



Getting Started with Salesforce CRM

Getting Started with SALESFORCE Part Lab IX

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:

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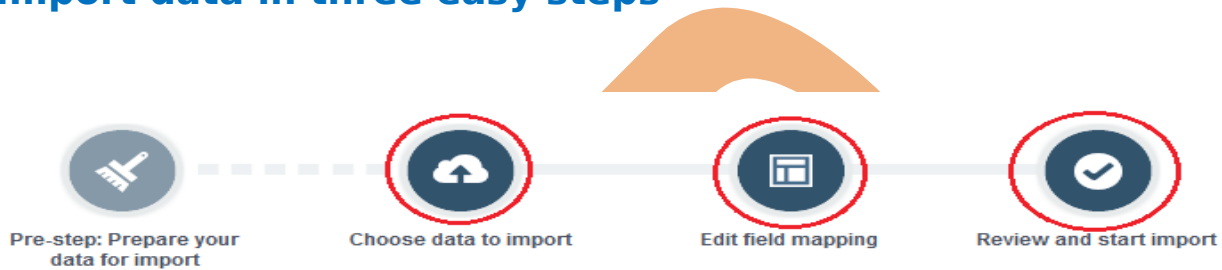


Data Import Wizard in Salesforce

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.

Home Positions Job Applications Departments Employees wiki Employment websites Employee List +

Expand All | Collapse All

Quick Find

Force.com Home

Administer

- Manage Users
- Manage Apps
- Company Profile
- Security Controls
- Domain Management **New!**
- Communication Templates
- Translation Workbench
- Data Management**

Analytic Snapshots

- Data Import Wizard **New!****
- Import Accounts/Contacts
- Import Leads
- Import Solutions
- Import Custom Objects
- Data Export
- Storage Usage
- Mass Transfer Records
- Mass Delete Records
- Mass Transfer Approval Requests
- Mass Update Addresses
- Data Loader

Data Import Wizard

Get Started | Help for this page ?

PILOT!

Before you import your data . . .

- Clean up your data import file**
You'll have fewer errors to resolve if your data file is clean and free of duplicates. [Watch video](#)
- Make sure your field names match Salesforce field names**
You'll be required to map your data fields to Salesforce data fields. Data in unmapped fields is not imported. [View a list of Salesforce data fields.](#)
- Make sure you're not importing too many records**
Using the Data Import Wizard, you can import up to 50,000 records at a time.

Import your data in 3 easy steps!

Launch the Data Import Wizard to import your data.

- Pre-step: Prepare your data for import
- Choose data to import
- Edit field mapping
- Review and start import

Launch Wizard!

Step 1 :-

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

- Standard object
 - 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.



Choose data

Almost done

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			

Map your field: Age

Select field

- Back Office Name >
- Employee Name >
- Age** ✓
- Dob >
- City >
- Record Owner >

[Cancel](#) [Map](#)

[Cancel](#) [Previous](#) [Next](#)

Step 3 :-

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

salesforce

Choose data Edit mapping Start import

Great job

Review & Start Import

Review your import information and press Start Import. [Help for this page](#)

Your selections:

- Back Offices ✓
- Add new records ✓
- backoffice.csv ✓

Your import will include:

Data from mapped fields

4

Your import will not include:

Data from unmapped fields

0

Cancel Previous **Start import**

Step 4 :-

After Click on [Start import](#) button then you can see Message box click on [Ok](#) button

Congratulations, your import has started!
View your import status on the Bulk Downloads page.

Ok

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.

75090000000RDJL

[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	751900000000LWA	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.

Home Positions Job Applications Departments Employees wiki Employment websites Employee List **Back Offices** +

Create New... All Edit | Delete | Create New View

Recent Items

- HR
- Development
- Emp-003

New Back Office Change Owner

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

Action	Back Office Name
Edit Del	Development
Edit Del	HR

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:

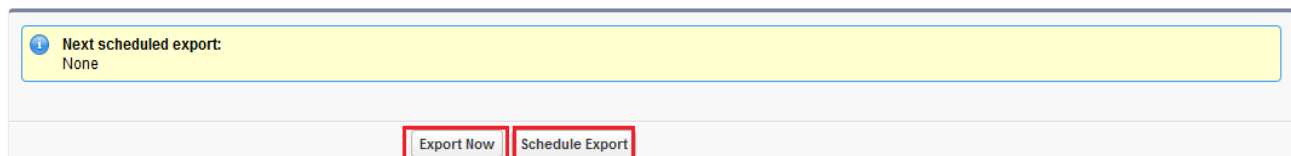
The Export Now option prepares your files for export immediately. This option is only available some time that store only last export record.

Click on **Export Now** button then you can see new screen, you can see below

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.



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.

Schedule Data Export

[Help for this Page](#)

Schedule Data Export Save Cancel

Export File Encoding: ISO-8859-1 (General US & Western European, ISO-LATIN-1)

Include images, documents, and attachments:

Include Chatter files and Salesforce CRM Content document versions:

Replace carriage returns with spaces:

Schedule Data Export

Frequency: On day 1 of every month On the 1st Sunday of every month

Start: 10/11/2013 [10/11/2013]

End: 11/11/2013 [10/11/2013]

Preferred Start Time: --None--

Exact start time will depend on job queue activity.

Save Cancel

Exported Data

Select what type of information you would like to include in the export. The data types listed below use the Apex API names. If you are not familiar with these names, select Include all data for your export.

- Include all data
- | | | |
|---|---|---|
| <input type="checkbox"/> RecordType | <input type="checkbox"/> BusinessProcess | <input type="checkbox"/> Contract |
| <input type="checkbox"/> Approval | <input type="checkbox"/> ContractContactRole | <input type="checkbox"/> EntityHistory |
| <input type="checkbox"/> FieldHistory | <input type="checkbox"/> User | <input type="checkbox"/> EmailRoutingAddress |
| <input type="checkbox"/> OrgWideEmailAddress | <input type="checkbox"/> LinkReference | <input type="checkbox"/> Campaign |
| <input type="checkbox"/> CampaignMember | <input type="checkbox"/> Account | <input type="checkbox"/> Contact |
| <input type="checkbox"/> Lead | <input type="checkbox"/> Opportunity | <input type="checkbox"/> AccountContactRole |
| <input type="checkbox"/> OpportunityContactRole | <input type="checkbox"/> OpportunityHistory | <input type="checkbox"/> OpportunityLineItem |
| <input type="checkbox"/> OpportunityCompetitor | <input type="checkbox"/> Partner | <input type="checkbox"/> Note |
| <input type="checkbox"/> FiscalYearSettings | <input type="checkbox"/> Period | <input type="checkbox"/> PricebookEntry |
| <input type="checkbox"/> Product2 | <input type="checkbox"/> Asset | <input type="checkbox"/> Case |
| <input type="checkbox"/> CaseComment | <input type="checkbox"/> CaseContactRole | <input type="checkbox"/> CaseHistory2 |
| <input type="checkbox"/> CaseSolution | <input type="checkbox"/> Solution | <input type="checkbox"/> ContentVersion |
| <input type="checkbox"/> NewsFeed | <input type="checkbox"/> FeedTrackedChange | <input type="checkbox"/> FeedPost |
| <input type="checkbox"/> FeedComment | <input type="checkbox"/> EntitySubscription | <input type="checkbox"/> FeedFieldHistory |
| <input type="checkbox"/> ProcessInstance | <input type="checkbox"/> ProcessInstanceStep | <input type="checkbox"/> ProcessInstanceWorkitem |
| <input type="checkbox"/> UserRole | <input type="checkbox"/> Task | <input type="checkbox"/> Event |
| <input type="checkbox"/> TaskRelation | <input type="checkbox"/> EventRelation | <input type="checkbox"/> EmailDisclaimer |
| <input type="checkbox"/> Pricebook2 | <input type="checkbox"/> Idea | <input type="checkbox"/> IdeaComment |
| <input type="checkbox"/> PushProfileMapping | <input type="checkbox"/> PushIntent | <input type="checkbox"/> MetricsTransmissionHistory |
| <input type="checkbox"/> JigsawSavedSearch | <input type="checkbox"/> DatacloudPurchaseUsage | <input type="checkbox"/> SocialPersona |
| <input type="checkbox"/> TopicGroupActivity | <input type="checkbox"/> TopicUserActivity | <input type="checkbox"/> TrendingTopic |
| <input type="checkbox"/> Review__c | <input type="checkbox"/> Employment_website__c | <input type="checkbox"/> Job_Posting__c |
| <input type="checkbox"/> ForTesting__c | <input type="checkbox"/> Position__c | <input type="checkbox"/> Candidate__c |
| <input type="checkbox"/> Job_Application__c | <input type="checkbox"/> DepartMent__c | <input type="checkbox"/> Back_Office__c |
| <input type="checkbox"/> Employee__c | <input type="checkbox"/> Book__c | |

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.

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:
A data export is currently in progress for your organization.

[Export Now](#) [Schedule Export](#)

Your export has been queued. You will receive an email notification when it is completed.

Scheduled By	yogesh sharma
Schedule Date	10/11/2013
Export File Encoding	ISO-8859-1 (General US & Western European, ISO-LATIN-1)

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.

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:
None

[Export Now](#) [Schedule Export](#)

Scheduled By	yogesh sharma
Schedule Date	10/11/2013
Export File Encoding	ISO-8859-1 (General US & Western European, ISO-LATIN-1)

Action	File Name	File Size
download	WE_00D900000000OX9EAM_1.ZIP	12.7K

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.

Schedule Data Export

[Help for this Page](#)

Schedule Data Export

Export File Encoding: ISO-8859-1 (General US & Western European, ISO-LATIN-1)

Include images, documents, and attachments

Include Chatter files and Salesforce CRM Content document versions

Replace carriage returns with spaces

Schedule Data Export

Frequency: On day 1 of every month On the 1st Sunday of every month

Start: 10/11/2013 [10/11/2013]

End: 11/11/2013 [10/11/2013]

Preferred Start Time: --None--

Exact start time will depend on job queue activity.

Exported Data

Select what type of information you would like to include in the export. The data types listed below use the Apex API names. If you are not familiar with these names, select Include all data for your export.

Include all data

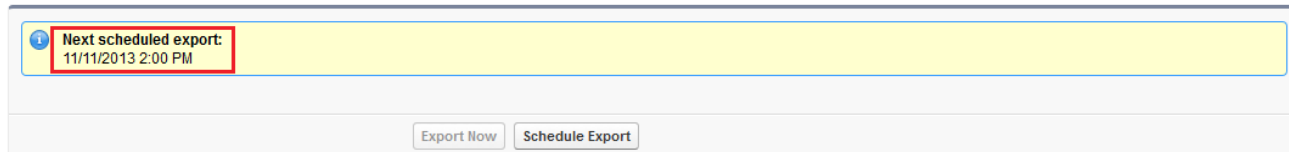
- | | | |
|---|---|---|
| <input type="checkbox"/> RecordType | <input type="checkbox"/> BusinessProcess | <input type="checkbox"/> Contract |
| <input type="checkbox"/> Approval | <input type="checkbox"/> ContractContactRole | <input type="checkbox"/> EntityHistory |
| <input type="checkbox"/> FieldHistory | <input type="checkbox"/> User | <input type="checkbox"/> EmailRoutingAddress |
| <input type="checkbox"/> OrgWideEmailAddress | <input type="checkbox"/> LinkReference | <input type="checkbox"/> Campaign |
| <input type="checkbox"/> CampaignMember | <input type="checkbox"/> Account | <input type="checkbox"/> Contact |
| <input type="checkbox"/> Lead | <input type="checkbox"/> Opportunity | <input type="checkbox"/> AccountContactRole |
| <input type="checkbox"/> OpportunityContactRole | <input type="checkbox"/> OpportunityHistory | <input type="checkbox"/> OpportunityLineItem |
| <input type="checkbox"/> OpportunityCompetitor | <input type="checkbox"/> Partner | <input type="checkbox"/> Note |
| <input type="checkbox"/> FiscalYearSettings | <input type="checkbox"/> Period | <input type="checkbox"/> PricebookEntry |
| <input type="checkbox"/> Product2 | <input type="checkbox"/> Asset | <input type="checkbox"/> Case |
| <input type="checkbox"/> CaseComment | <input type="checkbox"/> CaseContactRole | <input type="checkbox"/> CaseHistory2 |
| <input type="checkbox"/> CaseSolution | <input type="checkbox"/> Solution | <input type="checkbox"/> ContentVersion |
| <input type="checkbox"/> NewsFeed | <input type="checkbox"/> FeedTrackedChange | <input type="checkbox"/> FeedPost |
| <input type="checkbox"/> FeedComment | <input type="checkbox"/> EntitySubscription | <input type="checkbox"/> FeedFieldHistory |
| <input type="checkbox"/> ProcessInstance | <input type="checkbox"/> ProcessInstanceStep | <input type="checkbox"/> ProcessInstanceWorkitem |
| <input type="checkbox"/> UserRole | <input type="checkbox"/> Task | <input type="checkbox"/> Event |
| <input type="checkbox"/> TaskRelation | <input type="checkbox"/> EventRelation | <input type="checkbox"/> EmailDisclaimer |
| <input type="checkbox"/> Pricebook2 | <input type="checkbox"/> Idea | <input type="checkbox"/> IdeaComment |
| <input type="checkbox"/> PushProfileMapping | <input type="checkbox"/> Pushintent | <input type="checkbox"/> MetricsTransmissionHistory |
| <input type="checkbox"/> JigsawSavedSearch | <input type="checkbox"/> DatacloudPurchaseUsage | <input type="checkbox"/> SocialPersona |
| <input type="checkbox"/> TopicGroupActivity | <input type="checkbox"/> TopicUserActivity | <input type="checkbox"/> TrendingTopic |
| <input type="checkbox"/> Review__c | <input type="checkbox"/> Employment_website__c | <input type="checkbox"/> Job_Posting__c |
| <input type="checkbox"/> ForTesting__c | <input type="checkbox"/> Position__c | <input type="checkbox"/> Candidate__c |
| <input type="checkbox"/> Job_Application__c | <input type="checkbox"/> Department__c | <input type="checkbox"/> Back_Office__c |
| <input type="checkbox"/> Employee__c | <input type="checkbox"/> Book__c | |

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.



