Getting Started with SalesForce CRM

Getting Started with SALESFORCE Part Lab IX

BISP

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 import, export data, schedule export, mass transfer, mass delete, data loaded, security token Join our professional training program and learn from experts.

History:

Version	Description Change	Author	Publish Date
0.1	Initial Draft	Chandra Prakash Sharma	10th Jan 2013
0.1	Review#1	Amit Sharma	12th Jan 2013

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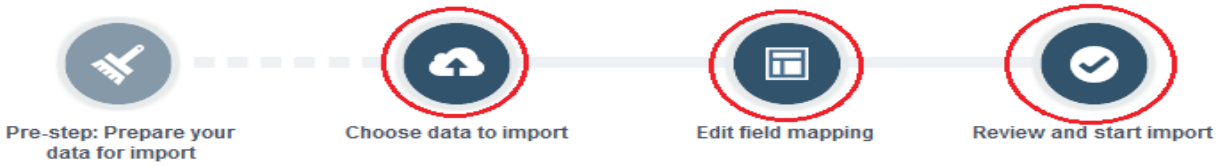
Data Import Wizard in SalesForce

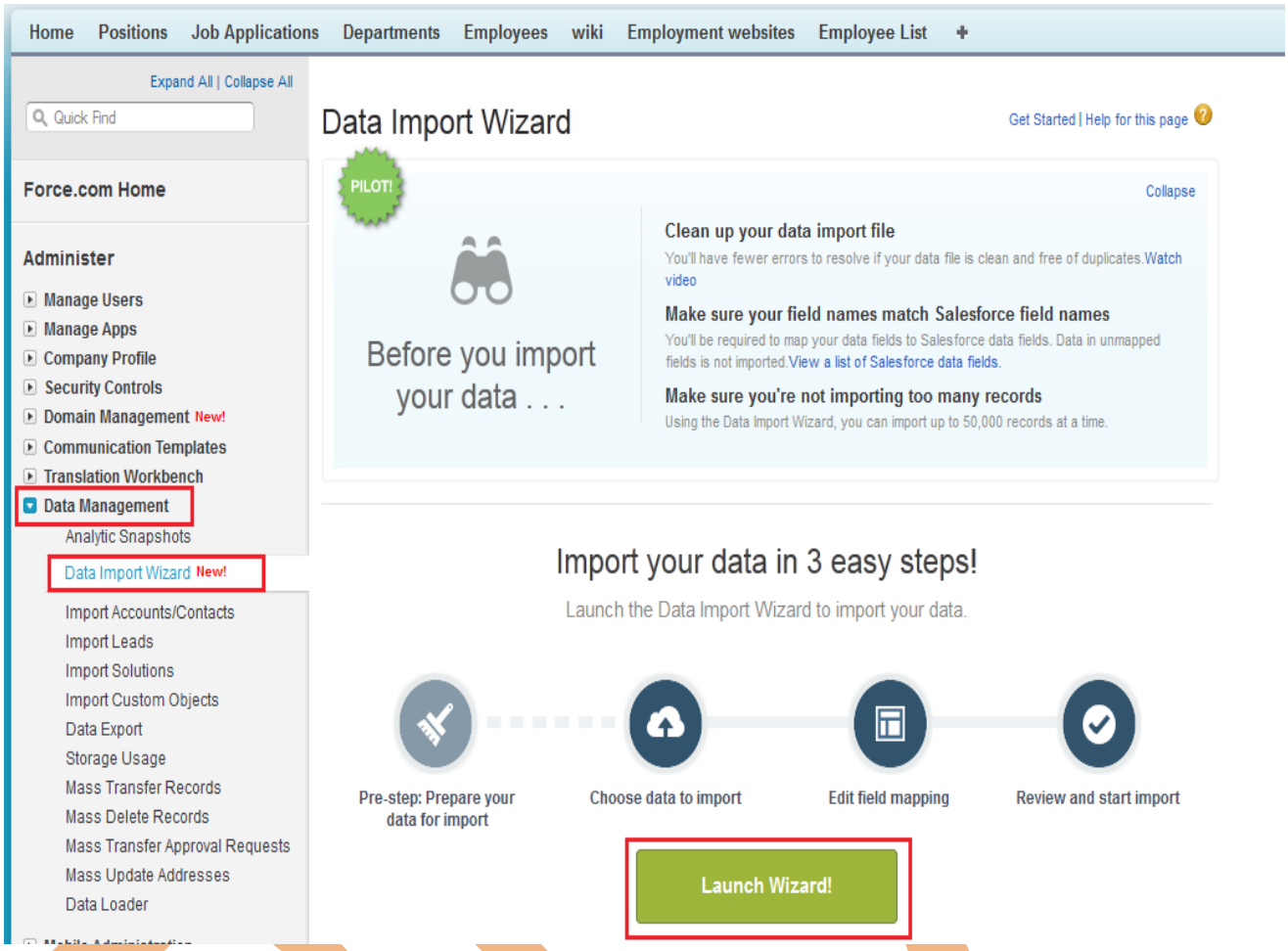
The Data Import Wizard provides a GUI Interface, Easily import data on SalesForce. It is a web based tools.
Data Import Wizard provides a unified interface that's you import a number of standard SalesForce objects, solutions, leads, contacts, and including accounts. The wizard also lets you import custom 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

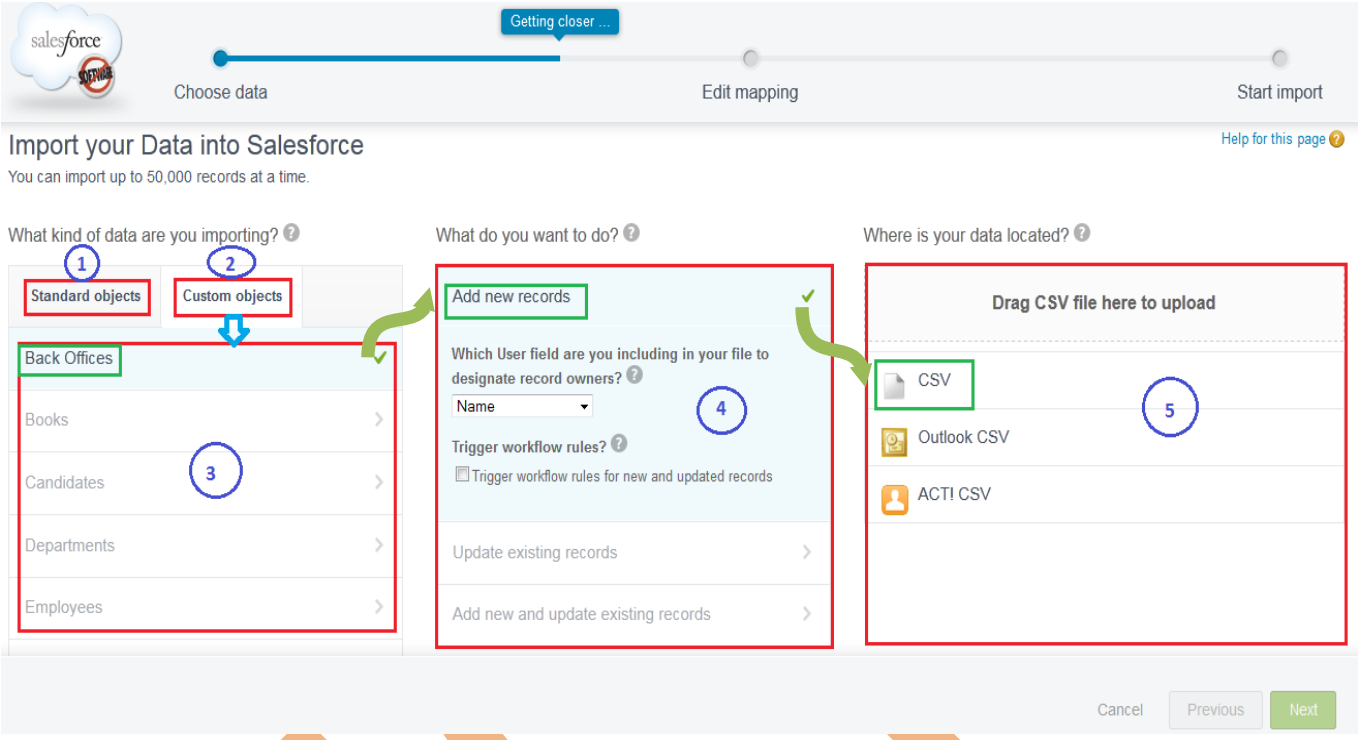
3. choose custom tab anyone.

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

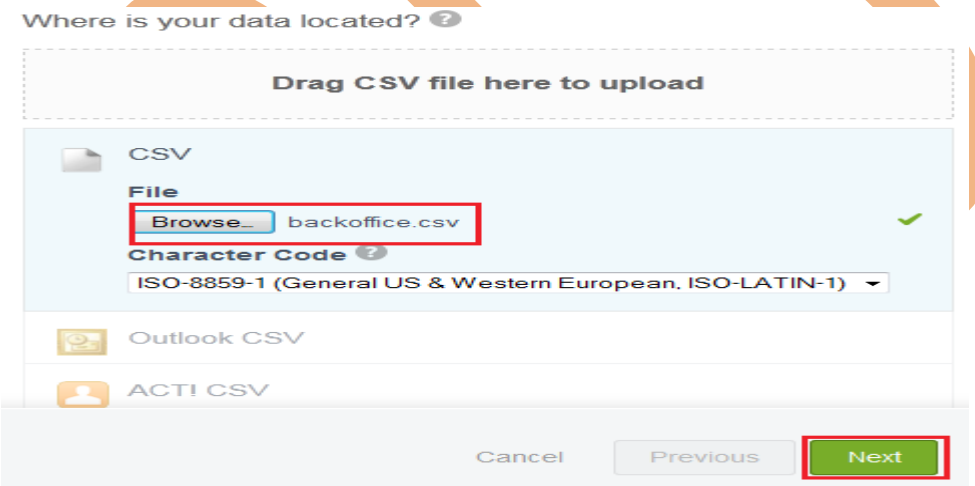
4. there is three option select any one, (For ex :- I will select Add new Record)

- 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)

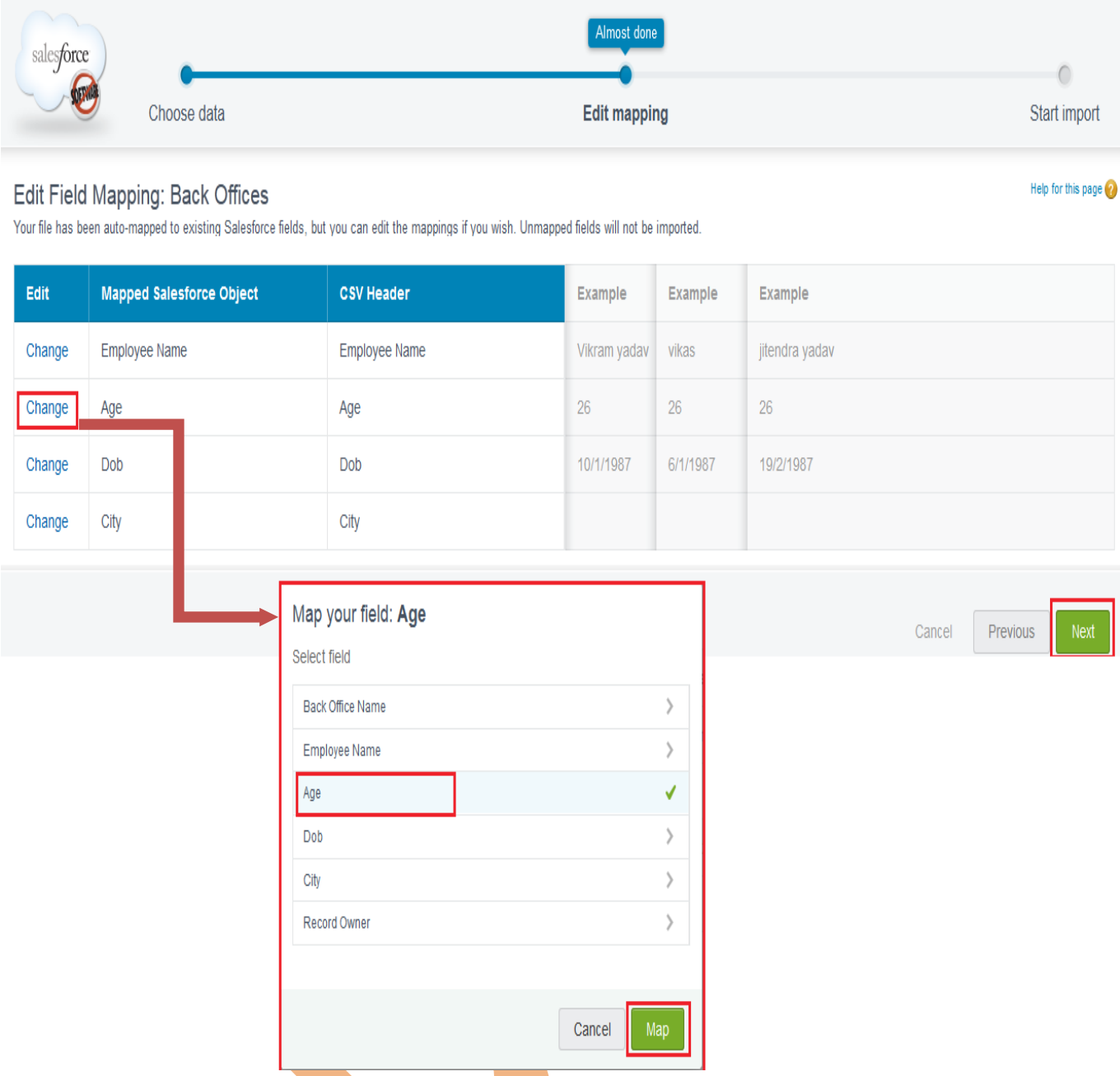


Then select CSV option and click to **Browse** button and select your .CSV file. and click to **Next** button.



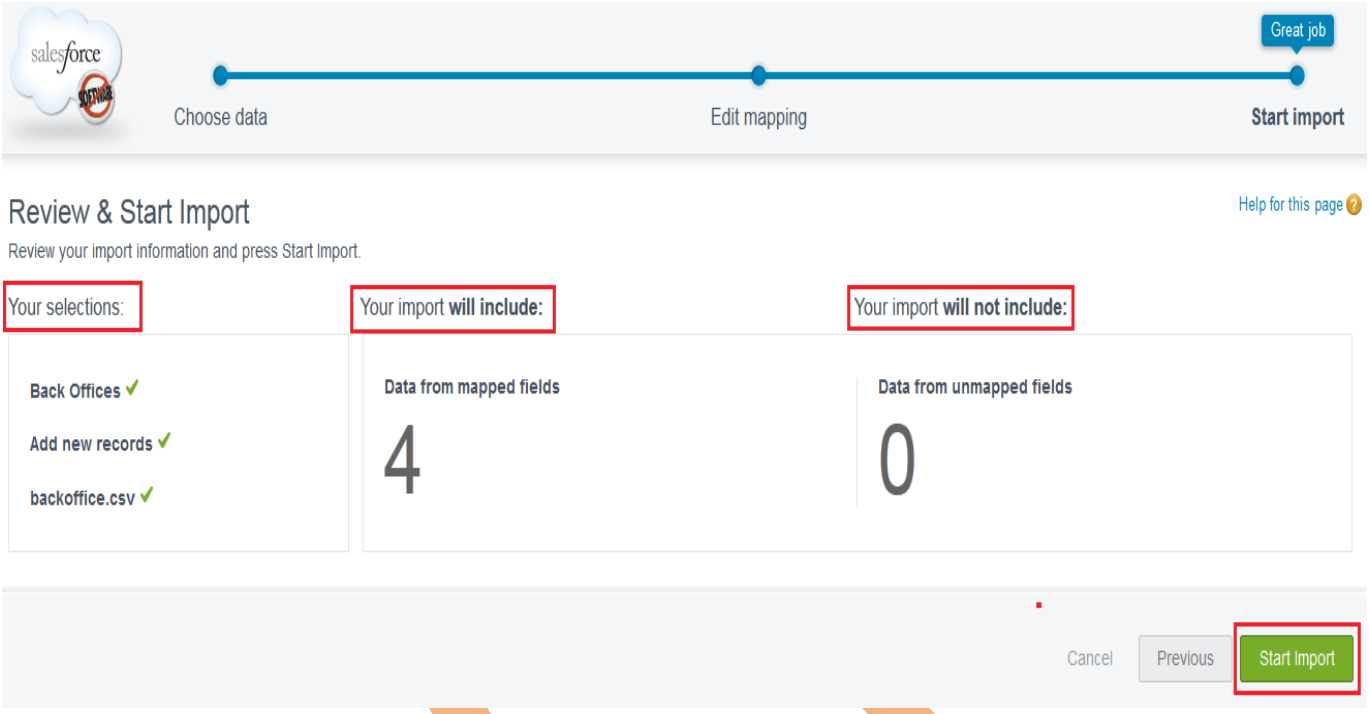
Step 2 :-

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.



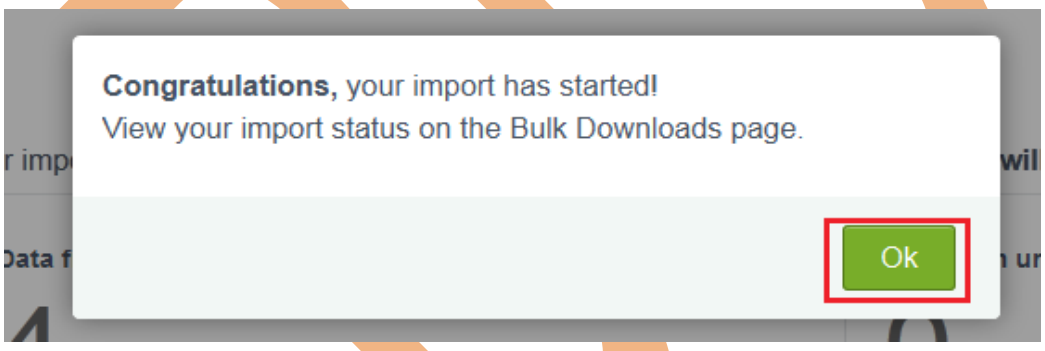
Step 3 :-

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.

