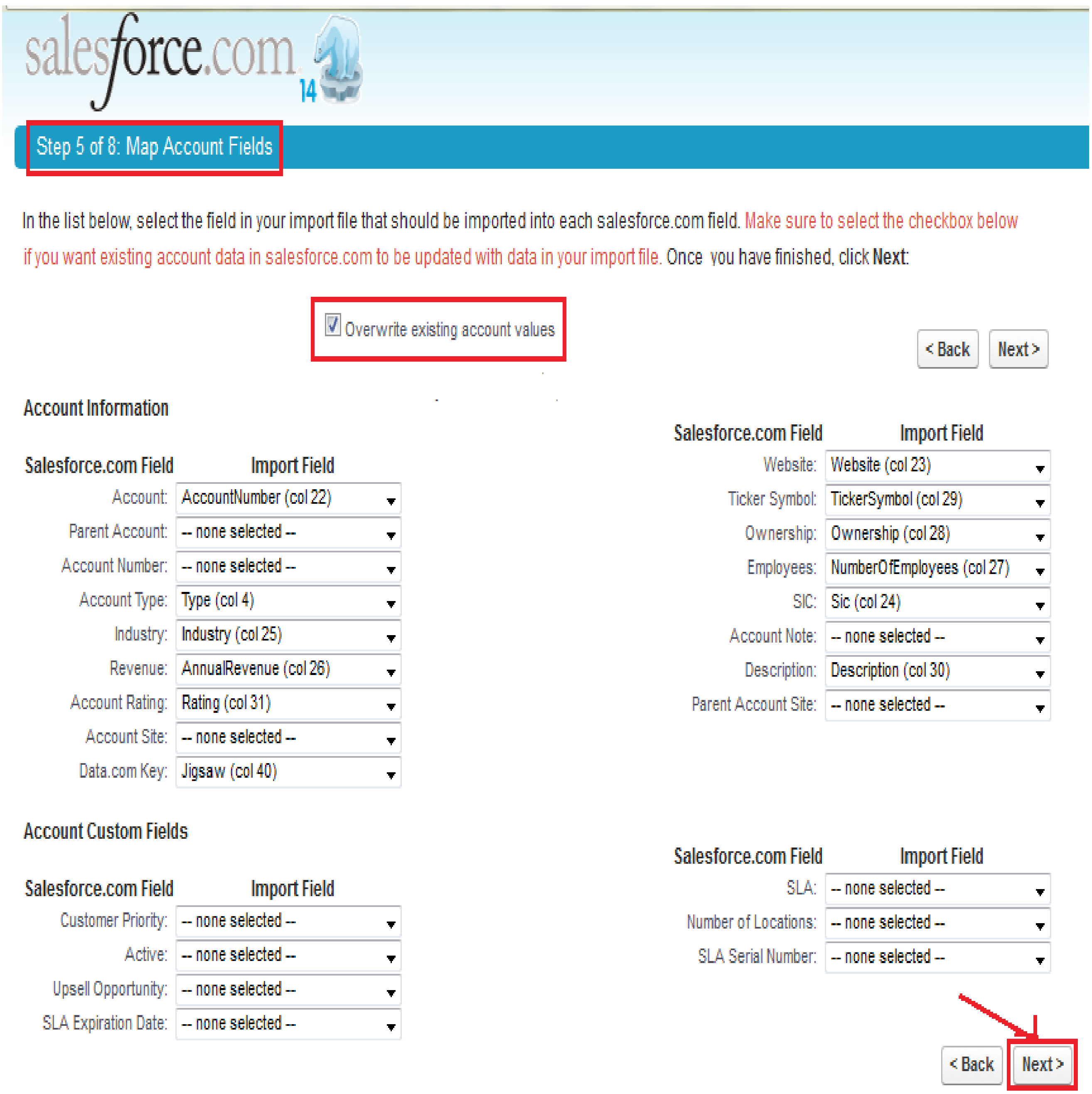
Step 4 :-

Map contact phone and address fields then click on **Next** button.

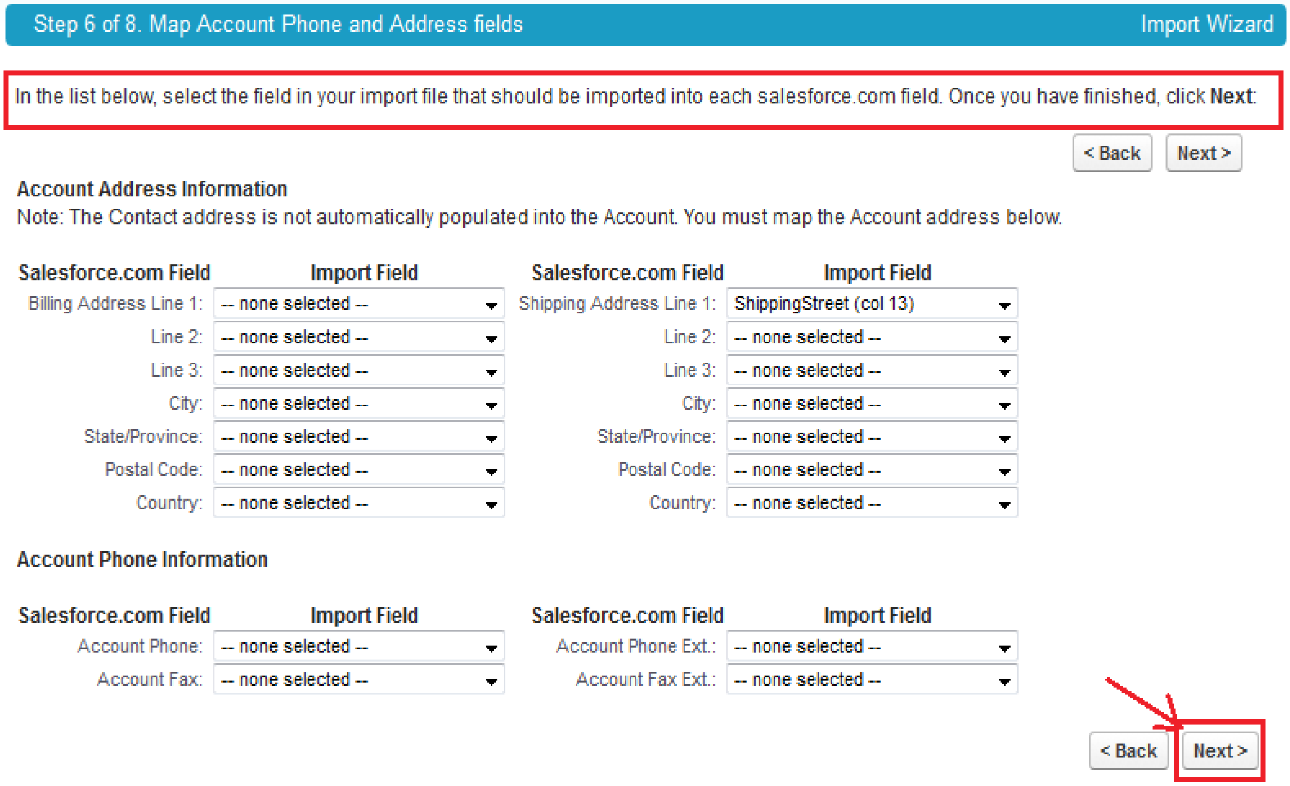


Step 5 :-

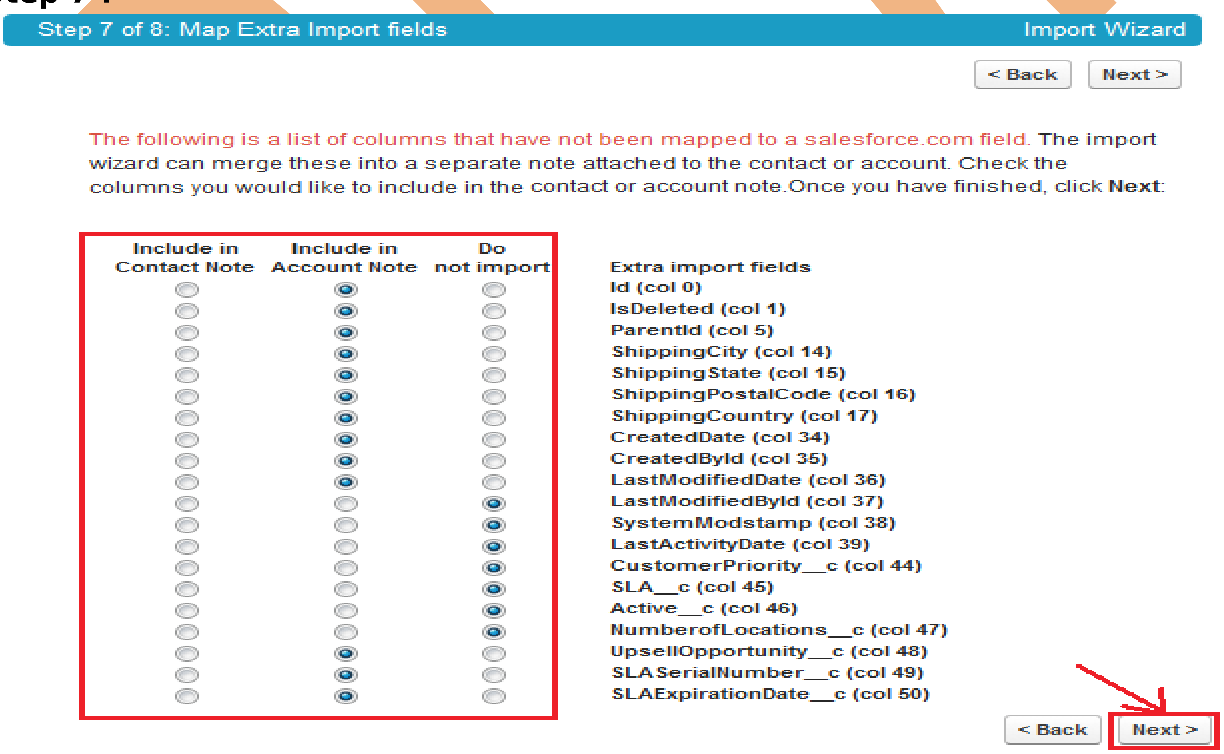
Map account field if you want to overwrite data checked **Overwrite existing account values** check box. then click on **Next** button.



Step 6 :-

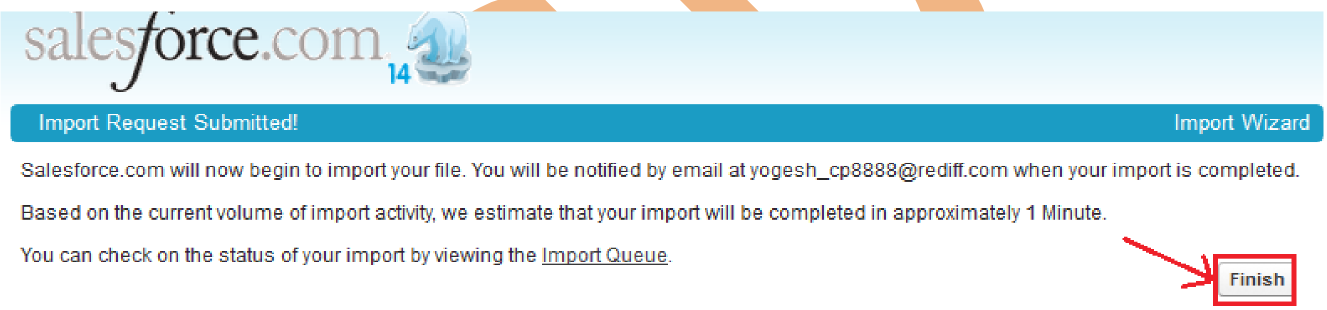

Step 6 of 8. Map Account Phone and Address fields
Import Wizard
In the list below, select the field in your import file that should be imported into each salesforce.com field. Once you have finished, click **Next**:
< Back
Next >
Account Address Information
Note: The Contact address is not automatically populated into the Account. You must map the Account address below.
Salesforce.com Field
Import Field
Billing Address Line 1: -- none selected --
Line 2: -- none selected --
Line 3: -- none selected --
City: -- none selected --
State/Province: -- none selected --
Postal Code: -- none selected --
Country: -- none selected --
Shipping Address Line 1: ShippingStreet (col 13)
Line 2: -- none selected --
Line 3: -- none selected --
City: -- none selected --
State/Province: -- none selected --
Postal Code: -- none selected --
Country: -- none selected --
Account Phone Information
Account Phone: -- none selected --
Account Fax: -- none selected --
Account Phone Ext.: -- none selected --
Account Fax Ext.: -- none selected --
< Back
Next >

Step 7 :-


Step 7 of 8: Map Extra Import fields
Import Wizard
< Back
Next >
The following is a list of columns that have not been mapped to a salesforce.com field. The import wizard can merge these into a separate note attached to the contact or account. Check the columns you would like to include in the contact or account note.Once you have finished, click **Next**:
Include in Contact Note
Include in Account Note
Do not import
Extra import fields
Id (col 0)
IsDeleted (col 1)
ParentId (col 5)
ShippingCity (col 14)
ShippingState (col 15)
ShippingPostalCode (col 16)
ShippingCountry (col 17)
CreatedDate (col 34)
CreatedById (col 35)
LastModifiedDate (col 36)
LastModifiedById (col 37)
SystemModstamp (col 38)
LastActivityDate (col 39)
CustomerPriority__c (col 44)
SLA__c (col 45)
Active__c (col 46)
NumberofLocations__c (col 47)
UpsellOpportunity__c (col 48)
SLASerialNumber__c (col 49)
SLAExpirationDate__c (col 50)
< Back
Next >

Step 8 :-

After then click on Finish button.