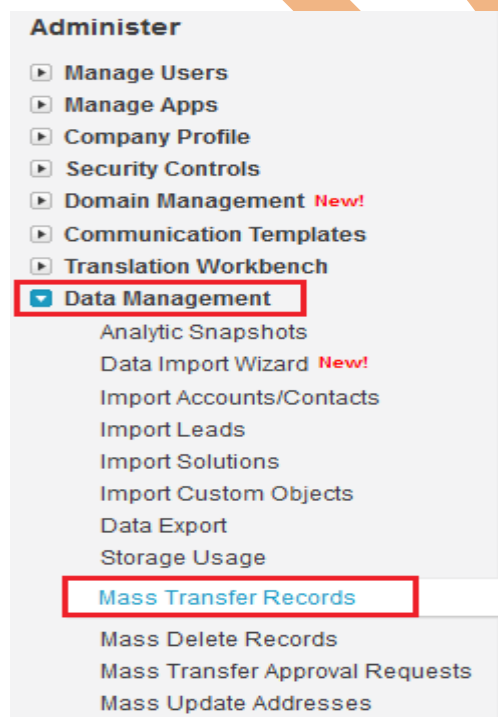
The screenshot shows a yellow notification bar with a blue information icon on the left. The text inside the bar reads: "Next scheduled export: 11/11/2013 2:00 PM". Below the bar, there are two buttons: "Export Now" and "Schedule Export".

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**



The screenshot shows the 'Administer' menu in Salesforce. The menu items are: Manage Users, Manage Apps, Company Profile, Security Controls, Domain Management **New!**, Communication Templates, Translation Workbench, **Data Management**, Analytic Snapshots, Data Import Wizard **New!**, Import Accounts/Contacts, Import Leads, Import Solutions, Import Custom Objects, Data Export, Storage Usage, **Mass Transfer Records**, Mass Delete Records, Mass Transfer Approval Requests, and Mass Update Addresses. The 'Data Management' and 'Mass Transfer Records' items are highlighted with red boxes.

Step 1 :-

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

Mass Transfer

- [Transfer Accounts](#) — Transfer multiple accounts from one user to another
- [Transfer Back Offices](#) — Transfer multiple back offices 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 For Testings](#) — Transfer multiple for testings 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

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.

Mass Transfer Positions

The screenshot shows the 'Mass Transfer Positions' interface. At the top, there are two callouts: 'Click here select Transfer' pointing to the 'Transfer from' and 'Transfer to' dropdown menus, and another 'Click here select Transfer' pointing to the search icons next to them. Below these are the 'Transfer from' and 'Transfer to' dropdowns, both set to 'User'. Callout 3 points to the search icon for 'Transfer from', and callout 4 points to the search icon for 'Transfer to'. A callout 5 points to the 'Find' button. Below the search fields is a section for finding positions that match criteria, with callout 1 pointing to the criteria table. Below this is a table of positions with callout 6 pointing to the 'Transfer' button. The table has columns for 'Position Name', 'Owner Alias', 'Created By Alias', and 'Last Modified By Alias'. The 'Position Name' column has checkboxes next to each row, with callout 5 pointing to the checkbox for 'Sr. SW'. Below the table are 'Transfer' and 'Cancel' buttons.

Transfer from: User

Transfer to: User

Find positions that match the following criteria:

--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND

Filter By Additional Fields (Optional):

- You can use "or" filters by entering multiple items in the third column, separated by commas.
- For date fields, enter the value in following format: 10/11/2013
- For date/time fields, enter the value in following format: 10/11/2013 3:46 PM

Find

<input type="checkbox"/>	Position Name	Owner Alias	Created By Alias	Last Modified By Alias
<input checked="" type="checkbox"/>	Java developer	yshar	yshar	yshar
<input type="checkbox"/>	sdfc developer	yshar	yshar	yshar
<input checked="" type="checkbox"/>	Sr. SW	yshar	yshar	yshar
<input type="checkbox"/>	dot net developer	yshar	yshar	yshar
<input checked="" type="checkbox"/>	php	yshar	yshar	yshar
<input type="checkbox"/>	oracle admin	yshar	yshar	yshar

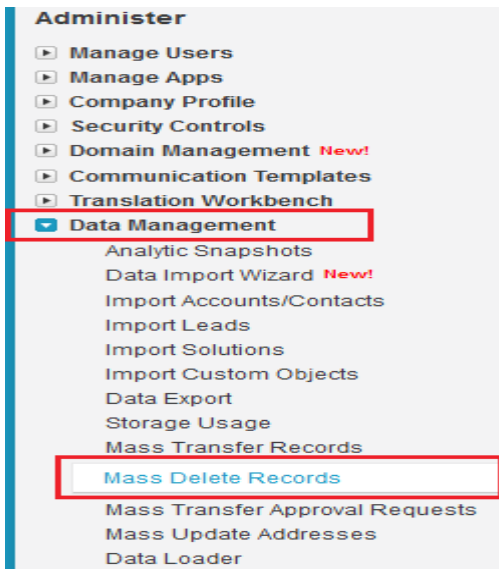
Transfer Cancel

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.

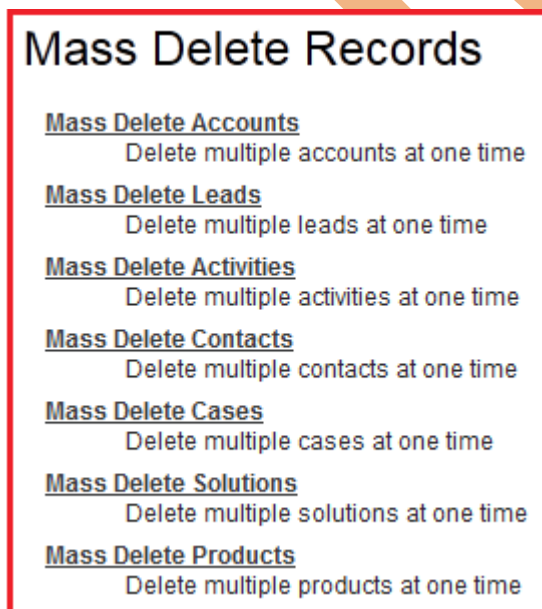
How to go Mass Delete Records :

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



Step 1 :-

Click on **Mass Delete Records** link then you can see 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.

Mass Delete

[Help for this Page](#) ?

Contacts

▼ Step 1: Review what will happen when you mass delete your Contacts:

This screen allows you to delete a list of Contacts from salesforce.com. The following data will also be deleted:

- Contact Notes
- All Opportunities associated with the Contacts
- All Activities associated with the Contacts

Once data is deleted, it will be moved to the Recycle Bin.

▼ Step 2: Recommendation prior to mass deleting:

We strongly recommend you run a report to archive your data before you continue.

It is also strongly advised to request and receive a weekly export of your data before running mass delete. The weekly export service is included with Enterprise Edition, and available for an additional cost with Professional Edition. Contact salesforce.com for more information.

▼ Step 3: Find Contacts that match the following criteria:

Account Name	▼ equals	▼ Grand Hotels & Resort	AND
--None--	▼ --None--	▼	AND
--None--	▼ --None--	▼	AND
--None--	▼ --None--	▼	AND
--None--	▼ --None--	▼	AND

1 Click here and find contacts that match following criteria

Filter By Additional Fields (Optional):

- You can use "or" filters by entering multiple items in the third column, separated by commas.
- For date fields, enter the value in following format: 10/12/2013
- For date/time fields, enter the value in following format: 10/12/2013 10:07 AM

Search

2 Click here for Search detail

- Contacts with associated cases will not be deleted.
- Partner Contacts with Partner users will not be deleted.

3 This is optional option

▼ Permanently delete

Permanently delete the selected records. When this option is selected, you cannot restore deleted records from the Recycle Bin. Please be careful when selecting this option.

4 Select Check box which want to delete

Delete

<input type="checkbox"/>	Name	Account Name	Title	Phone	Email	Contact Owner Alias	Created By Alias	Last Modified By Alias
<input type="checkbox"/>	Barr, Tim	Grand Hotels & Resorts Ltd	SVP, Administration and Finance	(312) 596-1000	barr_tim@grandhotels.com	yshar	yshar	yshar
<input type="checkbox"/>	Bond, John	Grand Hotels & Resorts Ltd	VP, Facilities	(312) 596-1000	bond_john@grandhotels.com	yshar	yshar	yshar

Delete

5 Click here to delete selected record

Data Loader in Salesforce.com

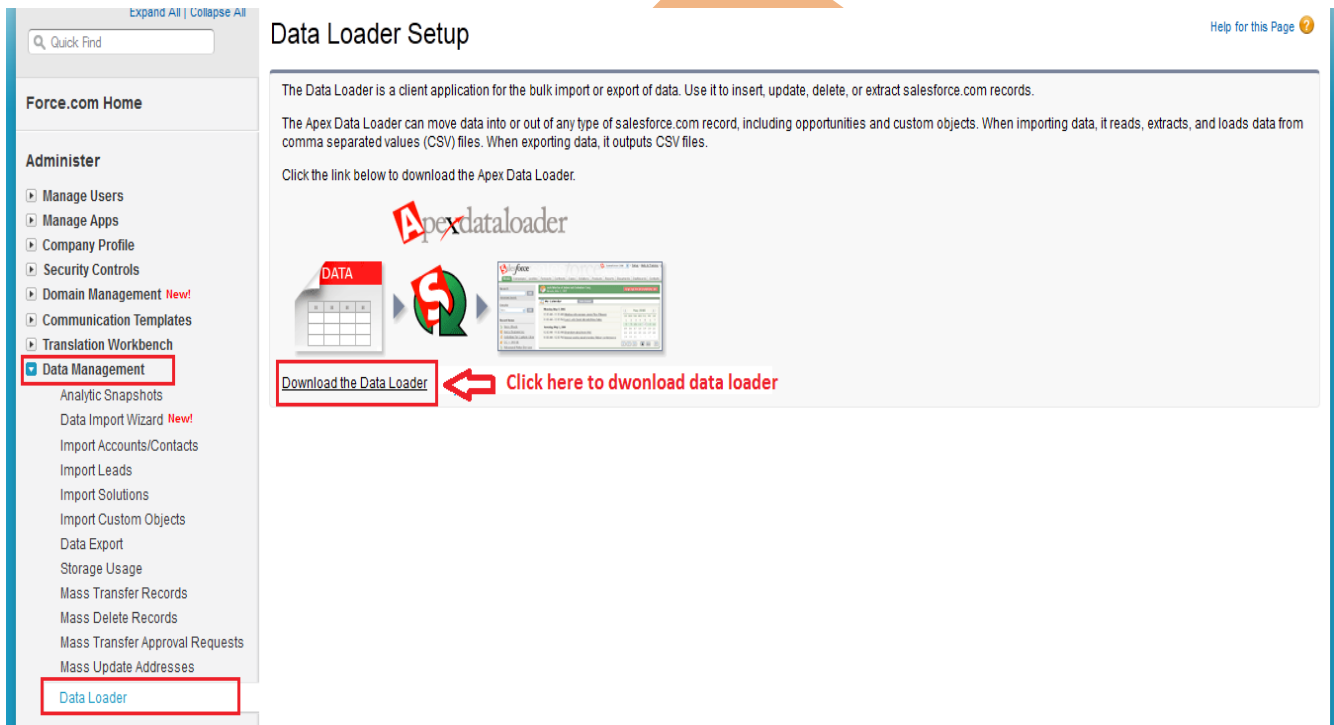
SalesForce provide to you client application it is data loader for work the bulk import or export of data.