Bulk Data Load Job

75090000000RDJL

Help for this Page

View the details of a bulk data load job.

« Back to List: Bulk Data Load Jobs

Bulk Data Load Job Detail Reload

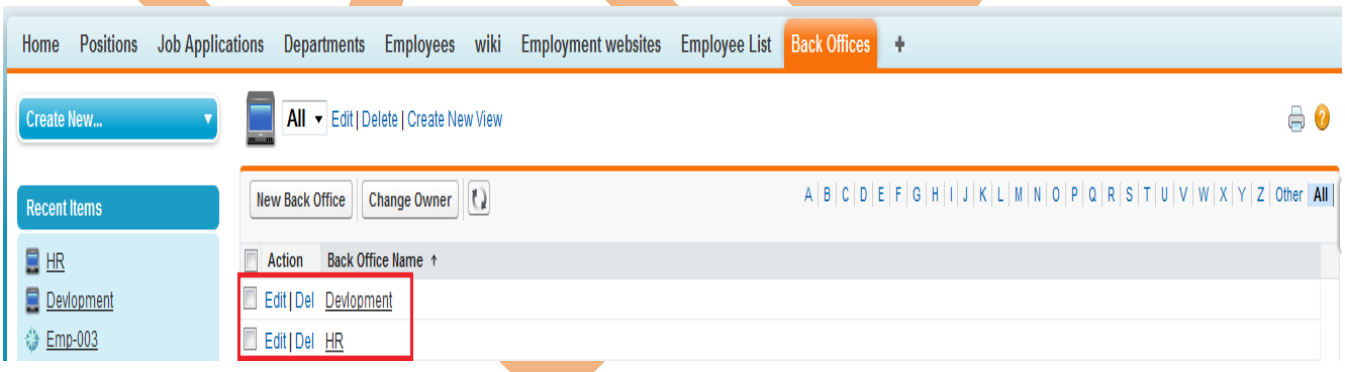
Job ID	75090000000RDJL	Status	Closed	Total Processing Time (ms)	245
Submitted By	yogesh sharma	Operation	Insert	API Active Processing Time (ms)	185
Start Time	10/10/2013 11:46 AM IST	Queued Batches	0	Apex Processing Time (ms)	0
End Time	10/10/2013 11:46 AM IST	In Progress Batches	0		
Time to Complete ([hh:]mm:ss)	00:01	Completed Batches	1		
Object	Back Office	Failed Batches	0		
External ID Field		Progress	100%		
Content Type	CSV	Records Processed	3		
Concurrency Mode	Parallel	Records Failed	1		
API Version	28.0	Retries	0		

Reload

Batches

View Request	View Result	Batch ID	Start Time	End Time	Total Processing Time (ms)	API Active Processing Time (ms)	Apex Processing Time (ms)	Records Processed	Records Failed	Retry Count	State Message	Status
View Request	View Result	75190000000ILwA	10/10/2013 11:46 AM	10/10/2013 11:46 AM	245	185	0	3	1	0		Completed

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.

Export Data in SalesForce.com

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.

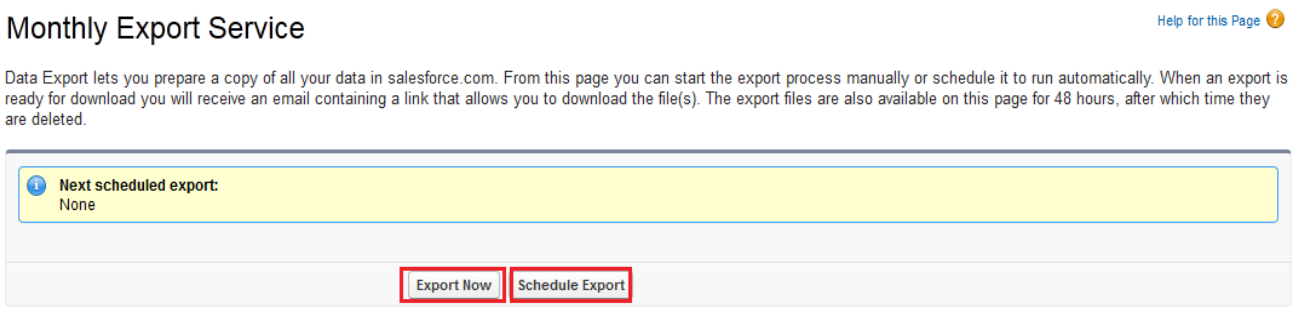
How to take Export data in SalesForce :

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.

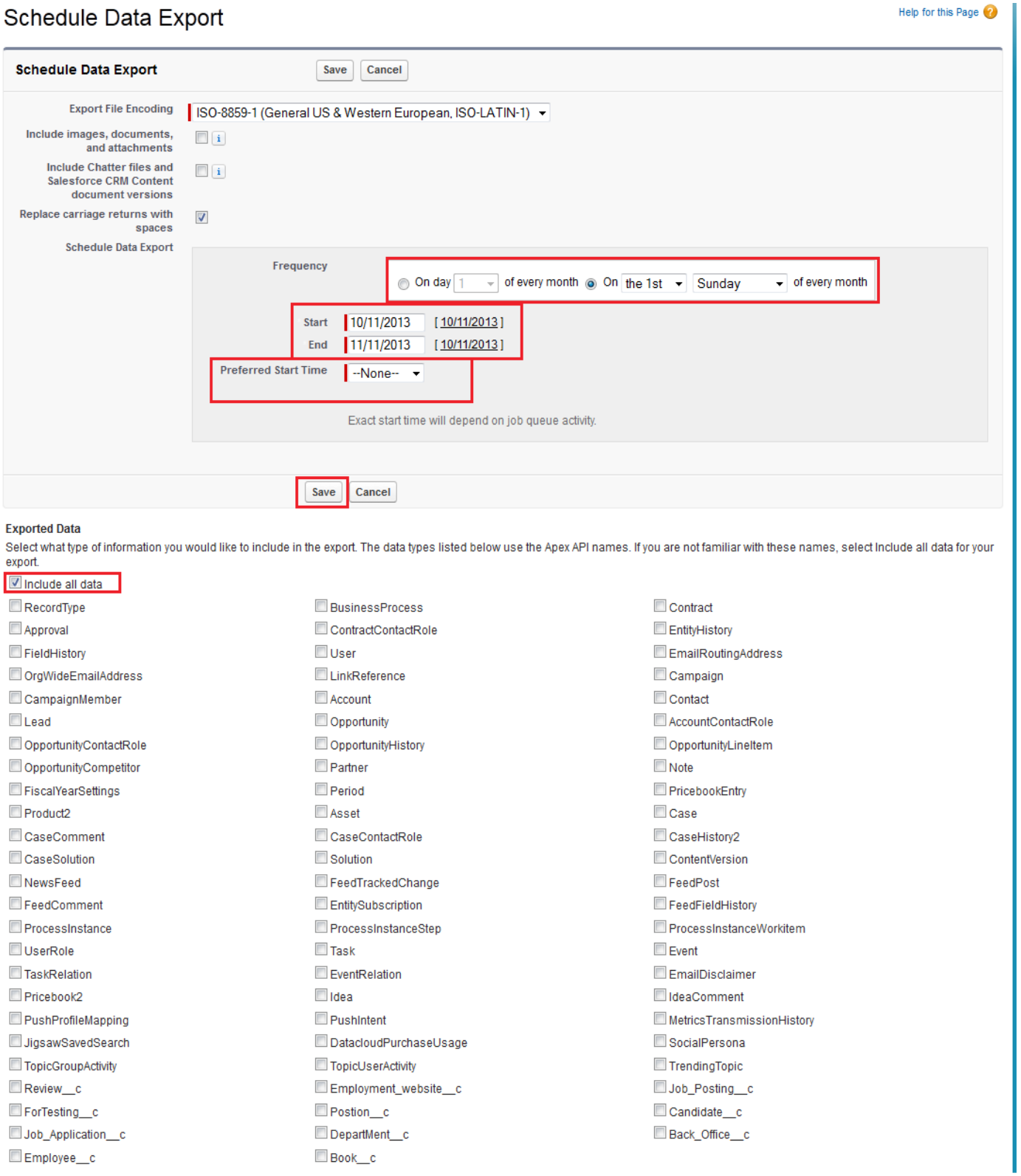
Export Now in SalesForce.com:

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

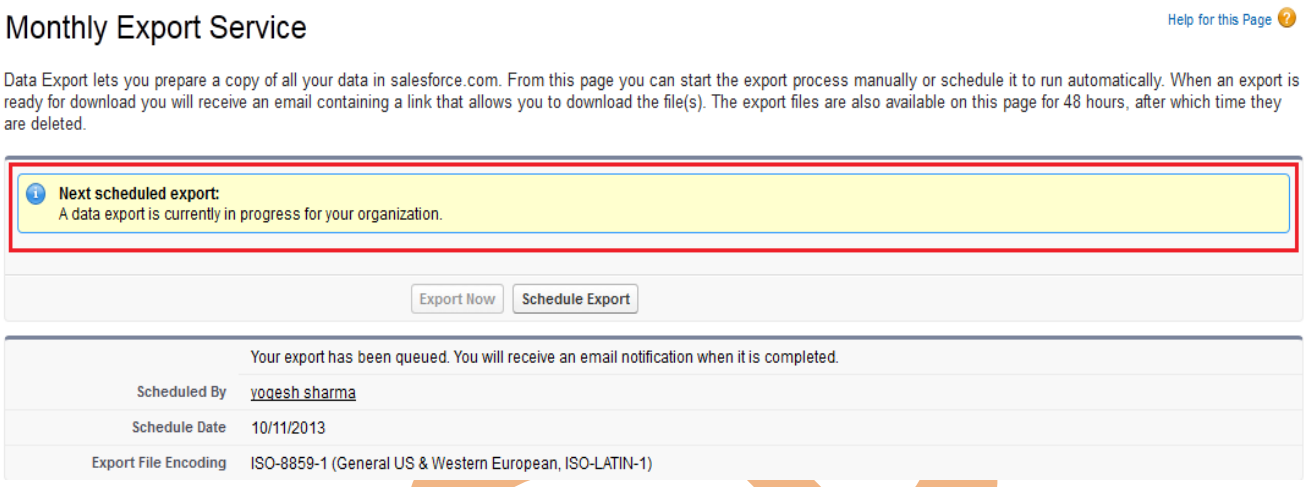


Step 1 :-

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.

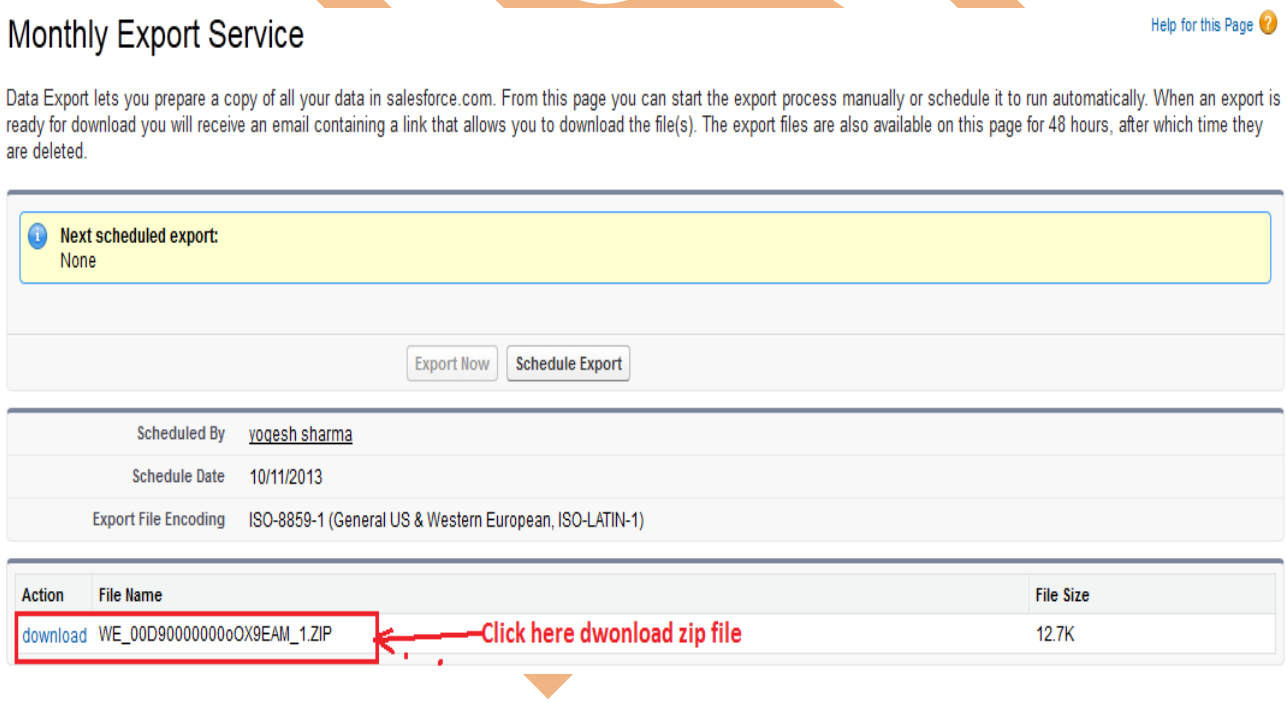


After click on Start Export few second take you got one new screen and send link you mail id you can see below. and all so check your mail id.



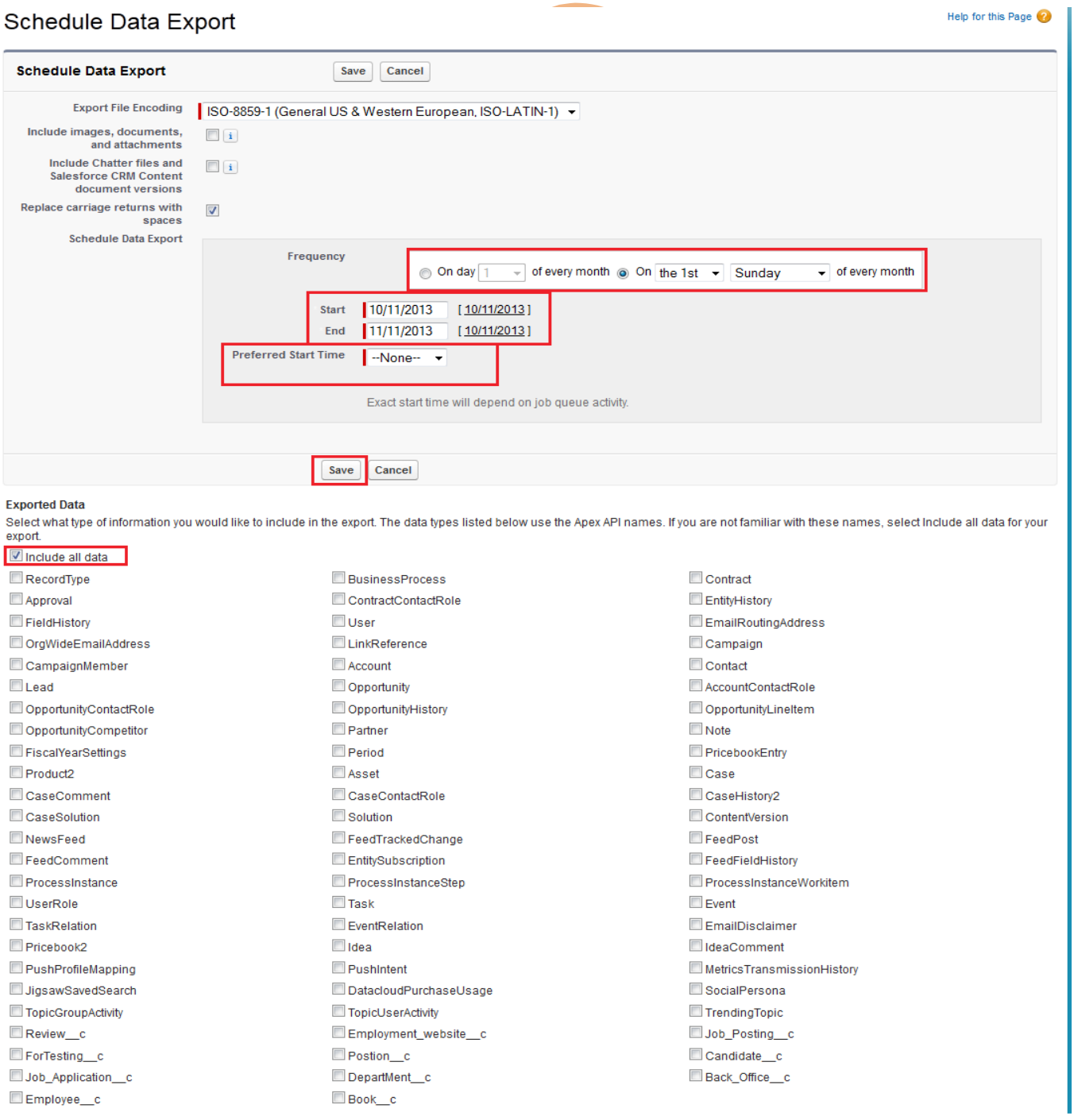
Step 3 :-

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.