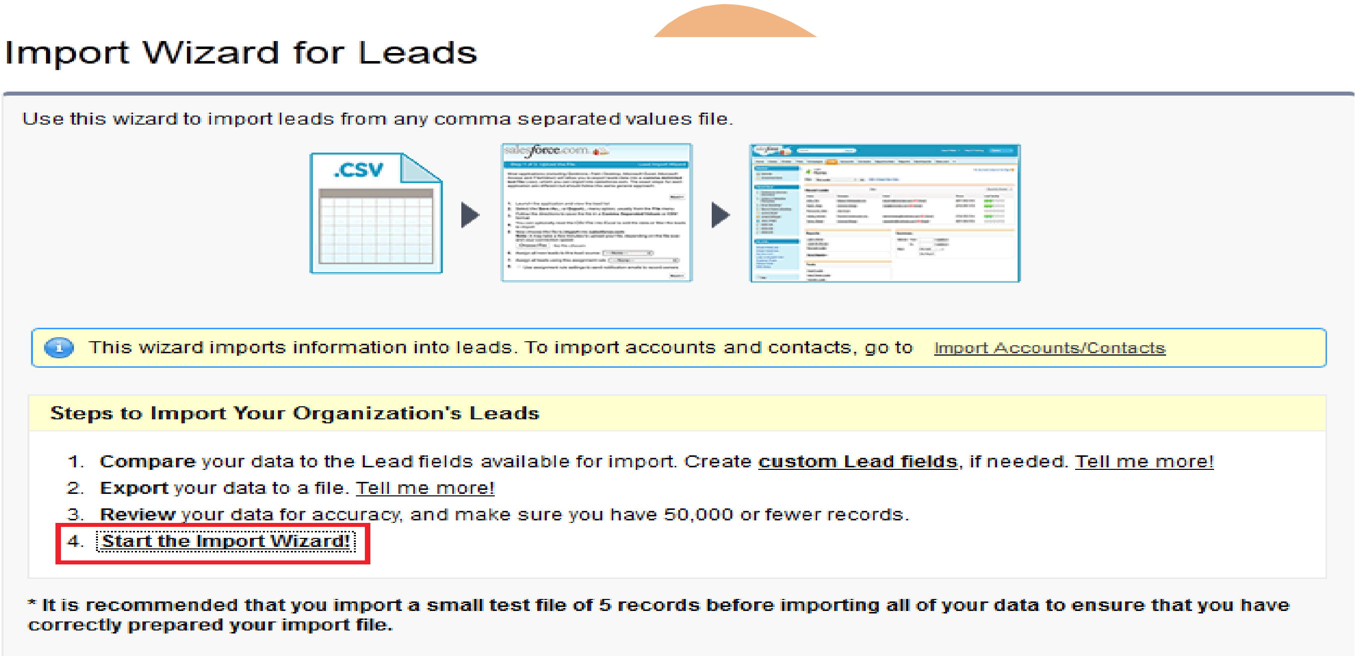


Import Wizard

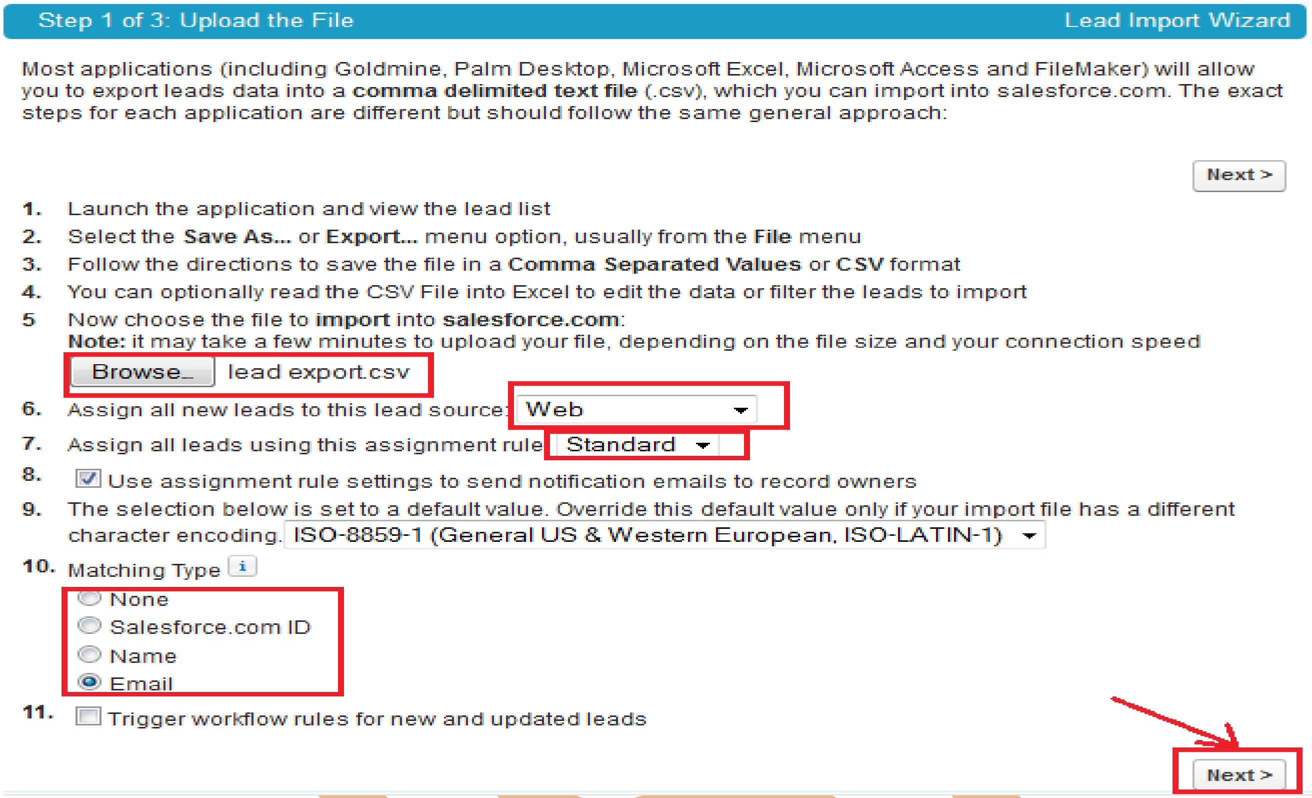
- Prepare your list of names according to the specifications for mapping fields in your lead import file.
- Click the Manage Members drop-down button and select Add Members - Import File on the detail page of the campaign you want to update.
- Click Import Leads.
- Click Browse and choose your import file.
- Select a lead source.
- Select an assignment rule to assign the leads.
- Optionally choose to use assignment rule settings to notify the new record owners.
- Select the default member status for leads with blank or invalid statuses.
- Select the character encoding of your import file. Most users do not need to change the default setting.
- Optionally choose to trigger workflow rules for new and updated records.
- Optionally choose to trigger workflow rules for new campaign members.
- Click Next.
- Map the SalesForce fields to the fields in your import file, then click Next.

- Map the SalesForce campaign member status field and any campaign member custom fields to your import file, then click Next. This is only available if you have campaign member custom fields.
- Click Import Now!.

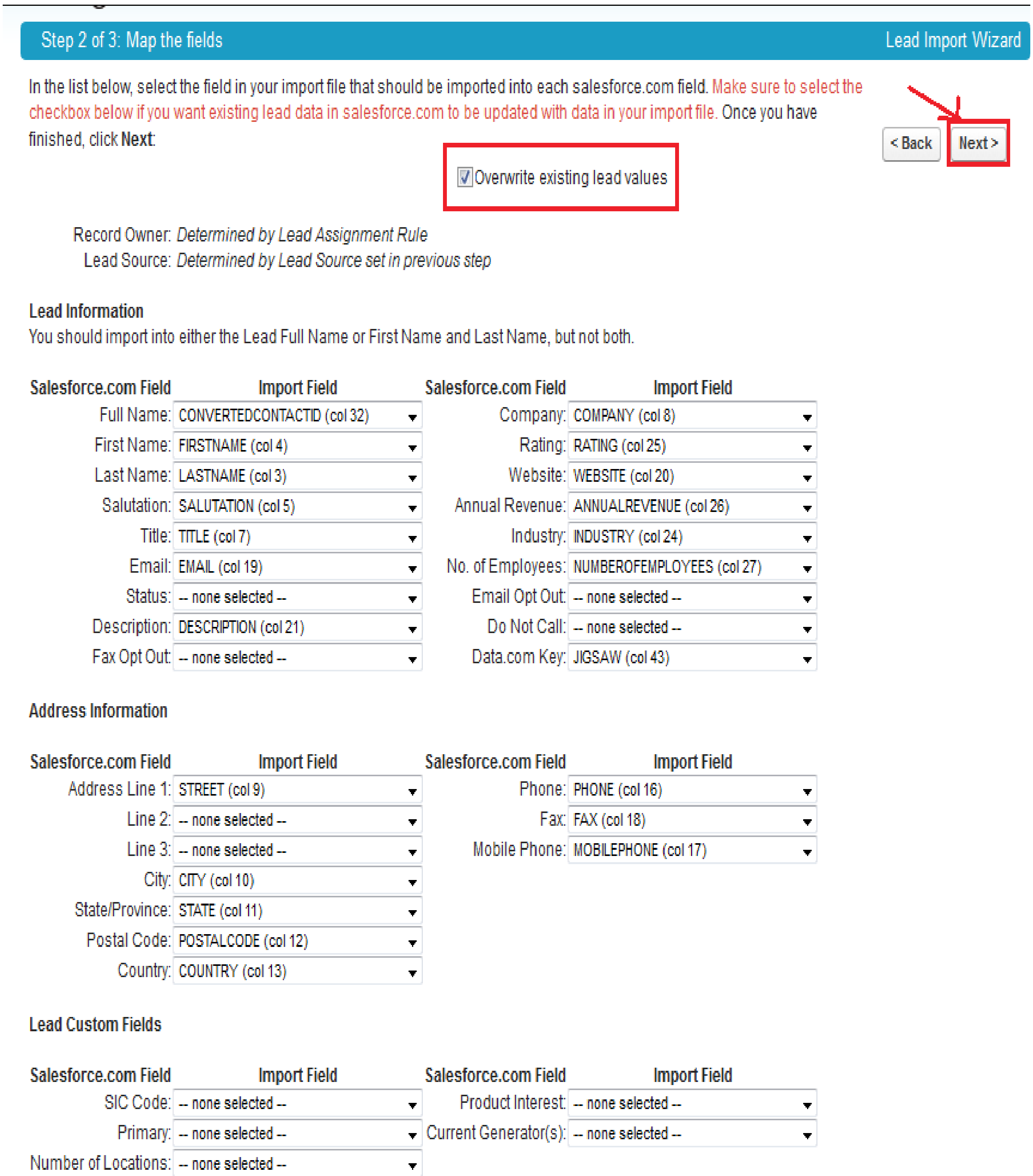
How to Import Lead :
Setup > **Data Management** > **Import Leads** then click on **Start The import Wizard !**



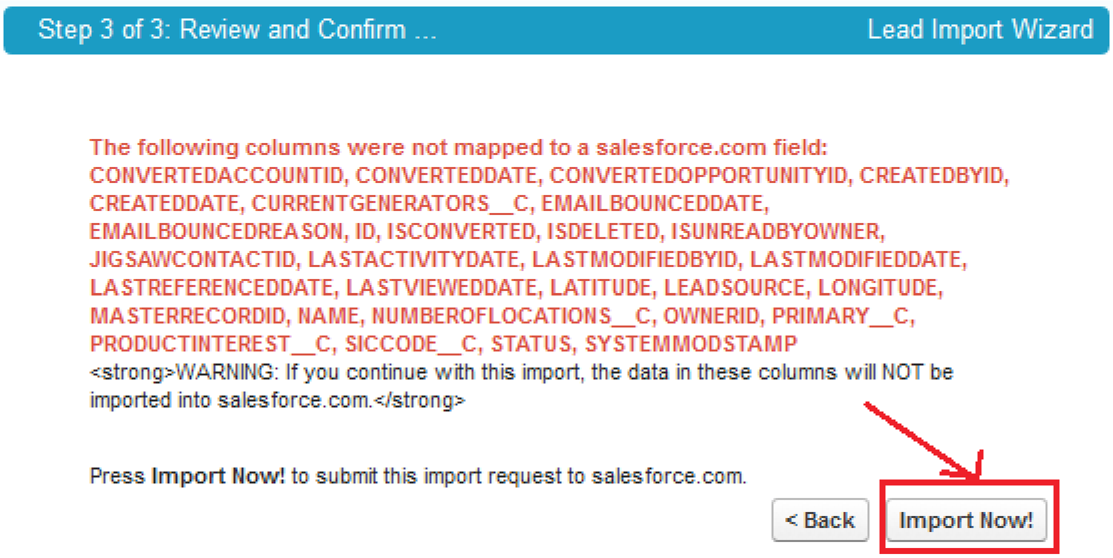
Step 1 :-


Step 1 of 3: Upload the File
Lead Import Wizard
Most applications (including Goldmine, Palm Desktop, Microsoft Excel, Microsoft Access and FileMaker) will allow you to export leads data into a comma delimited text file (.csv), which you can import into salesforce.com. The exact steps for each application are different but should follow the same general approach:
Next >
1. Launch the application and view the lead list
2. Select the Save As... or Export... menu option, usually from the File menu
3. Follow the directions to save the file in a Comma Separated Values or CSV format
4. You can optionally read the CSV File into Excel to edit the data or filter the leads to import
5 Now choose the file to import into salesforce.com:
Note: it may take a few minutes to upload your file, depending on the file size and your connection speed
Browse... lead export.csv
6. Assign all new leads to this lead source: Web
7. Assign all leads using this assignment rule Standard
8. Use assignment rule settings to send notification emails to record owners
9. The selection below is set to a default value. Override this default value only if your import file has a different character encoding. ISO-8859-1 (General US & Western European, ISO-LATIN-1)
10. Matching Type
None
Salesforce.com ID
Name
Email
11. Trigger workflow rules for new and updated leads
Next >

Step 2 :-


Step 2 of 3: Map the fields
Lead Import Wizard
In the list below, select the field in your import file that should be imported into each salesforce.com field. Make sure to select the checkbox below if you want existing lead data in salesforce.com to be updated with data in your import file. Once you have finished, click Next:
< Back
Next >
Overwrite existing lead values
Record Owner: Determined by Lead Assignment Rule
Lead Source: Determined by Lead Source set in previous step
Lead Information
You should import into either the Lead Full Name or First Name and Last Name, but not both.
Salesforce.com Field
Import Field
Salesforce.com Field
Import Field
Full Name: CONVERTEDCONTACTID (col 32)
Company: COMPANY (col 8)
First Name: FIRSTNAME (col 4)
Rating: RATING (col 25)
Last Name: LASTNAME (col 3)
Website: WEBSITE (col 20)
Salutation: SALUTATION (col 5)
Annual Revenue: ANNUALREVENUE (col 26)
Title: TITLE (col 7)
Industry: INDUSTRY (col 24)
Email: EMAIL (col 19)
No. of Employees: NUMBEROFEMPLOYEES (col 27)
Status: -- none selected --
Email Opt Out: -- none selected --
Description: DESCRIPTION (col 21)
Do Not Call: -- none selected --
Fax Opt Out: -- none selected --
Data.com Key: JIGSAW (col 43)
Address Information
Salesforce.com Field
Import Field
Salesforce.com Field
Import Field
Address Line 1: STREET (col 9)
Phone: PHONE (col 16)
Line 2: -- none selected --
Fax: FAX (col 18)
Line 3: -- none selected --
Mobile Phone: MOBILEPHONE (col 17)
City: CITY (col 10)
State/Province: STATE (col 11)
Postal Code: POSTALCODE (col 12)
Country: COUNTRY (col 13)
Lead Custom Fields
Salesforce.com Field
Import Field
Salesforce.com Field
Import Field
SIC Code: -- none selected --
Product Interest: -- none selected --
Primary: -- none selected --
Current Generator(s): -- none selected --
Number of Locations: -- none selected --

