



## Getting Started with Salesforce CRM

### Getting Started with SALESFORCE Part VIII

#### Description:

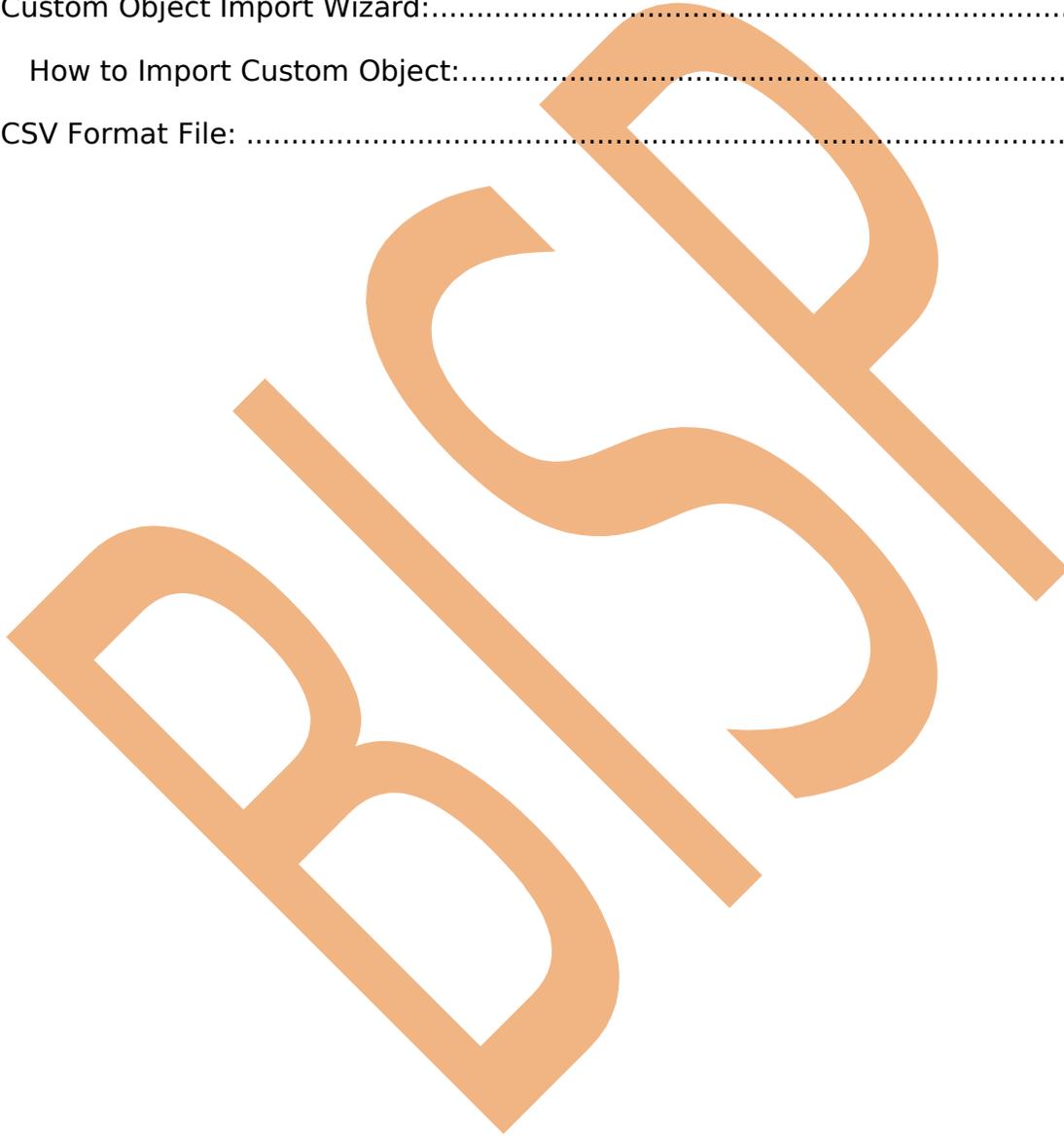
BISP is committed to provide BEST learning material to the beginners and advance learners. In the same series, we have prepared a complete end-to end Hands-on Beginner's Guide for Salesforce. The document focuses on Data Management and Data Loader using import wizard. **Join our professional training program and learn from experts.**

#### History:

Version	Description Change	Author	Publish Date
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## Contents

Contents.....	2
Data Management in Salesforce .....	3
Differences between Import Wizard and Data Loader.....	3
Similarity between Import Wizard and Data Loader :.....	3
Custom Object Import Wizard:.....	3
How to Import Custom Object:.....	3
CSV Format File: .....	9



## Data Management in Salesforce

SalesForce provide very power full tools Data Management, Administrator can take backup all data and upload bulk data by using Import Wizard and Data loader.