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.



Expand All | Collapse All

Quick Find

Force.com Home

Administer

- Manage Users
- Manage Apps
- Company Profile
- Security Controls
- Domain Management *New!*
- Communication Templates
- Translation Workbench
- Data Management**
 - Analytic Snapshots
 - Data Import Wizard *New!*
 - Import Accounts/Contacts
 - Import Leads
 - Import Solutions
 - Import Custom Objects
 - Data Export
 - Storage Usage
 - Mass Transfer Records
 - Mass Delete Records
 - Mass Transfer Approval Requests
 - Mass Update Addresses
 - Data Loader**


Data Loader Setup

Help for this Page

The Data Loader is a client application for the bulk import or export of data. Use it to insert, update, delete, or extract salesforce.com records.

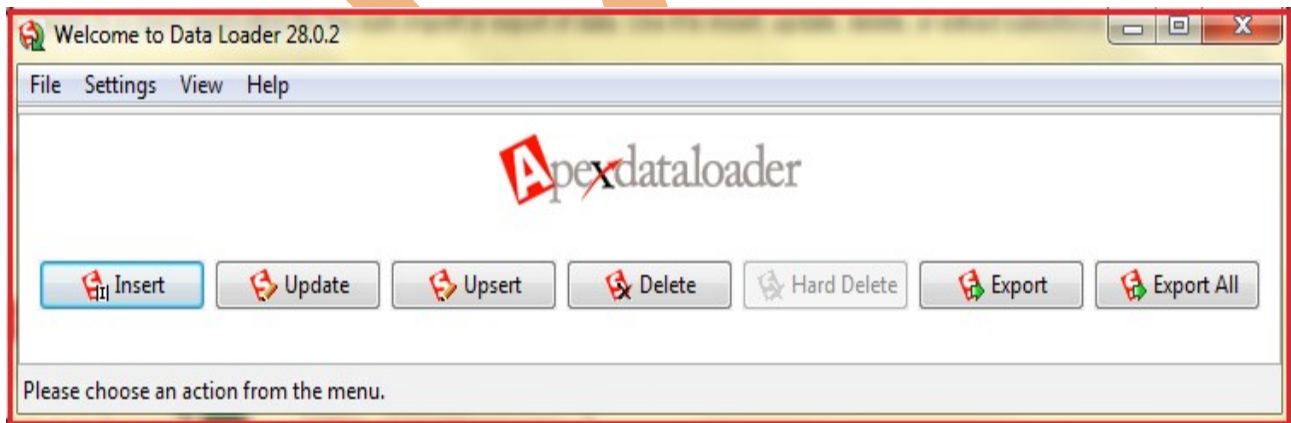
The Apex Data Loader can move data into or out of any type of salesforce.com record, including opportunities and custom objects. When importing data, it reads, extracts, and loads data from comma separated values (CSV) files. When exporting data, it outputs CSV files.

Click the link below to download the Apex Data Loader.




[Download the Data Loader](#) **Click here to dwnload data loader**

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



Welcome to Data Loader 28.0.2

File Settings View Help

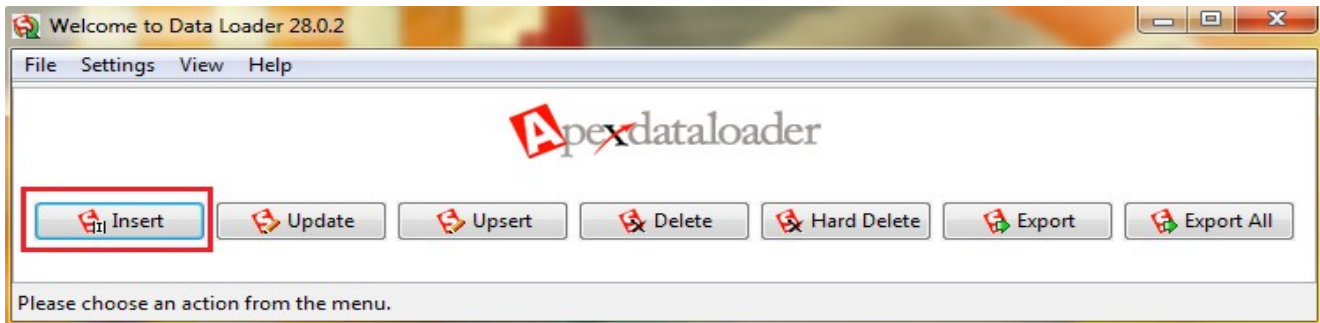


Insert Update Upsert Delete Hard Delete Export Export All

Please choose an action from the menu.

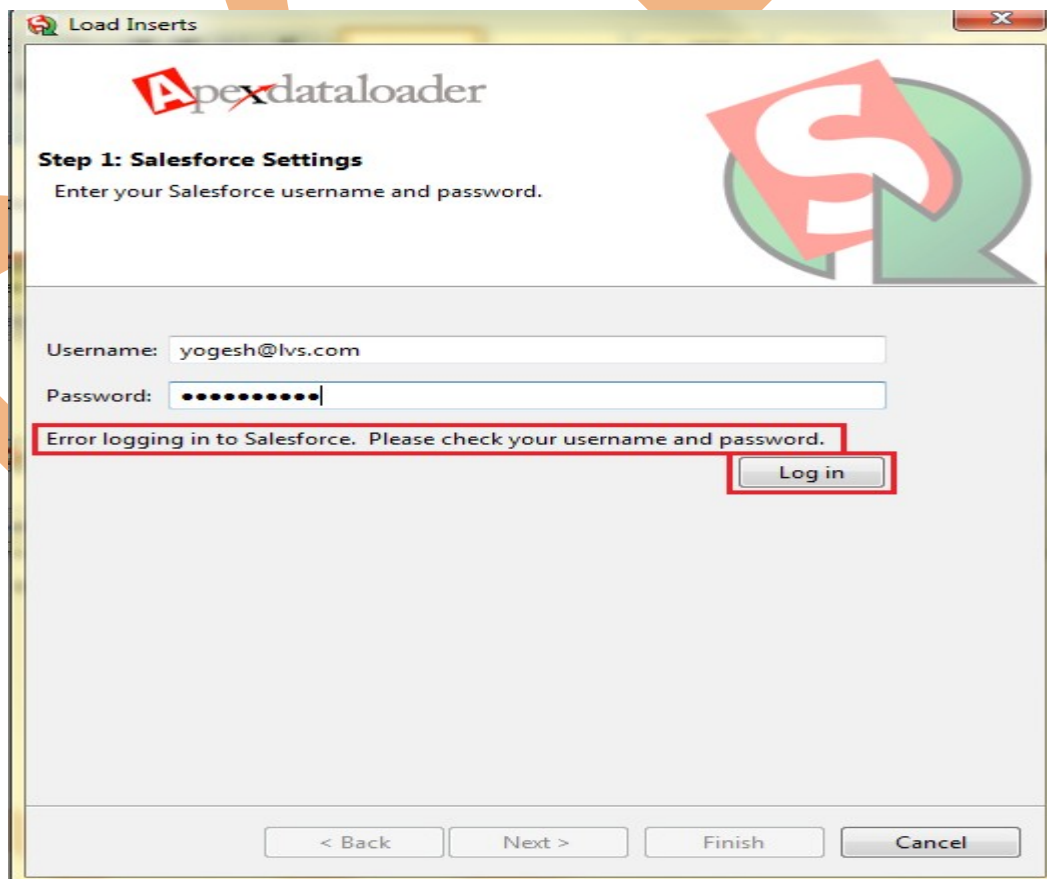
Insert Record By using Data Loader :

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 following detail login id and password Salesforce throw **Error message**. you can see below .



Solution : You need to Security Token.

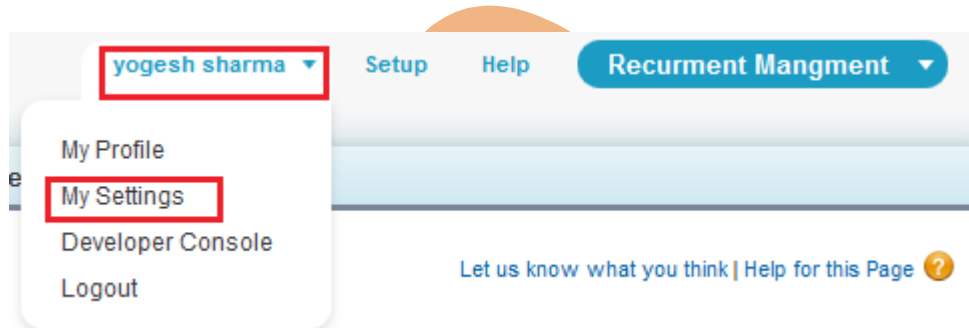
What is Security Token :

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.

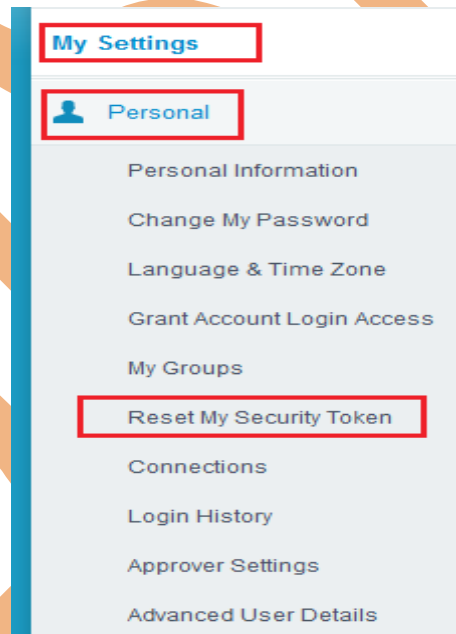
How to Open Security Token In Salesforce.com :

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.



Clicking the button below invalidates your existing token. After resetting your token, you will have to use the new token in all API applications.

When accessing salesforce.com from outside of your company's trusted networks, you must add a security token to your password to log in to the API or a desktop client such as Connect for Outlook, Connect Offline, Connect for Office, Connect for Lotus Notes, or the Data Loader.

Your security token is tied to your password and subject to any password policies your administrators have configured. Whenever your password is reset, your security token is also reset.

For security reasons, your security token is delivered to the email address associated with your account. To reset and send your security token, click the button below.

Reset Security Token

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.



A new security token has been sent to yogesh_cp8888@rediff.com, which is the email address associated to your user.

How to enter your security token:

When accessing salesforce.com either via a desktop client or the API from outside of your company's trusted networks:

If your password = "mypassword"
And your security token = "XXXXXXXXXXXX"
You must enter "mypasswordXXXXXXXXXXXX" in place of your password

Note that you do not enter a security token in place of your password when logging into salesforce.com via a browser.

Step 4 :-

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

User Name: yogesh@lvs.com
Security Token: bkO70IIJPCnPg7vxt085bNOv

and paste after password you can see below.

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

Load Inserts

Apexdataloader

Step 1: Salesforce Settings
Enter your Salesforce username and password.