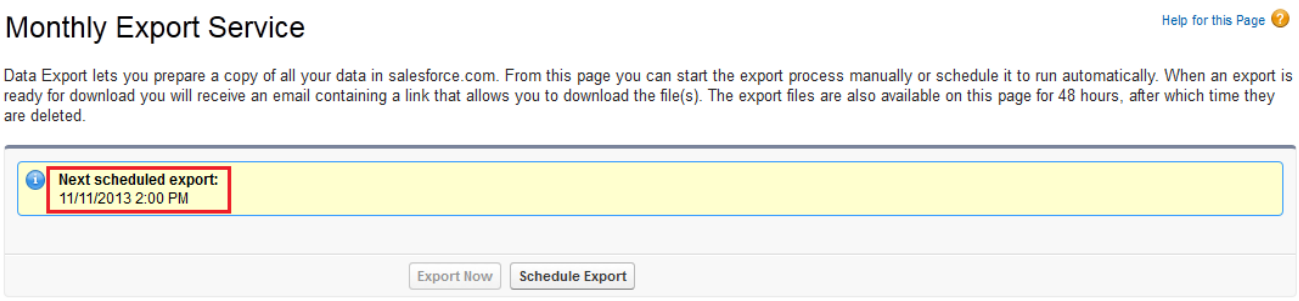


Schedule Export in SalesForce:

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.

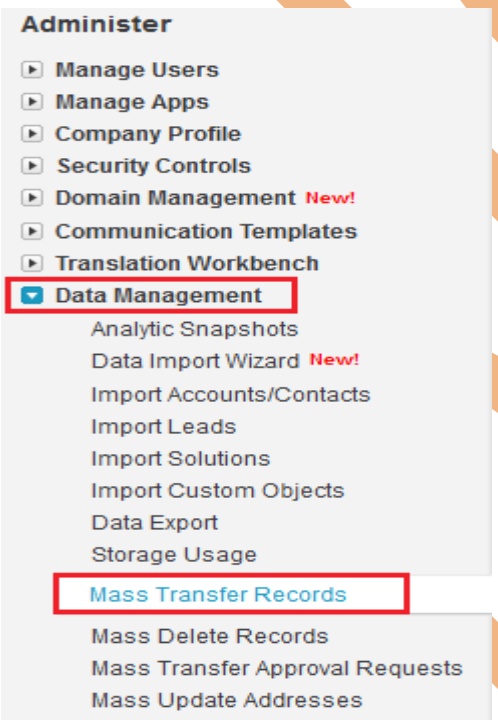


Mass Transfer Record in SalesForce

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

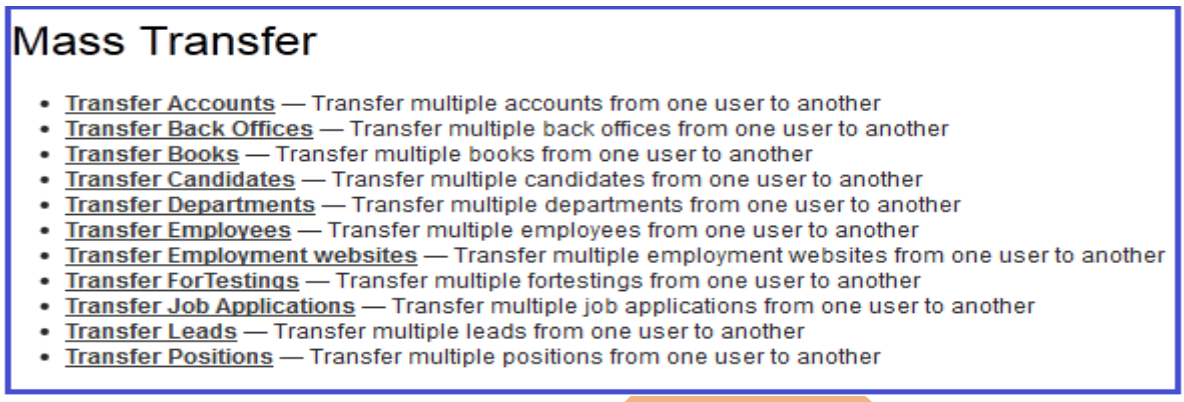
How to go Mass Transfer Records :

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.

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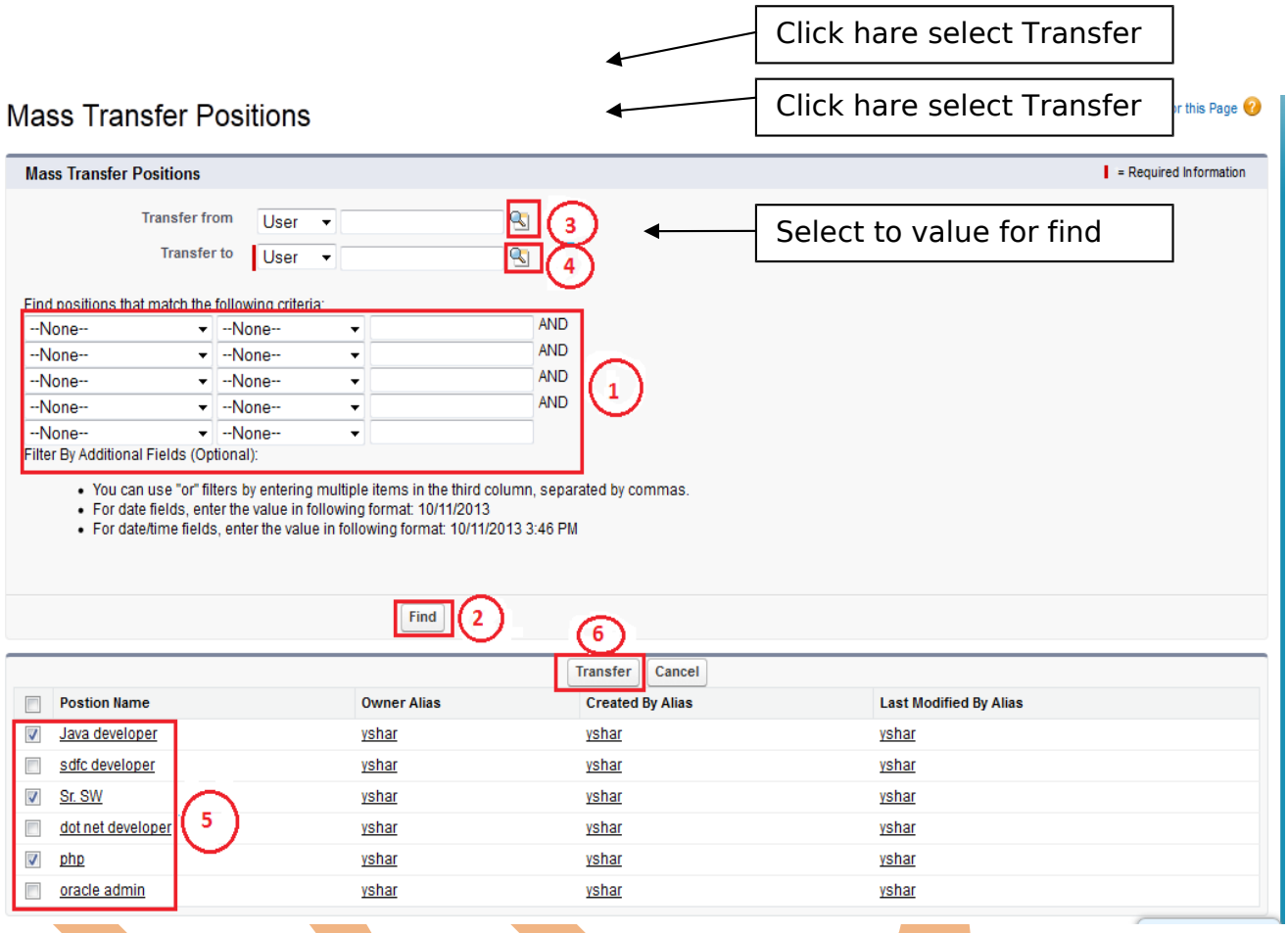
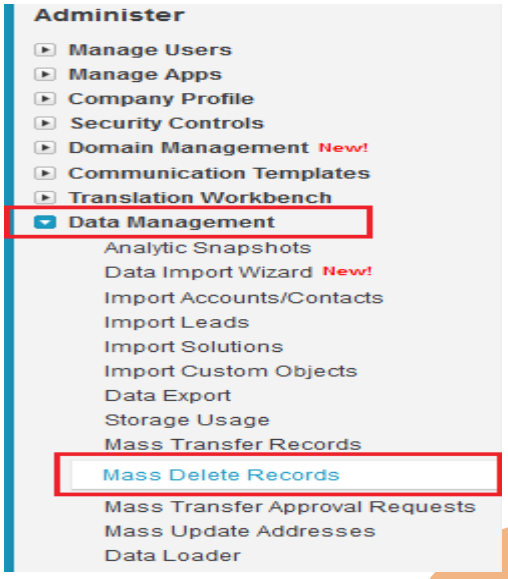


Mass Delete Record in SalesForce :

You can delete multiple record by using Mass Deleted Records. Mass Delete records delete some list of item accounts, leads, activities, contacts, Cases, solutions, products at one time.

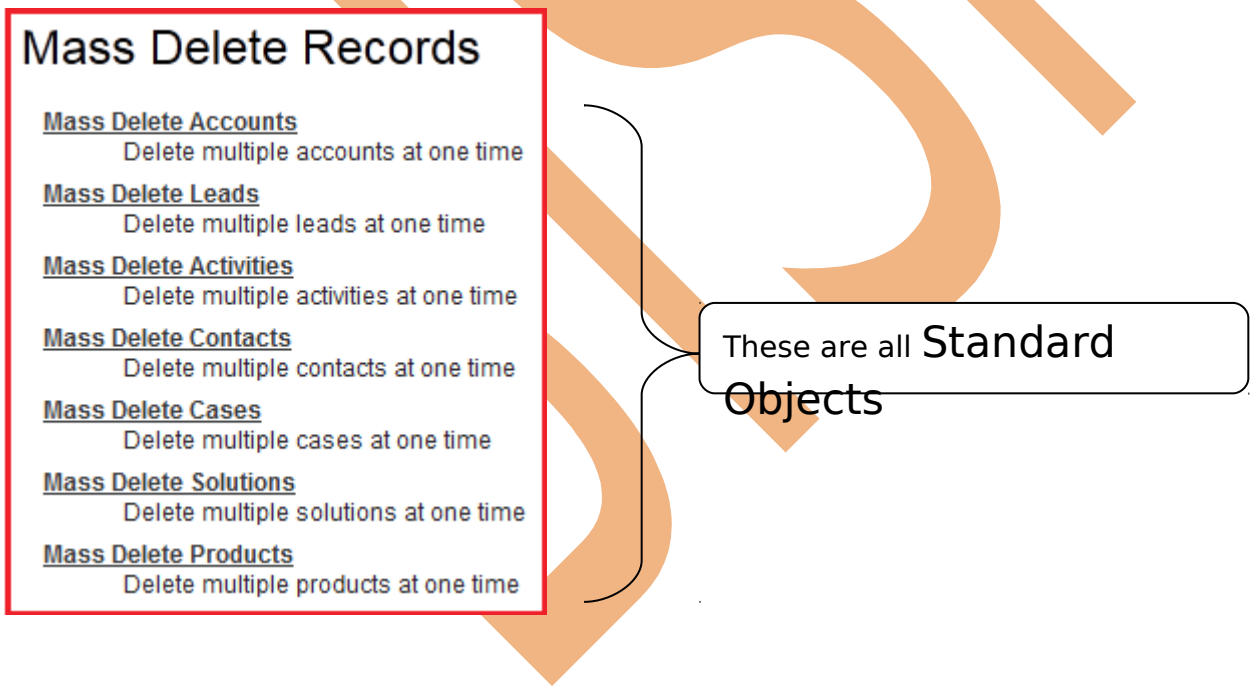
How to go Mass Delete Records :

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



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.)



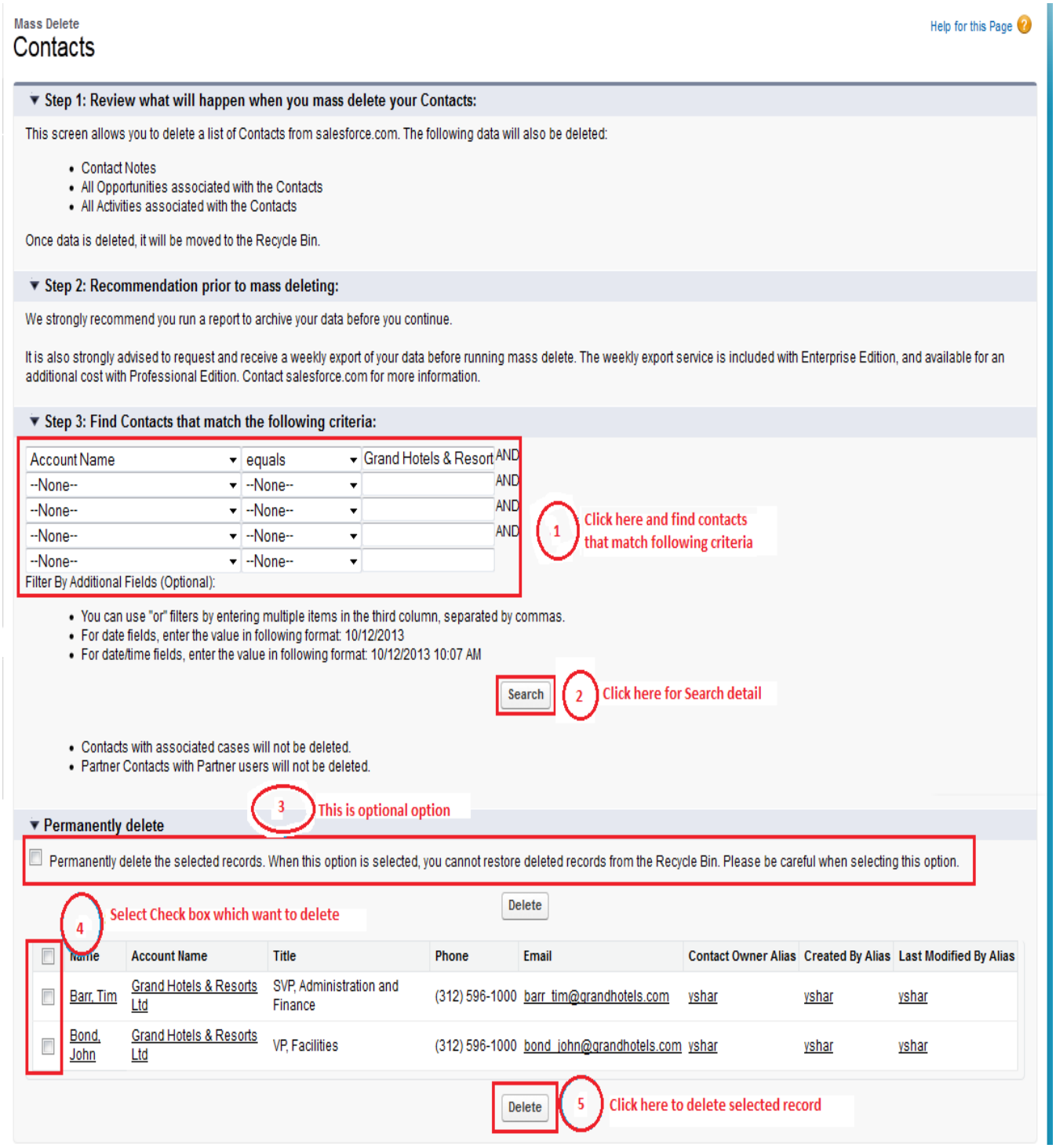
Step 2 :-

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.

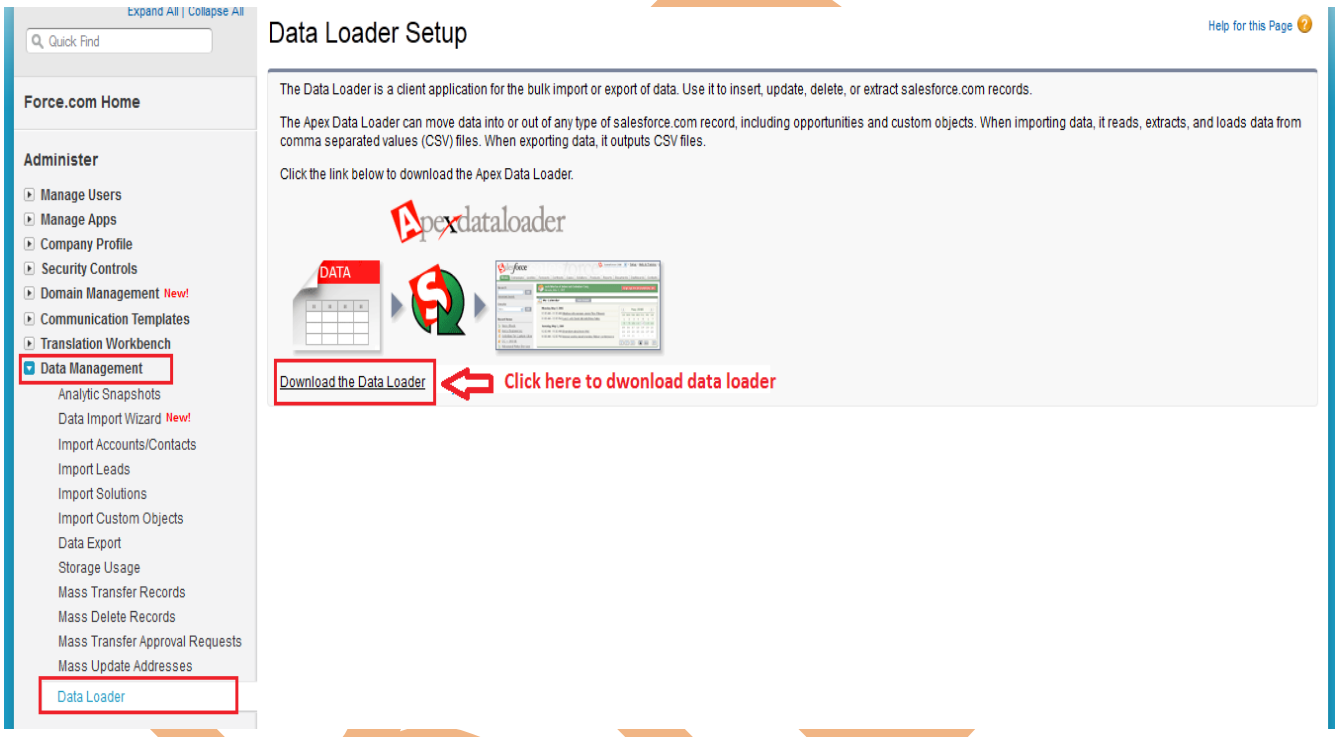


Data Loader in SalesForce.com

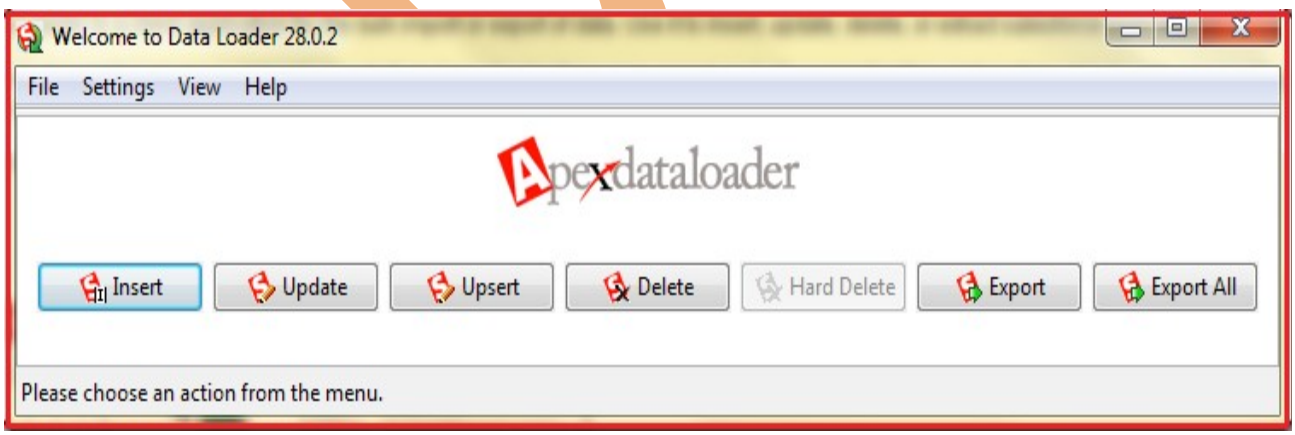
SalesForce provide to you client application it is data loader for work the bulk import or export of data.
Use it to Insert, update, Upsert, Delete, Export or Extract All salesforce.com records.