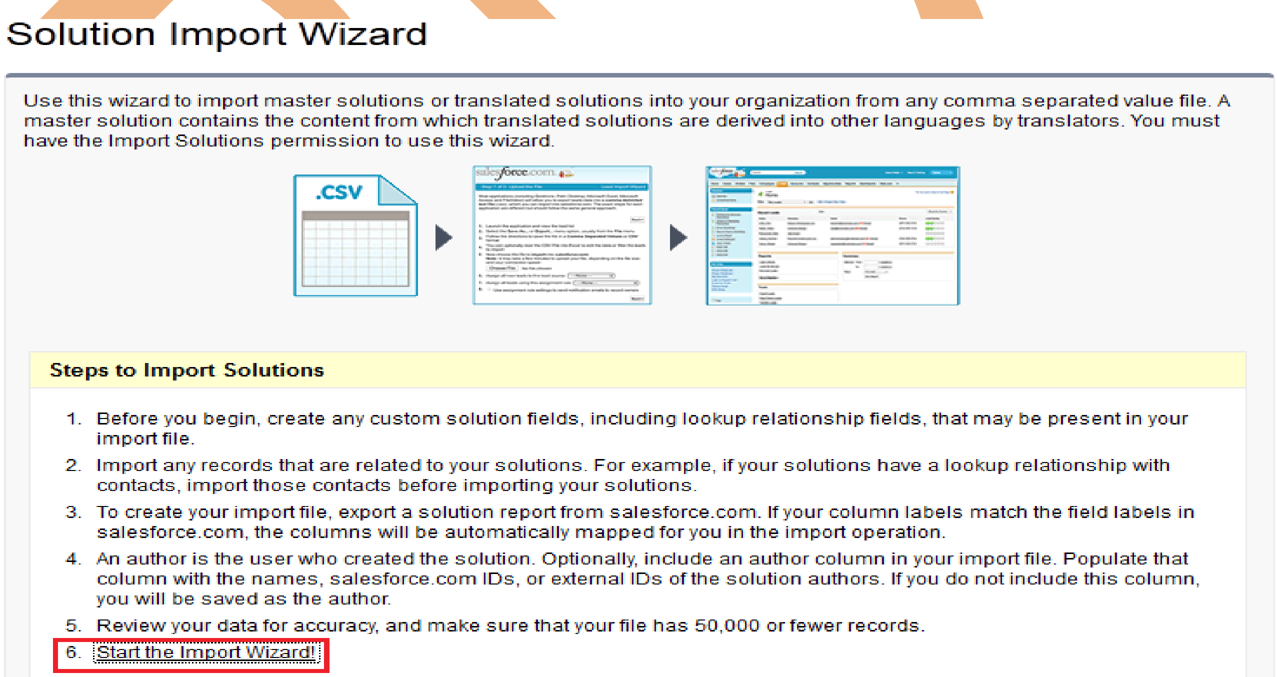
Step 3 :-



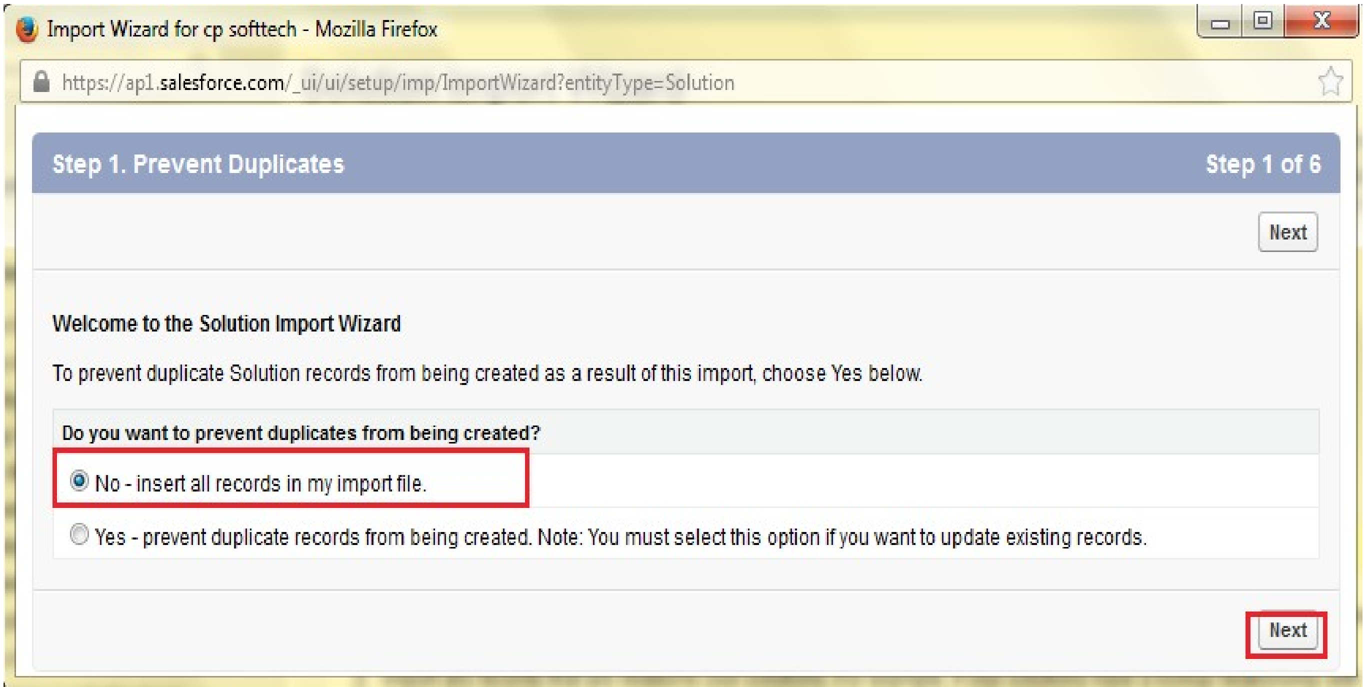
Click on **Import Now!** button then open new page click on **Finish** button.

Import Solutions

The import wizard for solutions allows you to prevent the creation of duplicate records by matching records according to one of the following fields: solution title, SalesForce ID, or external ID. In your import file, include a column for the field that you are using for record matching

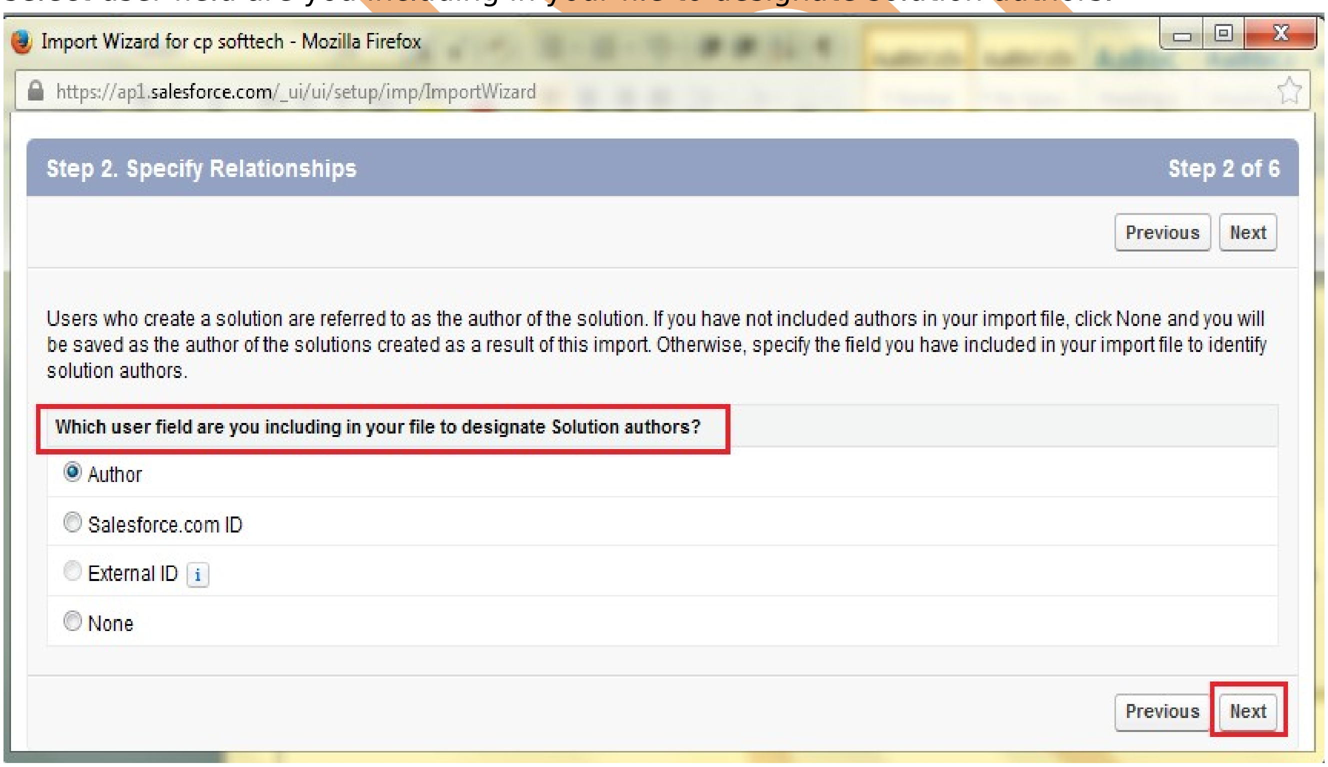


Step 1 :- checked **Radio** button No- insert all records in my import file.

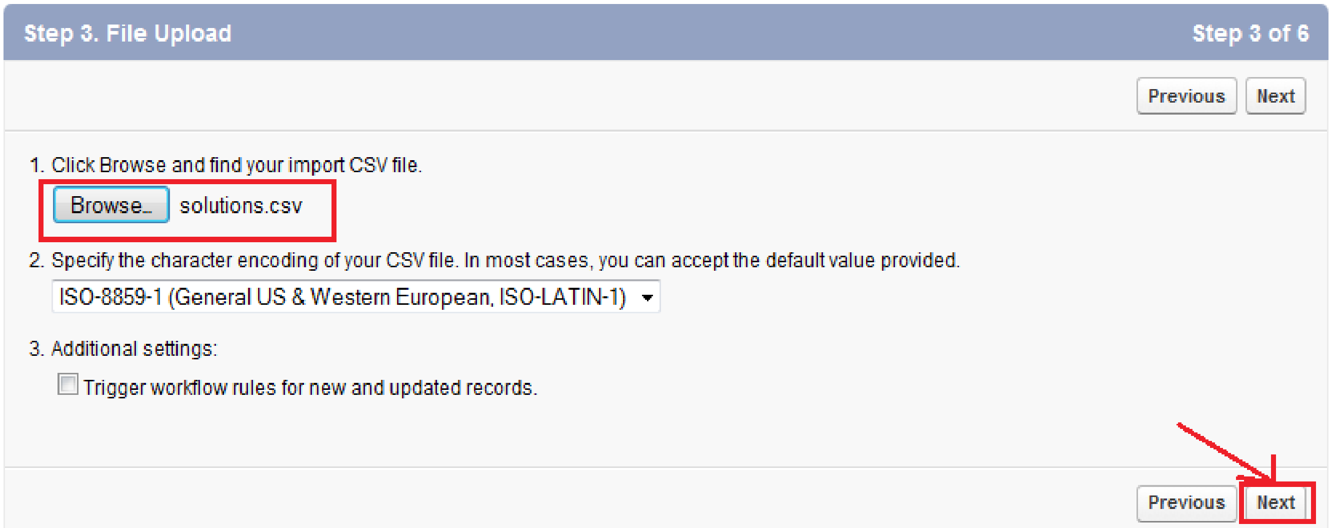


Step 4 :-

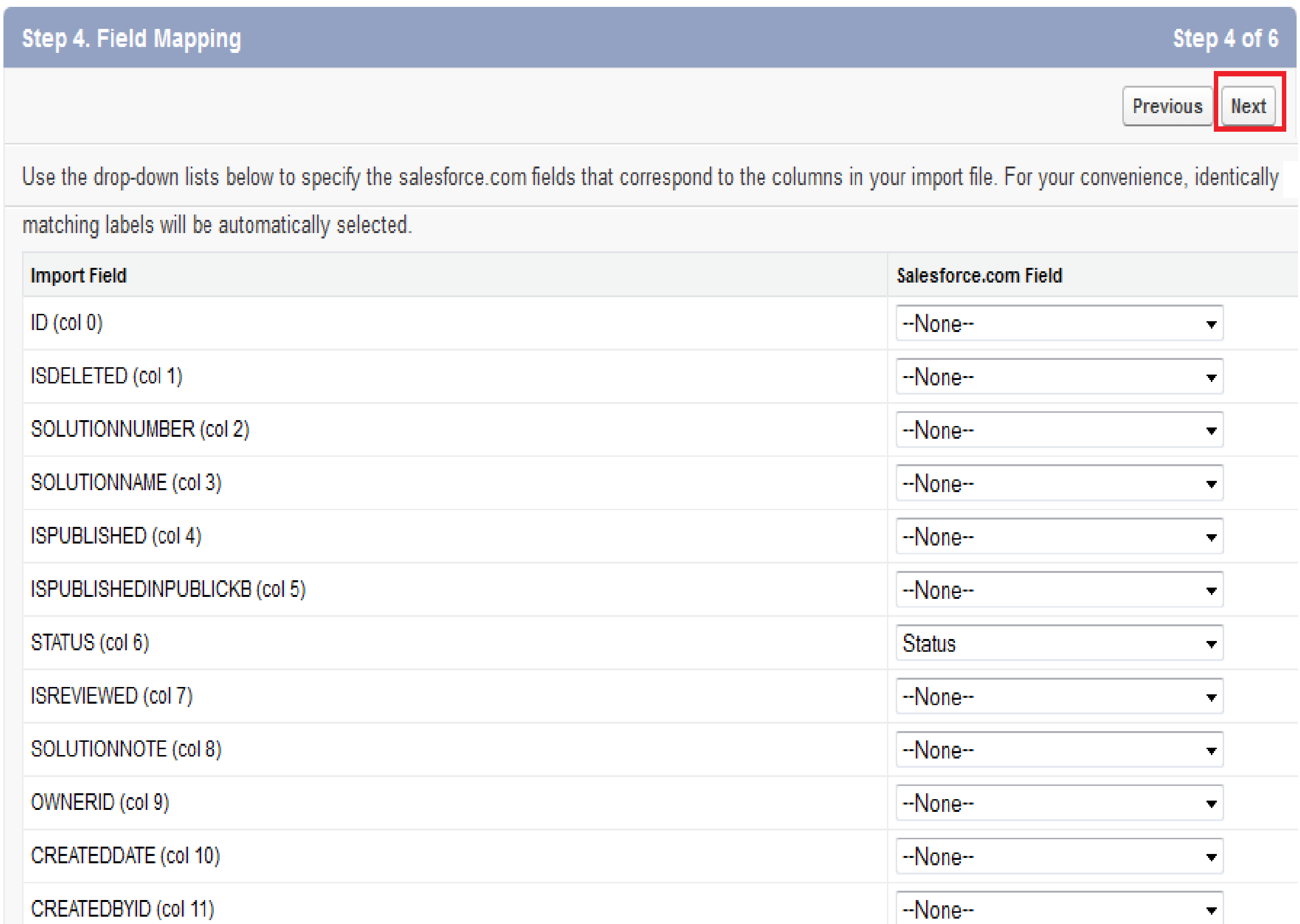
select user field are you including in your file to designate solution authors.