### There are two tools available for uploading data :

1. Import Wizard.
2. Data Loader.

## Differences between Import Wizard and Data Loader

### Import Wizard :

1. Import Wizard: web based tools.
2. Import wizard maximum handle 50000 records.
3. Import wizard use for only insert record.

### Data loader :

1. Desktop based external tool.
2. Data loader handled 5 million record maximum.
3. Data loader use for insert, update, upsert, export and delete record.

## Similarity between Import Wizard and Data Loader :

In Import Wizard and Data Loader Importing or exporting of records will happen in .CSV format(comma separated value) file.

## Custom Object Import Wizard:

By using Import Wizard to import and or update custom objects. in salesforce.com administrator to use this wizard.

### How to Import Custom Object:

Click to **Setup** -> **Data Management** -> Click on **Import Custom Objects** Then you can see below

After That Click to **Start Import Wizard!** Link.

## Custom Object Import Wizard

Use this wizard to import and/or update custom objects. You must be a salesforce.com administrator to use this wizard.



### Steps to Import Custom Objects

1. Before you begin, create the custom object and any custom fields on the object, including master-detail and lookup relationship fields.
2. Import any records that are related to your custom object records. For example, if your custom object has a lookup relationship with accounts, import those accounts before importing your custom object.
3. To create your import file, export a custom object report from salesforce.com. If your column labels match the field labels in salesforce.com, the columns will be automatically mapped for you in the import operation.
4. If your custom object has owners, make sure your import file includes an owner column. Populate that column with the names of the record owners. Alternatively, populate the column with the salesforce.com IDs or external IDs of those users.
5. Review your data for accuracy, and make sure that your file has 50,000 or fewer records.
6. **Start the Import Wizard!**

We recommend that you import a small test file of five records before importing all of your data to ensure that you have correctly prepared your import file.

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## Step 1 :-

When you click to **Start Import Wizard!** Link Then on new web page open you can see below.

Select any Custom object name (Ex :- Position ) and click to **Next** button.

The screenshot shows the Salesforce Import Wizard interface. On the left is the Force.com Home navigation menu with 'Data Management' and 'Import Custom Objects' highlighted. The main content area displays 'Steps to Import Custom Objects' with a list of instructions, where the final step 'Start the Import Wizard!' is highlighted. A modal window titled 'Step 1. Choose Record' is open, showing a table of record types. The 'Position' record type is selected with a radio button. A 'Next' button is visible in the bottom right corner of the modal.

Label	Master Object	Description
<input type="radio"/> Review	Job Application	
<input type="radio"/> Employment website		
<input type="radio"/> ForTesting		
<input checked="" type="radio"/> Position		
<input type="radio"/> Candidate		
<input type="radio"/> Job Application		
<input type="radio"/> Department		Department Description and Mission.
<input type="radio"/> Employee		
<input type="radio"/> Book		

## Step 2 :-

If you want insert duplicates values allow to insert click to Yes radio button if not allow duplicate value click to No radio button. After selection click to **Next** button.

### Step 3 :-

which user field are you include in your file to designate record owners Select any one option and click to **Next** button.

