



Getting Started with Salesforce CRM

Managing Data in SALESFORCE Part 1

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:

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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.

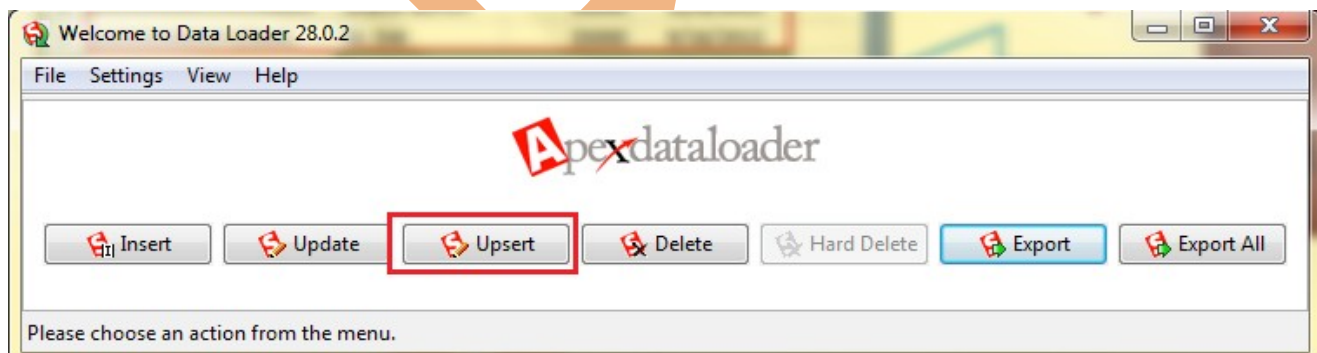
Upsert use in Data Loader :

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.

ID	NAME	MIN_PAY	COPEN_DATE
a069000000NXpDbAAL	Java developer	5000	9/3/2013
a069000000NXpDgAAL	sdhc 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

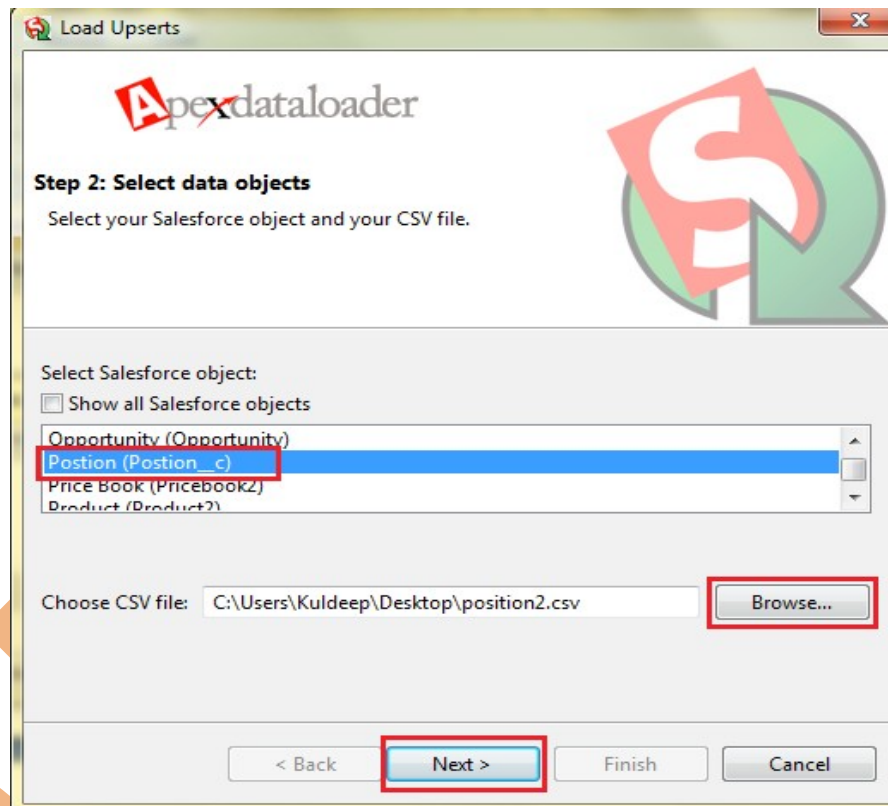
Step 1 :-

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

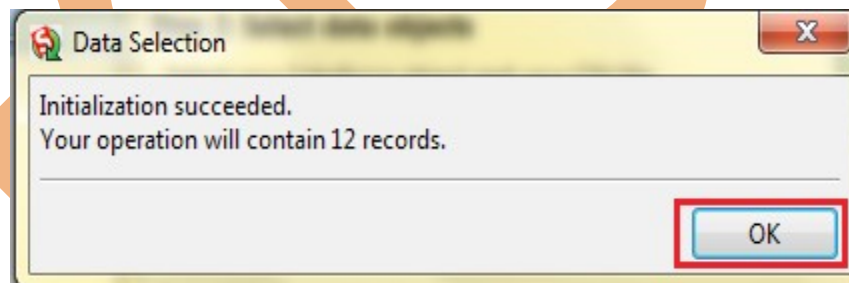


Step 2 :-

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

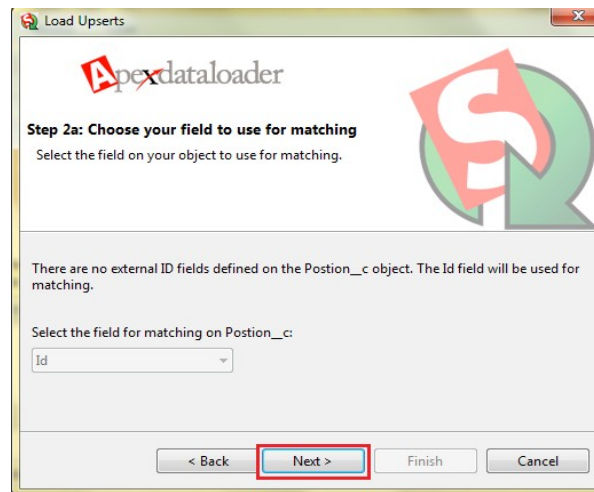


Then you got Message box Click to **OK** button.