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.

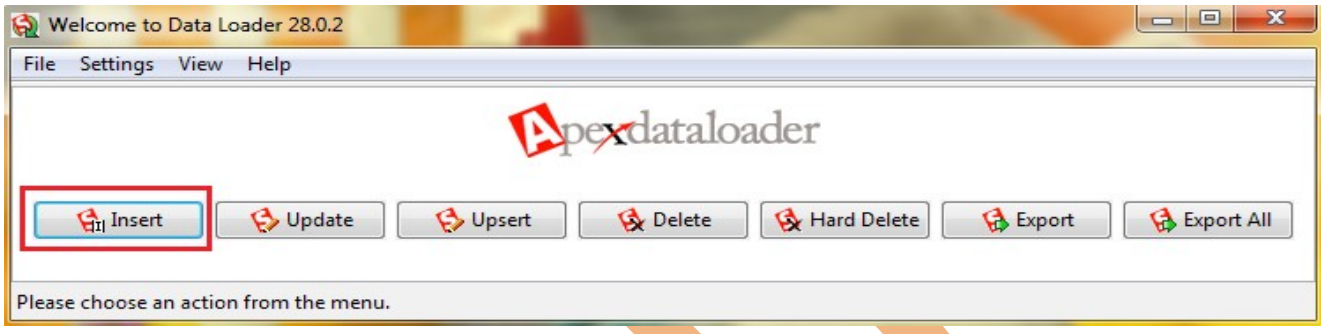


After download Data Loader Install this on your machine. Then click to Data Loader icon, after that open one window you can see below.



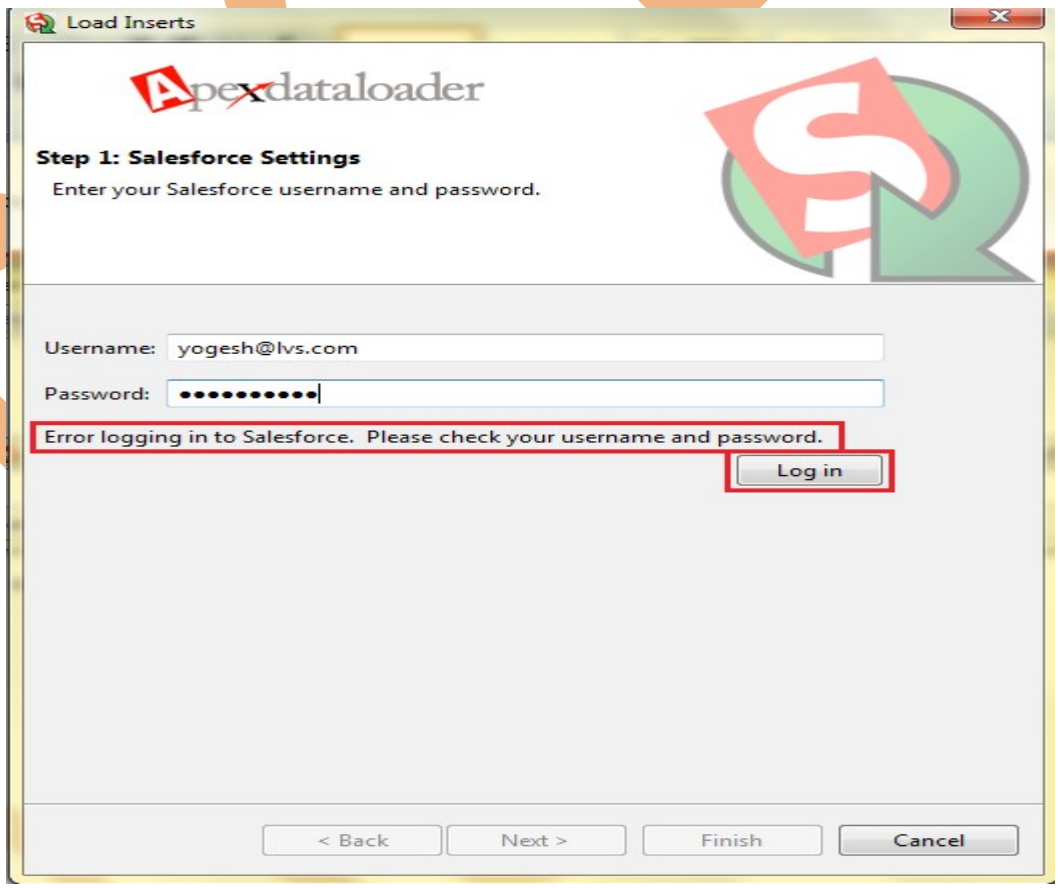
Insert Record By using Data Loader :

Step 1 :- Click to **Insert** button you can see below.



Step 2 :- After That you can see Login window there is provide login id or password

Problem :- If you try to login with fallowing detail login id and password SalesForce throw **Error message**. you can see below .



Solution : You need to Security Token.

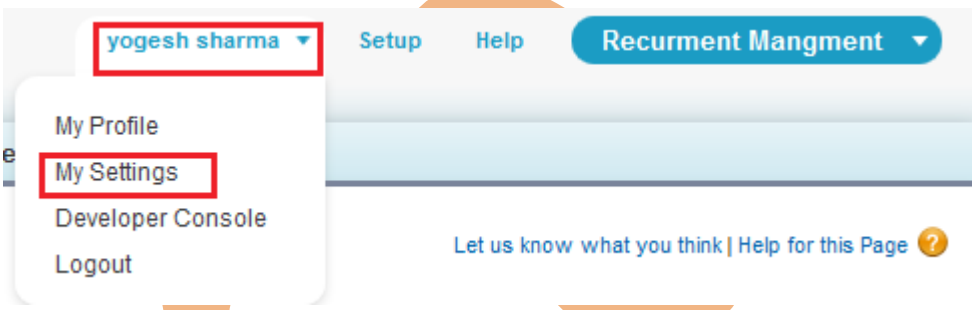
What is Security Token :

A security token is an automatically generated key by SalesForce that you must add to the end of your password in order to log into SalesForce from an untreated network.

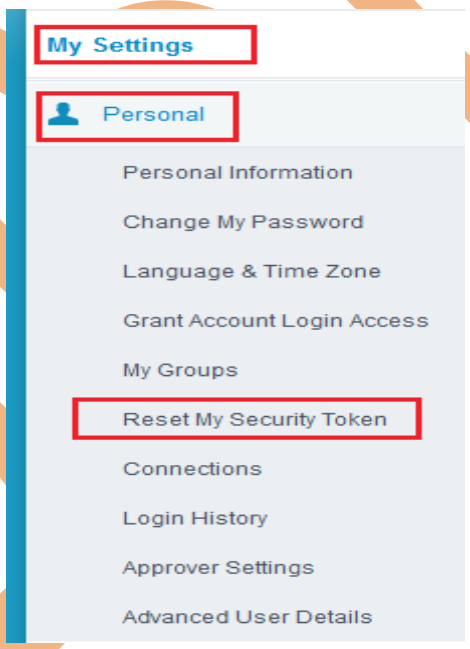
How to Open Security Token In SalesForce.com :

Step 1:-

Click to you **profile name** open dropdown menu then select **My Setting**



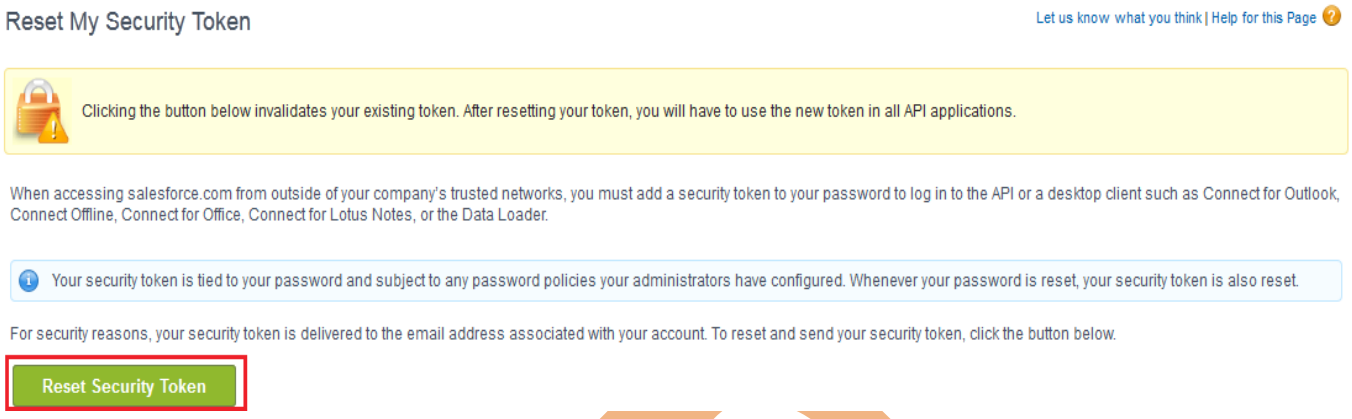
Go to **My Setting** -> **personal** -> **Reset My Security Token**



Click on **Reset My Security Token** link and you can see new web open new web page.

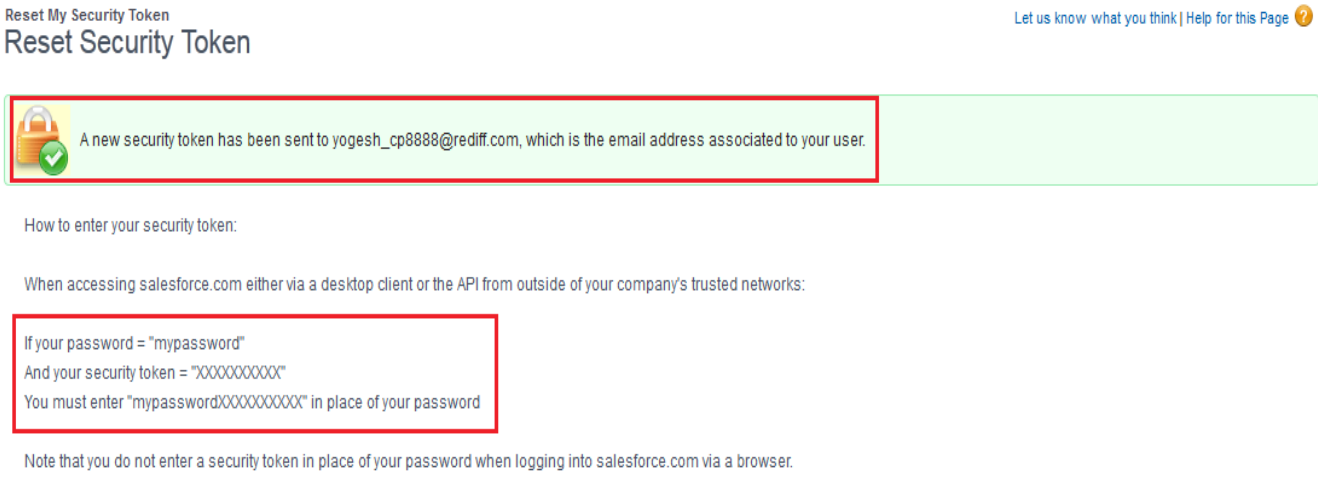
Step 2 :-

After That you can see **Reset Security Token** button Click on this button.



Step 3 :-

After Click **Reset Security Token** button, the token has been send on your mail id check your mail id and how to use security token instruction all so write here. you can see below.

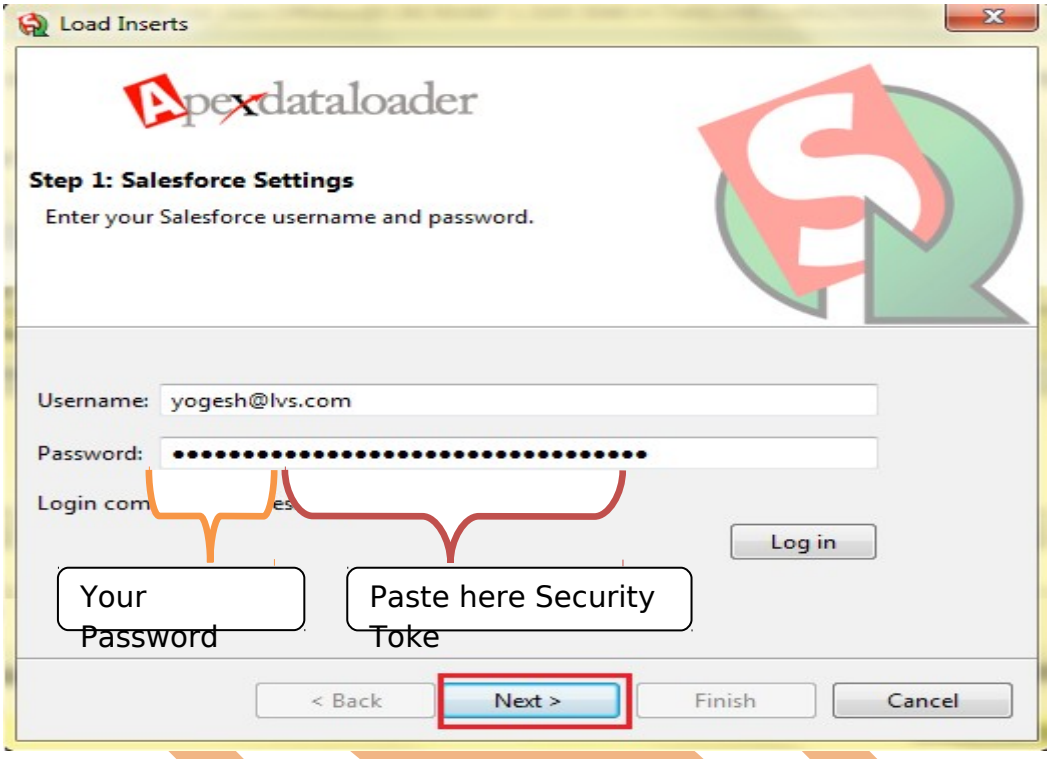


Step 4 :-

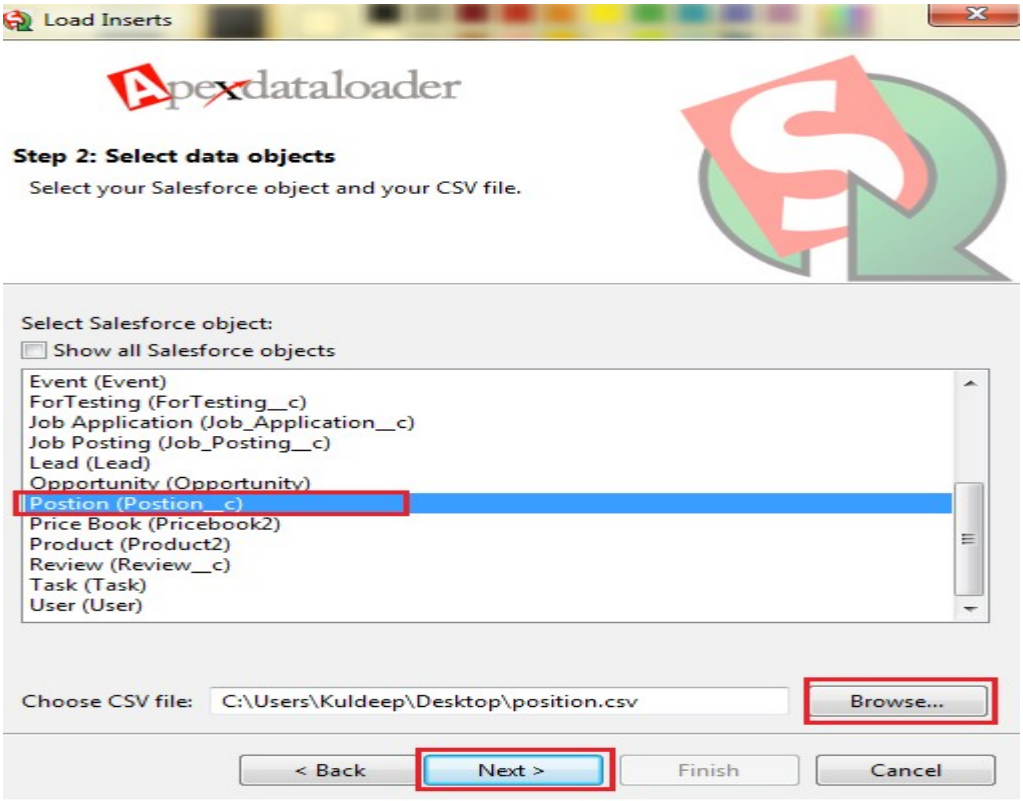
Open your mail id copy Security Token copy **Security Token** see below.

and paste after password you can see below.