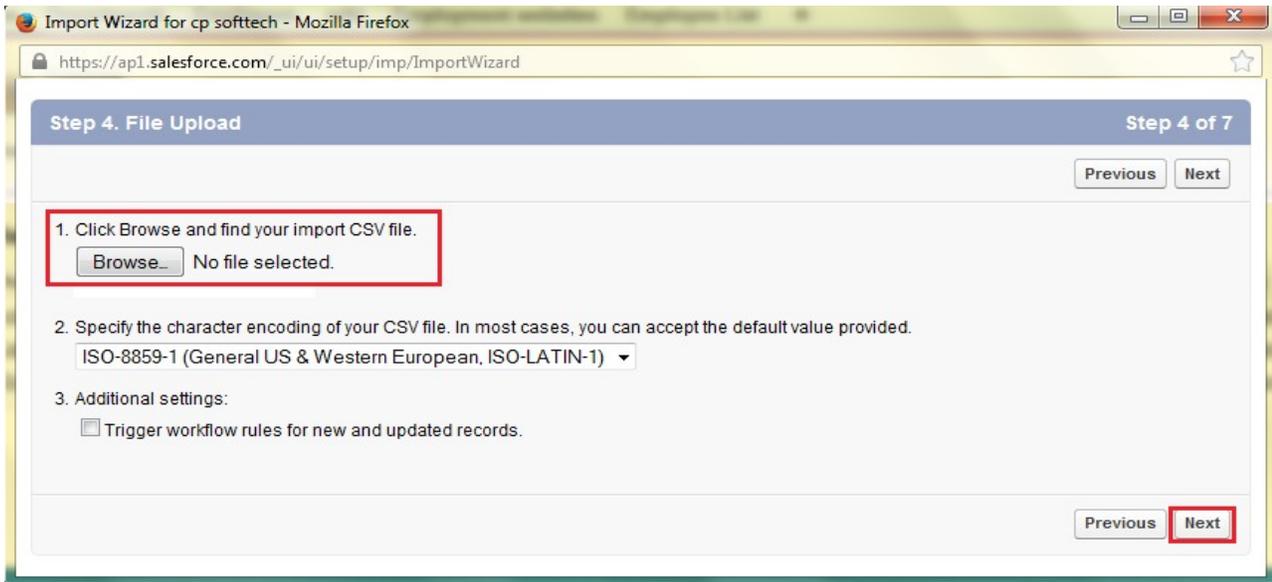
### Step 4 :-

Click to **Browse** button and select you .CSV format file.

#### Note :-

1. Make sure in .CSV file completely match data type to you given on custom object in Salesforce.com

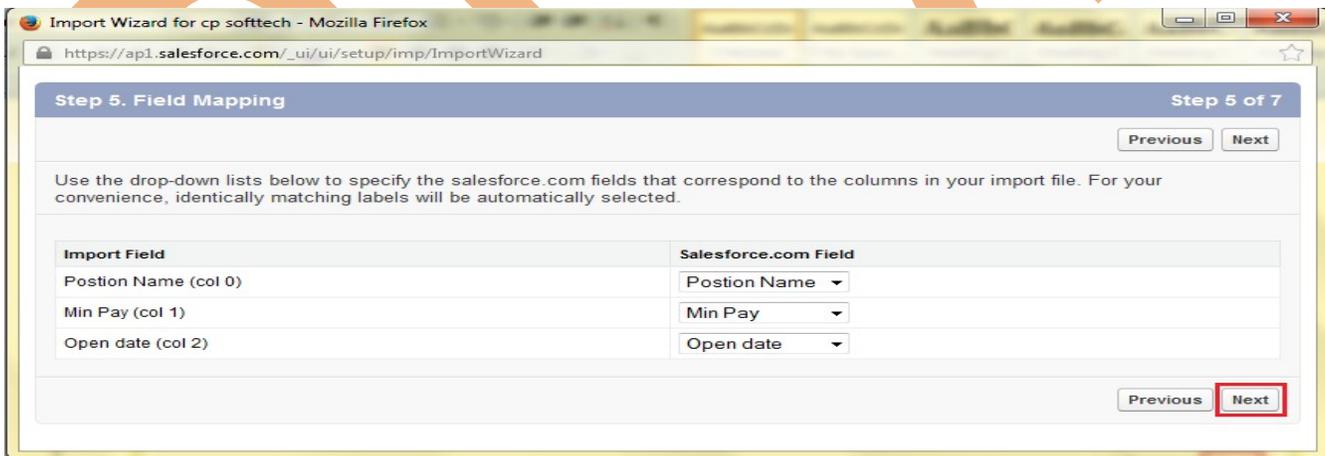
2. If you given wrong value in .CSV file, .CSV file not uploaded successfully and he gives error.