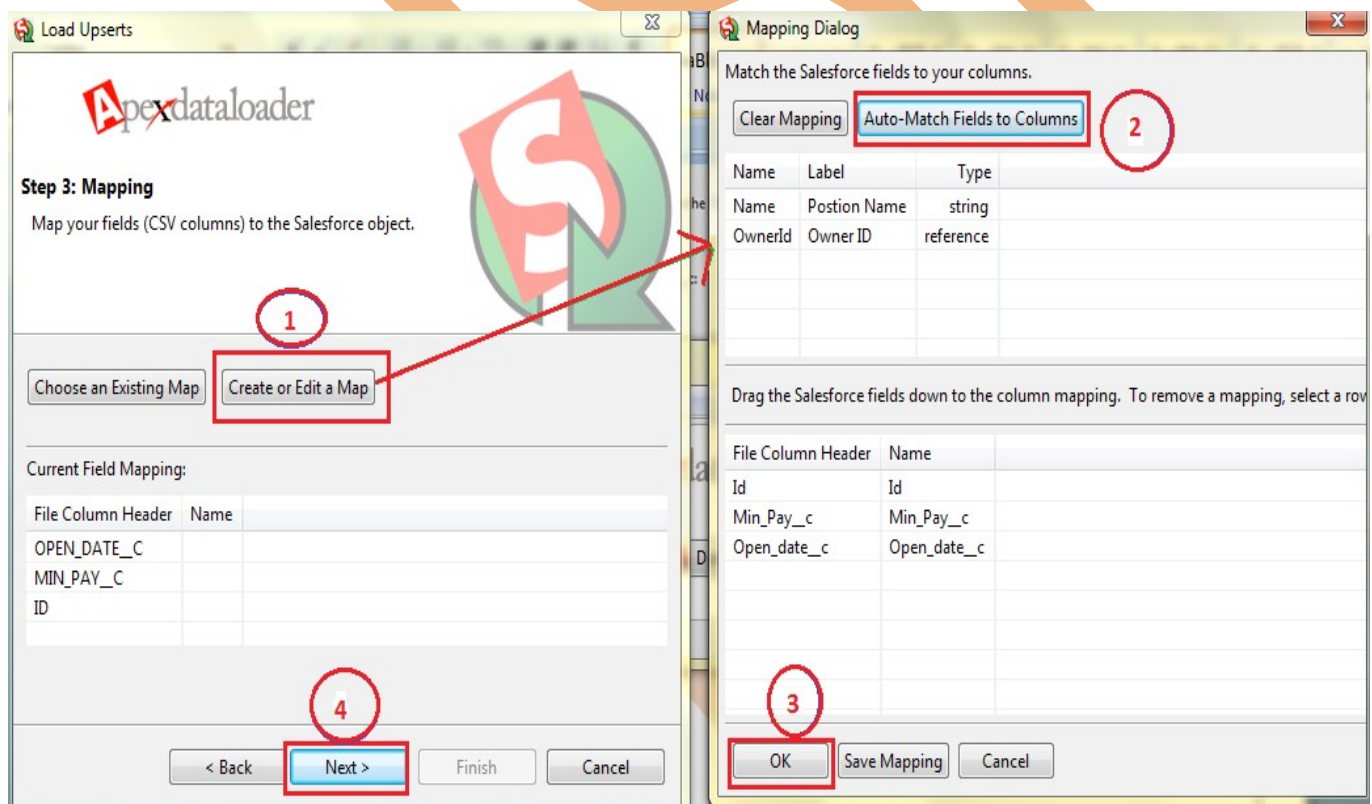
Step 3 :-

Click on the **Next** button.



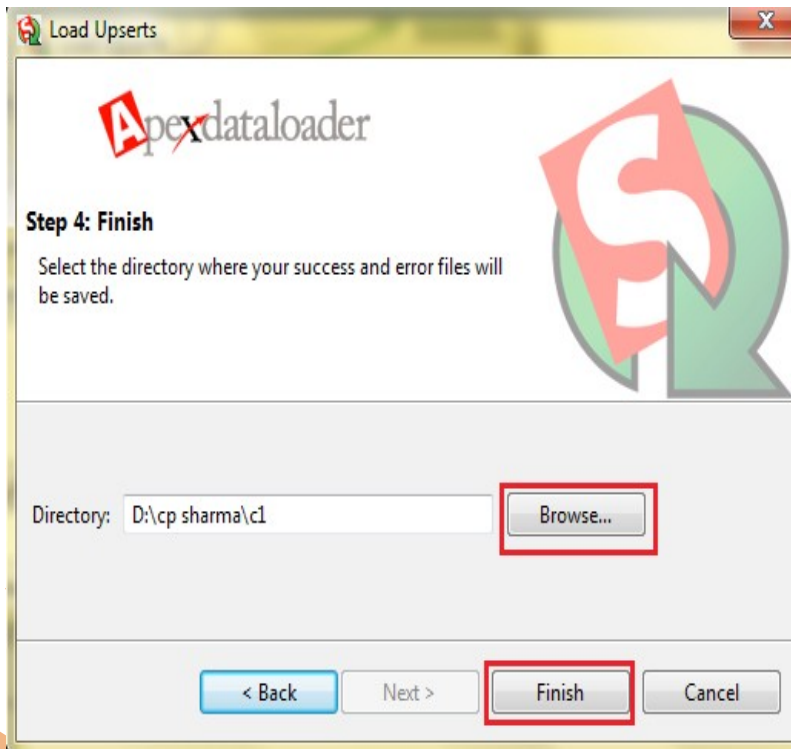
Step 4 :-

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.



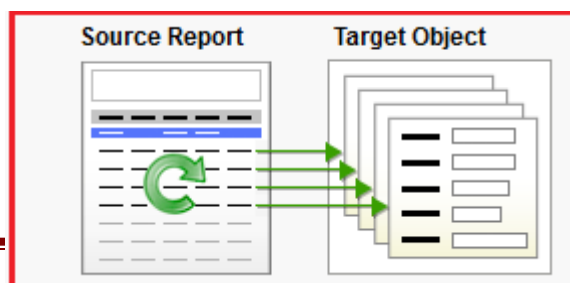
After that you receive one message window there you can see success or Error file, Then click to ok button.

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.

Analytic Snapshots

[Help for this Page](#) ?

Analytic snapshots allow you to load data from a custom report to a custom object on a regularly scheduled basis. Analytic snapshots enable you to work with report data as you would with other records in salesforce.com.

View: All Analytic Snapshots [Create New View](#)

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						
New Analytic Snapshot						
Action	Name ↑	Description	Scheduled	Next Run	Last Run	
Edit Del	test ana		✓	12/26/2013 8:03 AM		

Step 2 :-

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

New Analytic Snapshot

Edit Analytic SnapshotSaveSave & Edit Field MappingsCancel

Enter information about this analytic snapshot.

Analytic Snapshot Name

Job App Snap

Analytic Snapshot Unique Name

Job_App_Snap

Description

Running User

yogesh sharma

An analytic snapshot runs a source report, then loads the report data as records into a target object. Select a source report and target object.