Username: yogesh@lvs.com

Password:

Login com: es

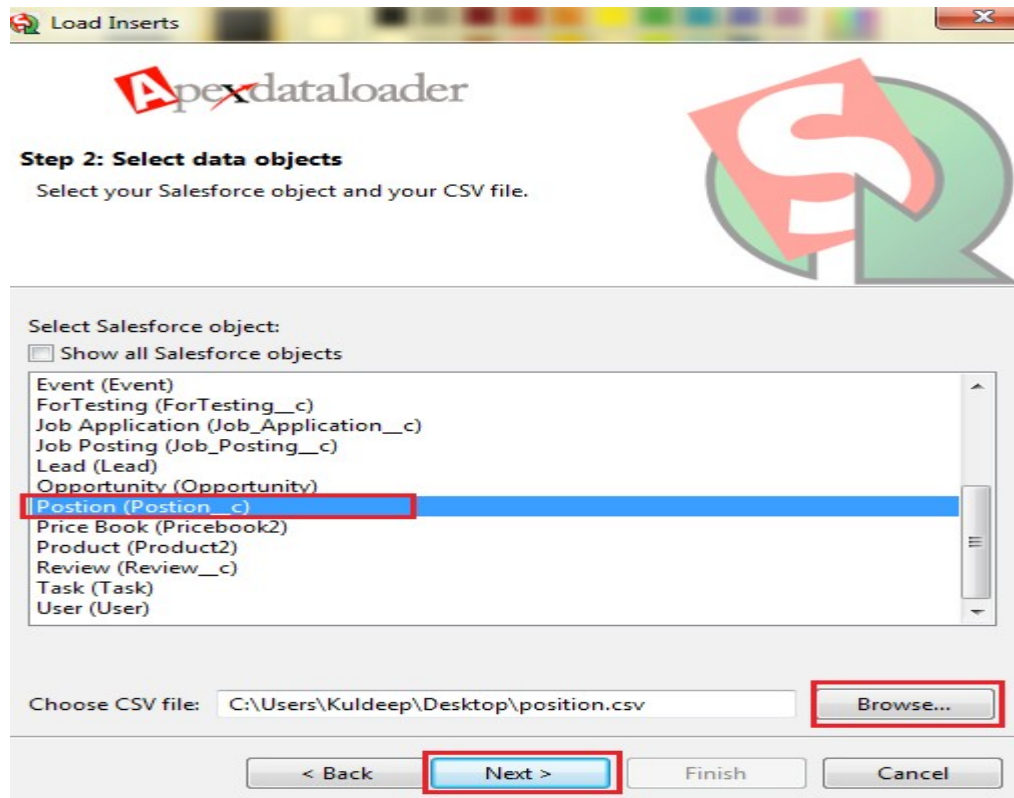
Log in

Your Password

Paste here Security Toke

< Back **Next >** Finish Cancel

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



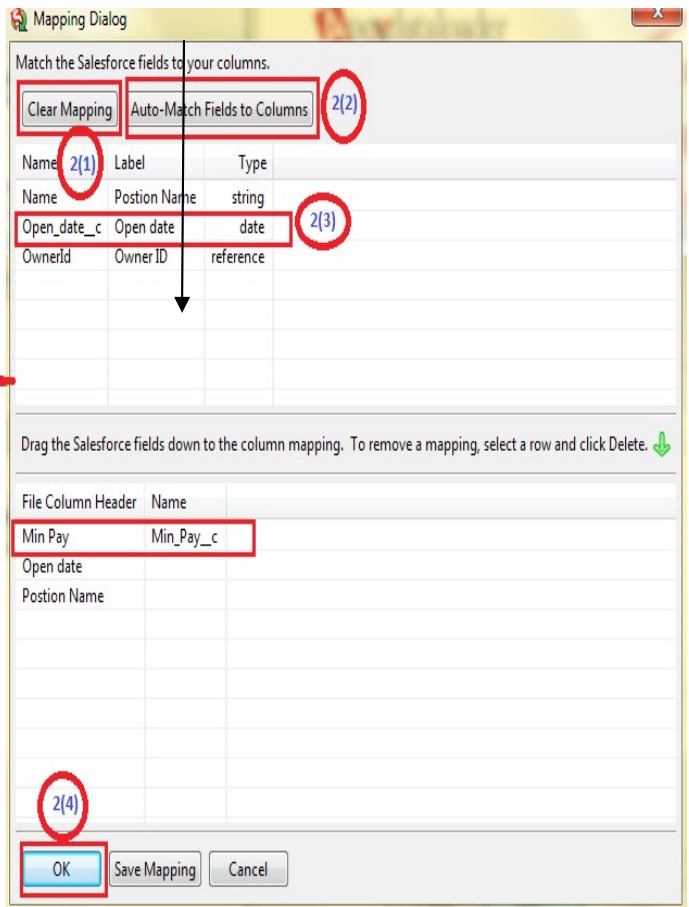
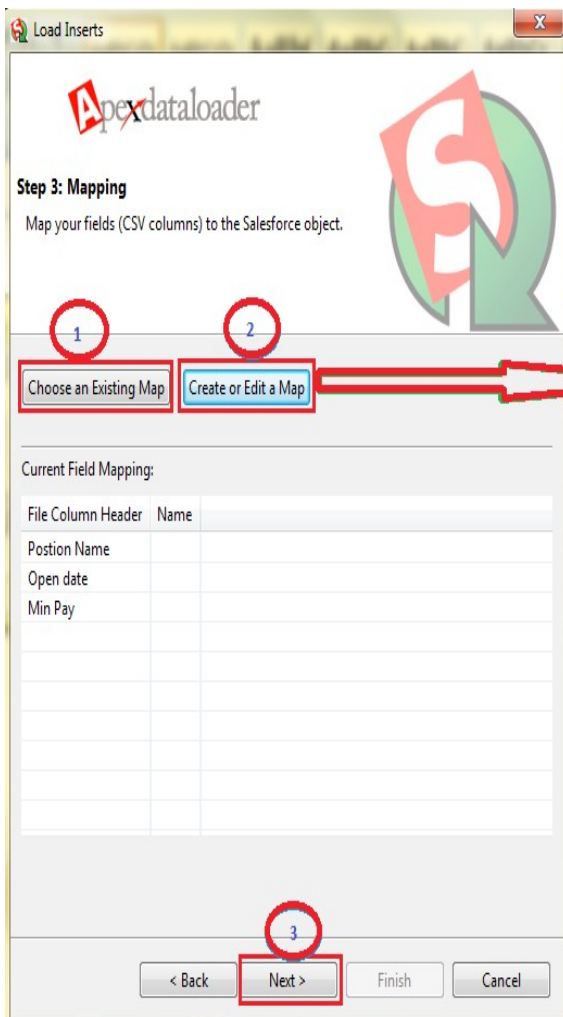
Step 6 :-

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



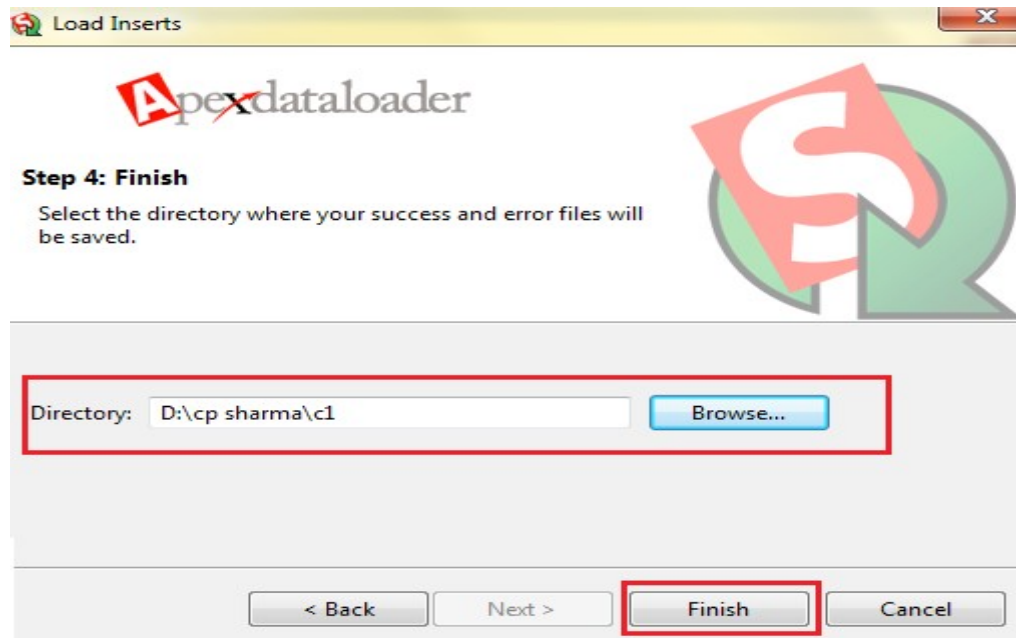
Then if you want to add mapping there is two option.

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.



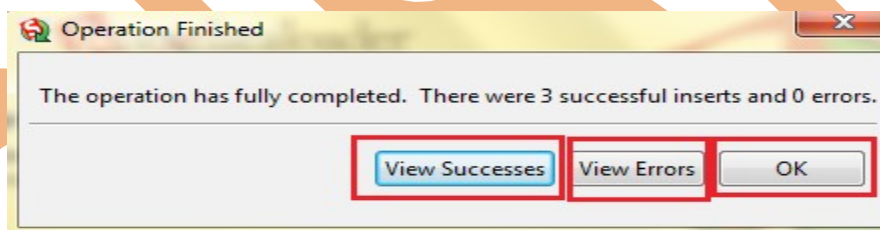
Step 7 :-

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



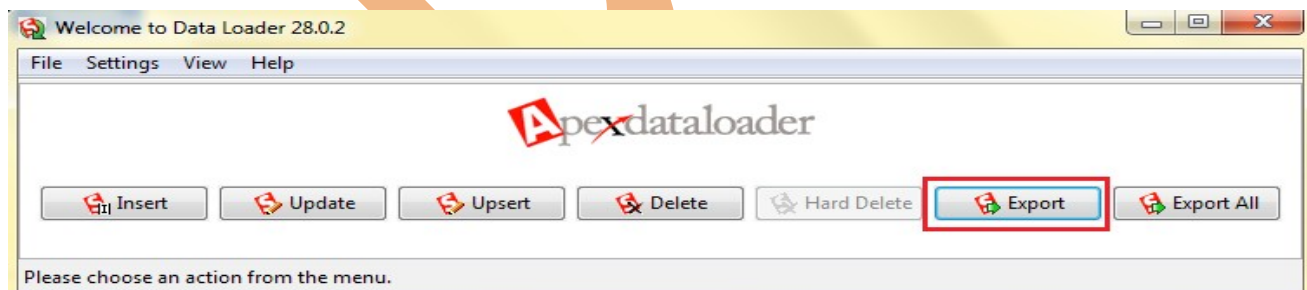
Step 8 :-

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



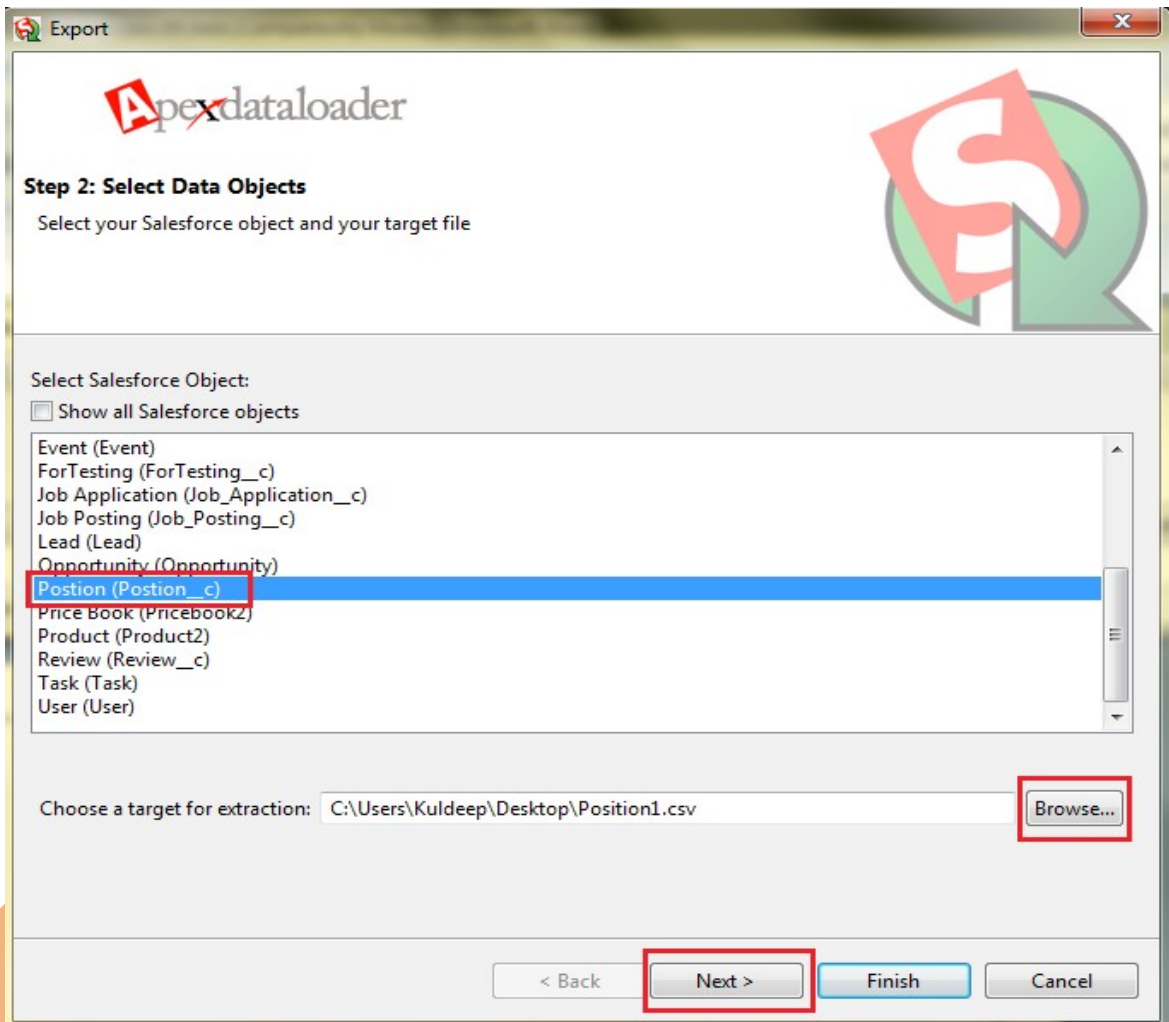
Export Record By using Data Loader :