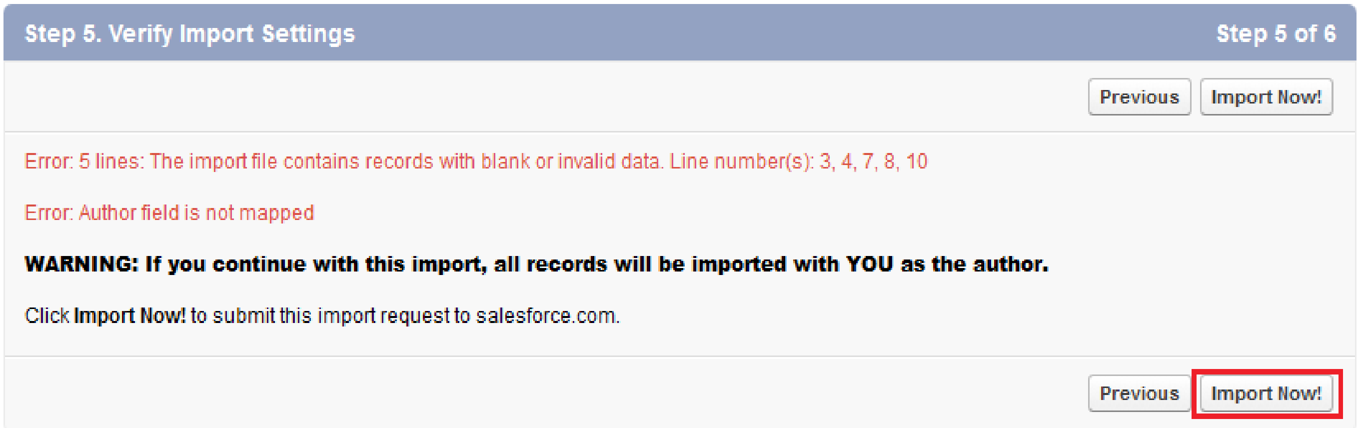
Step 3:-



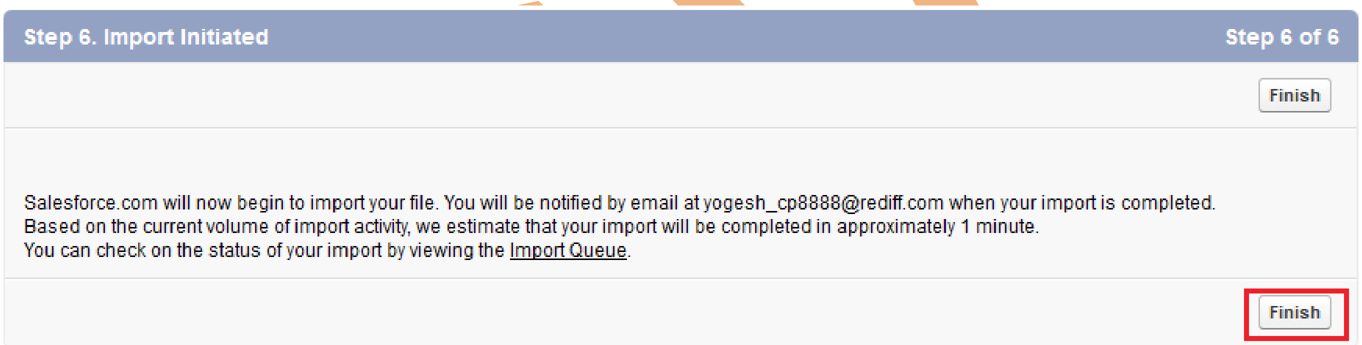
Step 4 :- if need to map field, you can do.



Step 5 :-

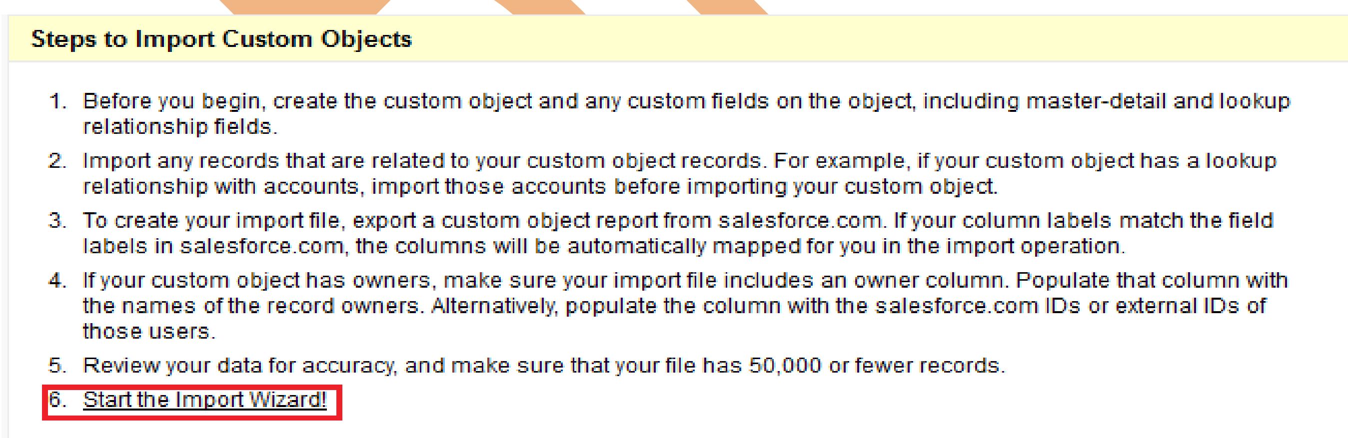


Step 6 :- click on **Finish** button.

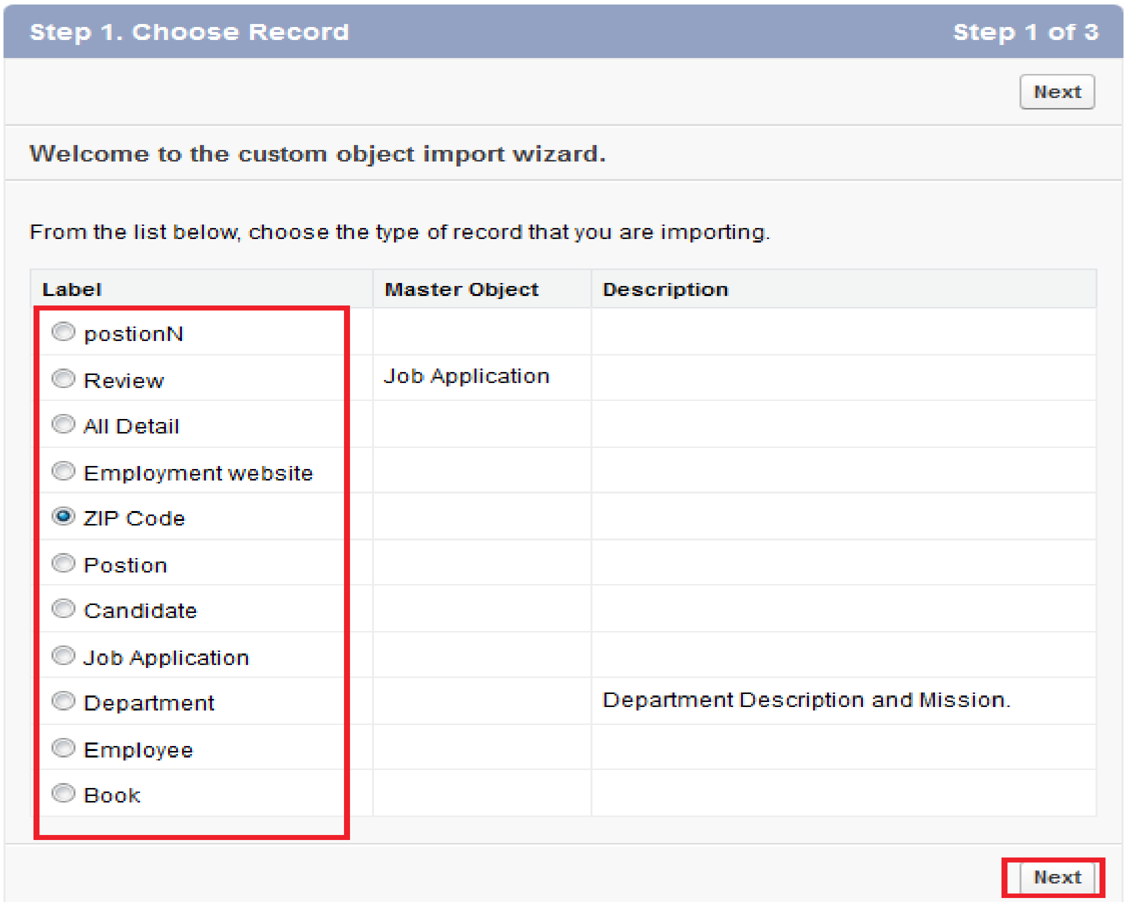


Import Custom Objects

Import wizard for custom objects allows you to prevent the creation of duplicate records by matching records according to one of the following fields: custom object name, SalesForce ID, or external ID. In your import file, include a column for the field that you are using for record matching.

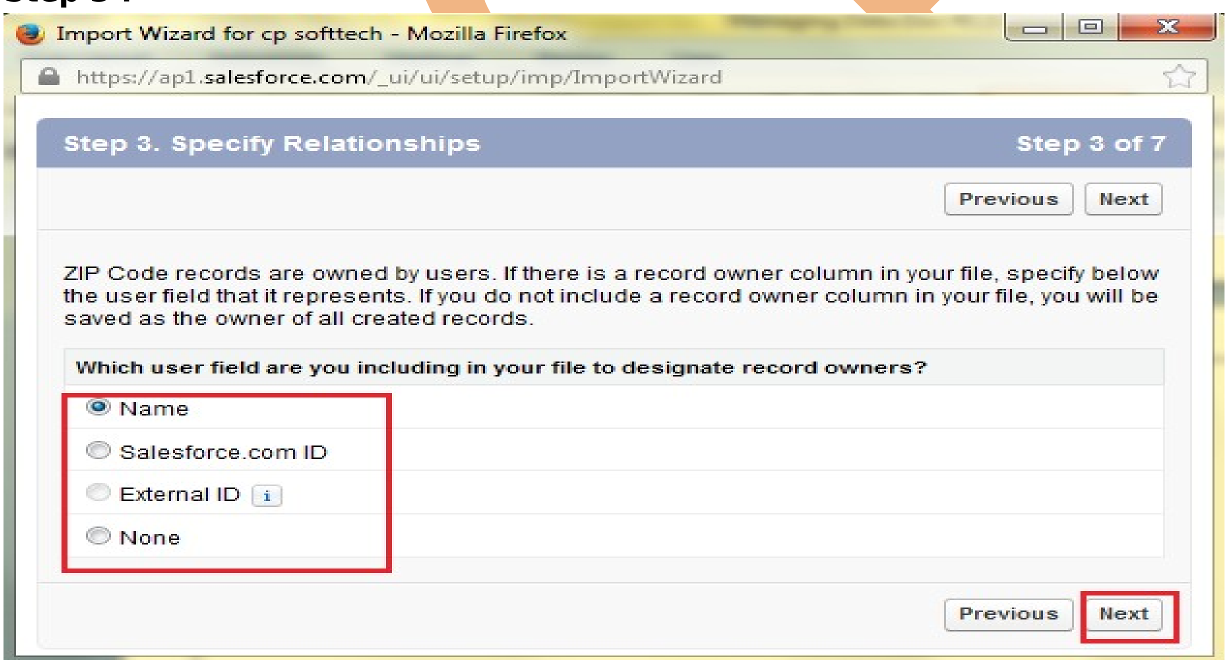


Step 1 :-
Select your custom object checked on radio button. then click on **Next** button.