Source Report

Target Object

Source Report

Tabular Report

Target Object

Job Application

SaveSave & Edit Field MappingsCancel

Step 3:-

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

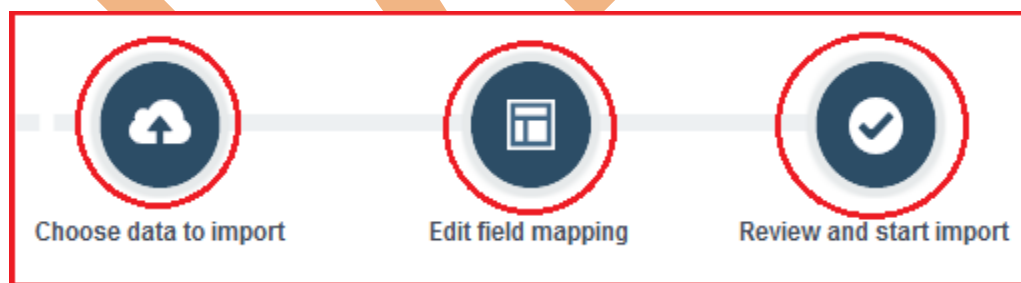
The screenshot shows the Salesforce Data Import Wizard interface. It consists of three main sections, each with a title bar and a content area. The first section is 'Field Mappings', which includes a table with 'Columns in Source Report: 4' and 'Fields in Target Object: 7'. The second section is 'Schedule Analytic Snapshot'. The third section is 'Run History'. Each section has an 'Edit' button highlighted with a red box. The 'Field Mappings' section also has a 'Field Mappings Help' link. The 'Schedule Analytic Snapshot' section has a 'Schedule Analytic Snapshot Help' link. The 'Run History' section has a 'Run History Help' link. All three sections display 'No records to display'.

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.

The screenshot shows the Salesforce Data Import Wizard interface. The top navigation bar includes links for Home, Positions, Job Applications, Departments, Employees, wiki, Employment websites, and Employee List. The left sidebar, titled 'Force.com Home', contains an 'Administer' section with various options. 'Data Management' is highlighted, and 'Data Import Wizard' is marked as 'New!'. The main content area, titled 'Data Import Wizard', includes a 'PILOT!' badge, a 'Clean up your data import file' section, and a 'Launch Wizard!' button. A large orange arrow points from the 'Launch Wizard!' button to the 'Step 1' section below.

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 any one.
 - 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)

salesforce Getting closer ...

Choose data Edit mapping Start import

Import your Data into Salesforce

You can import up to 50,000 records at a time. [Help for this page](#)

What kind of data are you importing? ?

1 Standard objects 2 Custom objects

Back Offices 3 Books Candidates Departments Employees

What do you want to do? ?

Add new records

Which User field are you including in your file to designate record owners? ?

Name 4

Trigger workflow rules? ?

☐ Trigger workflow rules for new and updated records

Update existing records

Add new and update existing records

Where is your data located? ?

Drag CSV file here to upload

5 CSV Outlook CSV ACT! CSV

Cancel Previous Next

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

Where is your data located? ?

Drag CSV file here to upload

CSV

File

Browse... backoffice.csv

Character Code ?

ISO-8859-1 (General US & Western European, ISO-LATIN-1)

Outlook CSV

ACT! CSV

Cancel Previous Next

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.

Great job

Choose data Edit mapping Start import

Review & Start Import

Review your import information and press Start Import.

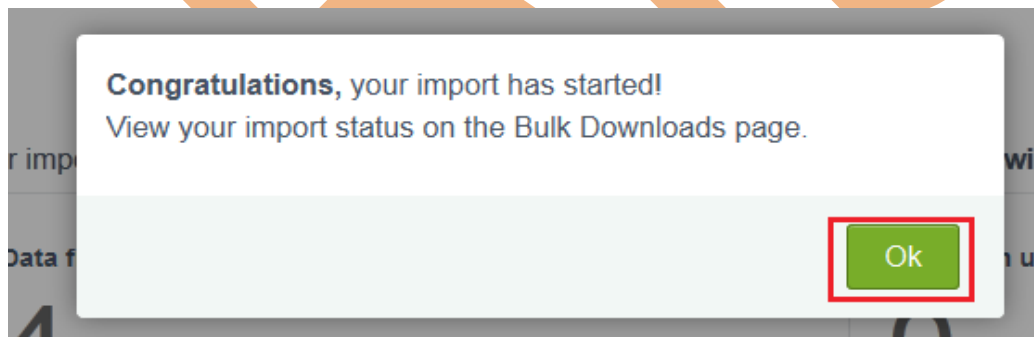
Help for this page

Your selections:	Your import will include:	Your import will not include:
Back Offices ✓ Add new records ✓ backoffice.csv ✓	Data from mapped fields 4	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



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.

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	751900000000ILwA	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.

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!** .

The screenshot shows the Salesforce Import Wizard for Accounts/Contacts, Step 1 of 8: Create your import file. The page title is "Salesforce - Import Wizard for cp softtech - Mozilla Firefox". The URL is "https://ap1.salesforce.com/setup/wiz/wizard.jsp?wizardUrl=/setup/imp/orgimport_format.jsp?stage=format&wizardPage". The page content includes the Salesforce logo and a blue header bar with "Step 1 of 8: Create your import file" and "Import Wizard". The main text explains that most applications (including Goldmine, Palm Desktop, Microsoft Excel, Microsoft Access and FileMaker) will allow you to export contact data into a **comma delimited text file (.csv)**. To create an import file for your organization's account and contact data, the following steps are listed:

1. Export and merge all your contacts into a single csv file.
2. Using Microsoft Excel or a similar product, label each column in the file with the appropriate field name.
3. Specify the owner of each contact and account record with a special column labeled Record Owner.
4. Export the spreadsheet to a single csv file.
5. Once you have created a master csv file for accounts and contacts, click the Next button.

A red arrow points to the "Next >" button at the bottom right of the page.

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

Salesforce - Import Wizard for cp softtech - Mozilla Firefox

https://ap1.salesforce.com/setup/wiz/wizard.jsp?wizardUrl=/setup/imp/orgimport_format.jsp?stage=format&wizardPage

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Step 2 of 8: Upload your file Import Wizard

1. Click Browse and find the file to import into salesforce.com:
 Account.csv
2. 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) ▾
3. Contact Matching Type ⓘ
☐ Salesforce.com ID
☒ Name (Recommended)
☐ Email
4. Account Matching Type ⓘ
☐ Salesforce.com ID
☒ Name and Site (Recommended)
5. ☐ Trigger workflow rules for new and updated records

< Back Next > Close Wizard

Step 3 :-

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

Step 3 of 8: Map Contact Fields

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 >**

Record Owner: OwnerId (col 33) ▼

Contact Information

You should import into either the **Contact Full Name** or **First Name** and **Last Name**, but not both.

Salesforce.com Field	Import Field	Salesforce.com Field	Import Field
Contact Full Name:	Name (col 3) ▼	Lead Source:	AccountSource (col 42) ▼
First Name:	-- none selected -- ▼	Reports To:	-- none selected -- ▼
Last Name:	-- none selected -- ▼	Birthdate:	-- none selected -- ▼
Salutation:	-- none selected -- ▼	Assistant's Name:	-- none selected -- ▼
Title:	-- none selected -- ▼	Description:	-- none selected -- ▼
E-mail Address:	-- none selected -- ▼	Contact Note:	-- none selected -- ▼
Department:	-- none selected -- ▼	Email Opt Out:	-- none selected -- ▼
Fax Opt Out:	-- none selected -- ▼	Data.com Key:	Jigsaw (col 40) ▼

Contact Custom Fields

Salesforce.com Field	Import Field	Salesforce.com Field	Import Field
Level:	-- none selected -- ▼	Languages:	-- none selected -- ▼

Additional Contact Information

Note: You can specify up to two additional contacts per record. Alternatively, you can move these contacts into separate records in your import file and restart the import wizard.