Write your password and paste you security Toke then Click to **Next** button.



Step 5 :- Select You Your object which want to upload and browse you .CSV file and click to Next button.



Step 6 :-

After click to Next button you got popup message how many field you upload. Click to ok button then go to new screen.

Then if you want to add mapping there is two option.

1. Choose an Existing Map :- if you have existing map click here.

2. Create or Edit Map :- if want to add mapping manually click here

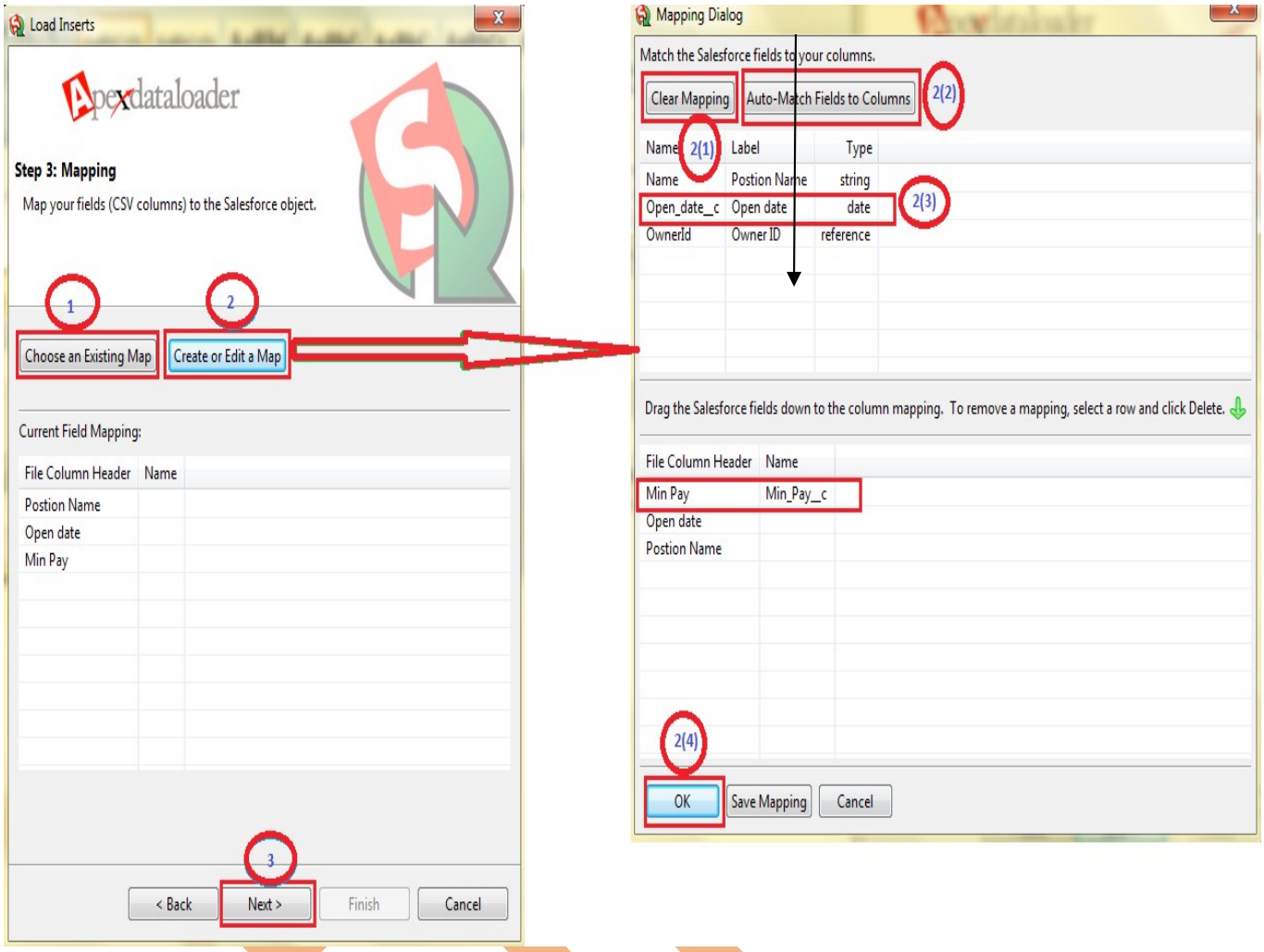
2[1] :- if want to clear mapping click on this button Clear Mapping.

2[2] :- If want to automatic field match click on this button. Auto-Match Fields to Columns

2[3] :- If want to manually complete this mapping just drag and drop field.

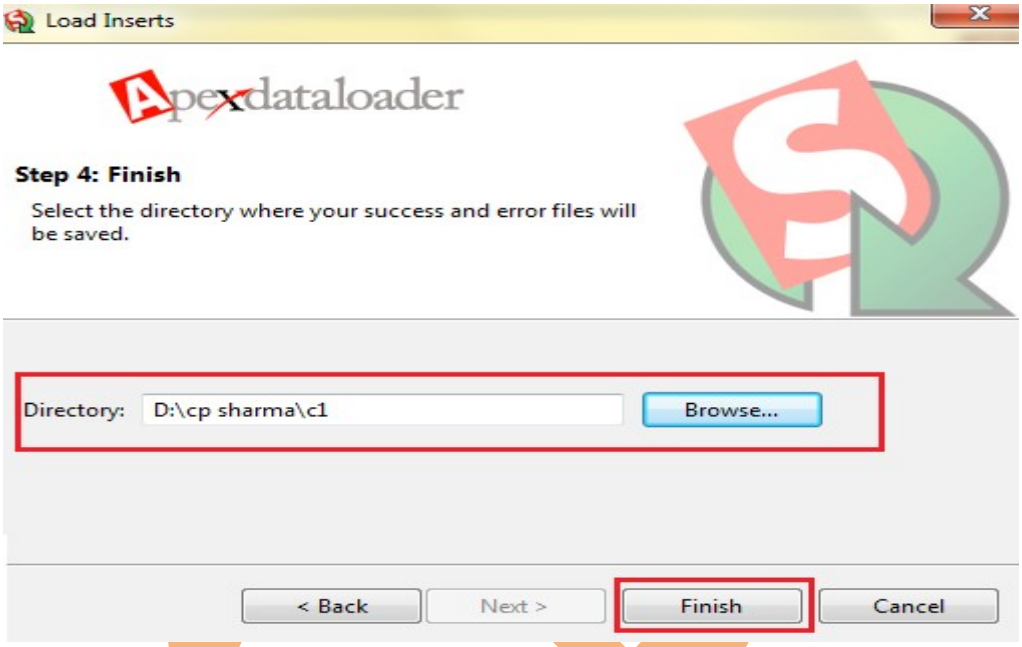
2[4] :- Click to ok button.

3. Click to Next button.



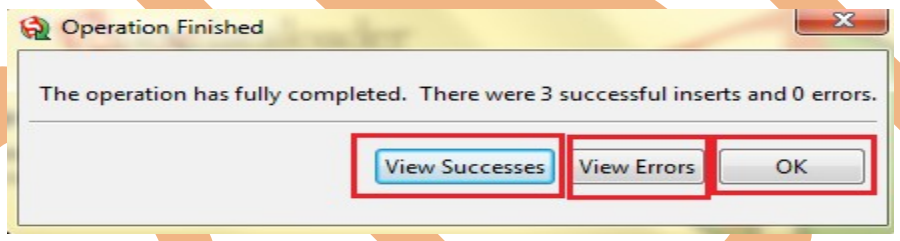
Step 7 :-

Then Browse where want store you error file. click on browse button, then click on Finish button.



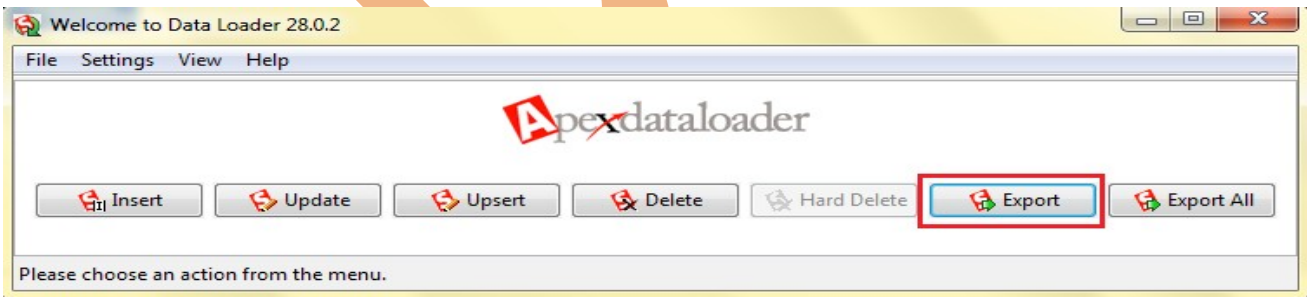
Step 8 :-

After that you got message window.
there is you can see View Successes file and View Errors file, then click to ok



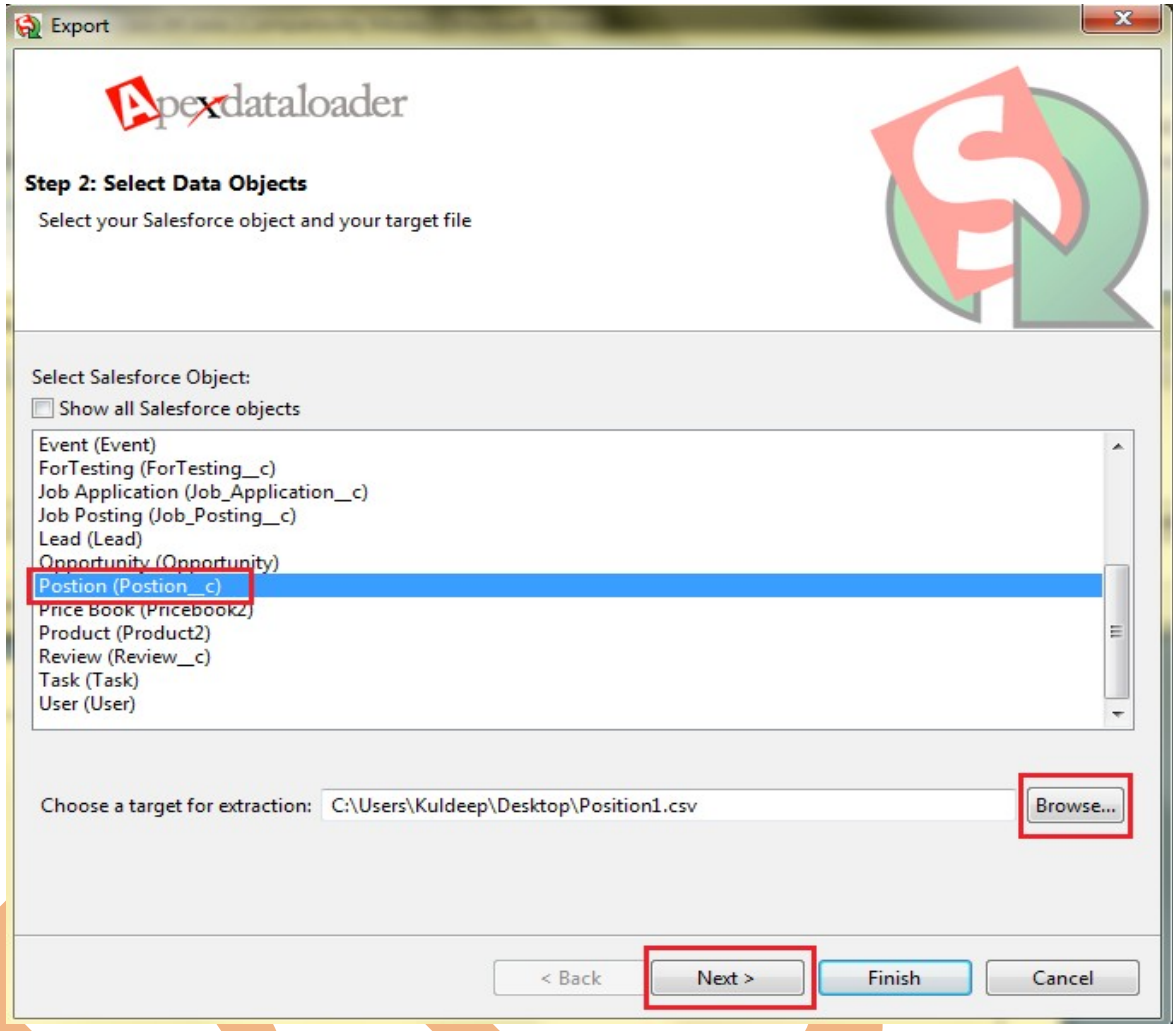
Export Record By using Data Loader :

Export Record feature is available on SalesForce client application, Export Record you can prepare a copy of all your data .
on this page you can start the export process manually by using client application.
Click to **Export** in Client application.



Step 1 :-

Select Custom Object Name(Ex:- Position), Choose target for save Export file, then click to Next button.



Step 3 :-

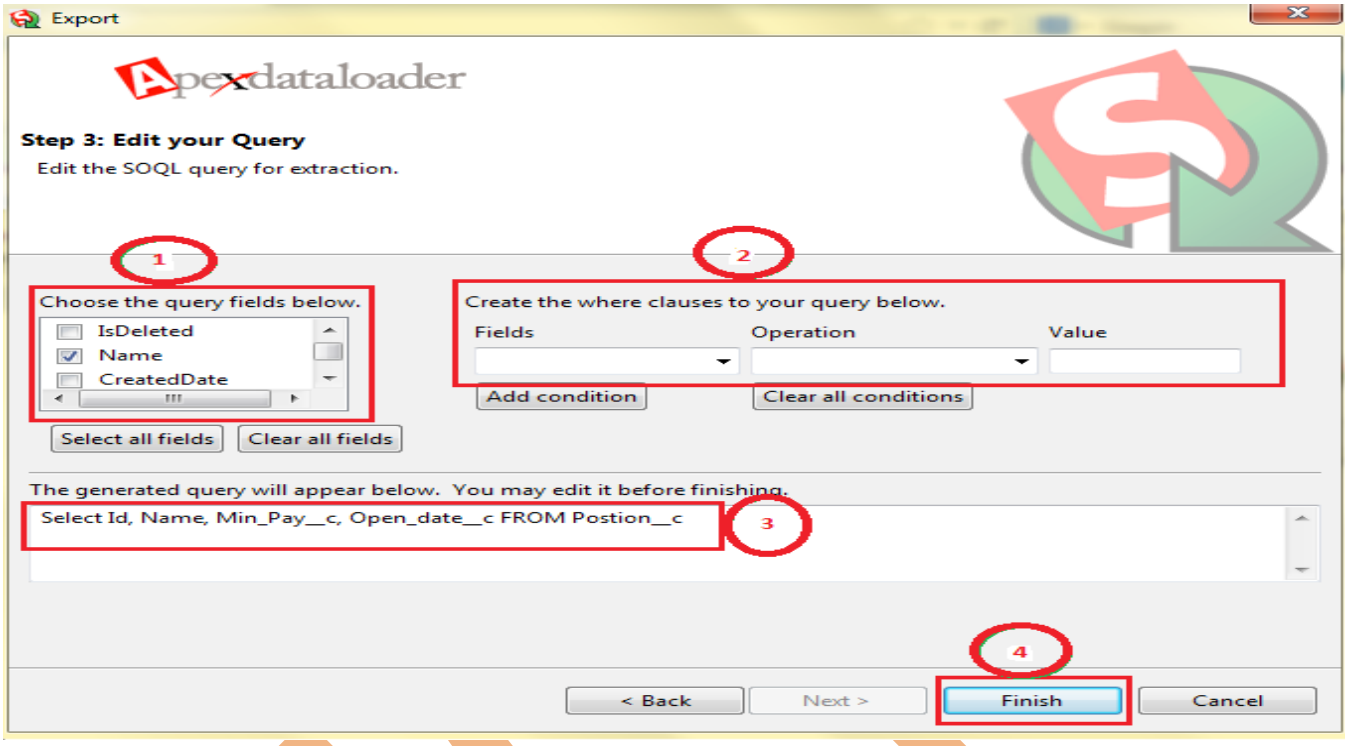
1. Choose Query filed which want to need, if you want to all field click to **Select All Fields** button.

2. If you need to some field (for Ex:- you need to city :- pune), you can use fields option.

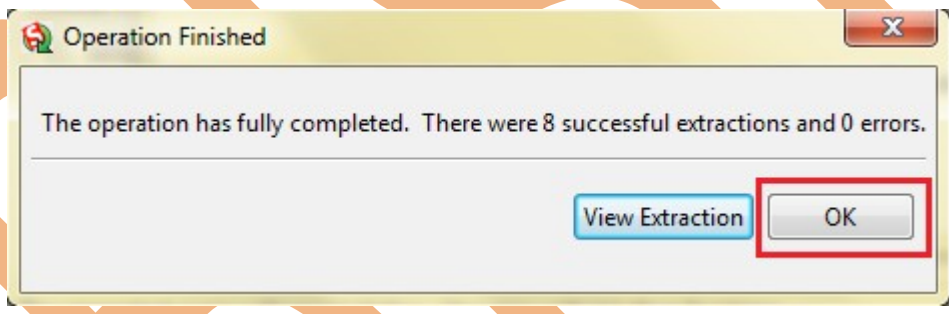
3. The generated query will show, you can edit it before finishing.

