

# Project Title: Event Venue CRM

## Phase 8 — Data Management & Deployment (Developer)

### 8.1 Data Import Wizard

*Purpose:* Import Contacts and Venues into the org.

*Setup:*

- App Launcher → Data Import Wizard → Standard Objects → Contacts → Add New Records → Upload Contacts.csv → Map Fields → Import
- Custom Objects → Venue\_\_c → Upload Venues.csv → Map Fields → Import

*Outcome:* Sample Contacts and Venues are loaded into the org.

Setup

Home

Object Manager

Search Setup

Almost done

Choose data

Edit mapping

Start import

Edit Field Mapping: Accounts and Contacts

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	Account: Account Name	Account Name	Grand Hall	Royal Banquet	Grand Hall
Change	Contact: First Name	FirstName	John	Priya	Abhishek
Change	Contact: Last Name	LastName	Smith	Kapoor	Hunashyal
Change	Contact: Email	Email	john@demo.com	priya@demo.com	abc@demo.com
Change	Account: Phone, Contact: Phone	Phone	8887776666	9991113333	1234567890
Change	Account: Billing Zip/Postal Code	Location	123 Main Street	123 Main Street	123 Main Street
Change	Account: Billing City	City	Bagalkot	Bidar	Bijapur
Change	Account: Billing State/Province	State	New York	Chicago	Karnataka

Setup

Home

Object Manager

Search Setup

Great job

Choose data

Edit mapping

Start import

Review & Start Import

Help for this page

Review your import information and click Start Import.

Your selections:

Accounts and Contacts

Add new records

Contact.csv

Your import will include:

Mapped fields

8

Your import will not include:

Unmapped fields

0

Congratulations, your import has started!  
Click OK to view your import status on the Bulk Data Load Job page.

OK

Setup

Home

Object Manager

data import

Integrations

Data Import Wizard

Didn't find what you're looking for?  
Try using Global Search.

Setup

Bulk Data Load Jobs

Bulk Data Load Job

750gL00000E6c91

View the details of a bulk data load job.

Back to List: Bulk Data Load Jobs

Bulk Data Load Job Detail

Reload

Job ID	750gL00000E6c91	Job Type	Bulk-V1	Status	Closed
Submitted by	Ashish Kumar	Operation	Insert	Total Processing Time (ms)	280
Start Time	9/25/2025, 7:01 AM PST	Queued Batches	0	API Active Processing Time (ms)	39
End Time	9/25/2025, 7:01 AM PST	In Progress Batches	0	Apex Processing Time (ms)	0
Time to Complete (hh:mm:ss)	00:00	Completed Batches	1		
Object	Account	Failed Batches	0		
External ID Field		Progress	100%		
Content Type	CSV	Records Processed	10		
Concurrency Mode	Parallel	Records Failed	10		
API Version	54.0	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
<a href="#">View Request</a>	<a href="#">View Result</a>	751gL000008PU1	9/25/2025, 7:01 AM	9/25/2025, 7:01 AM	280	39	0	10	10	0		Completed

For VENUES (Custom Object) :

Today

Venues

Contact

Setup

Home

Object Manager

Getting closer

Choose data

Edit mapping

Start import

Import your Data into Salesforce

You can import up to 50,000 records at a time.

What kind of data are you importing?

Standard objects

Custom objects

Booking Payments

Bookings

Customer

Mentors

Public Events

Session Registrations

Sessions

Students

Venue Amenities

Venue Blocks

Venues

What do you want to do?

Add new records

Match by

Which User field in your file designates record owners?

Trigger workflow rules and processes?

Update existing records

Add new and update existing records

Where is your data located?

Drag CSV file here to upload

CSV

File

Character Code

Values Separated By

Setup

Home

Object Manager

Search Setup

Almost done

Choose data

Edit mapping

Start import

### Edit Field Mapping: Venues

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	Venue Name	Account Name	Grand Hall	Royal Banquet	Palace
Change	Address	Billing City	New York	Chicago	Karnataka
Change	Capacity	Capacity_c	100	20	39
Change	Hourly Rate	Hourly_Rate__c	700	800	900
Change	Status	Status__c	Available	Available	Available

Setup

Home

Object Manager

Search Setup

Great job

Choose data

Edit mapping

Start import

### Review & Start Import

Review your import information and click Start Import.

Your selections:

- Venues ✓
- Add new records ✓
- Venues.csv ✓

Your import will include:

Mapped fields

5

Your import will not include:

Unmapped fields

0

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Didn't find what you're looking for? Try using Global Search.