Salesforce.com Field	Import Field	Salesforce.com Field	Import Field
2nd Contact Full Name:	-- none selected -- ▼	3rd Contact Full Name:	-- none selected -- ▼
2nd Contact Phone Number:	-- none selected -- ▼	3rd Contact Phone Number:	-- none selected -- ▼
2nd Contact Phone Ext.:	-- none selected -- ▼	3rd Contact Phone Ext.:	-- none selected -- ▼
2nd Contact Title:	-- none selected -- ▼	3rd Contact Title:	-- none selected -- ▼

< Back **Next >**

Step 4 :-

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

Step 4 of 8: Map Contact Phone and Address Fields

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 >

Contact Address Info

Salesforce.com Field	Import Field	Salesforce.com Field	Import Field
Mailing Address Line 1:	BillingStreet (col 6) ▼	Other Address Line 1:	-- none selected -- ▼
Line 2:	-- none selected -- ▼	Line 2:	-- none selected -- ▼
Line 3:	-- none selected -- ▼	Line 3:	-- none selected -- ▼
City:	BillingCity (col 7) ▼	City:	-- none selected -- ▼
State/Province:	BillingState (col 8) ▼	State/Province:	-- none selected -- ▼
Postal Code:	BillingPostalCode (col 9) ▼	Postal Code:	-- none selected -- ▼
Country:	BillingCountry (col 10) ▼	Country:	-- none selected -- ▼

Contact Phone Information

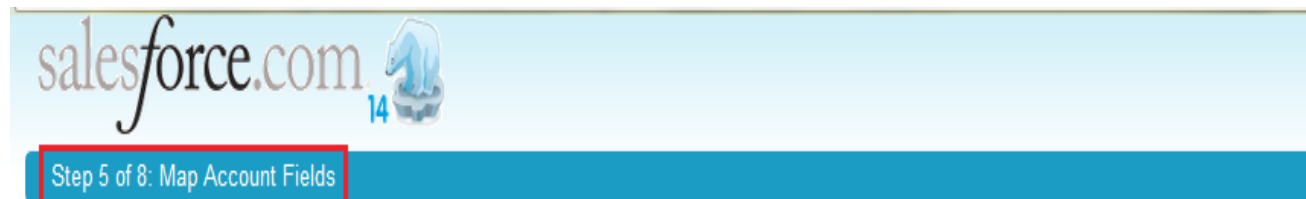
Salesforce.com Field	Import Field	Salesforce.com Field	Import Field
Business Phone:	Phone (col 20) ▼	Business Phone Ext.:	-- none selected -- ▼
Business Fax:	Fax (col 21) ▼	Business Fax Ext.:	-- none selected -- ▼
Mobile Phone:	-- none selected -- ▼	Mobile Phone Ext.:	-- none selected -- ▼
Home Phone:	-- none selected -- ▼	Home Phone Ext.:	-- none selected -- ▼
Other Phone:	-- none selected -- ▼	Other Phone Ext.:	-- none selected -- ▼
Asst. Phone:	-- none selected -- ▼	Asst. Phone Ext.:	-- none selected -- ▼
Do Not Call:	-- none selected -- ▼		

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Next >

Step 5 :-

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



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 account data in salesforce.com to be updated with data in your import file.** Once you have finished, click **Next**:

☒ Overwrite existing account values

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Next >

Account Information

Salesforce.com Field	Import Field
Account:	AccountNumber (col 22) ▼
Parent Account:	-- none selected -- ▼
Account Number:	-- none selected -- ▼
Account Type:	Type (col 4) ▼
Industry:	Industry (col 25) ▼
Revenue:	AnnualRevenue (col 26) ▼
Account Rating:	Rating (col 31) ▼
Account Site:	-- none selected -- ▼
Data.com Key:	Jigsaw (col 40) ▼

Salesforce.com Field	Import Field
Website:	Website (col 23) ▼
Ticker Symbol:	TickerSymbol (col 29) ▼
Ownership:	Ownership (col 28) ▼
Employees:	NumberOfEmployees (col 27) ▼
SIC:	Sic (col 24) ▼
Account Note:	-- none selected -- ▼
Description:	Description (col 30) ▼
Parent Account Site:	-- none selected -- ▼

Account Custom Fields

Salesforce.com Field	Import Field
Customer Priority:	-- none selected -- ▼
Active:	-- none selected -- ▼
Upsell Opportunity:	-- none selected -- ▼
SLA Expiration Date:	-- none selected -- ▼

Salesforce.com Field	Import Field
SLA:	-- none selected -- ▼
Number of Locations:	-- none selected -- ▼
SLA Serial Number:	-- none selected -- ▼

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Step 6 :-

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**:

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[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	Salesforce.com Field	Import Field
Billing Address Line 1:	-- none selected --	Shipping Address Line 1:	ShippingStreet (col 13)
Line 2:	-- none selected --	Line 2:	-- none selected --
Line 3:	-- none selected --	Line 3:	-- none selected --
City:	-- none selected --	City:	-- none selected --
State/Province:	-- none selected --	State/Province:	-- none selected --
Postal Code:	-- none selected --	Postal Code:	-- none selected --
Country:	-- none selected --	Country:	-- none selected --

Account Phone Information

Salesforce.com Field	Import Field	Salesforce.com Field	Import Field
Account Phone:	-- none selected --	Account Phone Ext.:	-- none selected --
Account Fax:	-- none selected --	Account Fax Ext.:	-- none selected --

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[Next ▶](#)

Step 7 :-

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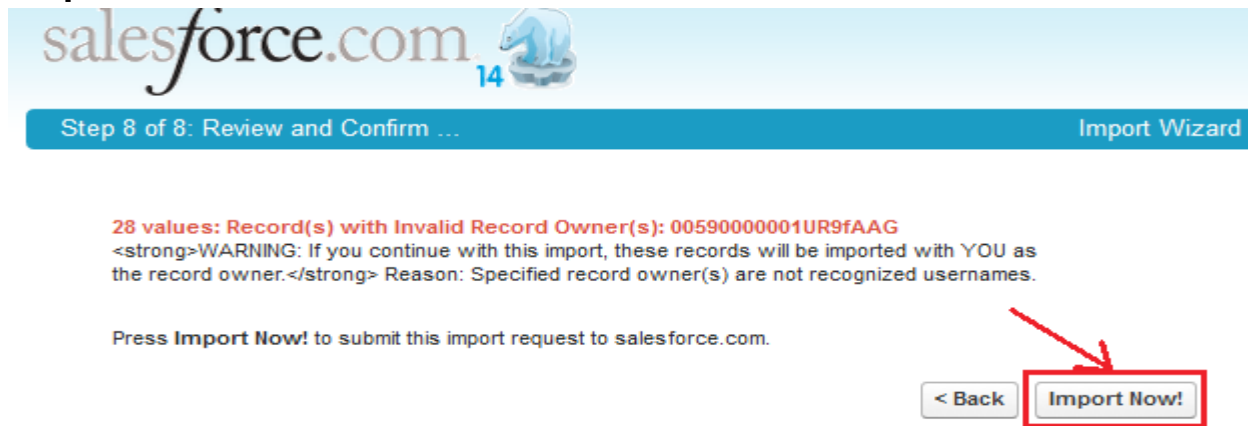
The following is a list of columns that have not been mapped to a salesforce.com field. The import wizard can merge these into a separate note attached to the contact or account. Check the columns you would like to include in the contact or account note. Once you have finished, click **Next**:

Include in Contact Note	Include in Account Note	Do not import
<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>
<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>

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)

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Step 8 :-



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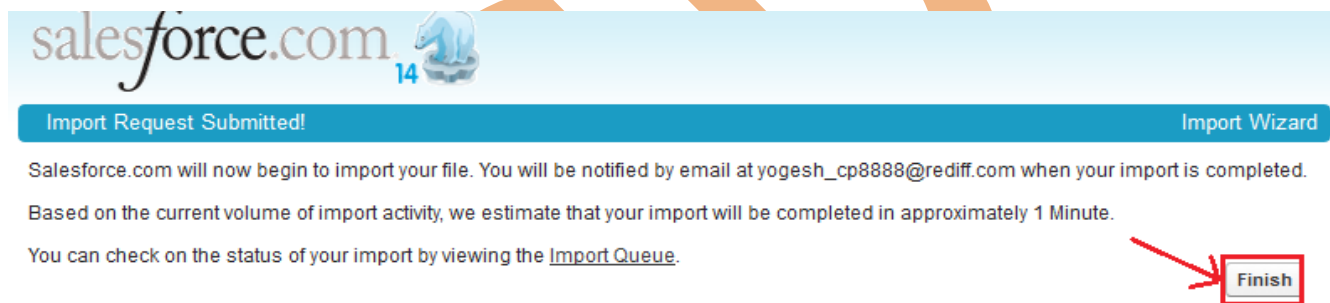
Step 8 of 8: Review and Confirm ... Import Wizard

28 values: Record(s) with Invalid Record Owner(s): 00590000001UR9fAAG
WARNING: If you continue with this import, these records will be imported with YOU as the record owner. Reason: Specified record owner(s) are not recognized usernames.

Press **Import Now!** to submit this import request to salesforce.com.

< Back Import Now!

After then click on Finish button.



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Import Request Submitted! Import Wizard

Salesforce.com will now begin to import your file. You will be notified by email at yogesh_cp8888@rediff.com when your import is completed. Based on the current volume of import activity, we estimate that your import will be completed in approximately 1 Minute. You can check on the status of your import by viewing the [Import Queue](#).

Finish

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 !**

Import Wizard for Leads

Use this wizard to import leads from any comma separated values file.



This wizard imports information into leads. To import accounts and contacts, go to [Import Accounts/Contacts](#)

Steps to Import Your Organization's Leads

1. **Compare** your data to the Lead fields available for import. Create **custom Lead fields**, if needed. [Tell me more!](#)
2. **Export** your data to a file. [Tell me more!](#)
3. **Review** your data for accuracy, and make sure you have 50,000 or fewer records.
4. **Start the Import Wizard!**


* It is recommended that you import a small test file of 5 records before importing all of your data to ensure that you have correctly prepared your import file.

Step 1 :-

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
 lead export.csv
6. Assign all new leads to this lead source:
7. Assign all leads using this assignment rule:
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.
10. Matching Type
☐ None
☐ Salesforce.com ID
☐ Name
☒ Email
11. ☐ Trigger workflow rules for new and updated leads

[Next >](#)

Step 2 :-

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**:

☒ Overwrite existing lead values

< Back

Next >

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 :-

The following columns were not mapped to a salesforce.com field:
 CONVERTEDACCOUNTID, CONVERTEDDATE, CONVERTEDOPPORTUNITYID, CREATEDBYID,
 CREATEDDATE, CURRENTGENERATORS__C, EMAILBOUNCEDDATE,
 EMAILBOUNCEDREASON, ID, ISCONVERTED, ISDELETED, ISUNREADBYOWNER,
 JIGSAWCONTACTID, LASTACTIVITYDATE, LASTMODIFIEDBYID, LASTMODIFIEDDATE,
 LASTREFERENCEDDATE, LASTVIEWEDDATE, LATITUDE, LEADSOURCE, LONGITUDE,
 MASTERRECORDID, NAME, NUMBEROFLOCATIONS__C, OWNERID, PRIMARY__C,
 PRODUCTINTEREST__C, SICCODE__C, STATUS, SYSTEMMODSTAMP
 WARNING: If you continue with this import, the data in these columns will NOT be
 imported into salesforce.com.

Press **Import Now!** to submit this import request to salesforce.com.

< Back

Import Now!

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

Solution Import Wizard

Use this wizard to import master solutions or translated solutions into your organization from any comma separated value file. A master solution contains the content from which translated solutions are derived into other languages by translators. You must have the Import Solutions permission to use this wizard.



Steps to Import Solutions

1. Before you begin, create any custom solution fields, including lookup relationship fields, that may be present in your import file.
2. Import any records that are related to your solutions. For example, if your solutions have a lookup relationship with contacts, import those contacts before importing your solutions.
3. To create your import file, export a solution 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. An author is the user who created the solution. Optionally, include an author column in your import file. Populate that column with the names, salesforce.com IDs, or external IDs of the solution authors. If you do not include this column, you will be saved as the author.
5. Review your data for accuracy, and make sure that your file has 50,000 or fewer records.
6. **Start the Import Wizard!**

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

The screenshot shows the 'Step 1. Prevent Duplicates' screen of the Salesforce Import Wizard. The browser window title is 'Import Wizard for cp softtech - Mozilla Firefox' and the URL is 'https://ap1.salesforce.com/_ui/ui/setup/imp/ImportWizard?entityType=Solution'. The page has a blue header with 'Step 1. Prevent Duplicates' and 'Step 1 of 6'. A 'Next' button is in the top right. The main content area says 'Welcome to the Solution Import Wizard' and 'To prevent duplicate Solution records from being created as a result of this import, choose Yes below.' It then asks 'Do you want to prevent duplicates from being created?' with two radio button options: 'No - insert all records in my import file.' (which is selected and highlighted with a red box) and 'Yes - prevent duplicate records from being created. Note: You must select this option if you want to update existing records.' A 'Next' button is in the bottom right, also highlighted with a red box.

Step 4 :-

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

The screenshot shows the 'Step 2. Specify Relationships' screen of the Salesforce Import Wizard. The browser window title is 'Import Wizard for cp softtech - Mozilla Firefox' and the URL is 'https://ap1.salesforce.com/_ui/ui/setup/imp/ImportWizard'. The page has a blue header with 'Step 2. Specify Relationships' and 'Step 2 of 6'. 'Previous' and 'Next' buttons are in the top right. The main content area explains that users creating a solution are referred to as the author and provides instructions on how to specify the field for identifying solution authors. It then asks 'Which user field are you including in your file to designate Solution authors?' with four radio button options: 'Author' (selected and highlighted with a red box), 'Salesforce.com ID', 'External ID' (with an information icon), and 'None'. 'Previous' and 'Next' buttons are in the bottom right, with the 'Next' button highlighted with a red box.