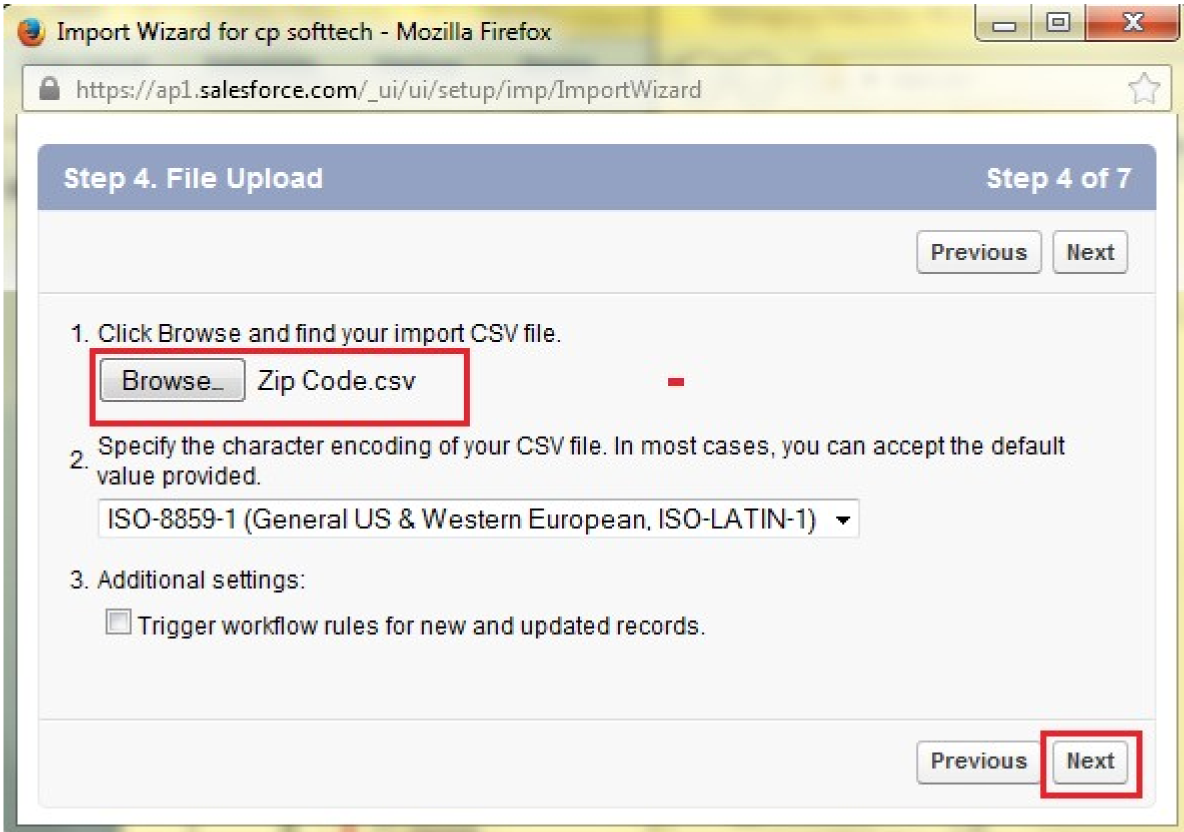


Step 2 :-

Step 3 :-

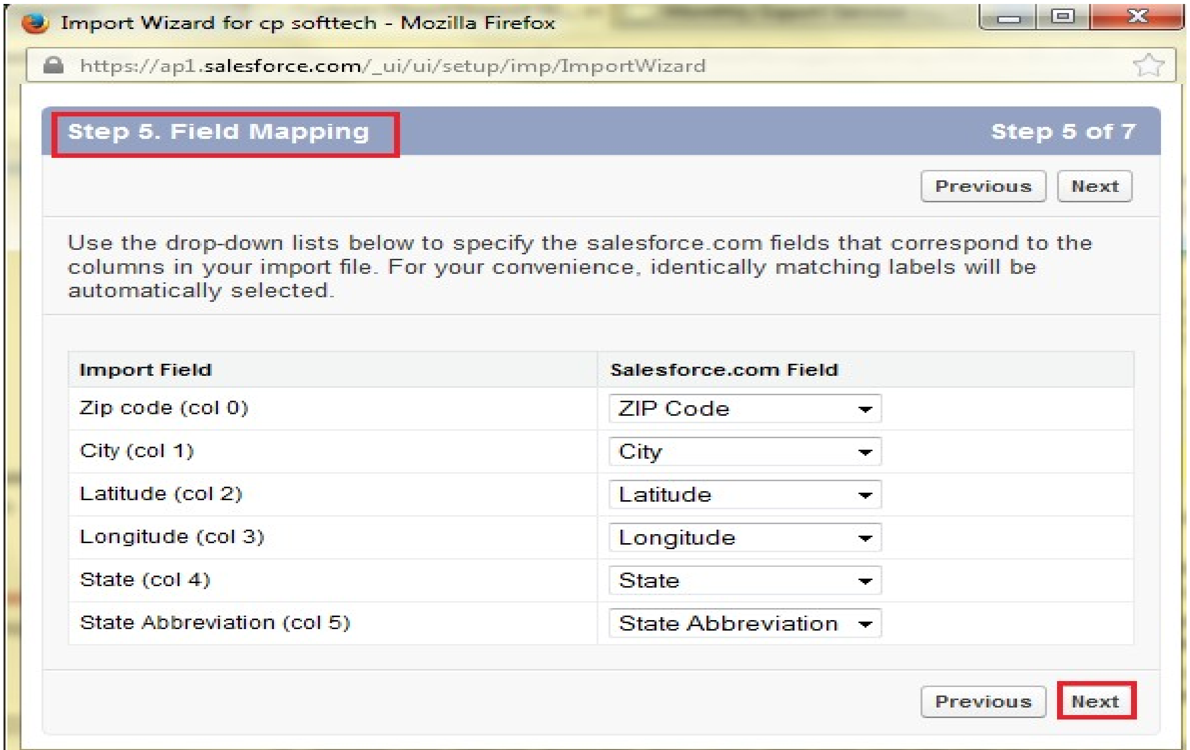


Step 4 :- Browse .CSV file and click on **Next** button.

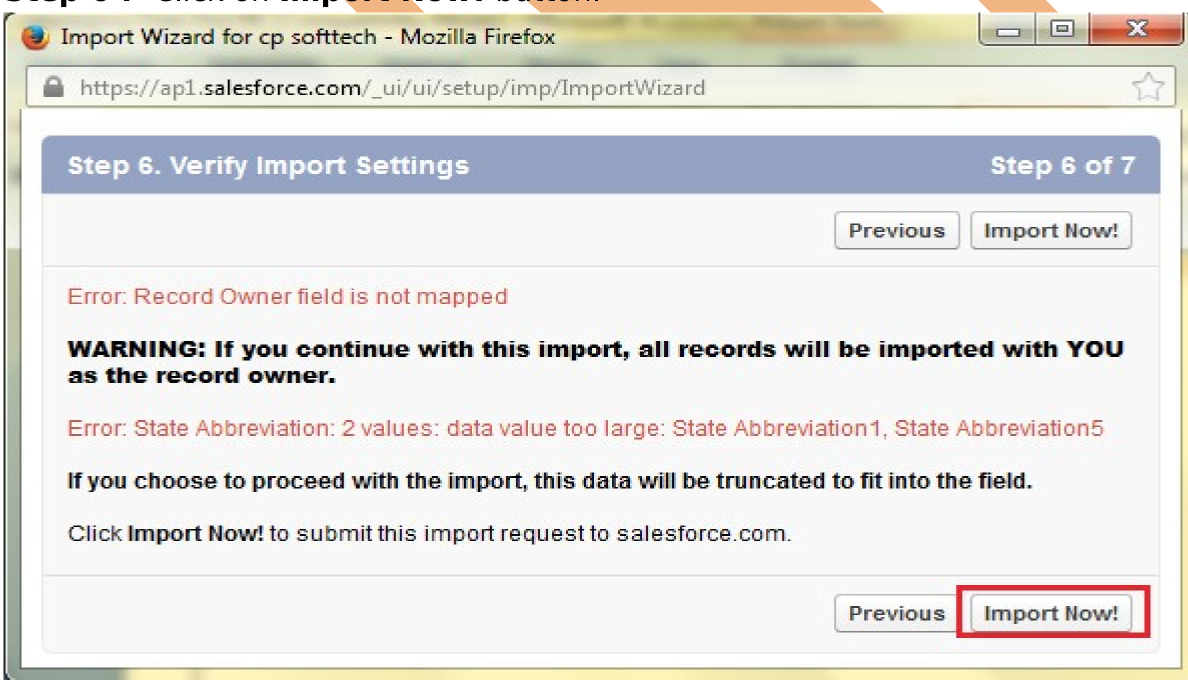


Step 5 :-

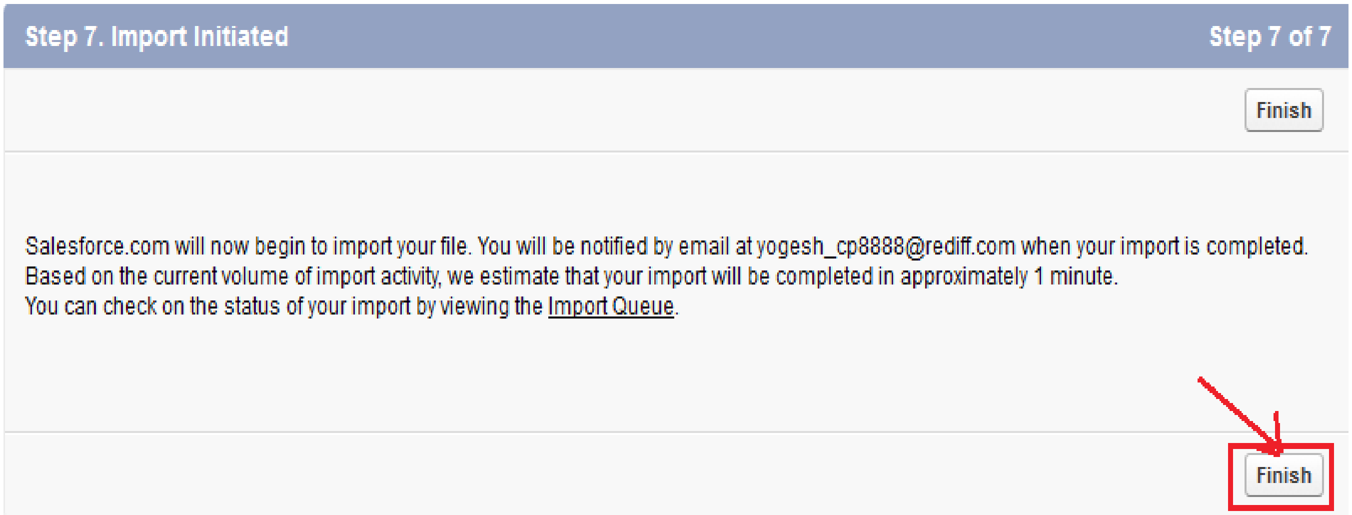
select field mapping and click on Next button.



Step 6 :- Click on **Import Now!** button.



Step 7 :- Click on Finish button.



Export Data

Data Export feature is available on SalesForce, In salesforce.com you can prepare a copy of all your data .
on this page you can start the export process manually or schedule it to run automatically.
when export is ready for download, you will receive an email containing a link that allows you to download the files
Export files are available on this page for 48 hours, after that they are deleted
it's available only .CSV format.

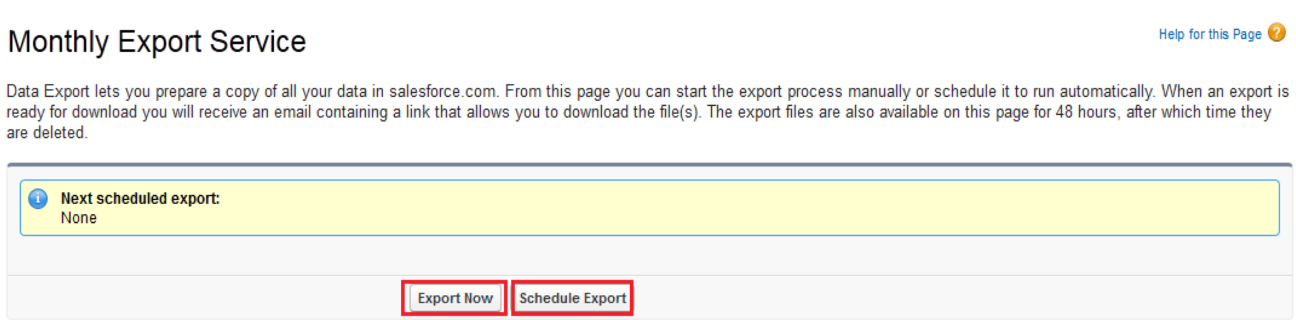
How to take Export data in SalesForce :

Click **Setup** -> **Data Management** -> **Data Export**

After click on **Data Export** you can see new page there is two option is available **Export Now** and **Schedule Export** you can see below.

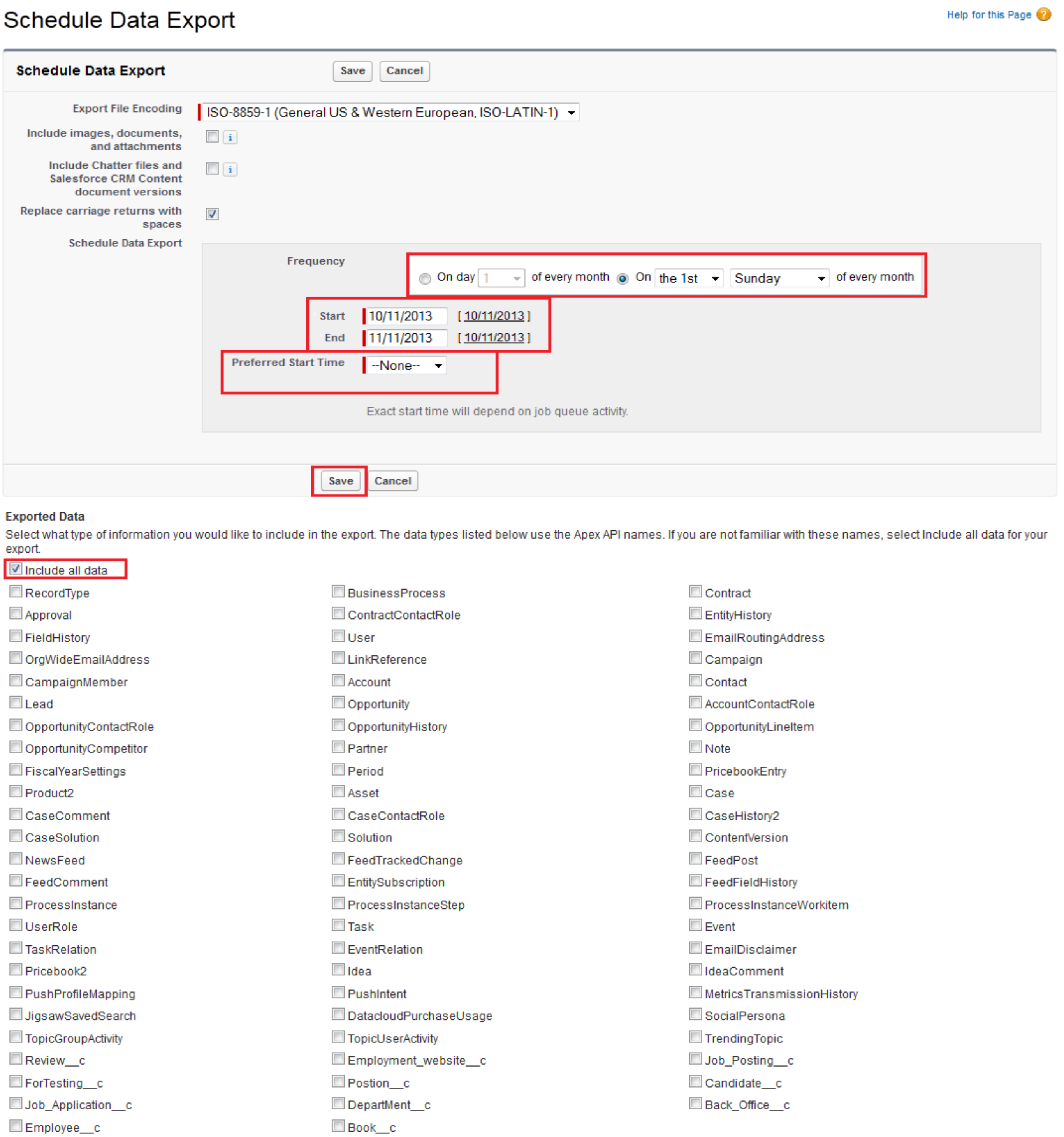
Export Now:

The Export Now option prepares your files for export immediately. This option is only available some time that store only last export record.
Click on **Export Now** button then you can seen new screen, you can see below

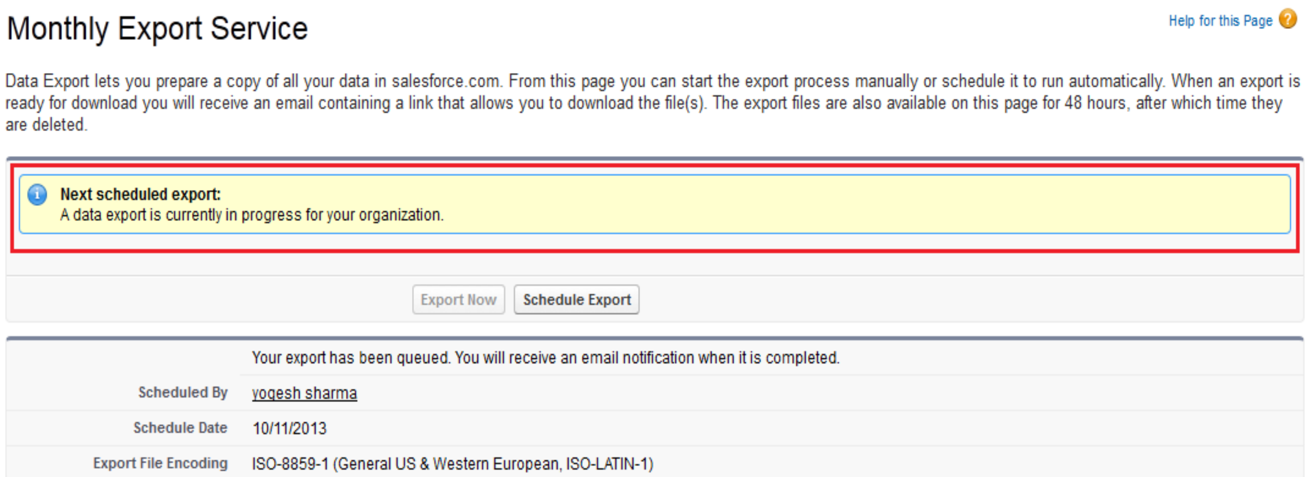


Step 1 :-

If you want to export all data checked the **Include all data** check box, and you want some limited data select you data by checked check box and click to Start Export button.