4. Click on finish button you can Export field.

You can see below.



After that you got Message box you can see below. click to ok .



Defiance Between Export and Export All By using Data Loader :

Export	Export All
1. Export Data loader only Export data Custom Object or Standard Object data.	1. Export All Data loader load Custom Object, Standard Object and all so Export Recycle Bin Data.

Export All By using Data Loader :

You can follow Same step as it is used in **Export Data Loader.**

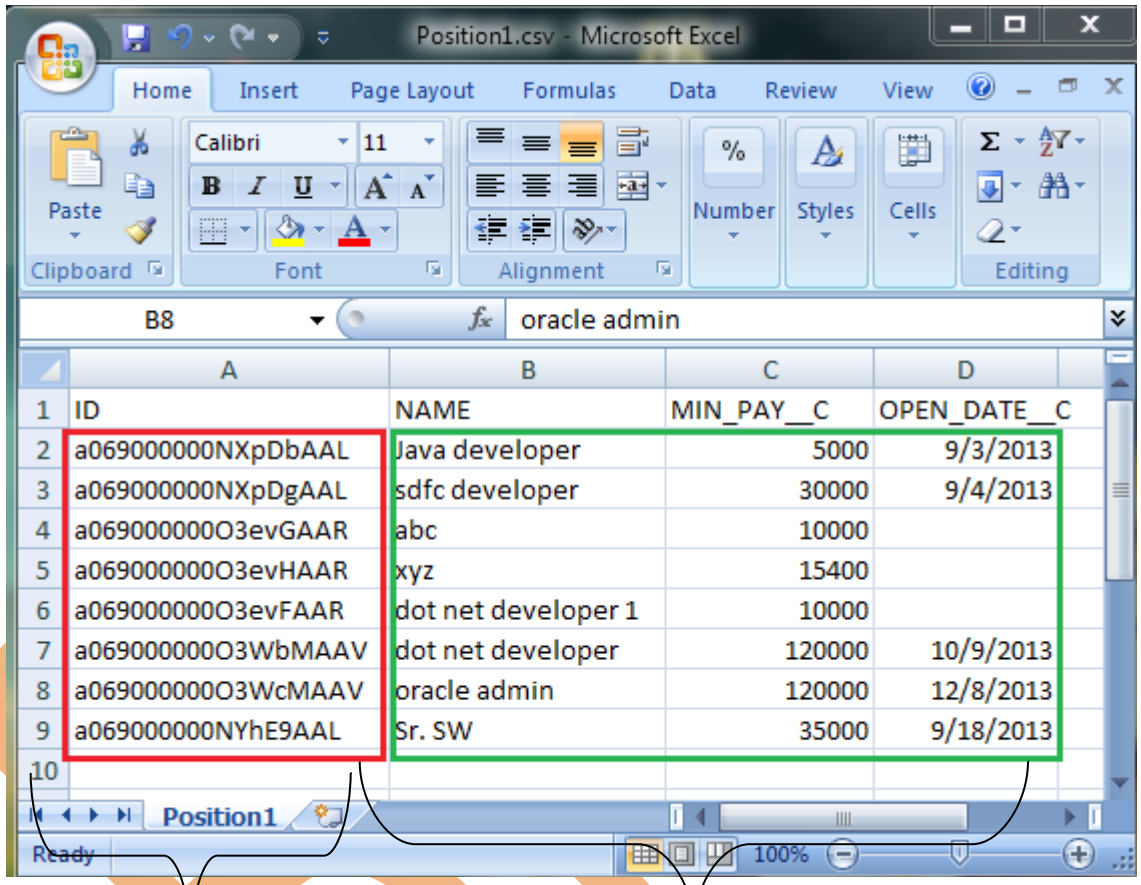
Update By using Data Loader :

You can all so update your data by using Data Loader in SalesForce.com.
First you will take need to Export this file, then you will change content on this file, after that you can upload this file.

How To Update Record by using Data Loader :

Step 1 :-

Note :- First you will take need to Export this file, then you will change content on this file, after that you can upload this file.You can see below .CSV file.

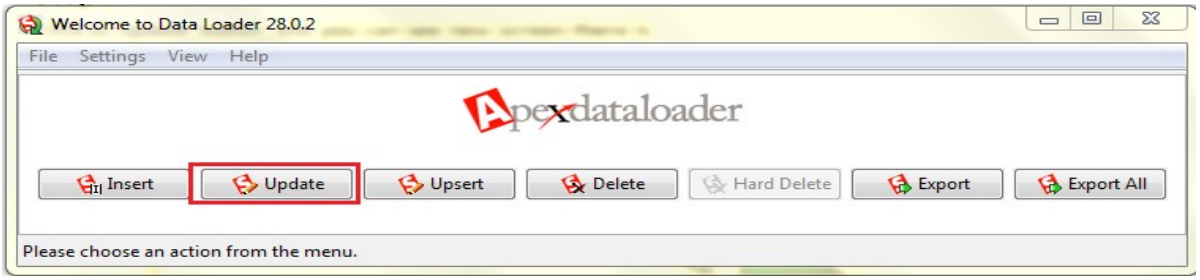


There is Id by generated SalesForce.com **do Not Change this id.**

There is field you can change on this field.

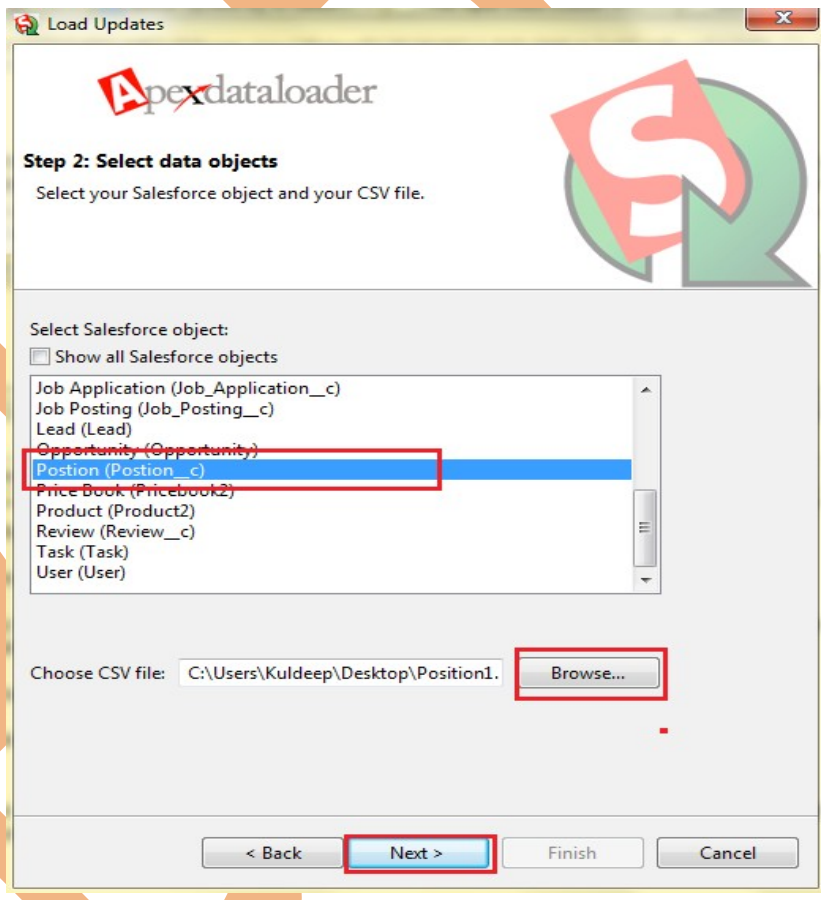
Step 2 :-

Open Data Loader on client machine then select Update button.



Step 3 :-

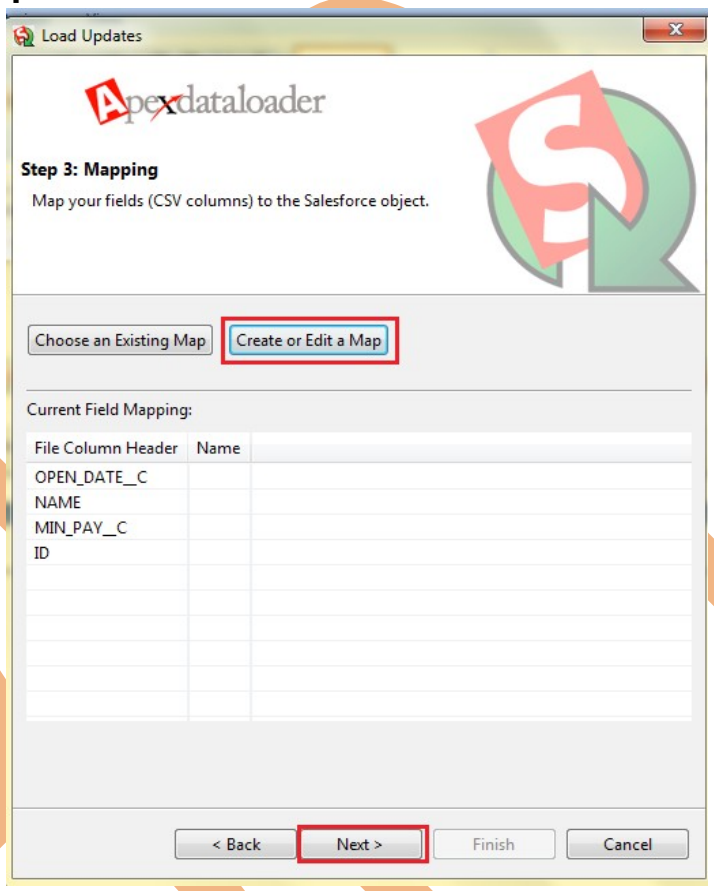
There is you can see new window screen, select Custom Field and browse you .CSV file after that click to Next button.



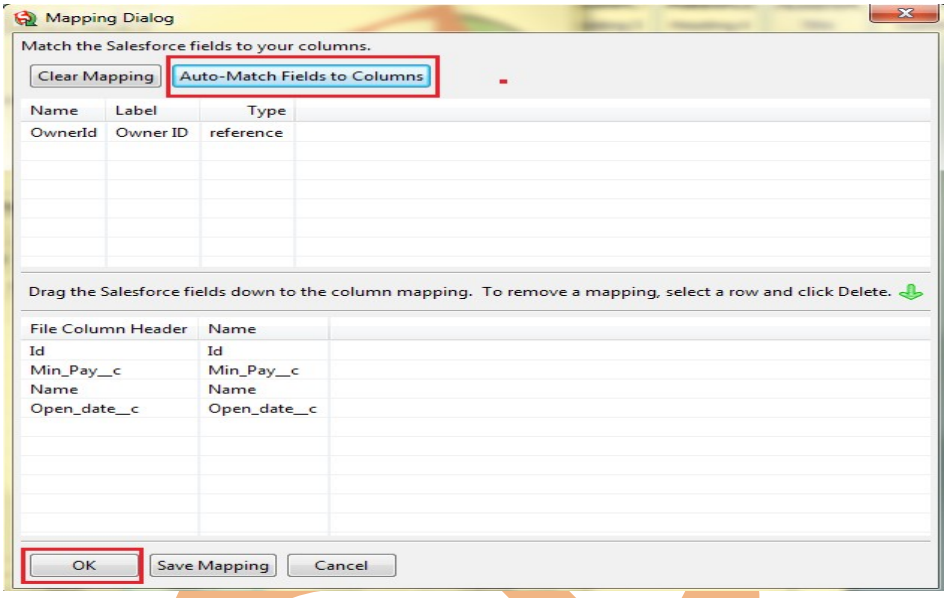
After that you got Message box, Click ok

Step 4 :-

Click to **Crete or Edit Map** button

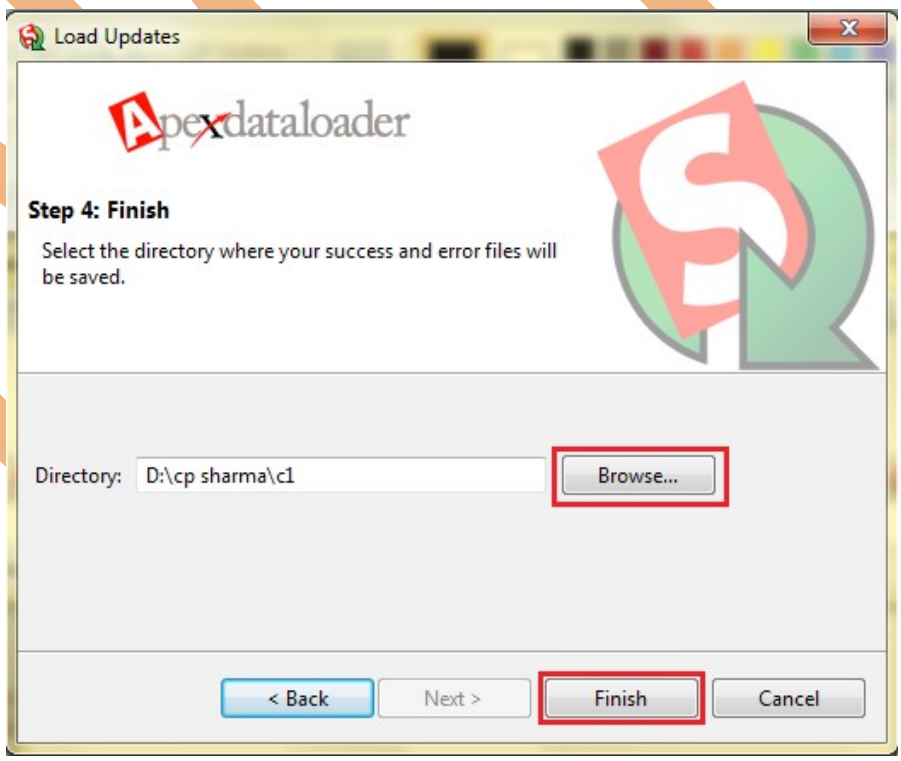


After Click you can see map window click **to Auto-Match Fields to Columns** button and click to **ok** button, then click to **Next** button.

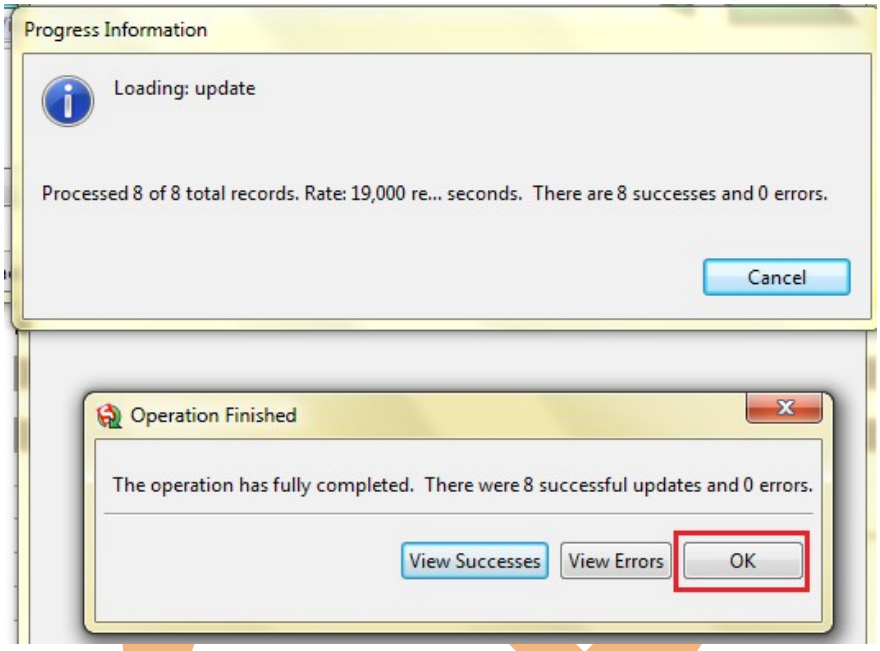


Step 5 :-

After that click to Finish button.



Then you got message window click to ok button. There is you can see View Success or View Error message.