Step 3:-

www.bispsolutions.com

www.bisptrainigs.com

www.hyperionguru.com

Step 3. File Upload

Step 3 of 6

Previous

Next

- Click Browse and find your import CSV file.

Browse...

solutions.csv
- Specify the character encoding of your CSV file. In most cases, you can accept the default value provided.

ISO-8859-1 (General US & Western European, ISO-LATIN-1)
- Additional settings:
☐ Trigger workflow rules for new and updated records.

Previous

Next

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

Step 4. Field Mapping

Step 4 of 6

Previous

Next

Use the drop-down lists below to specify the salesforce.com fields that correspond to the columns in your import file. For your convenience, identically matching labels will be automatically selected.

Import Field	Salesforce.com Field
ID (col 0)	--None--
ISDELETED (col 1)	--None--
SOLUTIONNUMBER (col 2)	--None--
SOLUTIONNAME (col 3)	--None--
ISPUBLISHED (col 4)	--None--
ISPUBLISHEDINPUBLICKB (col 5)	--None--
STATUS (col 6)	Status
ISREVIEWED (col 7)	--None--
SOLUTIONNOTE (col 8)	--None--
OWNERID (col 9)	--None--
CREATEDDATE (col 10)	--None--
CREATEDBYID (col 11)	--None--

Step 5 :-

www.bispsolutions.com

www.bisptrainigs.com

www.hyperionguru.com

Step 5. Verify Import Settings

Step 5 of 6

Previous

Import Now!

Error: 5 lines: The import file contains records with blank or invalid data. Line number(s): 3, 4, 7, 8, 10

Error: Author field is not mapped

WARNING: If you continue with this import, all records will be imported with YOU as the author.

Click **Import Now!** to submit this import request to salesforce.com.

Previous

Import Now!

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

Step 6. Import Initiated

Step 6 of 6

Finish

Salesforce.com will now begin to import your file. You will be notified by email at yogesh_cp8888@rediff.com when your import is completed. Based on the current volume of import activity, we estimate that your import will be completed in approximately 1 minute. You can check on the status of your import by viewing the [Import Queue](#).

Finish

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.

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!**

Step 1 :-

Select your custom object checked on radio button. then click on **Next** button.

Step 1. Choose Record

Step 1 of 3

Next

Welcome to the custom object import wizard.

From the list below, choose the type of record that you are importing.

Label	Master Object	Description
<input type="radio"/> positionN		
<input type="radio"/> Review	Job Application	
<input type="radio"/> All Detail		
<input type="radio"/> Employment website		
<input checked="" type="radio"/> ZIP Code		
<input type="radio"/> Postion		
<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		

Next

Step 2 :-

Import Wizard for cp softtech - Mozilla Firefox

https://ap1.salesforce.com/_ui/ui/setup/imp/ImportWizard

Step 2. Prevent Duplicates Step 2 of 7

Previous Next

To prevent duplicate ZIP Code records from being created as a result of this import, choose Yes below.

Do you want to prevent duplicates from being created?

☒ No - insert all records in my import file.

☐ Yes - prevent duplicate records from being created. Note: You must select this option if you want to update existing records.

Previous Next

Step 3 :-

Import Wizard for cp softtech - Mozilla Firefox

https://ap1.salesforce.com/_ui/ui/setup/imp/ImportWizard

Step 3. Specify Relationships Step 3 of 7

Previous Next

ZIP Code records are owned by users. If there is a record owner column in your file, specify below the user field that it represents. If you do not include a record owner column in your file, you will be saved as the owner of all created records.

Which user field are you including in your file to designate record owners?

☒ Name

☐ Salesforce.com ID

☐ External ID [i](#)

☐ None

Previous Next

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

Import Wizard for cp softtech - Mozilla Firefox

https://ap1.salesforce.com/_ui/ui/setup/imp/ImportWizard

Step 4. File Upload Step 4 of 7

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

1. Click Browse and find your import CSV file.

[Browse...](#) Zip Code.csv
2. Specify the character encoding of your CSV file. In most cases, you can accept the default value provided.

ISO-8859-1 (General US & Western European, ISO-LATIN-1) ▼
3. Additional settings:
☐ Trigger workflow rules for new and updated records.

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

Step 5 :-
select field mapping and click on Next button.

Import Wizard for cp softtech - Mozilla Firefox

https://ap1.salesforce.com/_ui/ui/setup/imp/ImportWizard

Step 5. Field Mapping Step 5 of 7

Previous Next

Use the drop-down lists below to specify the salesforce.com fields that correspond to the columns in your import file. For your convenience, identically matching labels will be automatically selected.

Import Field	Salesforce.com Field
Zip code (col 0)	ZIP Code
City (col 1)	City
Latitude (col 2)	Latitude
Longitude (col 3)	Longitude
State (col 4)	State
State Abbreviation (col 5)	State Abbreviation

Previous **Next**

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

Import Wizard for cp softtech - Mozilla Firefox

https://ap1.salesforce.com/_ui/ui/setup/imp/ImportWizard

Step 6. Verify Import Settings Step 6 of 7

Previous **Import Now!**

Error: Record Owner field is not mapped

WARNING: If you continue with this import, all records will be imported with YOU as the record owner.

Error: State Abbreviation: 2 values: data value too large: State Abbreviation1, State Abbreviation5

If you choose to proceed with the import, this data will be truncated to fit into the field.

Click **Import Now!** to submit this import request to salesforce.com.

Previous **Import Now!**

Step 7 :- Click on Finish button.

Step 7. Import Initiated

Step 7 of 7

Finish

Salesforce.com will now begin to import your file. You will be notified by email at yogesh_cp8888@rediff.com when your import is completed. Based on the current volume of import activity, we estimate that your import will be completed in approximately 1 minute. You can check on the status of your import by viewing the [Import Queue](#).

Finish

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

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 NowSchedule Export

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

SaveCancel

Export File EncodingISO-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 day1of every month

Onthe 1stSundayof every month

Start10/11/2013

End11/11/2013

Preferred Start Time--None--

Exact start time will depend on job queue activity.