### Step 5:-

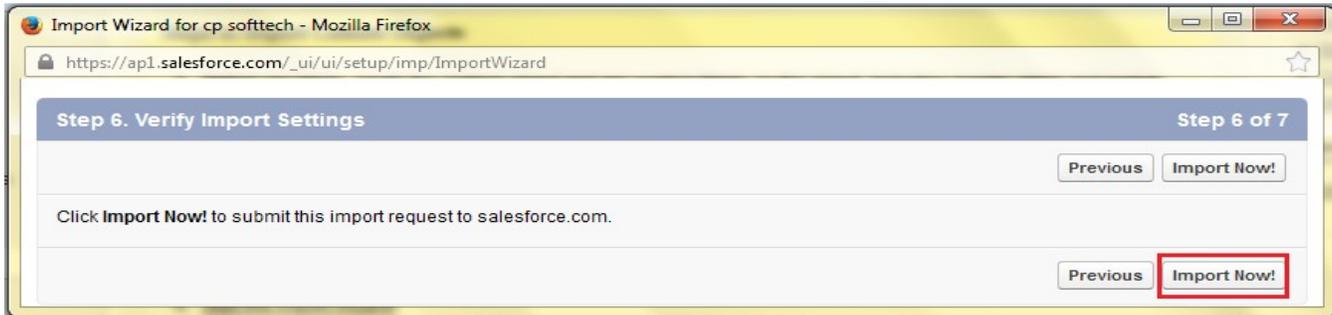
If need map Import Field to Salesforce.com field to select value by dropdown and you can mapped this field.

If not required to map this field click to **Next** button continue this steps.



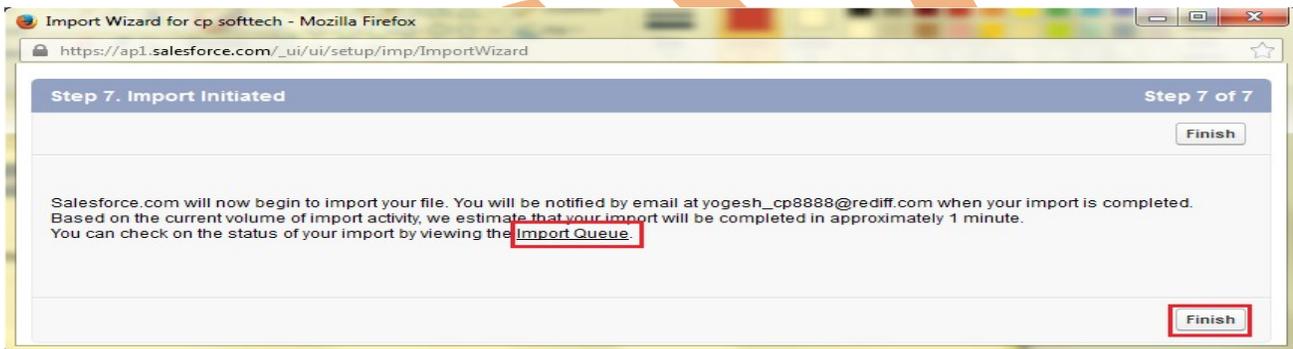
### Step 6:-

Click to **Import Now!** button.



## Step 7:-

If you want to see Import Queue for My Organization click to Import Queue! link and click them **Finish** button. and all so you got mail from Salesforce.com



## Step 8 :-

click to **Import Queue!** link then you can see the Import Queue for My Organization there is you can see **Action, Filename, Submitted By, Records, Submitted, Status, Stared, Completed, Import Type..** There is you can see Status is Completed.

### Import Queue for My Organization

[Help for this Page](#) ?

Action	Filename	Submitted By	Records	Submitted	Status	Started	Completed	Import Type
Del	position.csv	yogesh.sharma	3	10/9/2013 10:38 AM	Completed			Positions

## Step 9 :-

After that you can see how many field increase in your custom object(Ex :- position) Click to Position tab and click to **Go** button then you can see list of field. see below. There you can see that, I am add three field dot net developer, oracle admin, and php these are field add successfully.

Action    Position Name    ↑  
 Edit | Del    dot.net developer  
 Edit | Del    Java developer  
 Edit | Del    oracle admin  
 Edit | Del    php  
 Edit | Del    sdfc developer  
 Edit | Del    Sr. SW

## CSV Format File:

Employee Name	Age	Dob	City
Vikram yadav	26	10/1/1987	Bhopal
vikas	26	6/1/1987	Indore
jitendra yadav	26	19/2/1987	Pune

Heading Field

Data Field