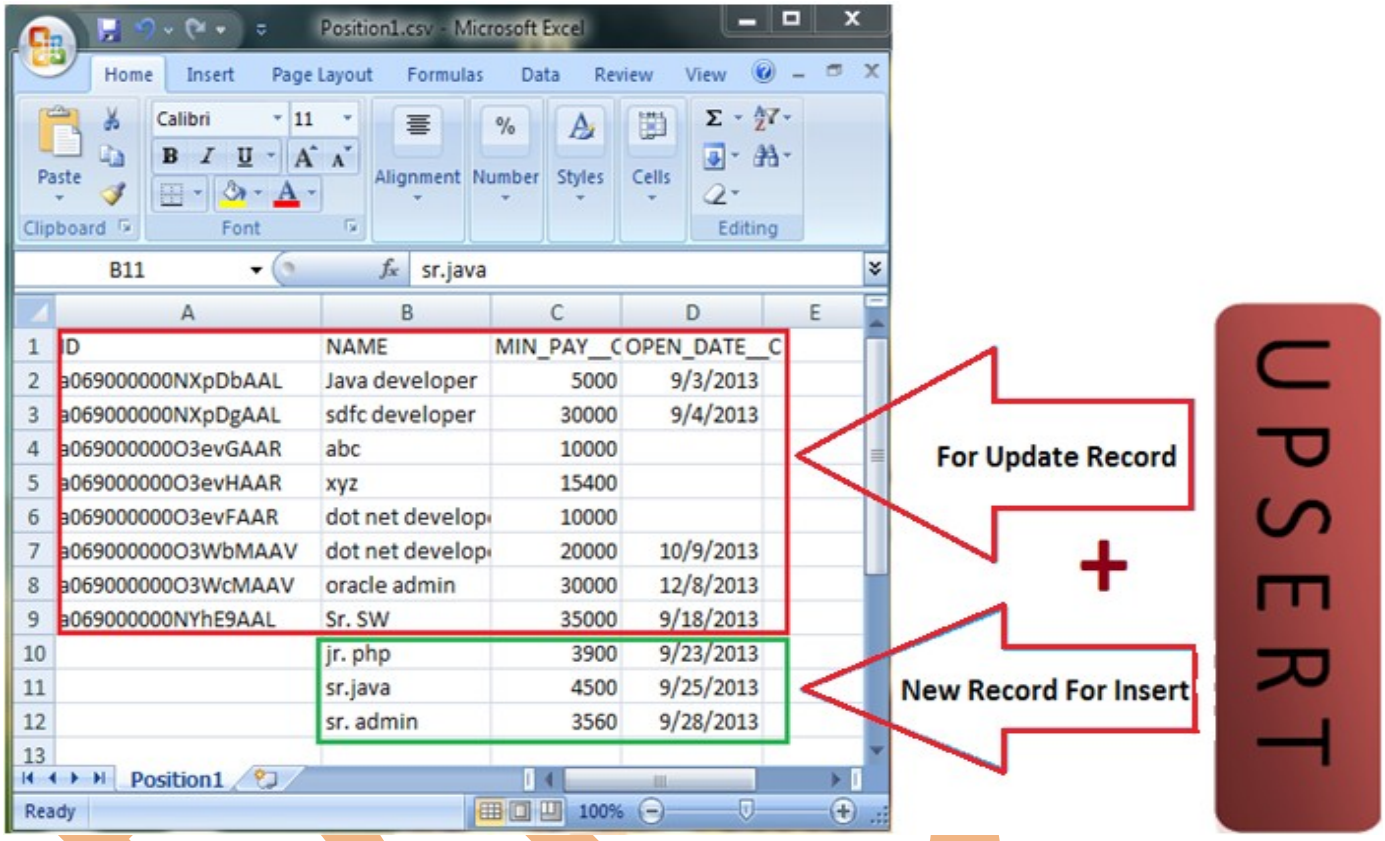


Upsert By using Data Loader :

SalesForce. com provide to you upsert option by using data loader, upsert operation create new records and update existing records.

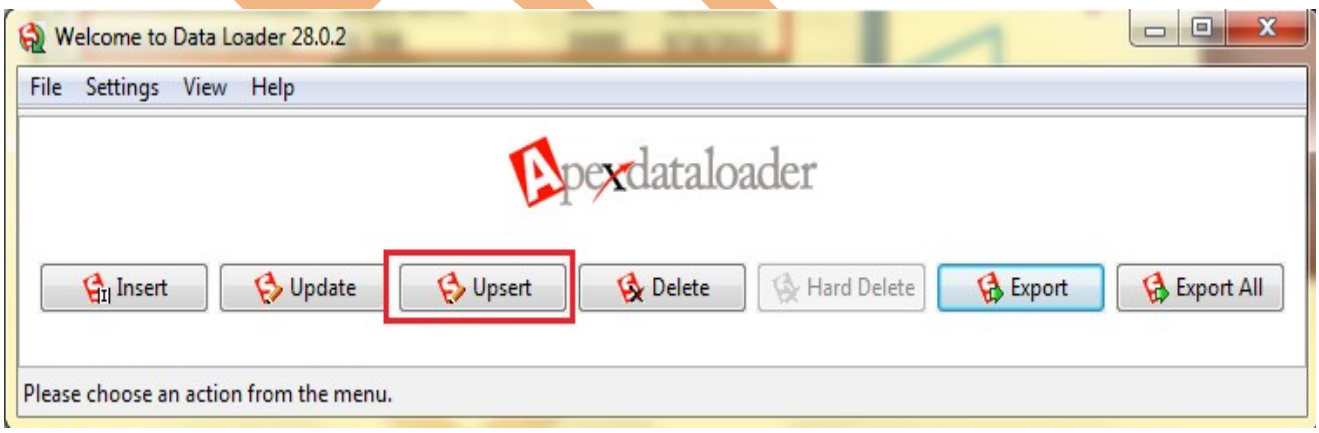
How to Use Upsert in Data Loader :

There is .CSV file format. You can see below.



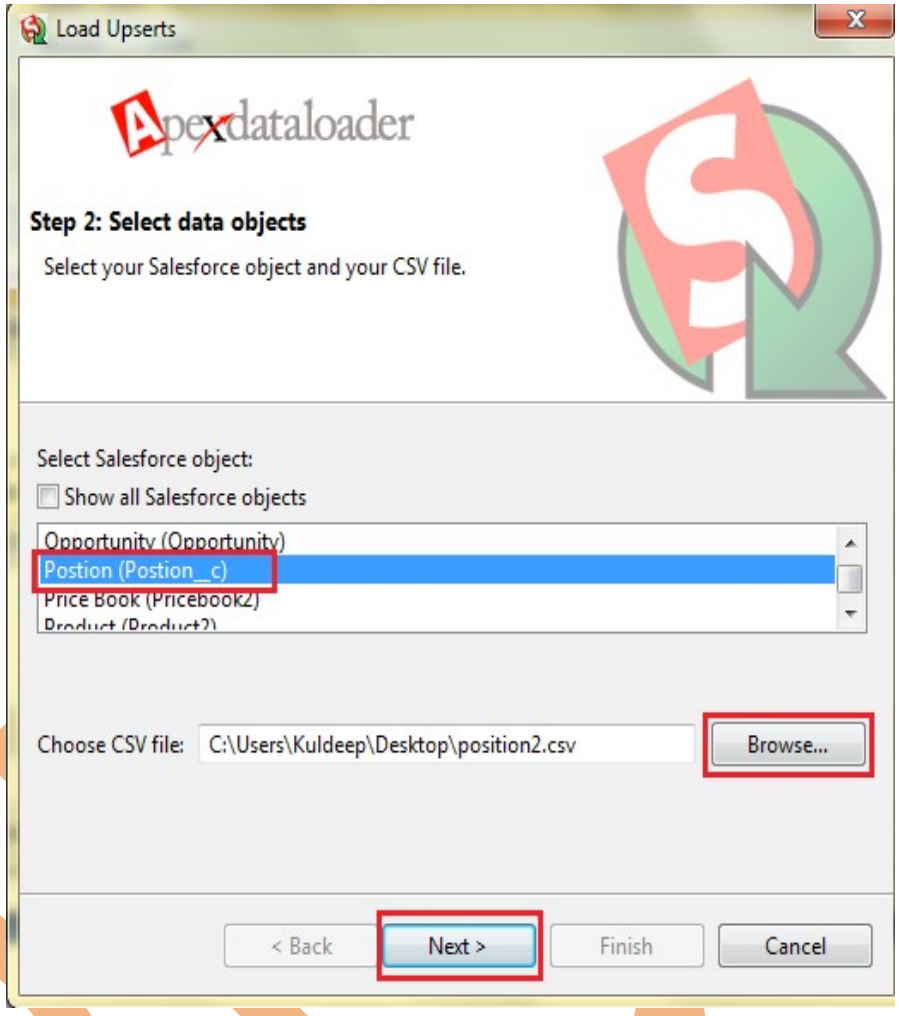
Step 1 :-

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

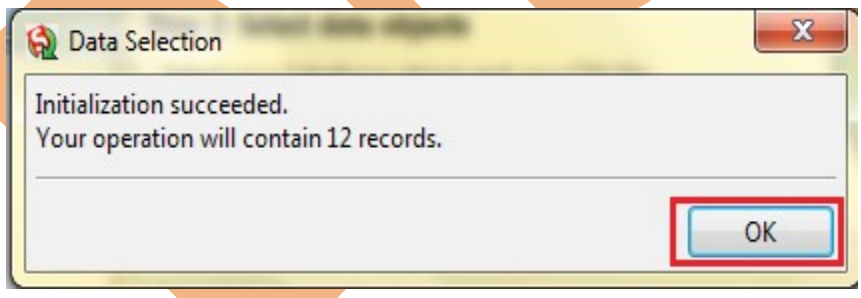


Step 2 :-

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

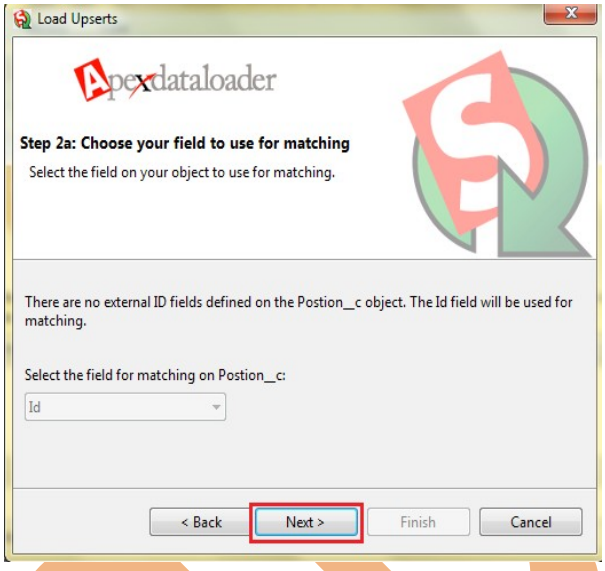


Then you got Message box Click to OK button.



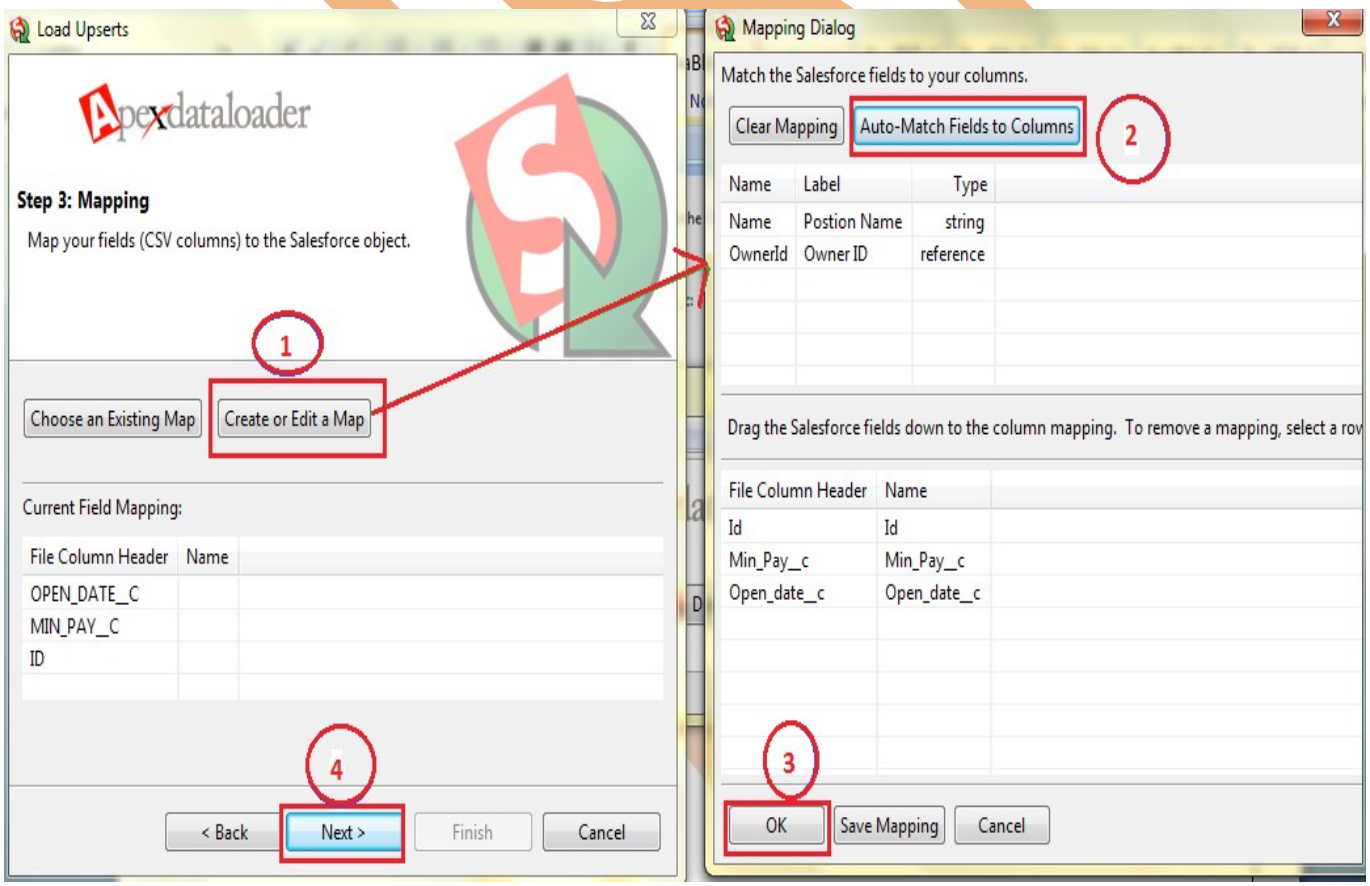
Step 3 :-

Click on the **Next** button.



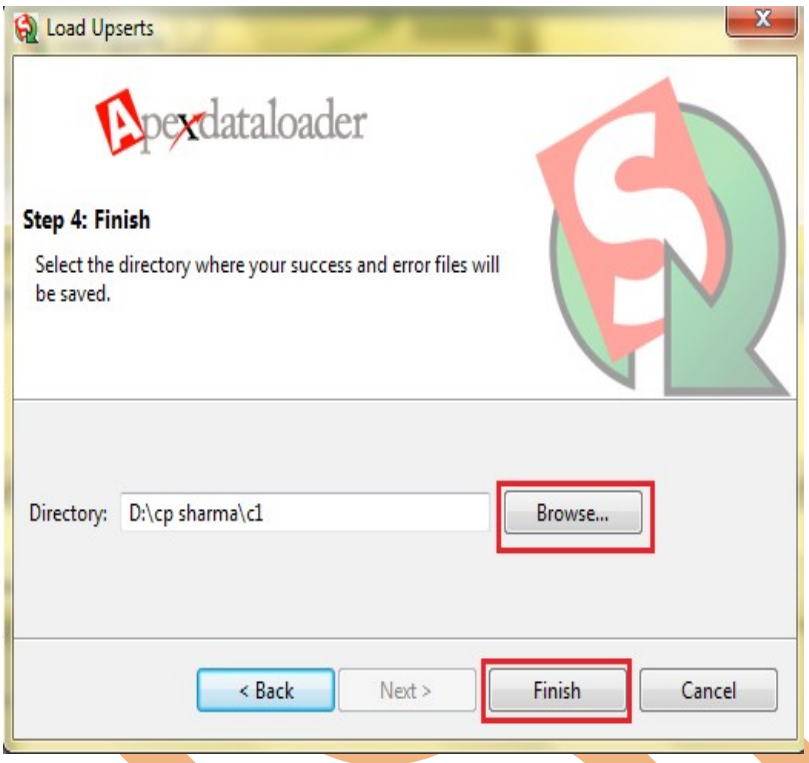
Step 4 :-

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.

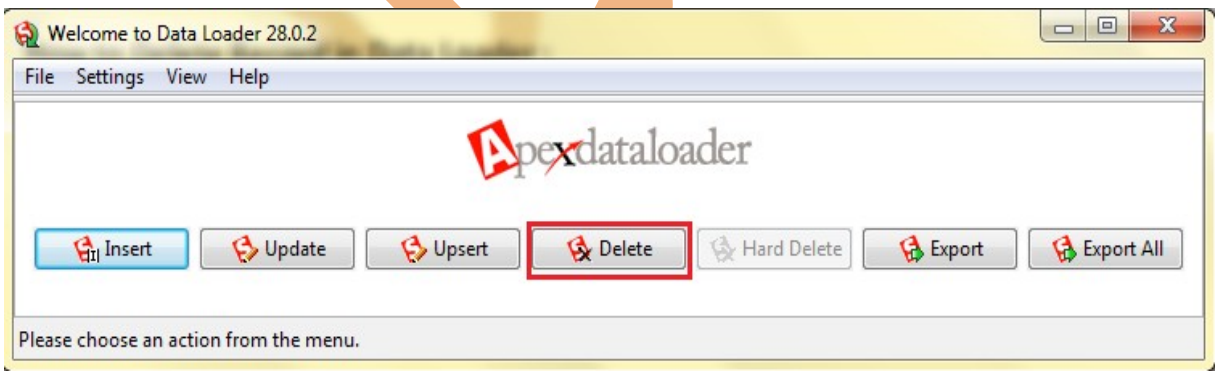
Delete By using Data Loader :

In SalesForce.com by using Client software Data Loader you can delete bulk data.

How to Delete Record in Data Loader :

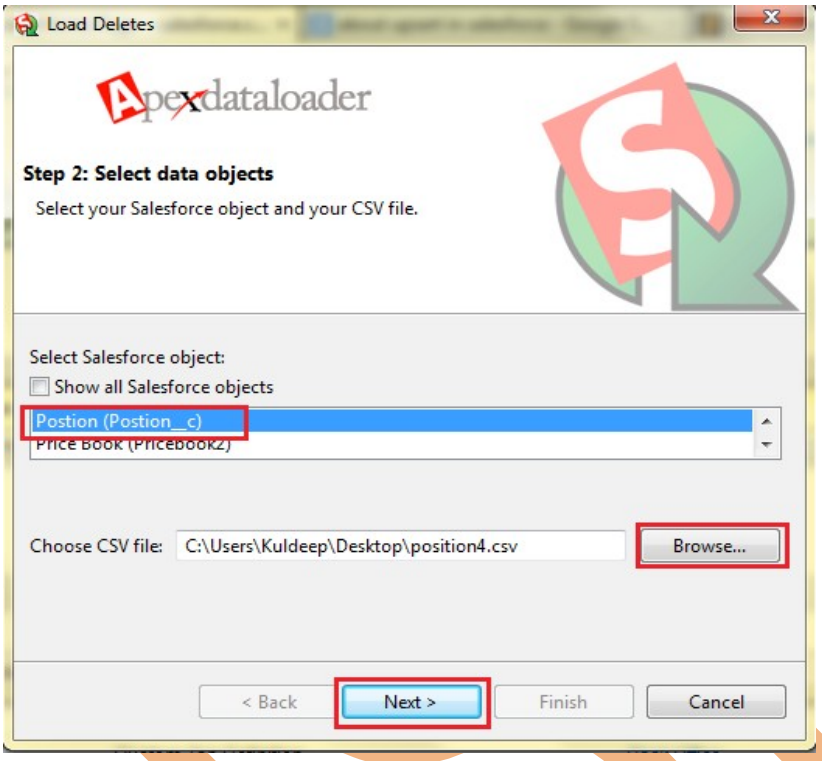
Step 1 :-

Open Data Loader on client machine then select Delete button.