SaveCancel

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

☐ RecordType

☐ Approval

☐ FieldHistory

☐ OrgWideEmailAddress

☐ CampaignMember

☐ Lead

☐ OpportunityContactRole

☐ OpportunityCompetitor

☐ FiscalYearSettings

☐ Product2

☐ CaseComment

☐ CaseSolution

☐ NewsFeed

☐ FeedComment

☐ ProcessInstance

☐ UserRole

☐ TaskRelation

☐ Pricebook2

☐ PushProfileMapping

☐ JigsawSavedSearch

☐ TopicGroupActivity

☐ Review__c

☐ ForTesting__c

☐ Job_Application__c

☐ Employee__c

☐ BusinessProcess

☐ ContractContactRole

☐ User

☐ LinkReference

☐ Account

☐ Opportunity

☐ OpportunityHistory

☐ Partner

☐ Period

☐ Asset

☐ CaseContactRole

☐ Solution

☐ FeedTrackedChange

☐ EntitySubscription

☐ ProcessInstanceStep

☐ Task

☐ EventRelation

☐ Idea

☐ PushIntent

☐ DatacloudPurchaseUsage

☐ TopicUserActivity

☐ Employment_website__c

☐ Position__c

☐ DepartMent__c

☐ Book__c

☐ Contract

☐ EntityHistory

☐ EmailRoutingAddress

☐ Campaign

☐ Contact

☐ AccountContactRole

☐ OpportunityLineItem

☐ Note

☐ PricebookEntry

☐ Case

☐ CaseHistory2

☐ ContentVersion

☐ FeedPost

☐ FeedFieldHistory

☐ ProcessInstanceWorkitem

☐ Event

☐ EmailDisclaimer

☐ IdeaComment

☐ MetricsTransmissionHistory

☐ SocialPersona

☐ TrendingTopic

☐ Job_Posting__c

☐ Candidate__c

☐ Back_Office__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

Click here dwnload zip file

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.

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: ☐ [i]

Include Chatter files and Salesforce CRM Content document versions: ☐ [i]

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 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.

[Help for this Page](#) ?

Storage Usage

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
vqesh sharma	784 KB	99%
Vikram vadav	2 KB	0%

Top Users by File Storage Usage

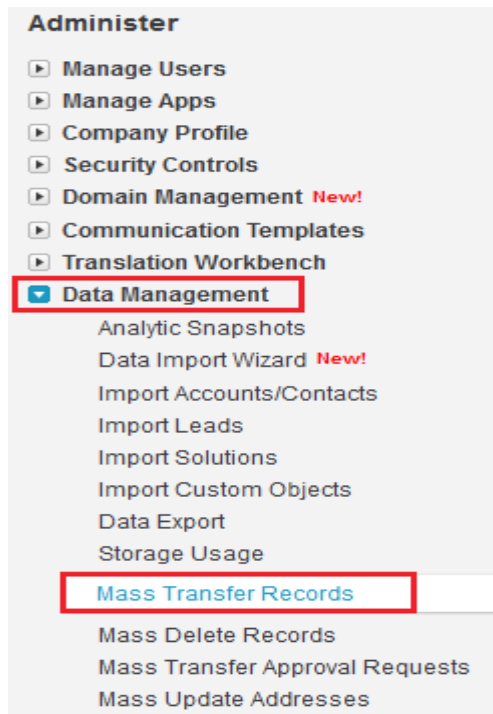
User	Storage	Percent
vqesh sharma	25 KB	56%
Chatter Expert	13 KB	29%

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.

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 Help for this Page ?

Mass Transfer Positions ! = Required Information

Transfer from: User 3

Transfer to: User 4

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

2

6

<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

5

Mass Transfer Records

Mass Delete Records

Mass Transfer Approval Requests

Mass Update Addresses

Data Loader

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.)

Mass Delete Records

Mass Delete Accounts

Delete multiple accounts at one time

Mass Delete Leads

Delete multiple leads at one time

Mass Delete Activities

Delete multiple activities at one time

Mass Delete Contacts

Delete multiple contacts at one time

Mass Delete Cases

Delete multiple cases at one time

Mass Delete Solutions

Delete multiple solutions at one time

Mass Delete Products

Delete multiple products at one time

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 Contacts

[Help for this Page](#) ?

▼ 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-- ▼		

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

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

▼ 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.

<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

Data Loader in Salesforce.com

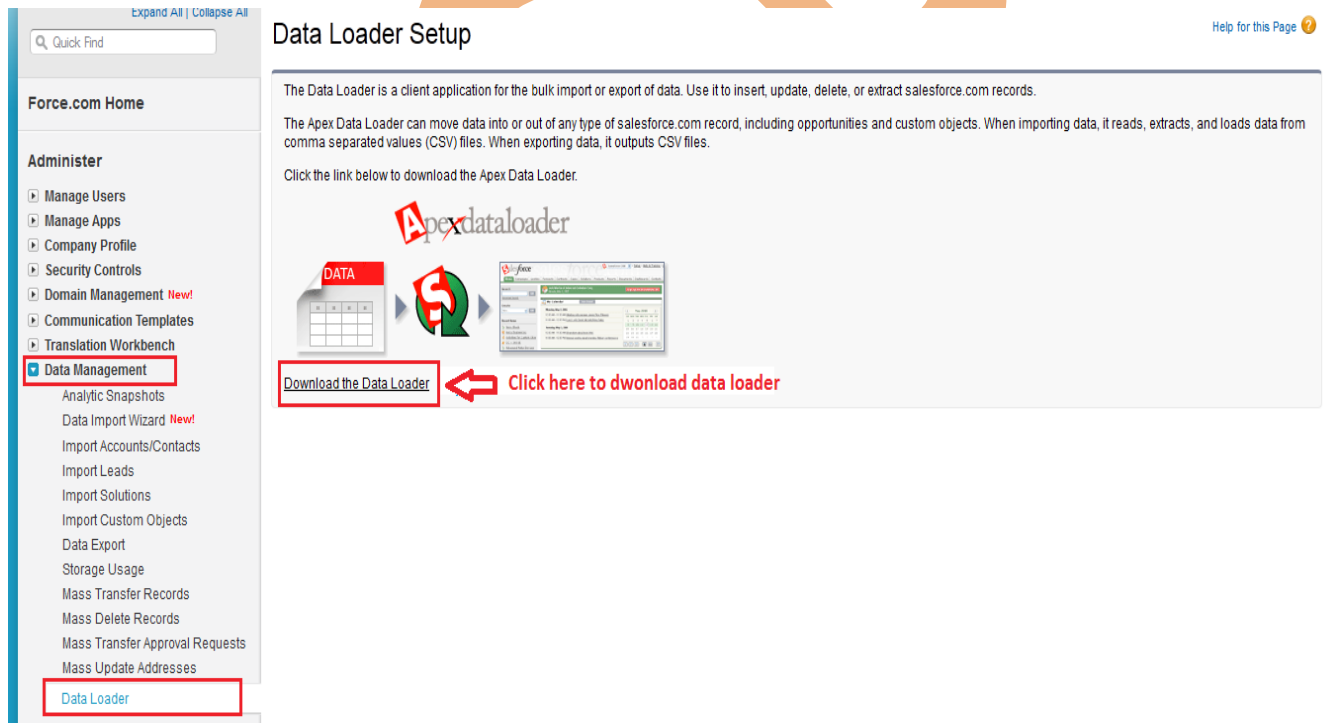
SalesForce provide to you client application it is data loader for work the bulk import or export of data.

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.