SETUP

Bulk Data Load Jobs

### Bulk Data Load Job

750gL00000E6eae

View the details of a bulk data load job.

[Back to List: Bulk Data Load Jobs](#)

**Bulk Data Load Job Detail**

Job ID: 750gL00000E6eae

Submitted By: Abhishek Hunashyal

Start Time: 9/25/2025, 7:10 AM PST

End Time: 9/25/2025, 7:10 AM PST

Time to Complete (hh:mm:ss): 00:09

Object: Venue

External ID Field:

Content Type: CSV

Concurrency Mode: Parallel

API Version: 64.0

Job Type: Bulk V1

Operation: Insert

Queued Batches: 0

In Progress Batches: 0

Completed Batches: 1

Failed Batches: 0

Progress: 100%

Records Processed: 11

Records Failed: 0

Retries: 0

Status: Closed

Total Processing Time (ms): 95

API Active Processing Time (ms): 41

Apex Processing Time (ms): 0

**Batches**

## 8.2 Data Export (Backup)

*Purpose:* Maintain backup of key objects.

*Setup:*

- Setup → Quick Find → Data Export → Export Now or Schedule Export
- Select objects: Venue\_\_c, Booking\_\_c, Booking\_Payment\_\_c, Contact
- Include images/docs → Save

*Outcome:* Backup files available for safety and restoration.

The image shows two screenshots of the Salesforce Data Export interface. The top screenshot is the 'Schedule Data Export' page. It features a 'Schedule Data Export' section with options for 'Export File Encoding' (set to ISO-8859-1), 'Include Images, documents, and attachments' (checked), 'Include Salesforce Files and Salesforce CRM Content document versions' (checked), and 'Replace carriage returns with spaces' (checked). The 'Frequency' is set to 'On day 1 of every month'. The 'Start' date is 9/25/2025 and the 'End' date is 10/25/2025. Below this is a list of objects to export, including Contact, Account, Partner, and many others. The bottom screenshot is the 'Monthly Export Service' page. It shows the 'Next scheduled export' as 10/7/2025, 10:00 AM. At the bottom, there are buttons for 'Export Now' and 'Schedule Export'.

**Screenshot 1: Schedule Data Export**

**Schedule Data Export**

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

Include Images, documents, and attachments: ☒

Include Salesforce Files and Salesforce CRM Content document versions: ☒

Replace carriage returns with spaces: ☒

Frequency: On day 1 of every month

Start: 9/25/2025 (9/25/2025)

End: 10/25/2025 (10/25/2025)

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

☐ Contact

☐ Asset

☐ Lead

☐ BusinessProcess

☐ Campaign

☐ CaseContactRole

☐ ContentDocumentLink

☐ ContractContactRole

☐ EmailRoutingAddress

☐ Event

☐ FeedFieldHistory

☐ FieldHistory

☐ Individual

☐ Note

☐ OpportunityContactRole

☐ OrgWideEmailAddress

☐ ProcessInstance

☐ RecordType

☐ TaskRelation

☐ VoiceCallRecording

☐ RequestsForAccessSIO

☐ WorkOrder

☐ Order

☐ Account

☐ Partner

☐ NotificationMember

☐ CampaignMember

☐ CaseHistory2

☐ ContentVersion

☐ EmailDisclaimer

☐ EntityHistory

☐ EventRelation

☐ FeedPost

☐ FiscalYearSettings

☐ LinkReference

☐ Opportunity

☐ OpportunityHistory

☐ Period

☐ ProcessInstanceStep

☐ Solution

☐ VoiceCall

☐ SigUserBlacklist

☐ SalesforelqSynofFailure

☐ WorkOrderLineItem

☐ OrderItem

☒ Contact

☐ Product2

☐ UserRole

☐ Case

☐ CaseSolution

☐ ContentVersionMap

☐ EmailMessage

☐ EntitySubscription

☐ FeedComment

☐ FeedTrackedChange

☐ GroupSubscription

☐ NewsFeed

☐ OpportunityCompetitor

☐ OpportunityLineItem

☐ PricebookEntry

☐ ProcessInstanceWorkItem

☐ Task

☐ User

☐ StreamActivityAccess

☐ AccountContactRole

☐ ServiceAppointment

**Screenshot 2: Monthly Export Service**

**Monthly Export Service**

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:** 10/7/2025, 10:00 AM

**Export Now** **Schedule Export**