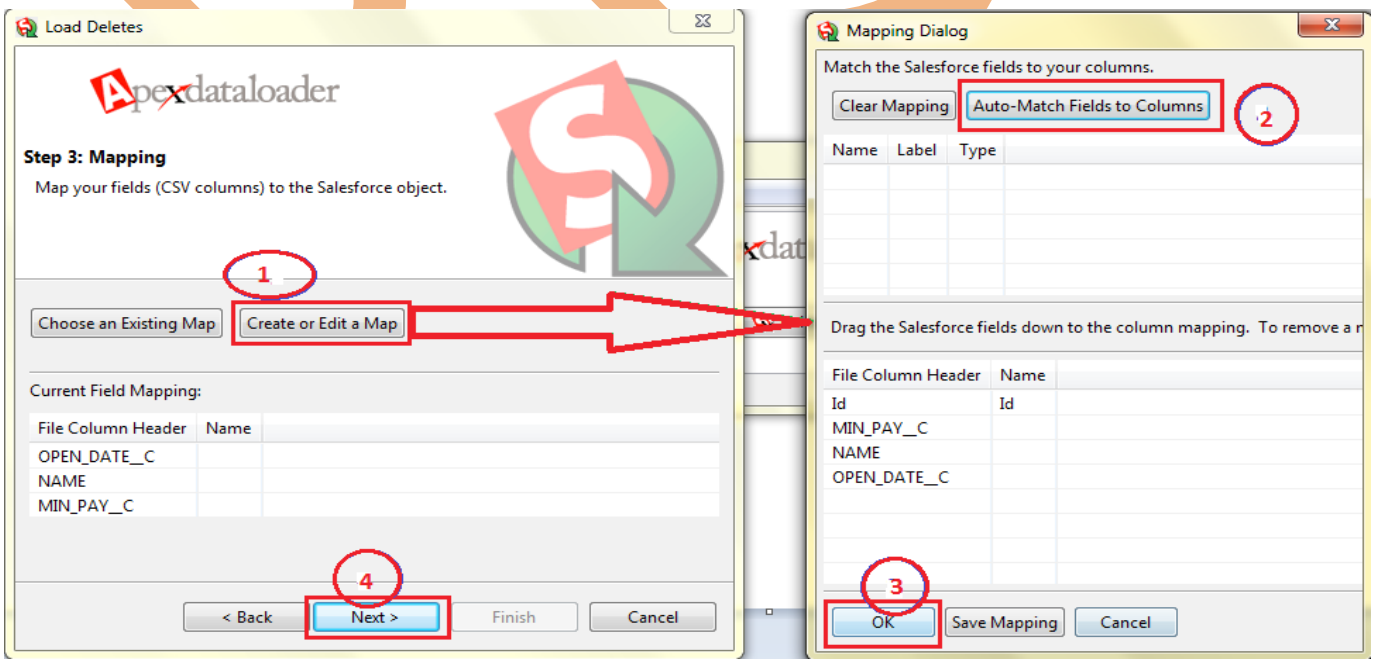
Step 2 :-

Select SalesForce Object, then browse .CSV file (in this CSV file you can write id), Then click to Next button.

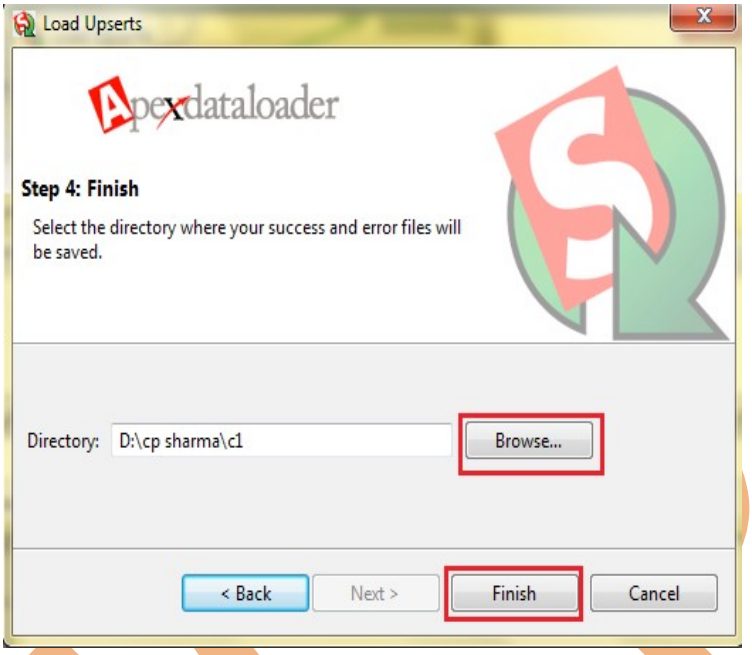


Step 3 :-

Click to Create or Edit a Map then open new window on this window click to Auto-Match Fields to Columns then click to ok button, After that click to Next button.



Step 4 :- click on Browse button for save log file, Then click to Finish button.



Note :- That file not permanently delete it go to recycle bin you can see it. and all so restore .

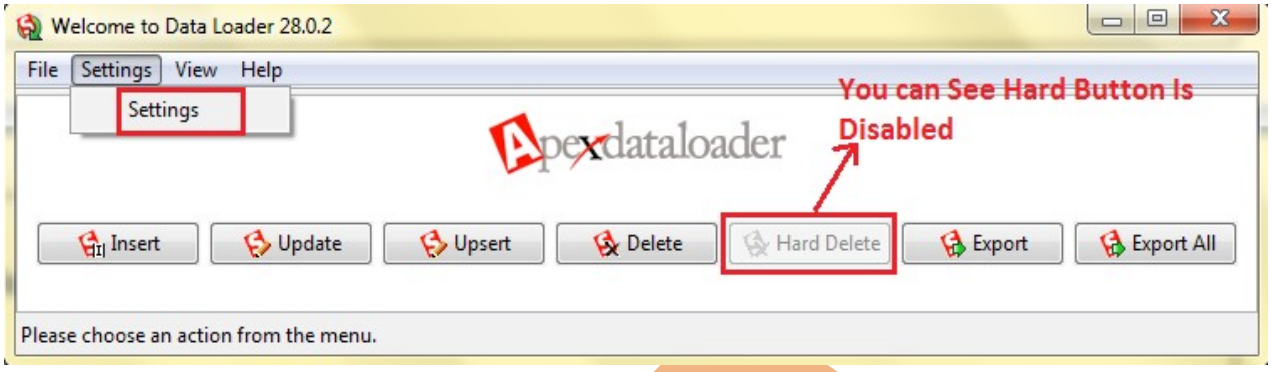
Defiance Between Delete and Hard Delete By using Data Loader :

Delete	Hard Delete
1. When will you Delete option it not delete permanently data after deleting data it go to Recycle bin.	1. When we will use Hard delete option it delete permanently, it not store in recycle bin.

How To Enable Hard Delete Button in Data Loader :

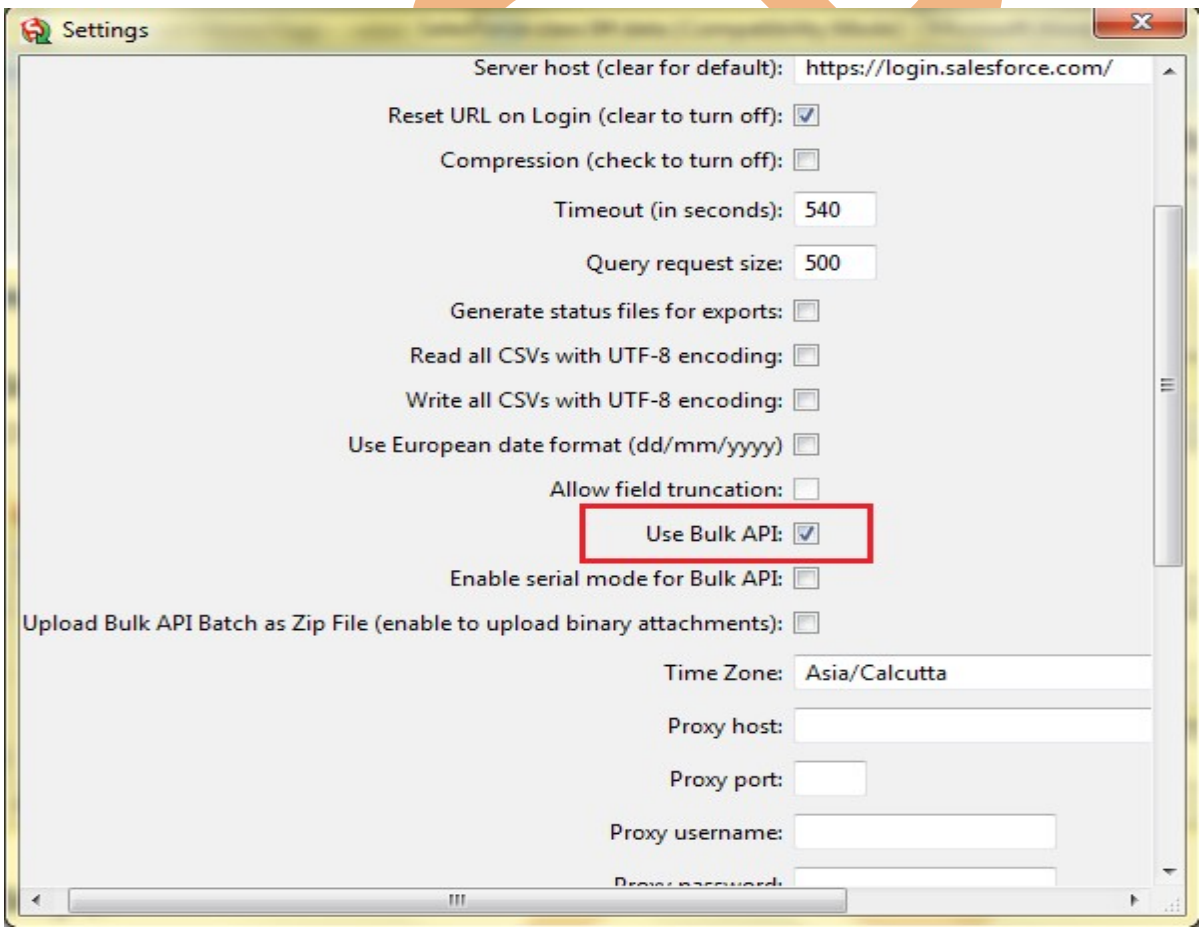
Step1 :-

Click on Setting on Data Loader.



Step 2:-

You can see new screen on this screen find **Use Bulk API** and check this field then click ok button.
after click ok button you can see Hard Delete button visible.

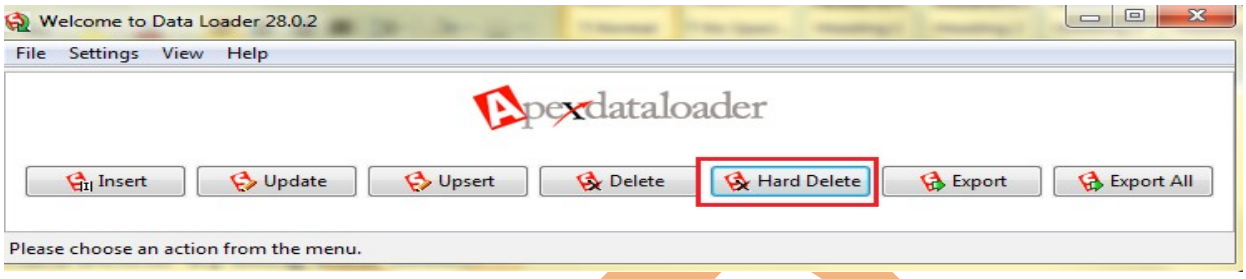


Hard Delete By using Data Loader :

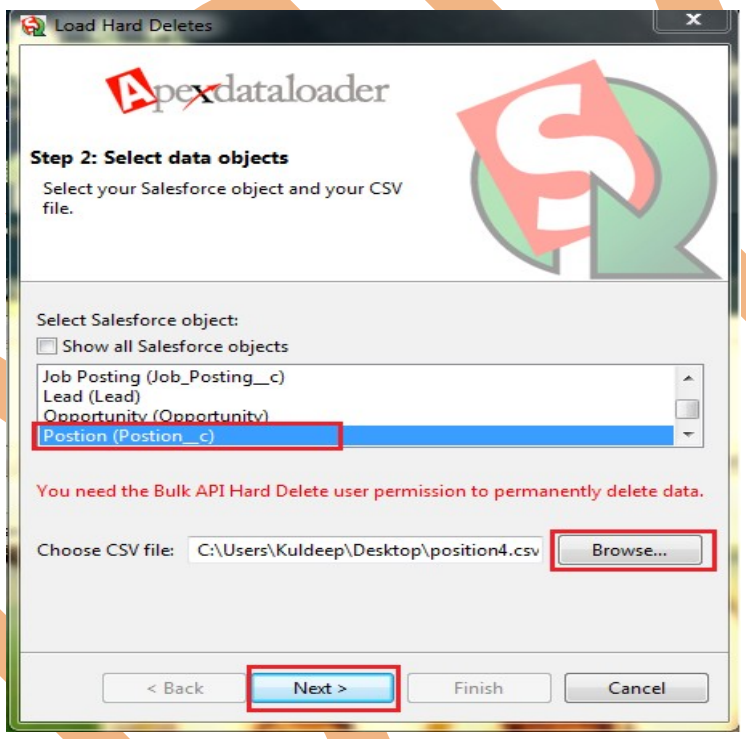
Hard Delete operation, the deleted records are not stored in the recycle bin. instead, they become immediately eligible for deletion.

How to Delete Record in Data Loader :

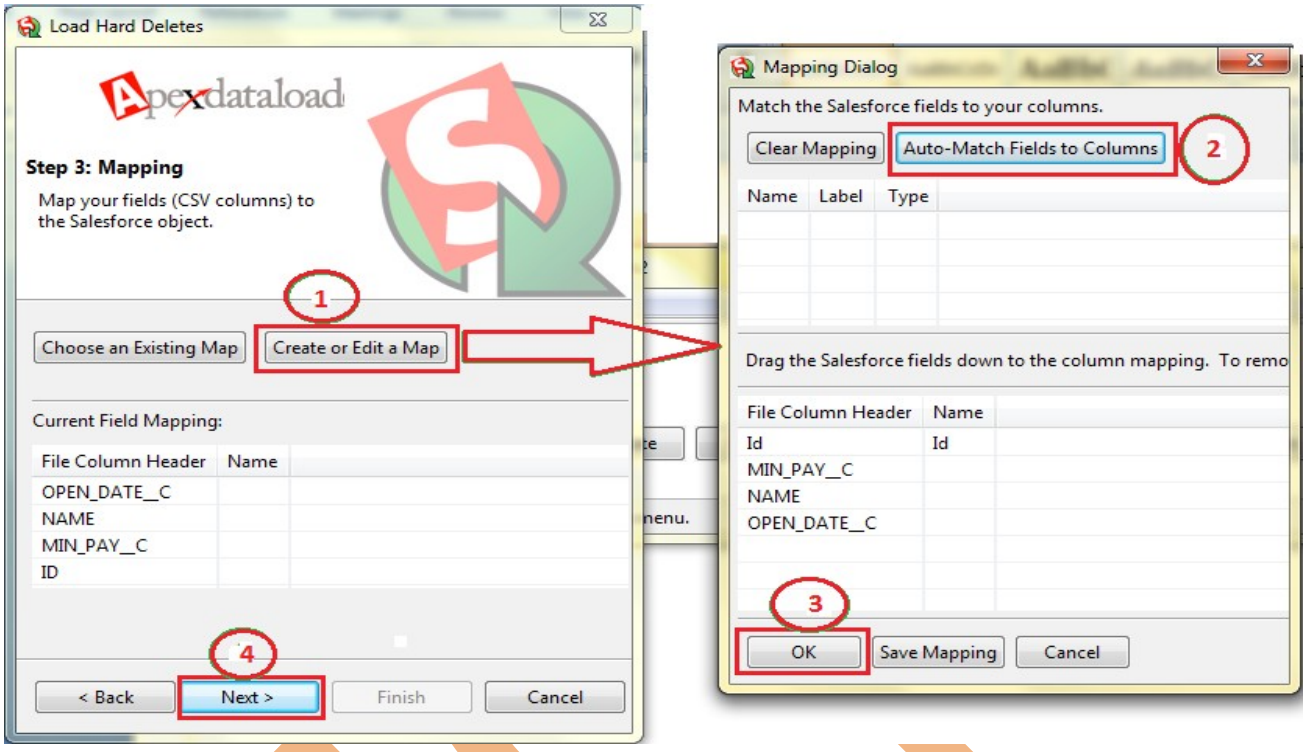
Step 1 :- Open Data Loader on client machine then select Hard Delete button.



Step 2 :- Select SalesForce Object, Then Select CSV file for which data want to delete, then click to Next button.



Step 3 :- After that You can see new screen on this screen click on **Create or Edit Map** button, Then open mapping Dialog on this page click on **Auto-Match Fields to Columns** then click on **ok** button after that click on **Next** button.



Step 4 :-

Browse where want to save log file, then checked check box after that click on Finish button.