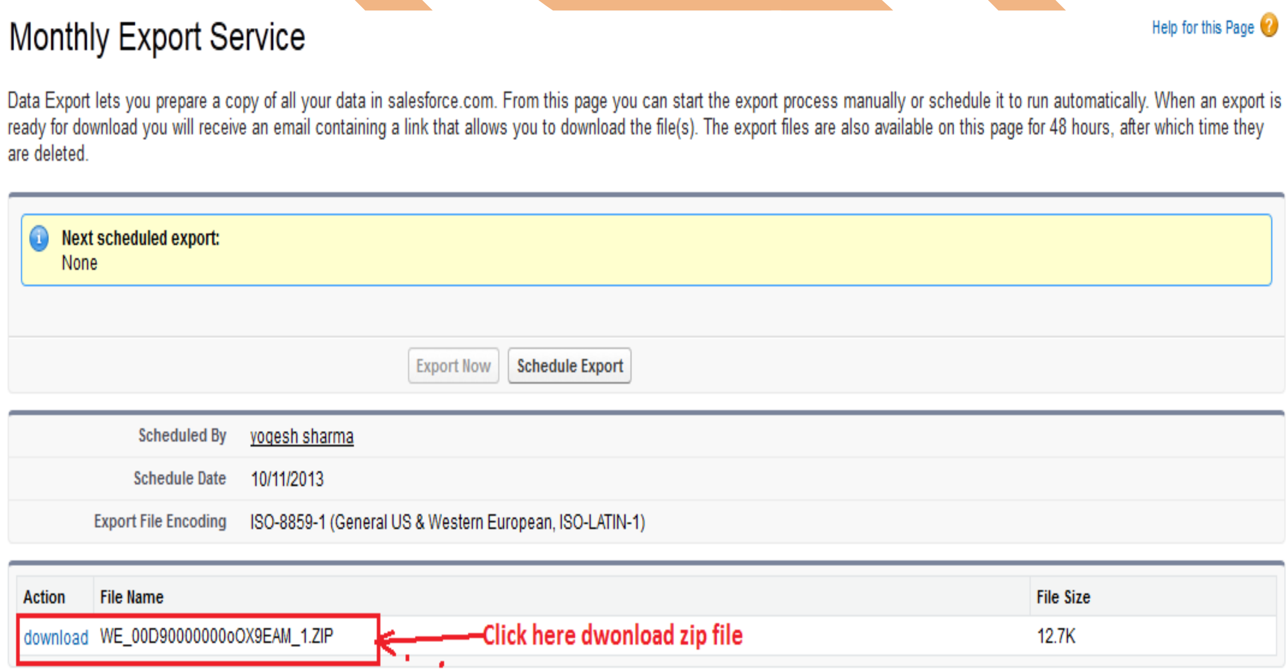


After click on Start Export few second take you got one new screen and send link you mail id you can see below. and all so check your mail id.



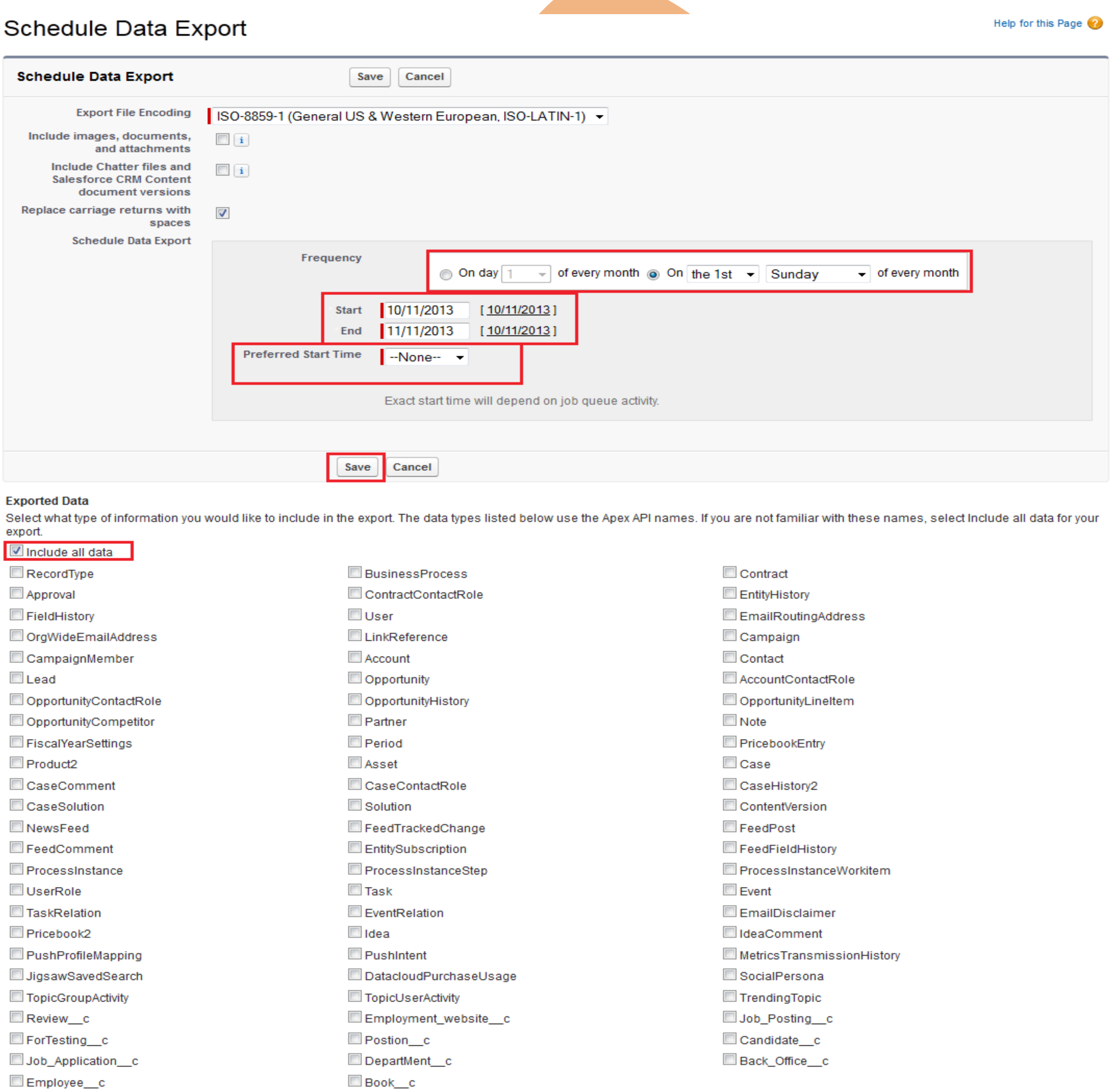
Step 3 :-

After that you can Refresh your page you can see that link available on page click to given below link and download export data. downloaded file is available in zip folder.



Schedule Export:

SalesForce provide to you Schedule Export option its allows you to schedule the export process for weekly or monthly intervals,
and you can Export by start date and end date.
You can schedule export data any day of month, any weak of month, and all you can choose Start date to End date for schedule export data.
After schedule you can click on Save button.



After click on Save button you can see one message in message some write **Next Schedule Export** you can see below. you get a remainder on this date every month.

Monthly 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:
11/11/2013 2:00 PM

Export Now | Schedule Export

Storage Usage

Storage usage show Your organization's storage usage data.

Storage Usage

Help for this Page

Your organization's storage usage is listed below.

Storage Type	Limit	Used	Percent Used
Data Storage	5.0 MB	791 KB	15%
File Storage	20.0 MB	44 KB	0%

Current Data Storage Usage

Record Type	Record Count	Storage	Percent
Notes	143	286 KB	36%
Contacts	37	74 KB	9%
Opportunities	35	70 KB	9%
Cases	28	56 KB	7%
Accounts	25	50 KB	6%

Current File Storage Usage

Record Type	Record Count	Storage	Percent
All Details	1	3 KB	6%
Photos	8	34 KB	78%
Documents	1	7 KB	16%

Top Users by Data Storage Usage

User	Storage	Percent
yogesh sharma	784 KB	99%
Vikram yadav	2 KB	0%

Top Users by File Storage Usage

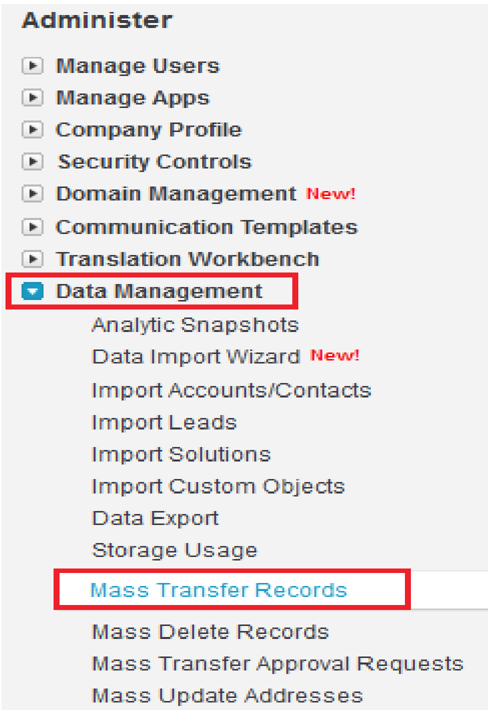
User	Storage	Percent
yogesh sharma	25 KB	56%
Chatter Expert	13 KB	29%

Mass Transfer Record

SalesForce provide to Mass Transfer tool, Use this tool to transfer multiple accounts, service contracts, leads and custom objects from one user to another.

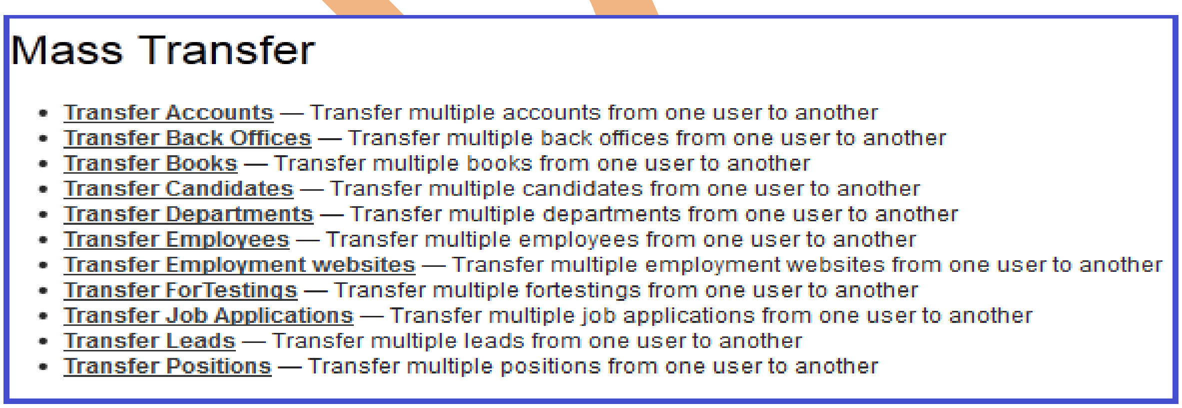
How to go Mass Transfer Records :

click **Setup** -> **Data Management** -> **Mass Transfer Records**



Step 1 :-

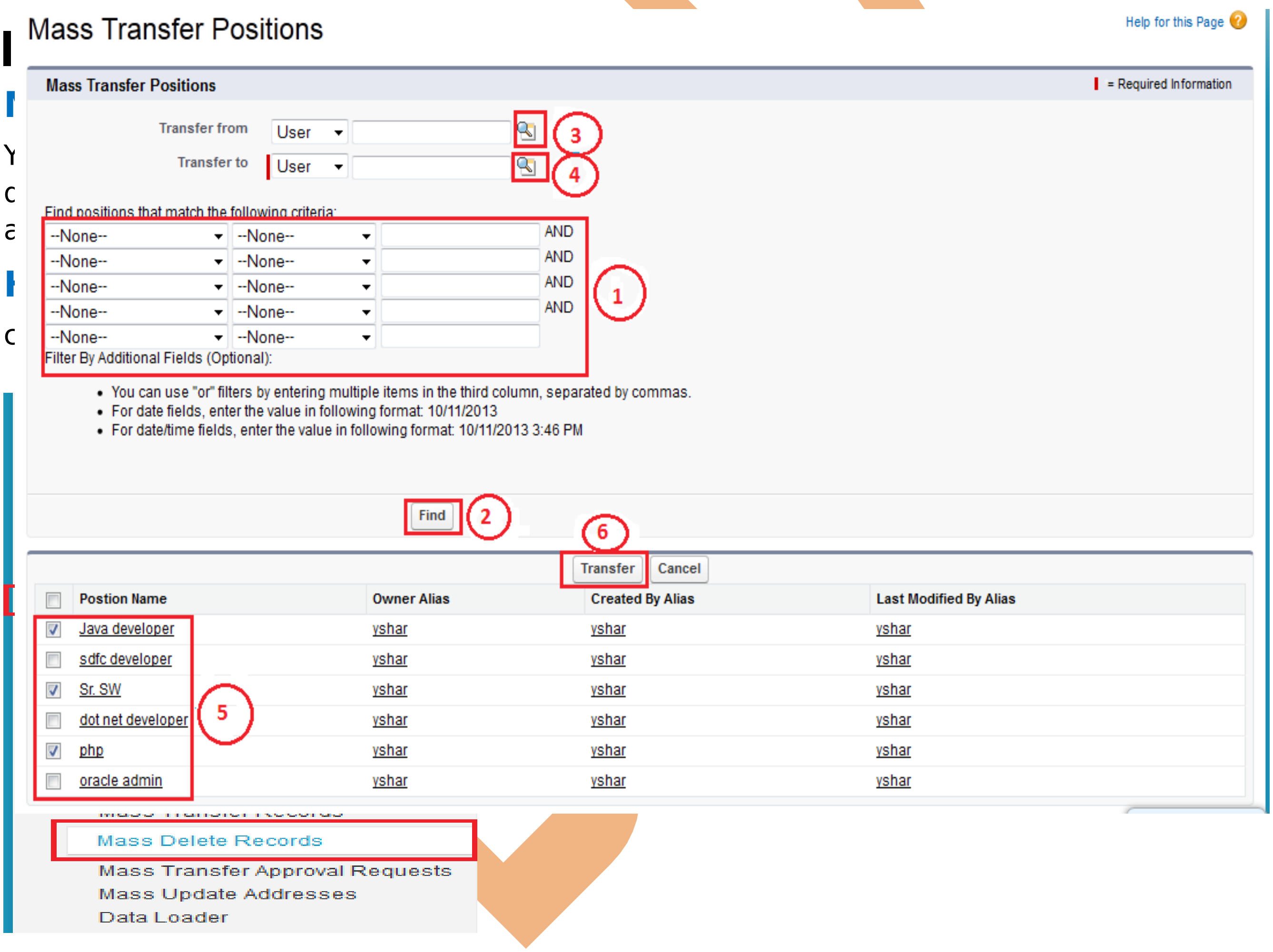
Click on Mass Transfer Records you can see mass Transfer right side on web page. you can see below.