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 :-

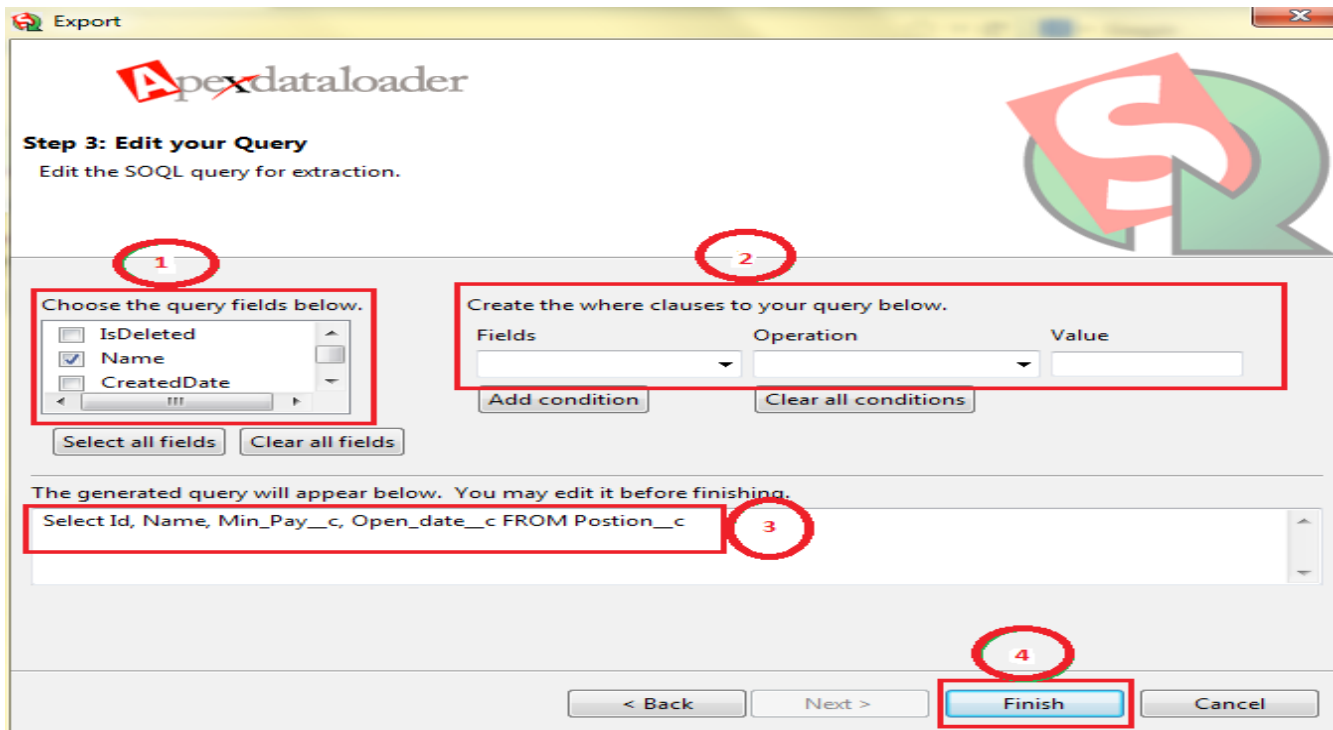
Select Custom Object Name(Ex:- Position), Choose target for save Export file, then click to **Next** button.



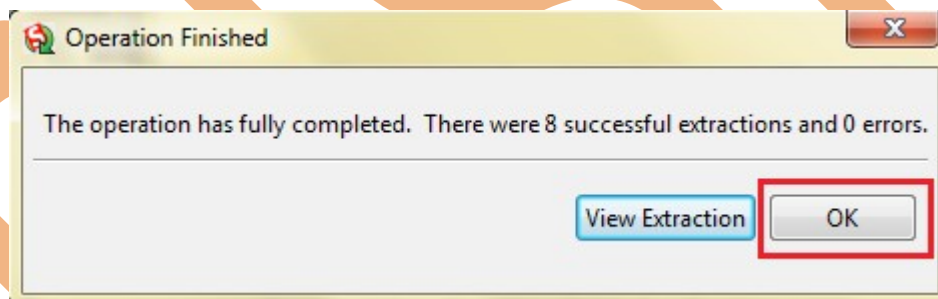
Step 3 :-

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.

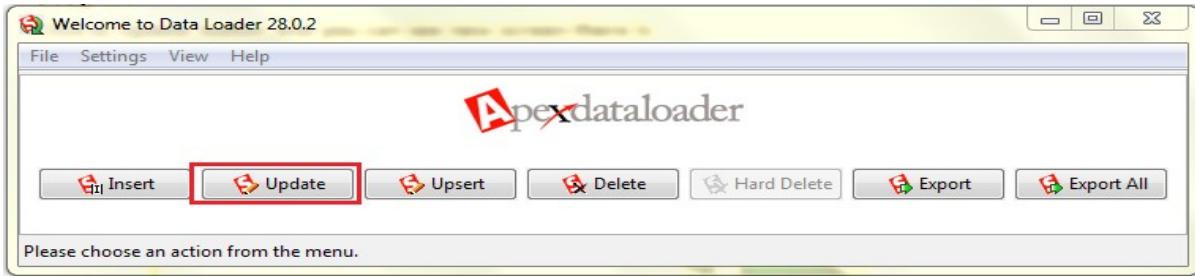
	A	B	C	D
1	ID	NAME	MIN_PAY_C	OPEN_DATE_C
2	a069000000NXpDbAAL	Java developer	5000	9/3/2013
3	a069000000NXpDgAAL	sdfc developer	30000	9/4/2013
4	a069000000O3evGAAR	abc	10000	
5	a069000000O3evHAAR	xyz	15400	
6	a069000000O3evFAAR	dot net developer 1	10000	
7	a069000000O3WbMAAV	dot net developer	120000	10/9/2013
8	a069000000O3WcMAAV	oracle admin	120000	12/8/2013
9	a069000000NYhE9AAL	Sr. SW	35000	9/18/2013

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

There is field you can change on this field.

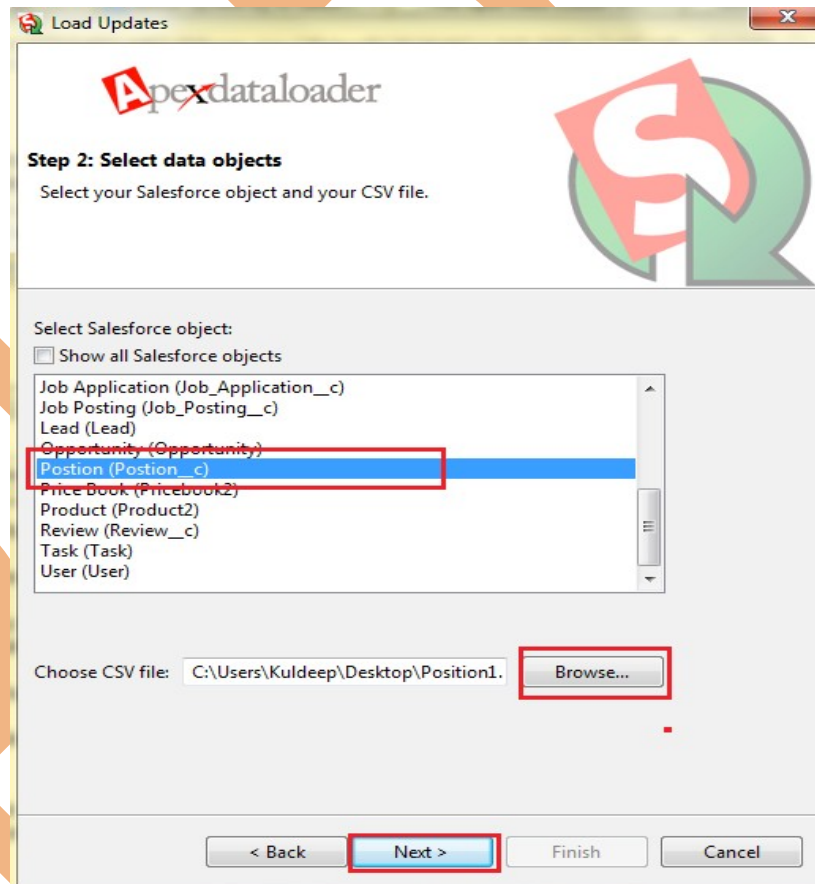
Step 2^{id}:-

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.