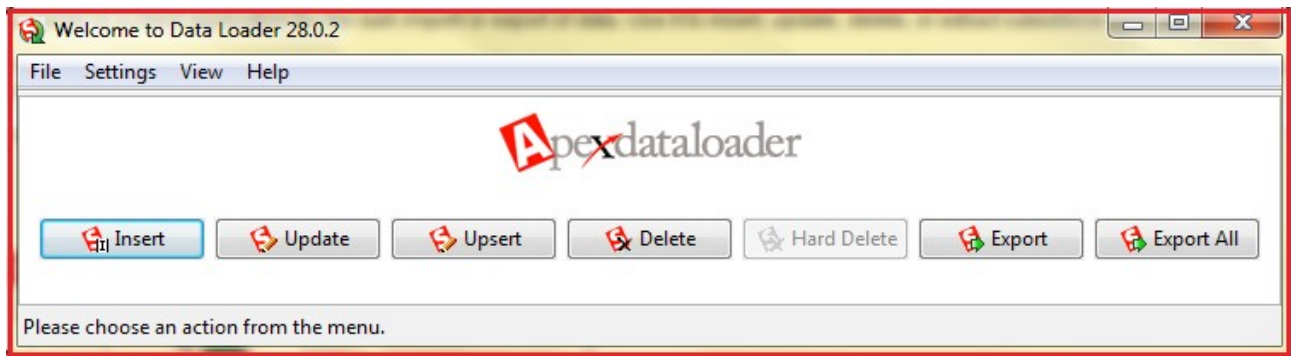
The Apex Data Loader can move data into or out of any type of salesforce.com record, including opportunities and custom objects. When importing data, it reads, extracts, and loads data from comma separated values (CSV) files. When exporting data, it outputs CSV files.

Click the link below to download the Apex Data Loader.

[Download the Data Loader](#)  Click here to download 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.



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 PositionNs](#) — Transfer multiple positionns from one user to another
- [Transfer ZIP Codes](#) — Transfer multiple zip codes from one user to another

Step 1 :-

Mass Transfer Employees

Mass Transfer Employees

Transfer from

User ▼ yogesh sharma

Transfer to

User ▼ Vikram yadav

1

Find employees that match the following criteria:

--None--	▼	--None--	▼		AND
--None--	▼	--None--	▼		AND
--None--	▼	--None--	▼		AND
--None--	▼	--None--	▼		AND
--None--	▼	--None--	▼		

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: 11/27/2013
- For date/time fields, enter the value in following format: 11/27/2013 12:40 PM

Find

2

3

Transfer

Cancel

<input type="checkbox"/>	Employee Number	Owner Alias	Created By Alias	Last Modified By Alias
<input checked="" type="checkbox"/>	Emp-002	yshar	yshar	yshar
<input checked="" type="checkbox"/>	Emp-003	yshar	yshar	yshar
<input checked="" type="checkbox"/>	Emp-005	yshar	yshar	yshar
<input type="checkbox"/>	Emp-006	yshar	yshar	yshar
<input type="checkbox"/>	Emp-007	yshar	yshar	yshar

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.

Accounts

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

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

- Account Notes
- All Contacts associated to this Account plus all related Contact data
- All Opportunities on Accounts
- All Activities associated with the Accounts

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 Accounts that match the following criteria:

--None--	▼	--None--	▼		AND
--None--	▼	--None--	▼		AND
--None--	▼	--None--	▼		AND
--None--	▼	--None--	▼		AND
--None--	▼	--None--	▼		

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: 11/27/2013
- For date/time fields, enter the value in following format: 11/27/2013 12:51 PM

Search

▼ Step 4: Choose to delete Accounts with Closed-Won Opportunities

☐ Delete Accounts that have associated Closed/Won Opportunities. (If not checked, those Accounts will not be deleted.)

▼ Step 5: Choose to delete Accounts with another owner's Opportunities

☐ Delete Accounts that are associated with Opportunities owned by someone else. (If not checked, those Accounts will not be deleted.)

- Accounts with associated cases will not be deleted.
- Accounts with activated contracts will not be deleted.
- Partner Accounts with Partner users will not be deleted.

▼ 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.

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

<input type="checkbox"/>	Account Name	Account Site	Billing State/Province	Phone	Type	Account Owner Alias	Created By Alias	Last Modified By Alias
<input type="checkbox"/>	bisp		london	254125487		yshar	yshar	yshar
<input type="checkbox"/>	Bisp Trainings				Technology Partner	yshar	yshar	yshar
<input type="checkbox"/>	Burlington Textiles Corp of America		NC	(336) 222-7000	Customer - Direct	yshar	yshar	yshar
<input checked="" type="checkbox"/>	CC213425				Customer - Channel	yshar	yshar	yshar
<input checked="" type="checkbox"/>	CC634267				Customer - Channel	yshar	yshar	yshar
<input checked="" type="checkbox"/>	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.

[Data Management](#) >

State and Country Picklists

[Help for this Page](#) ?

Enable State and Country Picklists

Before switching to state and country picklist fields, you must find and convert existing state and country text data into standard picklist values. You should also find where state and country data is used in customizations such as reports and list views, because you may need to update them when you enable the picklists.

1. Configure state and country picklists.

Specify the states and countries that you want to be available in your organization.
[Configure states and countries.](#)

2. Scan your organization.

Search for all state and country values in your records and find where they're used in reports, list views, validation rules, and other customizations.

When the scan is complete, you'll receive an email with a link to a report. Review the report, which details the data that needs to be converted and the customizations in your organization that may need to be updated.

[Scan now.](#)

3. Convert your data.

Map existing state and country data in your records to standardized picklist values. You'll map country values first, and then state values.
[Convert now.](#)

4. Turn on state and country picklists.

Enable state and country picklists for your organization when you finish converting your data, or if you don't have any data, enable the picklists now.



Please complete Step 2 and Step 3 before enabling state and country picklists.

[Enable](#)

5. Rescan and fix customizations.

If needed, scan your organization again to identify and fix customizations that might have broken when you enabled state and country picklists.

[Scan again now.](#)

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

www.bispsolutions.com

www.bisptrainigs.com

www.hyperionguru.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
<code>create()</code>	Adds one or more new records to your organization's data.
<code>delete()</code>	Deletes one or more records from your organization's data.
<code>describeGlobal()</code>	Lists the available Tooling API objects and their metadata.
<code>describeSObjects()</code>	Describes metadata (field list and object properties) for the specified object or array of objects. Call <code>describeGlobal()</code> to retrieve a list of all Tooling API objects for your organization, then iterate through the list and use <code>describeSObjects()</code> to obtain metadata about individual objects.
<code>executeAnonymous(string apexcode)</code>	Executes the specified block of Apex anonymously and returns the result.
<code>query()</code>	Executes a query against a Tooling API object and returns data that matches the specified criteria.
<code>retrieve()</code>	Retrieves one or more records based on the specified IDs.
<code>update()</code>	Updates one or more existing records in your organization's data.
<code>upsert()</code>	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.
/subjects/	GET	Lists the available Tooling API objects and their metadata.
/subjects/ <i>SObjectName</i> /	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.
/subjects/ <i>SObjectName</i> /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.
/subjects/ <i>SObjectName</i> /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.
/subjects/ ApexLog /id/Body/	GET	Retrieves a raw debug log by ID. Available from API version 28.0 or later.