Select any one option click to any link.(Ex :- Transfer Positions) then open new web page you can see below.

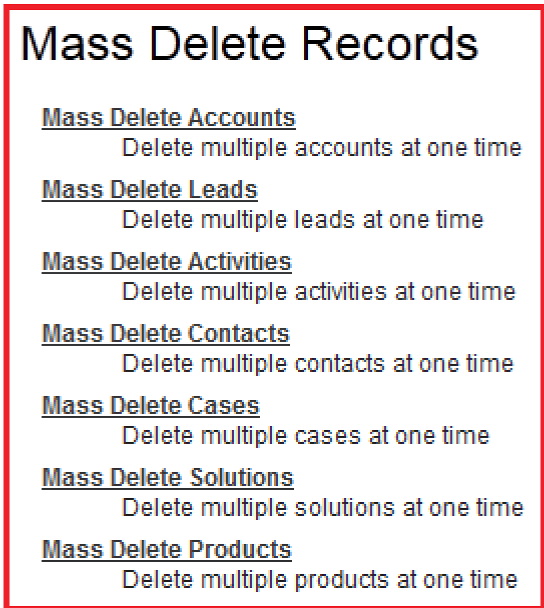
Step 2 :-

2(1) :- Find positions that match the following criteria. Select value by using dropdown if not select any field you can directly find.
2(2) :- Click to Find button for find the values. If value is available show below on find button, if not value not available there nothing print.
2(3) :- Click on Lookup button and select Transfer From and select name on given list.
2(4) :- Click Lookup button and select Transfer To select name on given list.
2(5) :- Check box checked which want to transfer
2(6) :- Click to Transfer button.



Step 1 :-

Click on **Mass Delete Records** link then you can seen new web page. there is Mass Delete Record list show you can see below. Click to any one object for delete record.(Ex :- Mass Delete Contacts.)

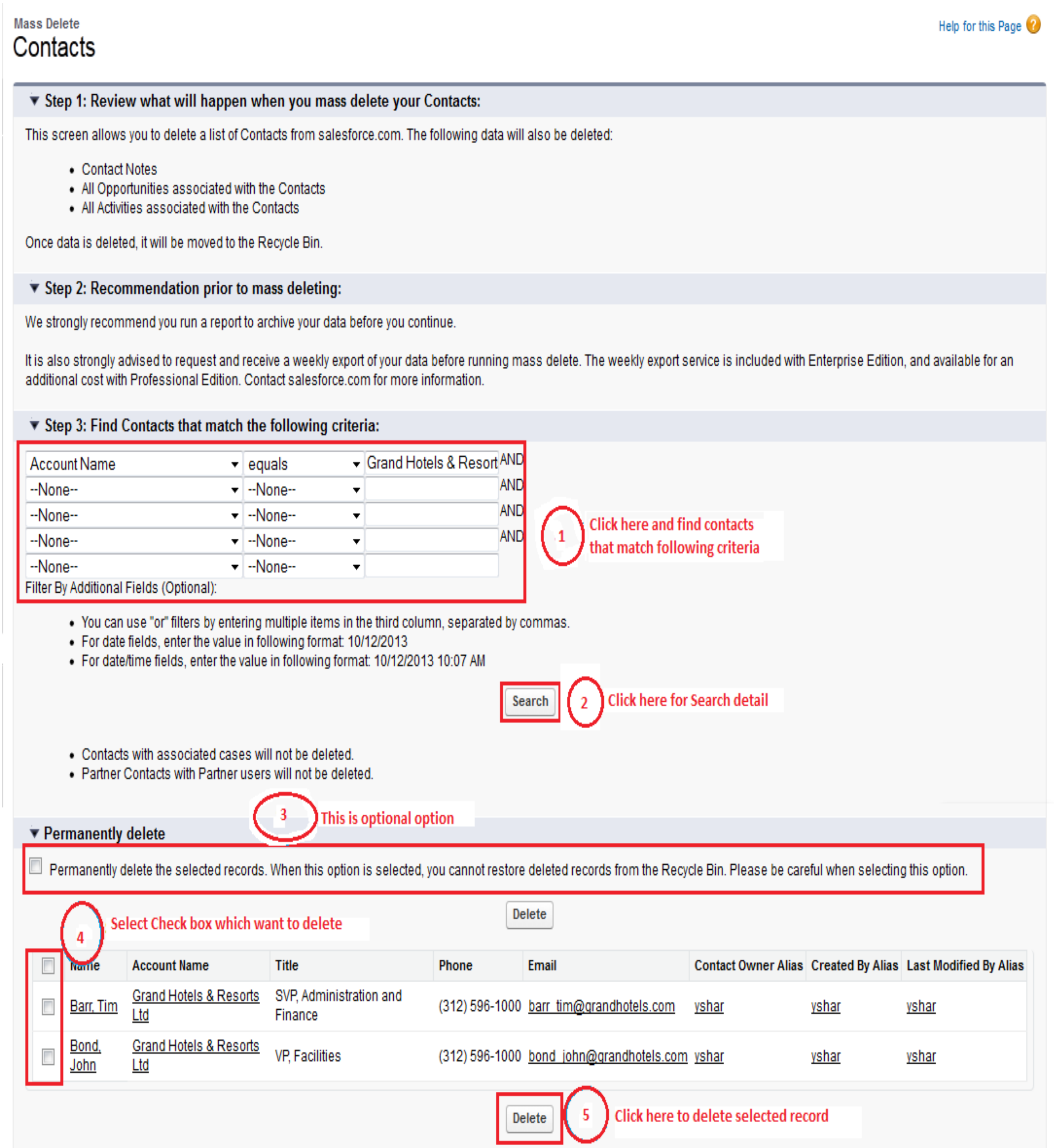


These are all Standard Objects

Step 2 :-

2[1] :- Find Contacts that match the following criteria. this is not a mandatory field you can without select any field search directly.
2[2] :- Click to search records.
2[3] :- If want to delete permanently check this check box, else unchecked this check box.
2[4] :- Click to here to checked check box's which want to delete.

2[5] :- Click to Delete button for delete records.

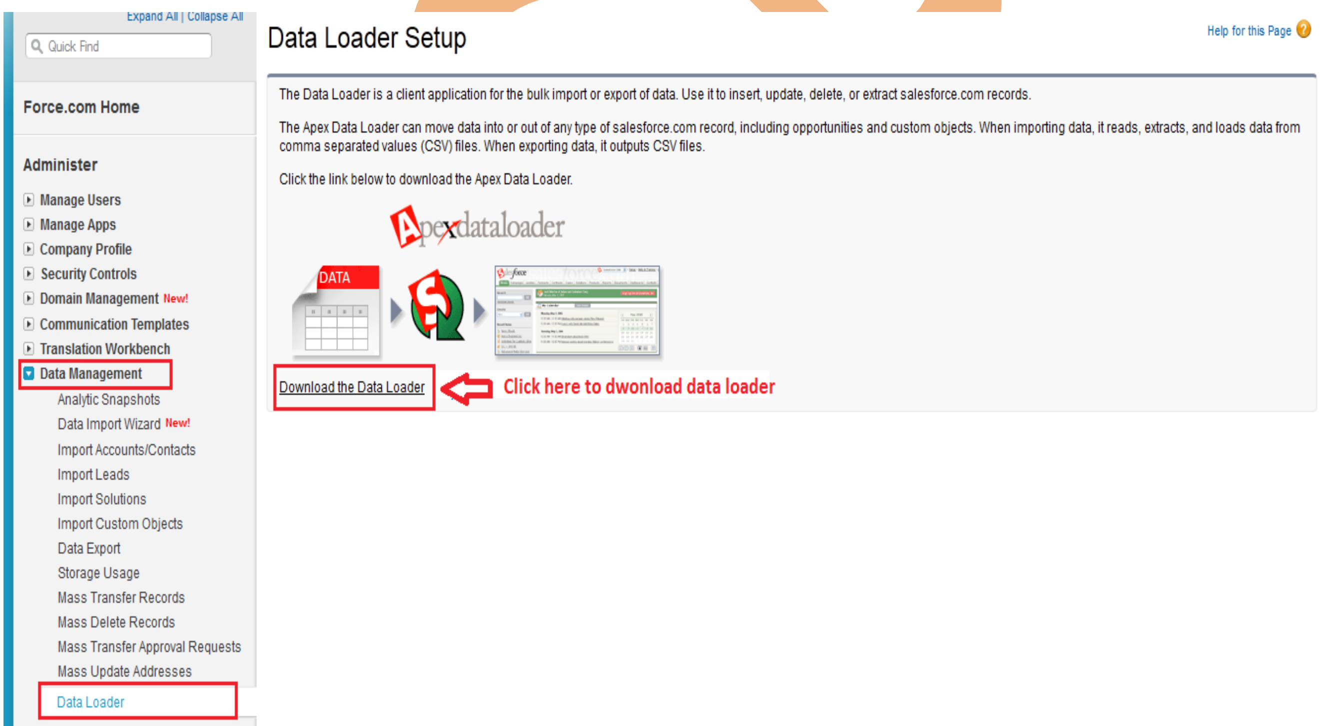


Data Loader in SalesForce.com

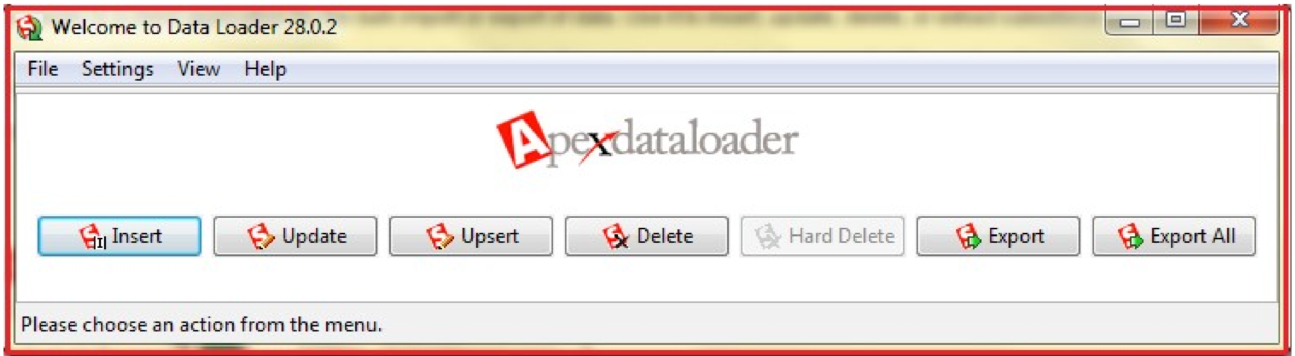
SalesForce provide to you client application it is data loader for work the bulk import or export of data.
Use it to Insert, update, Upsert, Delete, Export or Extract All salesforce.com records.

How to download Data Loader Exe file from Slesforce.com :

Click to **Setup** -> **Data Management** ->**Data loader**
Then you can see link for download **Data Loader** Exe.

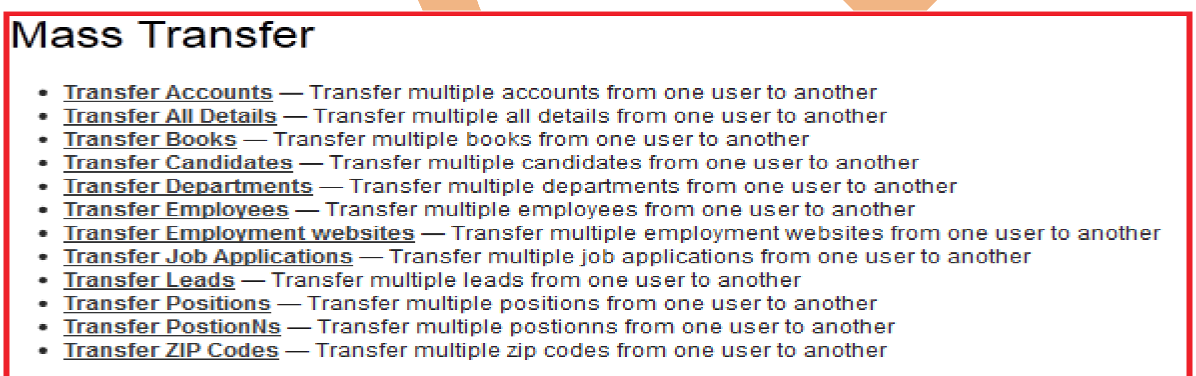


After download Data Loader Install this on your machine. Then click to Data Loader icon, after that open one window you can see below.



Mass Transfer Records

Using Mass Transfer Records you can transfer Custom record or Standard recorder Transfer one user to another user. Select any user on click link .

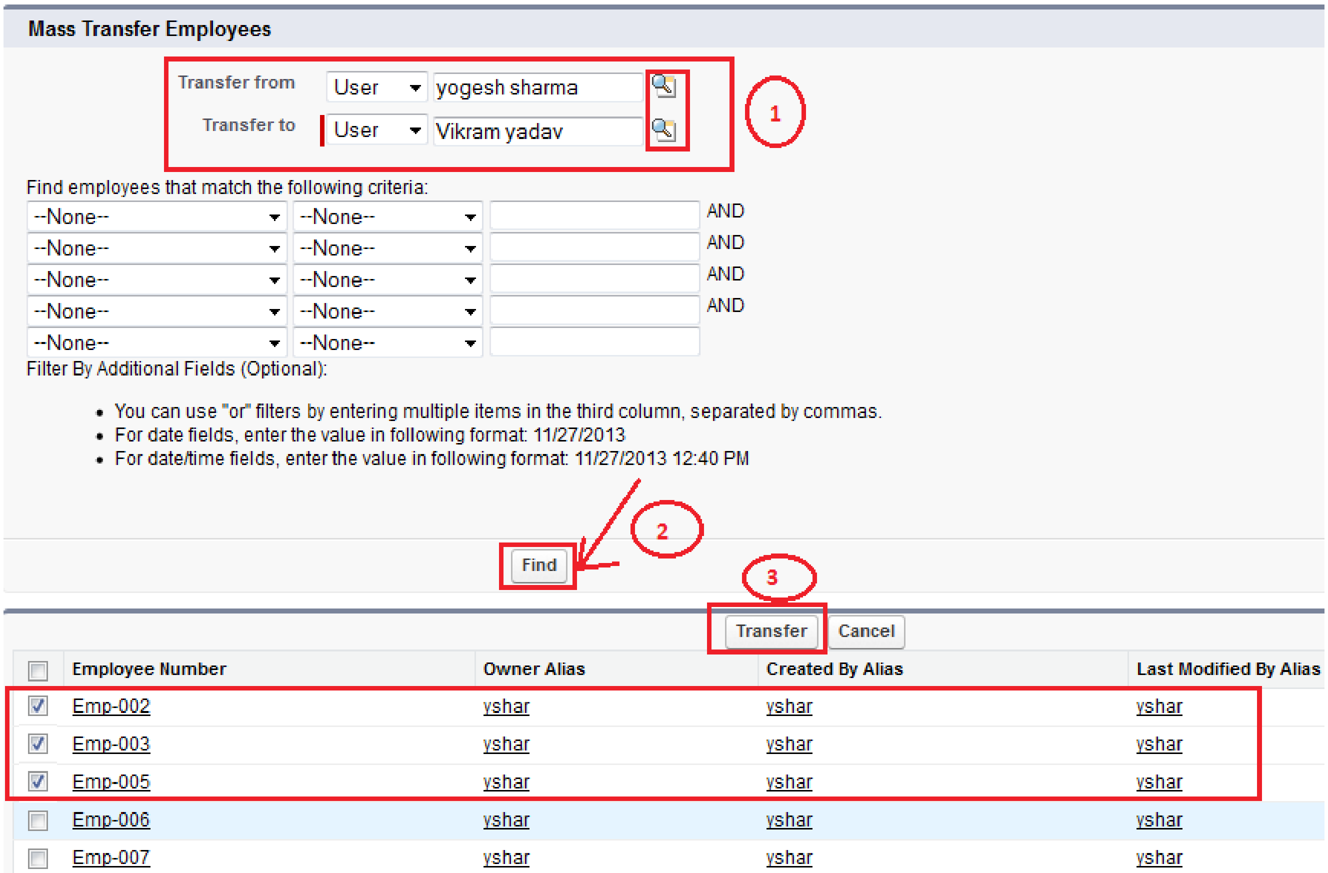


Mass Transfer

- Transfer Accounts — Transfer multiple accounts from one user to another
- Transfer All Details — Transfer multiple all details from one user to another
- Transfer Books — Transfer multiple books from one user to another
- Transfer Candidates — Transfer multiple candidates from one user to another
- Transfer Departments — Transfer multiple departments from one user to another
- Transfer Employees — Transfer multiple employees from one user to another
- Transfer Employment websites — Transfer multiple employment websites from one user to another
- Transfer Job Applications — Transfer multiple job applications from one user to another
- Transfer Leads — Transfer multiple leads from one user to another
- Transfer Positions — Transfer multiple positions from one user to another
- Transfer PostionNs — Transfer multiple postionns from one user to another
- Transfer ZIP Codes — Transfer multiple zip codes from one user to another