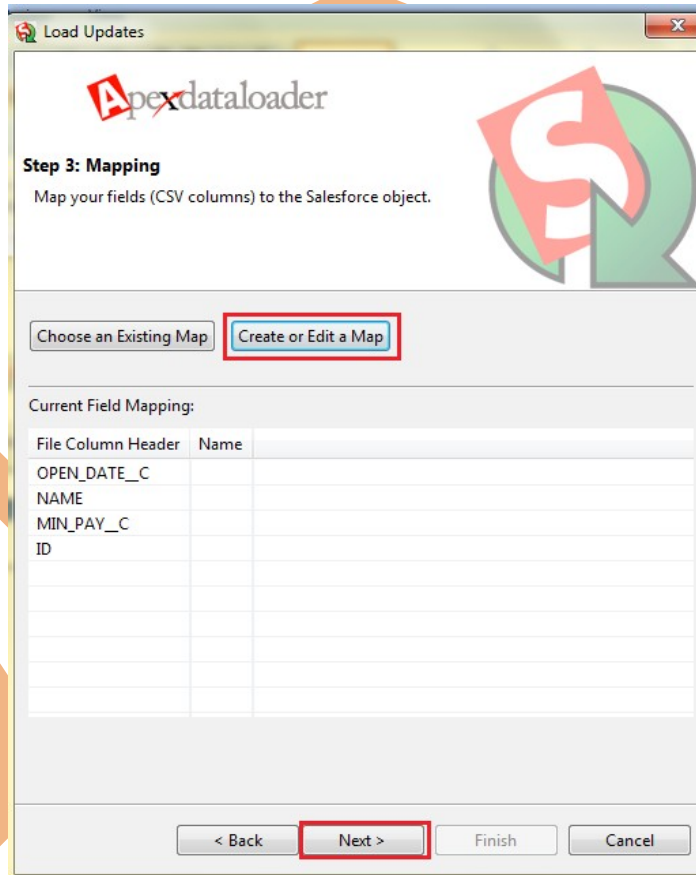


After that you got Message box, Click ok

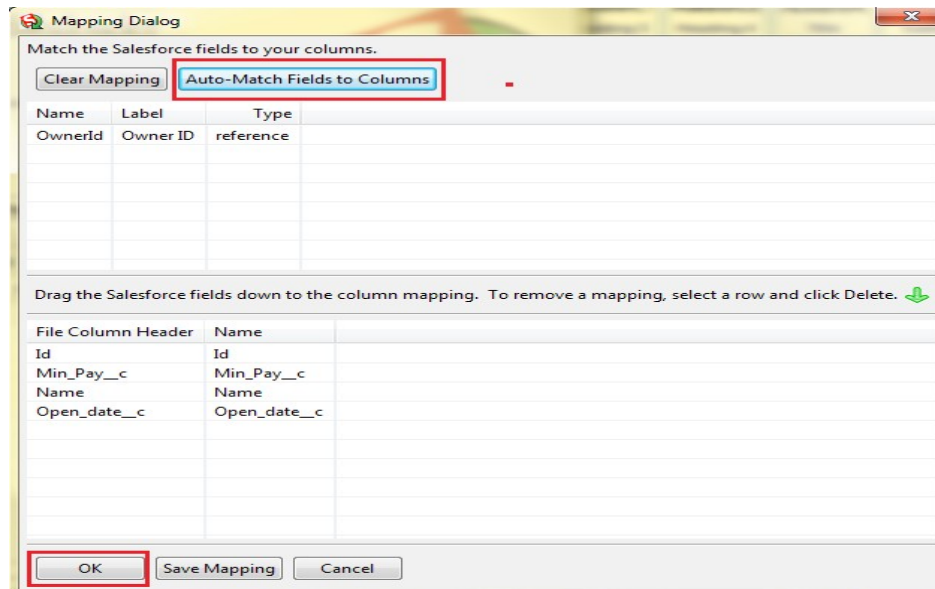


Step 4 :-

Click to **Crete or Edit Map** button

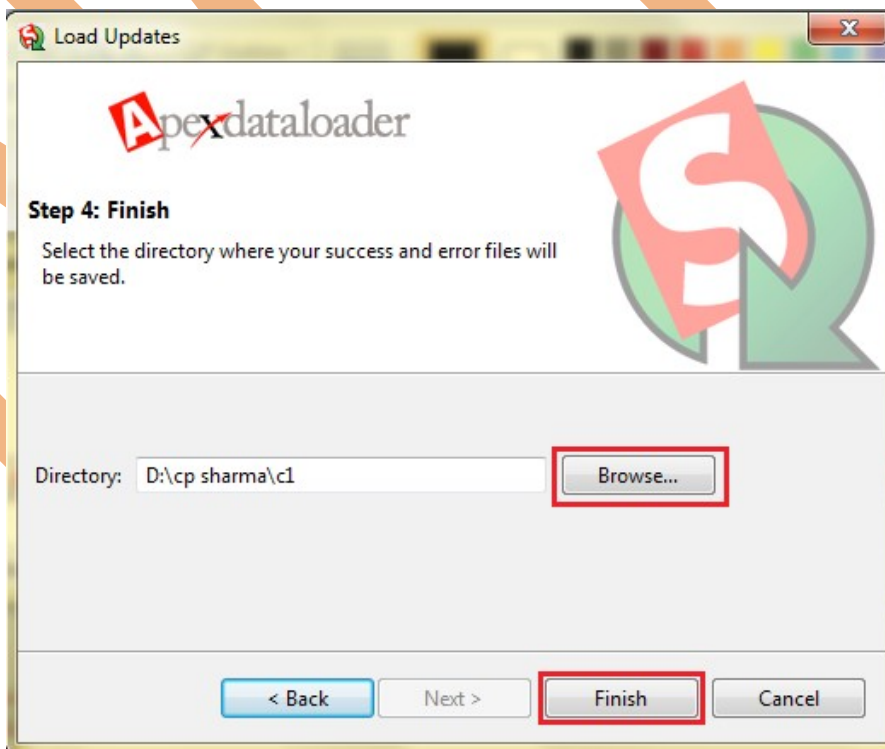


After Click you can see map window click to **Auto-Match Fields to Columns** button and click to **ok** button, then click to **Next** button.

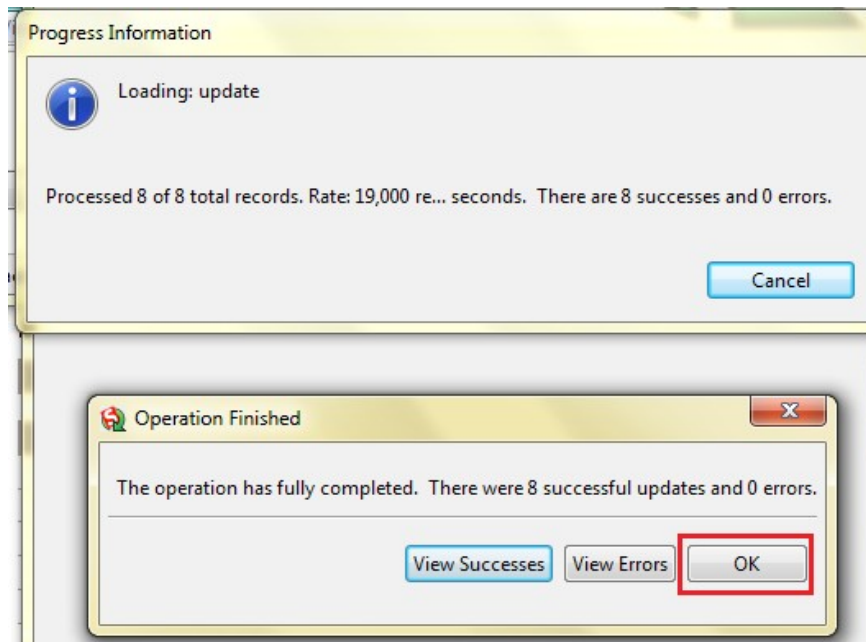


Step 5 :-

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.

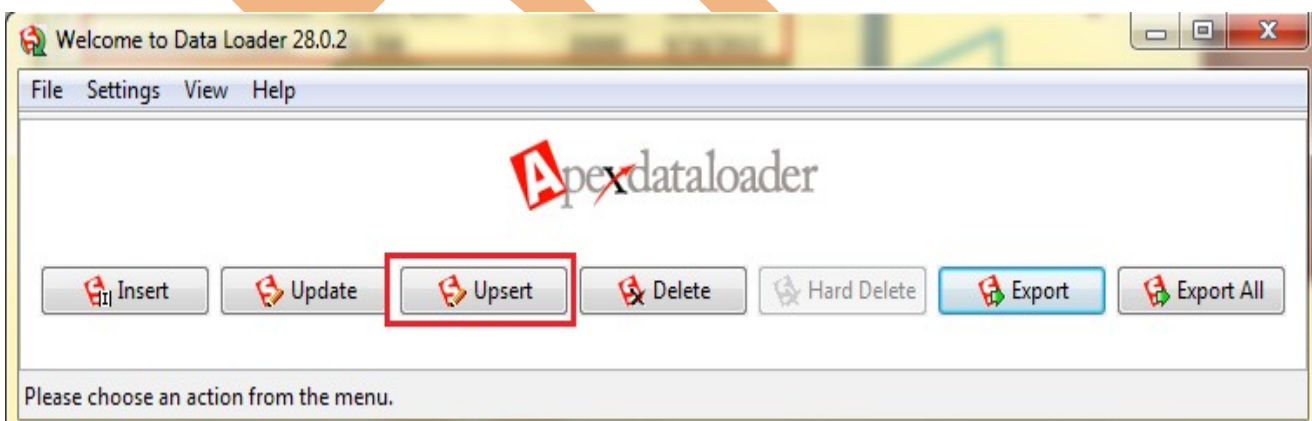
How to Use Upsert in Data Loader :

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

ID	NAME	MIN_PAY	COPEN_DATE	C
a069000000NXpDbAAL	Java developer	5000	9/3/2013	
a069000000NXpDgAAL	sdfc developer	30000	9/4/2013	
a069000000O3evGAAR	abc	10000		
a069000000O3evHAAR	xyz	15400		
a069000000O3evFAAR	dot net develop	10000		
a069000000O3WbMAAV	dot net develop	20000	10/9/2013	
a069000000O3WcMAAV	oracle admin	30000	12/8/2013	
a069000000NYhE9AAL	Sr. SW	35000	9/18/2013	
	jr. php	3900	9/23/2013	
	sr.java	4500	9/25/2013	
	sr. admin	3560	9/28/2013	

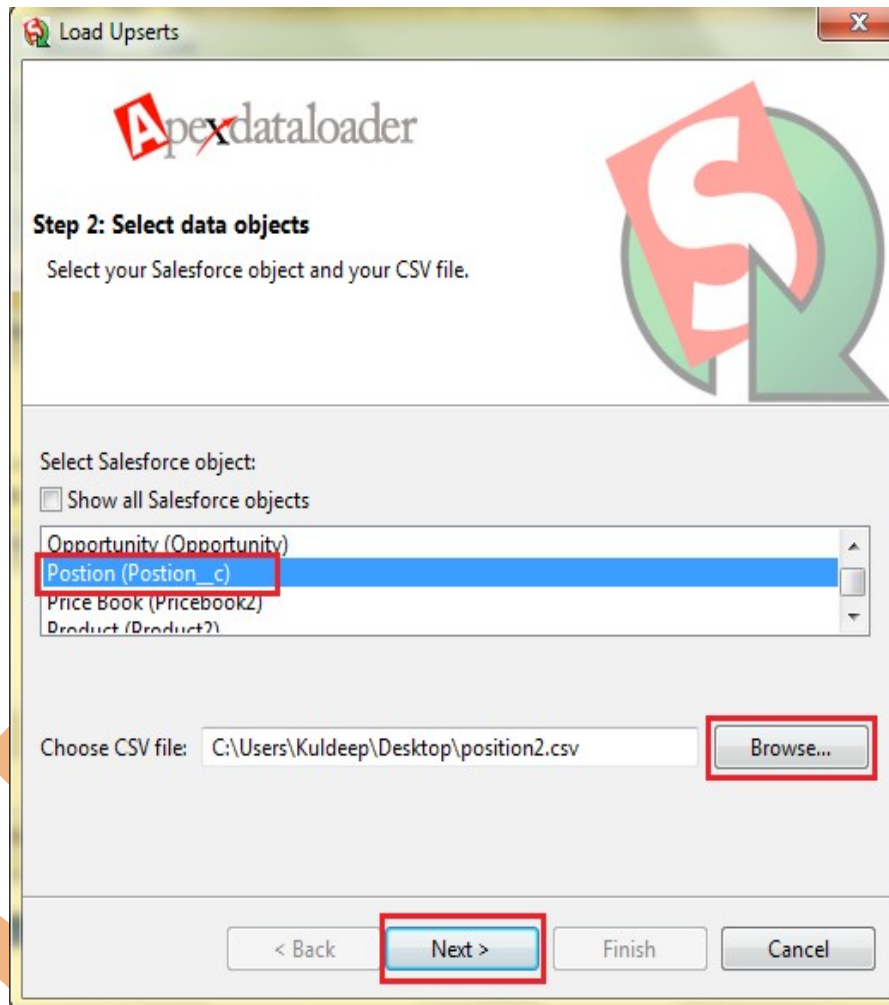
Step 1 :-

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

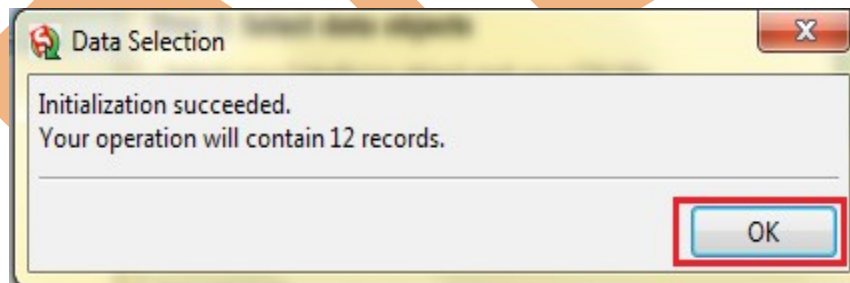


Step 2 :-

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

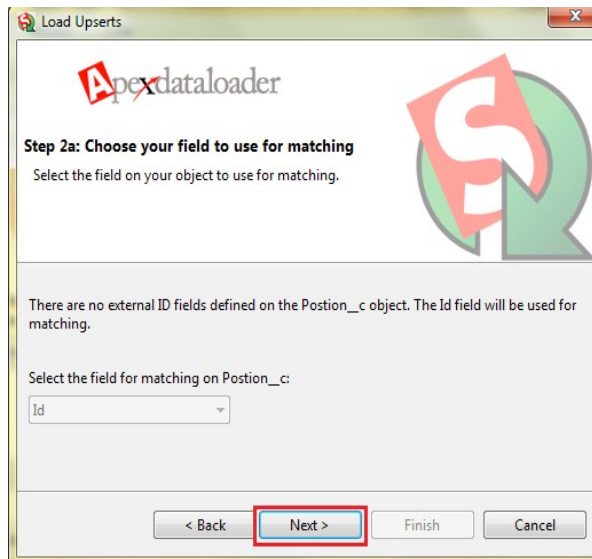


Then you got Message box Click to **OK** button.