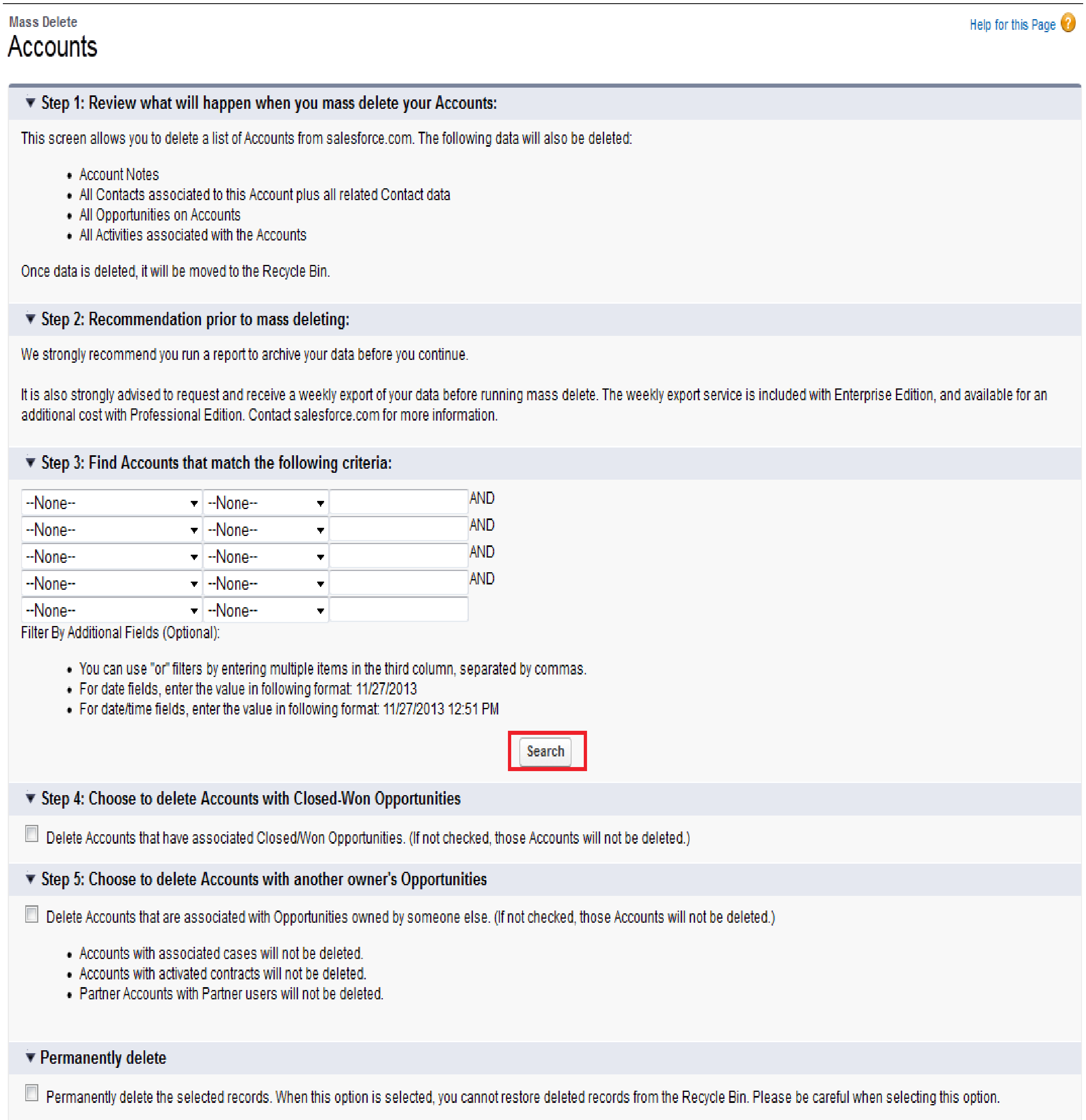
Step 1 :-

Mass Transfer Employees

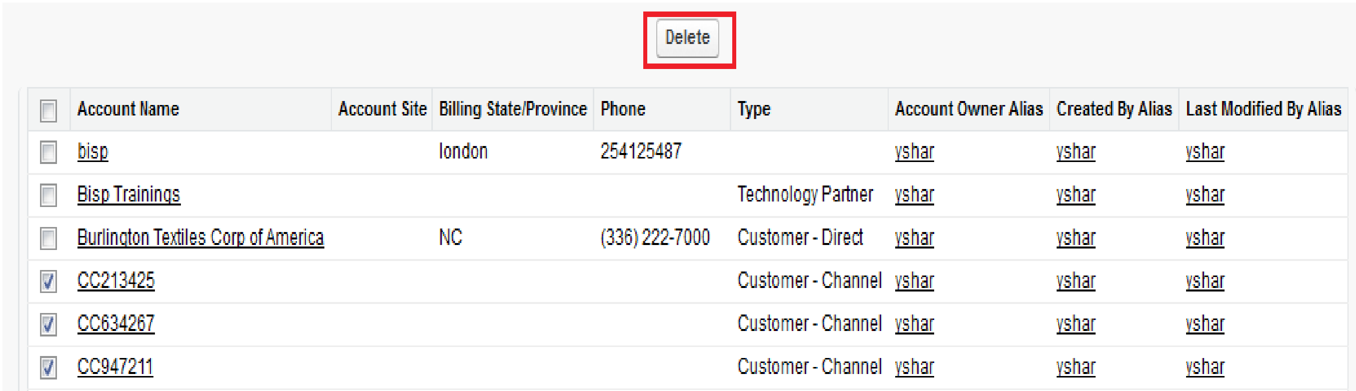


Mass Delete Records

You can delete multiple contacts, leads, cases, solutions, accounts, products or activities at one time. by using mass delete records you can delete Standard record . Before you use mass delete, we strongly suggest you run a report to archive your information.



click on Search button then you can see search result checked delete field's. you can see below.
Then you can click on **Delete** button.

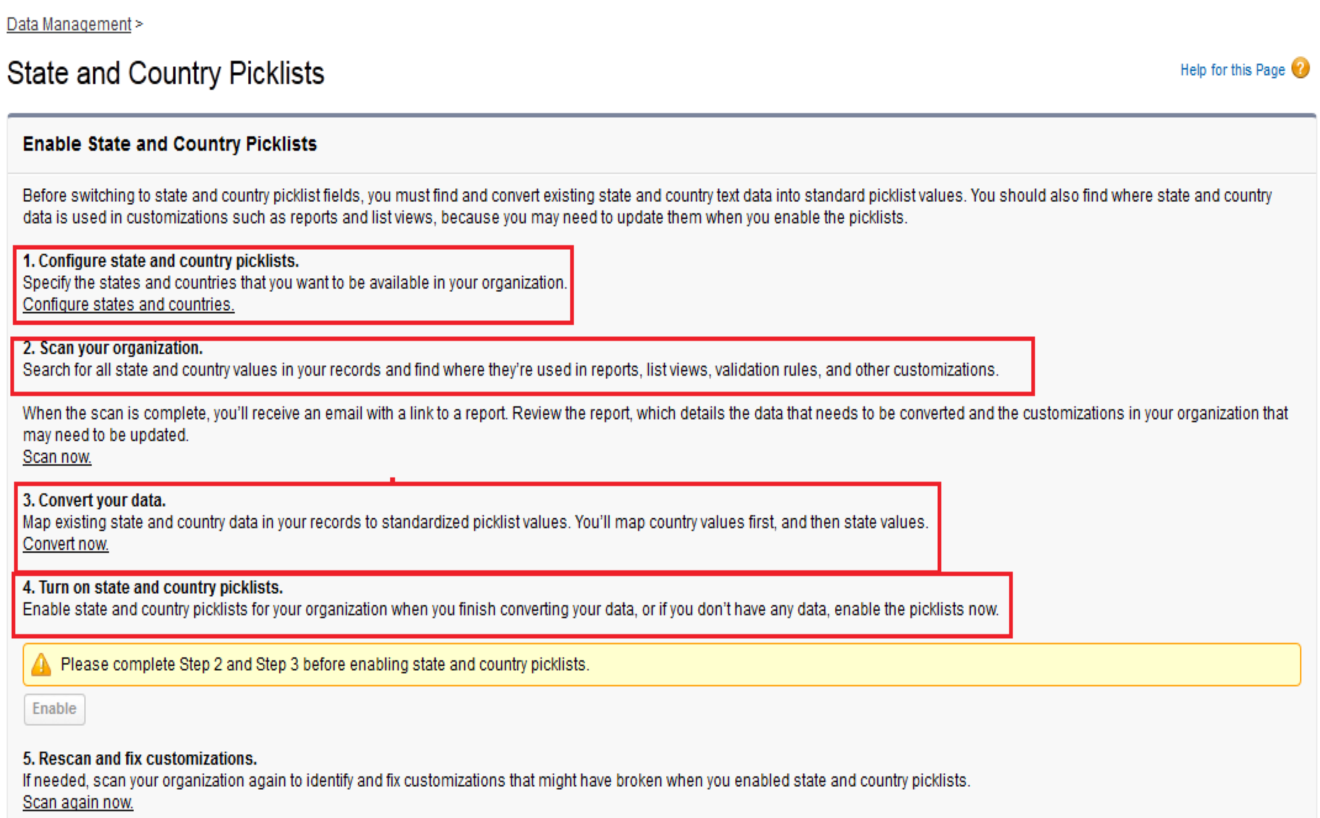


Delete

	Account Name	Account Site	Billing State/Province	Phone	Type	Account Owner Alias	Created By Alias	Last Modified By Alias
☐	bisp		london	254125487		yshar	yshar	yshar
☐	Bisp Trainings				Technology Partner	yshar	yshar	yshar
☐	Burlington Textiles Corp of America		NC	(336) 222-7000	Customer - Direct	yshar	yshar	yshar
☑	CC213425				Customer - Channel	yshar	yshar	yshar
☑	CC634267				Customer - Channel	yshar	yshar	yshar
☑	CC947211				Customer - Channel	yshar	yshar	yshar

State and Country Picklists

State and country picklists allow users to select states and countries from predefined, standardized lists, instead of entering state and country data into text fields. State and country picklists allow for faster and easier data entry and help to ensure cleaner data that can be leveraged for other uses—in reports and dashboards.



You can use the state and country picklists in most places that state and country fields are available in SalesForce.com :

- Record edit and detail pages.
- List views, reports, and dashboards.
- Filters, functions, rules, and assignments.

API - Based Tools

SOAP API :

Use SOAP API bindings if you are using a strongly typed language like Java that generates Web service client code. SalesForce provides programmatic access to your organization's information using simple, powerful, and secure application programming interfaces. To use this document, you should have a basic familiarity with software development, Web services, and the SalesForce user interface.

Call	Description
`create()`	Adds one or more new records to your organization's data.
`delete()`	Deletes one or more records from your organization's data.
`describeGlobal()`	Lists the available Tooling API objects and their metadata.
`describeSObjects()`	Describes metadata (field list and object properties) for the specified object or array of objects. Call `describeGlobal()` to retrieve a list of all Tooling API objects for your organization, then iterate through the list and use `describeSObjects()` to obtain metadata about individual objects.
`executeanonymous(string apexcode)`	Executes the specified block of Apex anonymously and returns the result.
`query()`	Executes a query against a Tooling API object and returns data that matches the specified criteria.
`retrieve()`	Retrieves one or more records based on the specified IDs.
`update()`	Updates one or more existing records in your organization's data.
`upsert()`	Creates new records and updates existing records; uses a custom field to determine the presence of existing records.

REST API :

Use REST API bindings if you are using a language that is not strongly typed, like JavaScript. The REST Tooling API can be used just like the Force.com REST API.

URI	Supported Methods	Description
`/completions?type=`	GET	Retrieves available code completions of the referenced type. Currently only supports Apex system method symbols (`type=`**`apex`**). Available from API version 28.0 or later.
`/executeAnonymous/?anonymousBody=<url encoded body>`	GET	Executes Apex code anonymously. Available from API version 29.0 or later.
`/query/?q=`	GET	Executes a query against a Tooling API object and returns data that matches the specified criteria. If the query results are too large, the response contains the first batch of results and a query identifier. The identifier can be used in an additional request to retrieve the next batch.
`/sobjects/`	GET	Lists the available Tooling API objects and their metadata.
`/sobjects/`***`SObjectName`***`/`	GET POST	Describes the individual metadata for the specified object or creates a new record for a given object. For example, use the GET method to retrieve the metadata for the ApexExecutionOverlayAction object. Use the POST method to create a new ApexExecutionOverlayAction object.
`/sobjects/`***`SObjectName`***`/describe/`	GET	Completely describes the individual metadata at all levels for the specified object. For example, use this resource to retrieve the fields, URLs, and child relationships for a Tooling API object.
`/sobjects/`***`SObjectName`***`/`***`id`***`/`	GET PATCH DELETE	Accesses records based on the specified object ID. Use the GET method to retrieve records or fields, the DELETE method to delete records, and the PATCH method to update records.
`/sobjects/`**`ApexLog/`*****`id`***`/Body/`	GET	Retrieves a raw debug log by ID. Available from API version 28.0 or later.