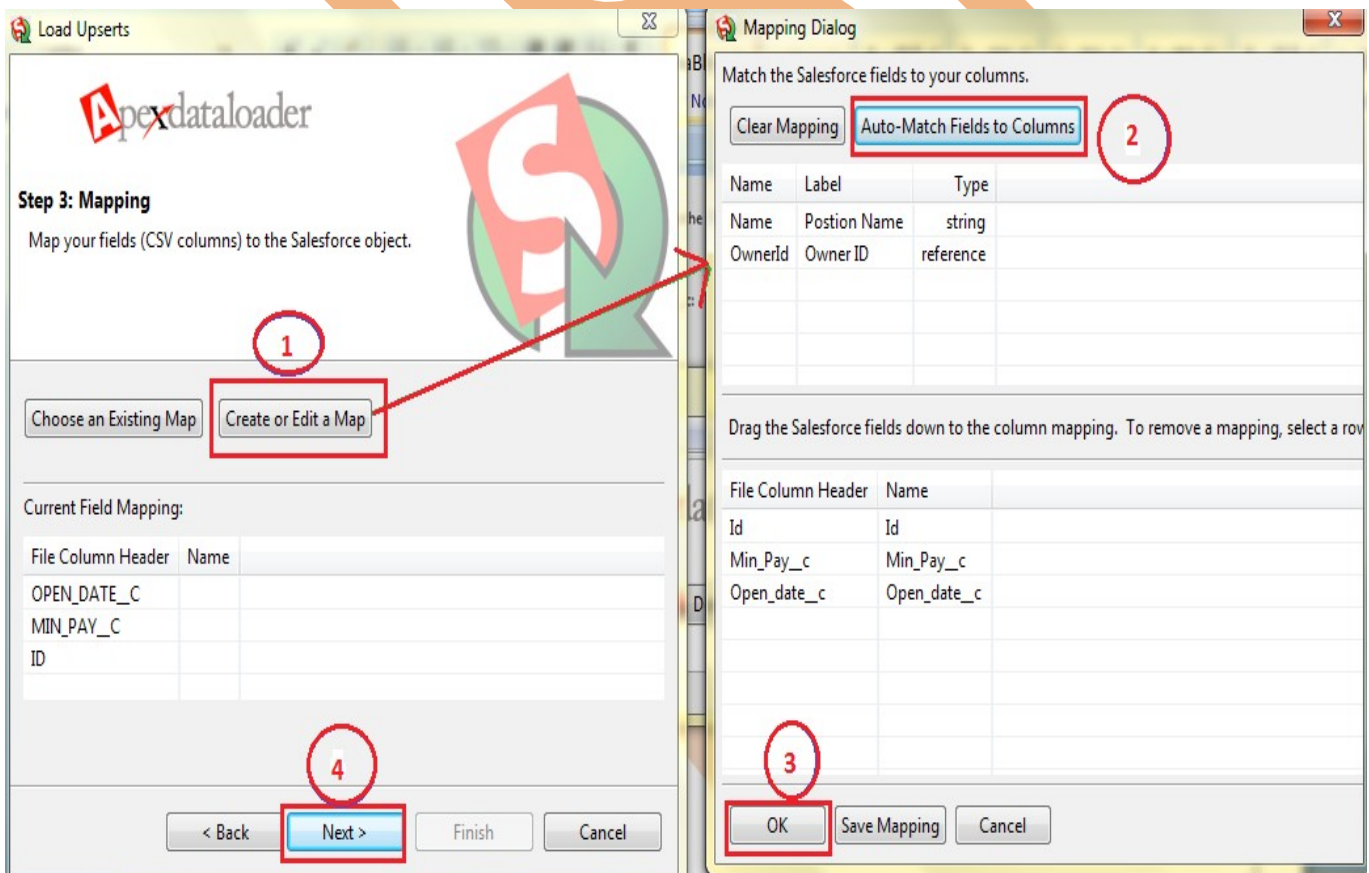
Step 3 :-

Click on the **Next** button.



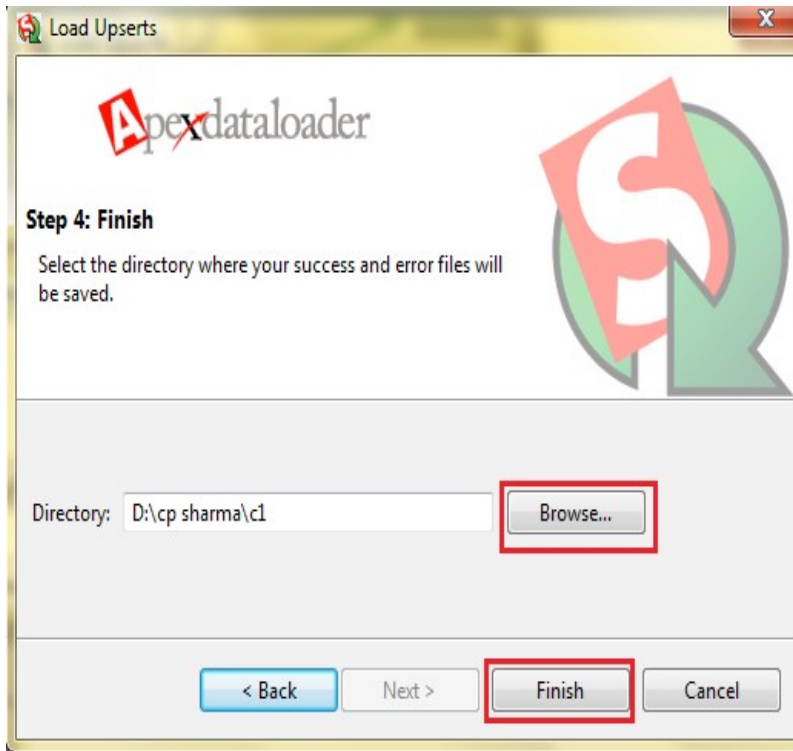
Step 4 :-

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.

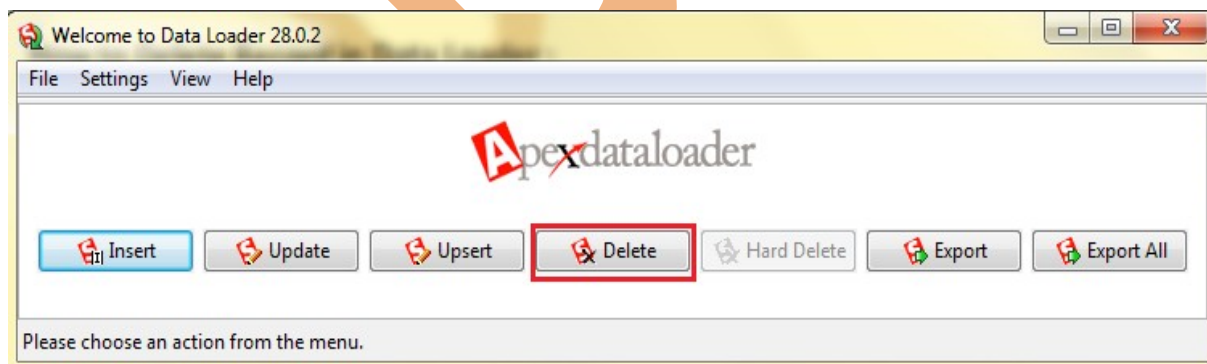
Delete By using Data Loader :

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

How to Delete Record in Data Loader :

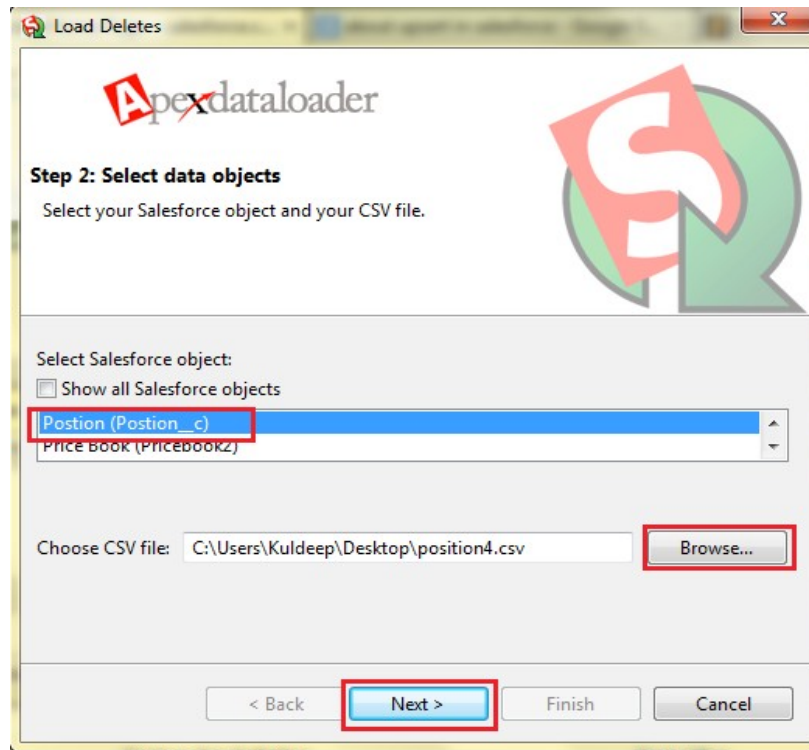
Step 1 :-

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



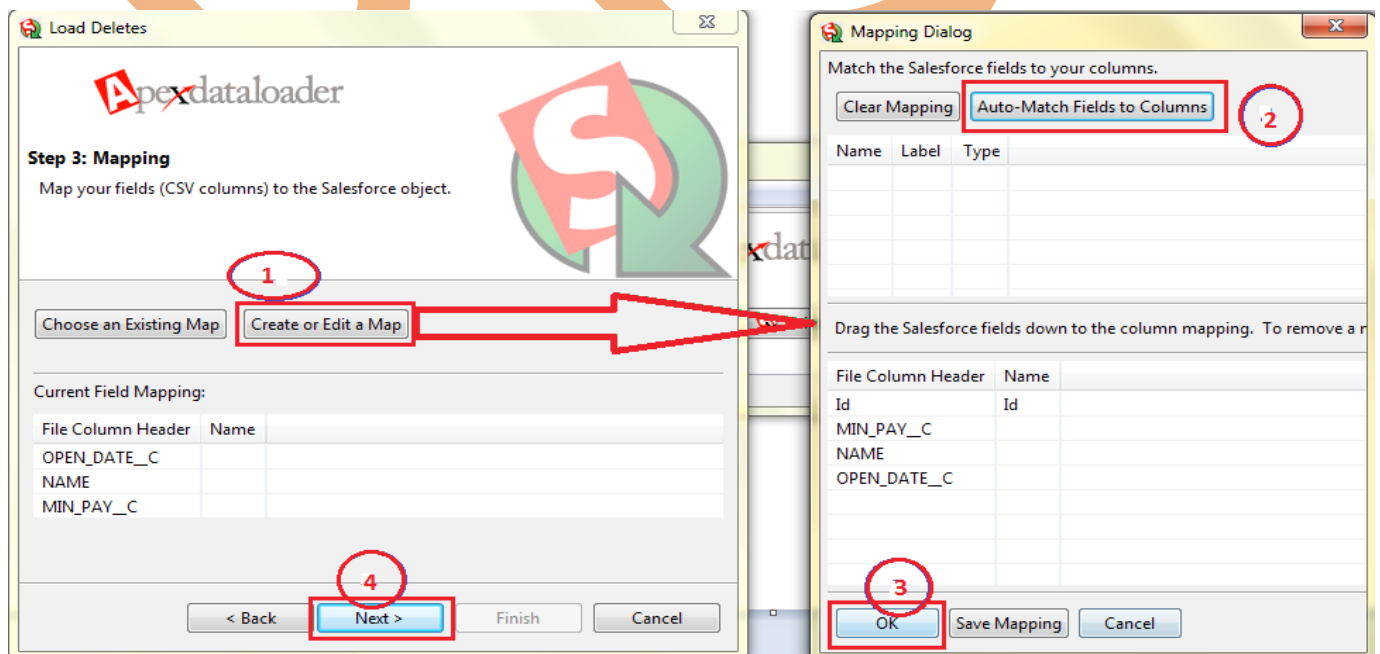
Step 2 :-

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

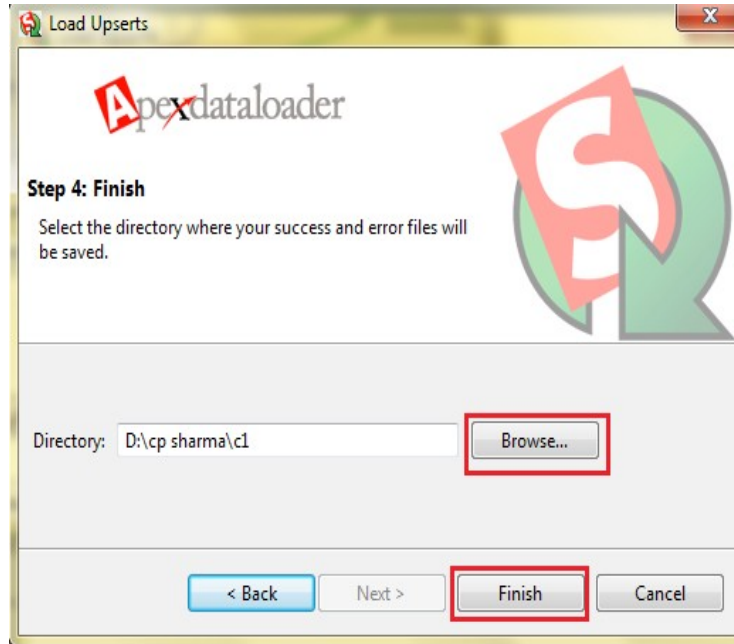


Step 3 :-

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 .

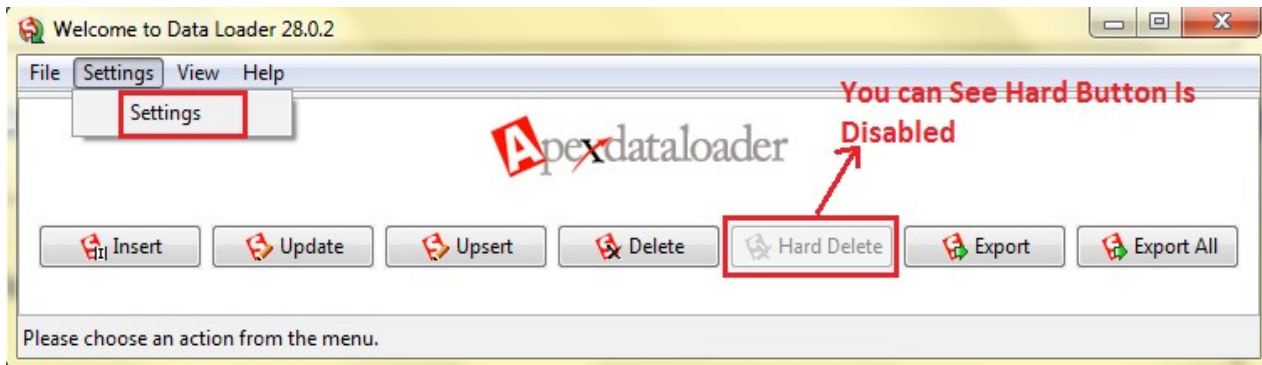
Defiance Between Delete and Hard Delete By using Data Loader :

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 :

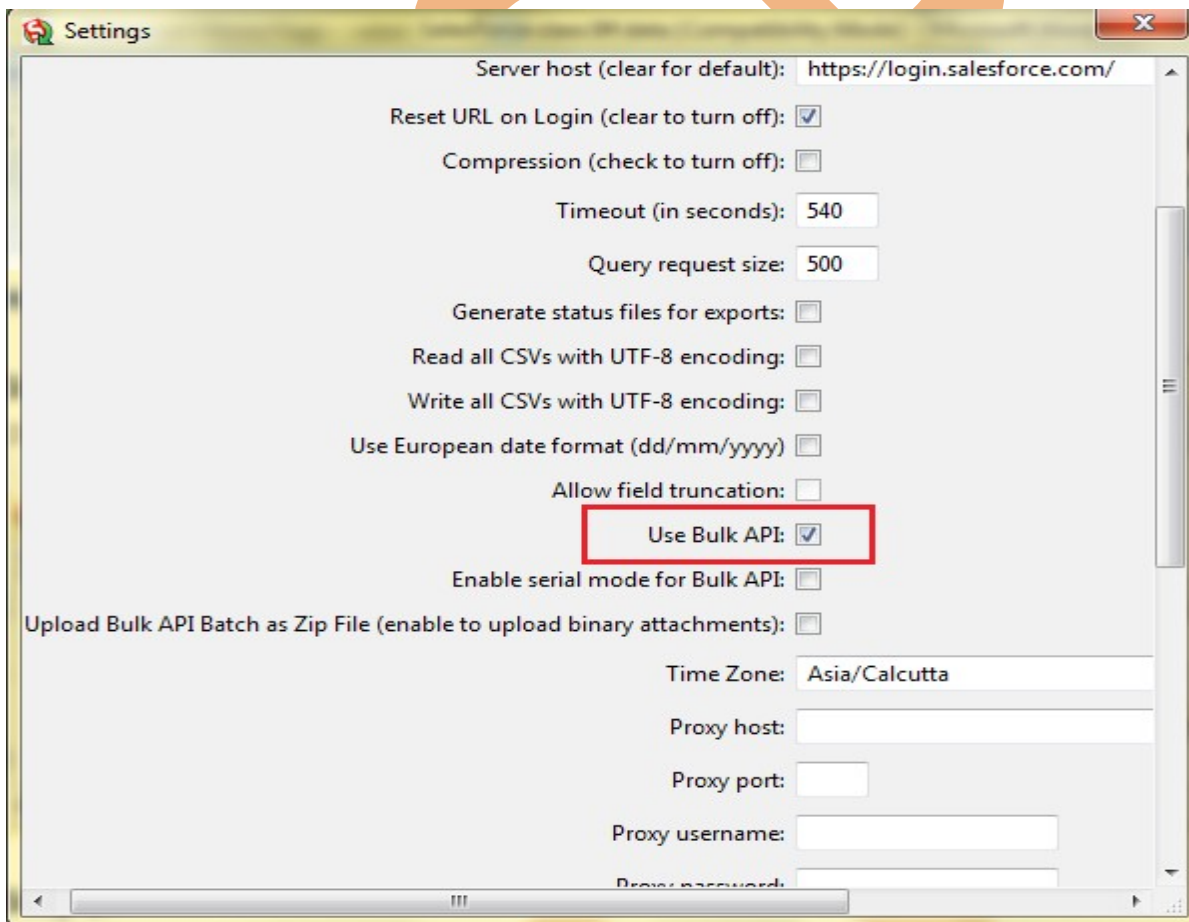
Step1 :-

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.

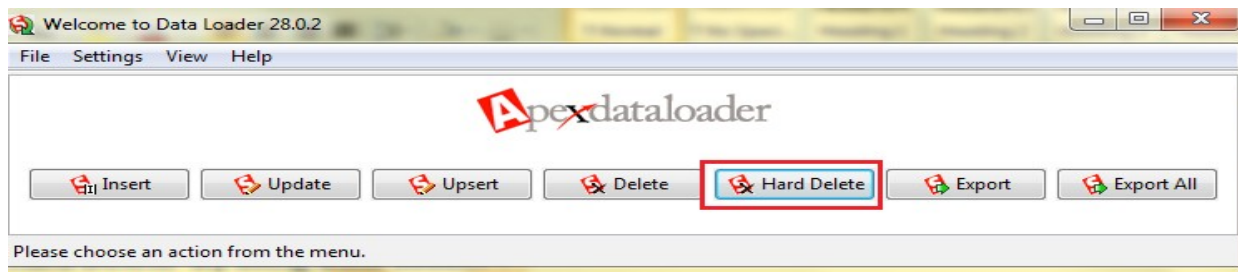


Hard Delete By using Data Loader :

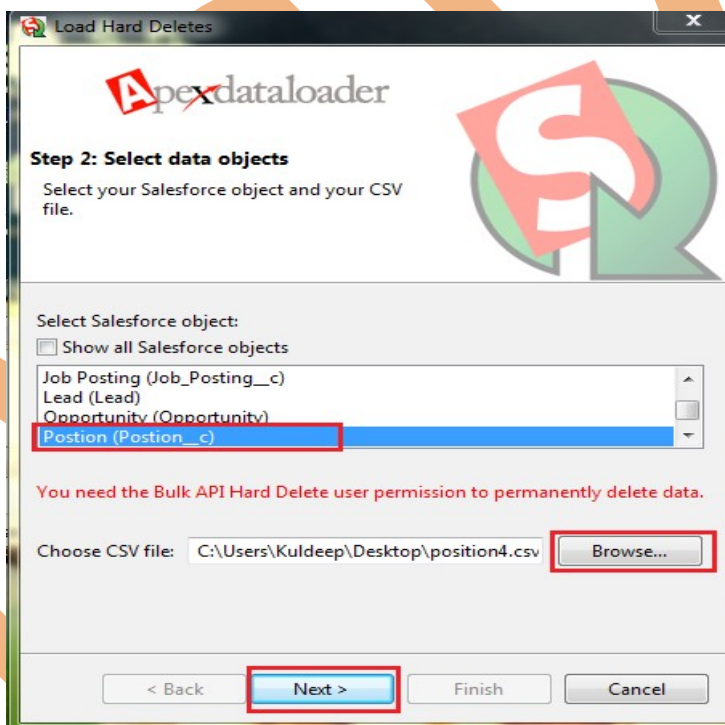
Hard Delete operation, the deleted records are not stored in the recycle bin. instead, they become immediately eligible for deletion.

How to Delete Record in Data Loader :

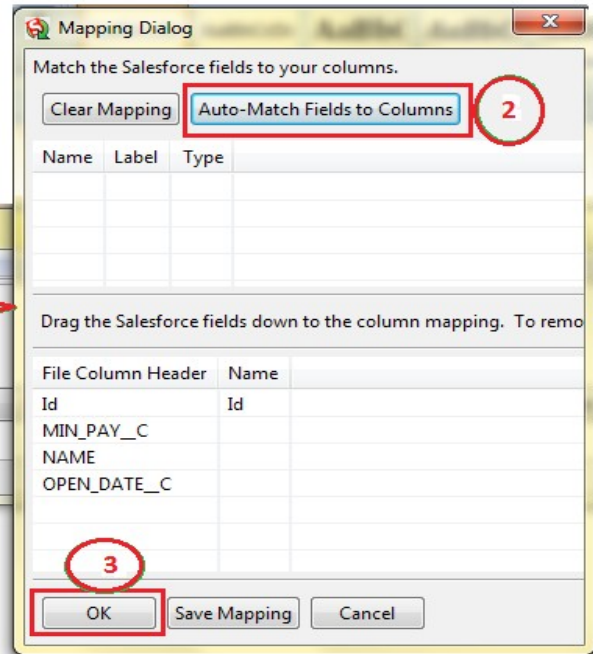
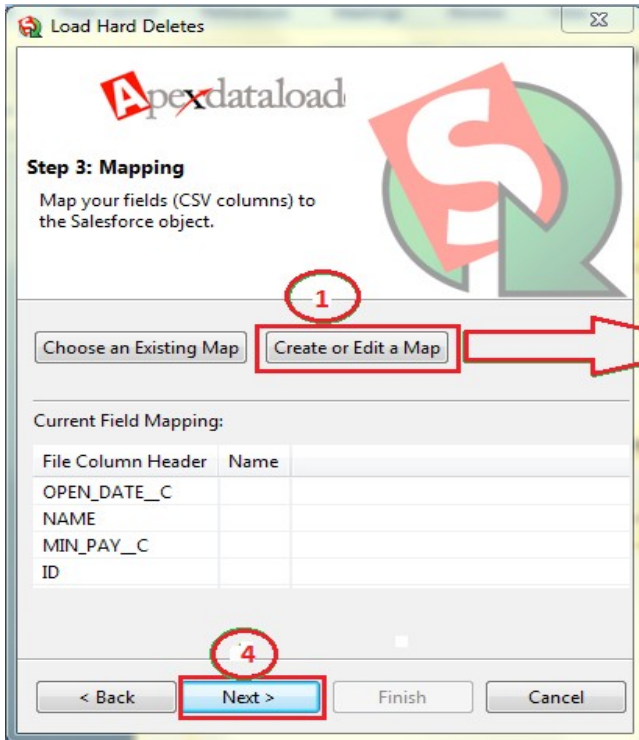
Step 1 :- Open Data Loader on client machine then select **Hard Delete** button.



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.

