Salesforce Certified Admin and App Builder

Lesson 9—Data Management

- Importing and Mass Deleting Records

- Using the Data Loader

- Creating fields using the Schema Builder

- Scheduling Data Exports

- Configuring a Sandbox

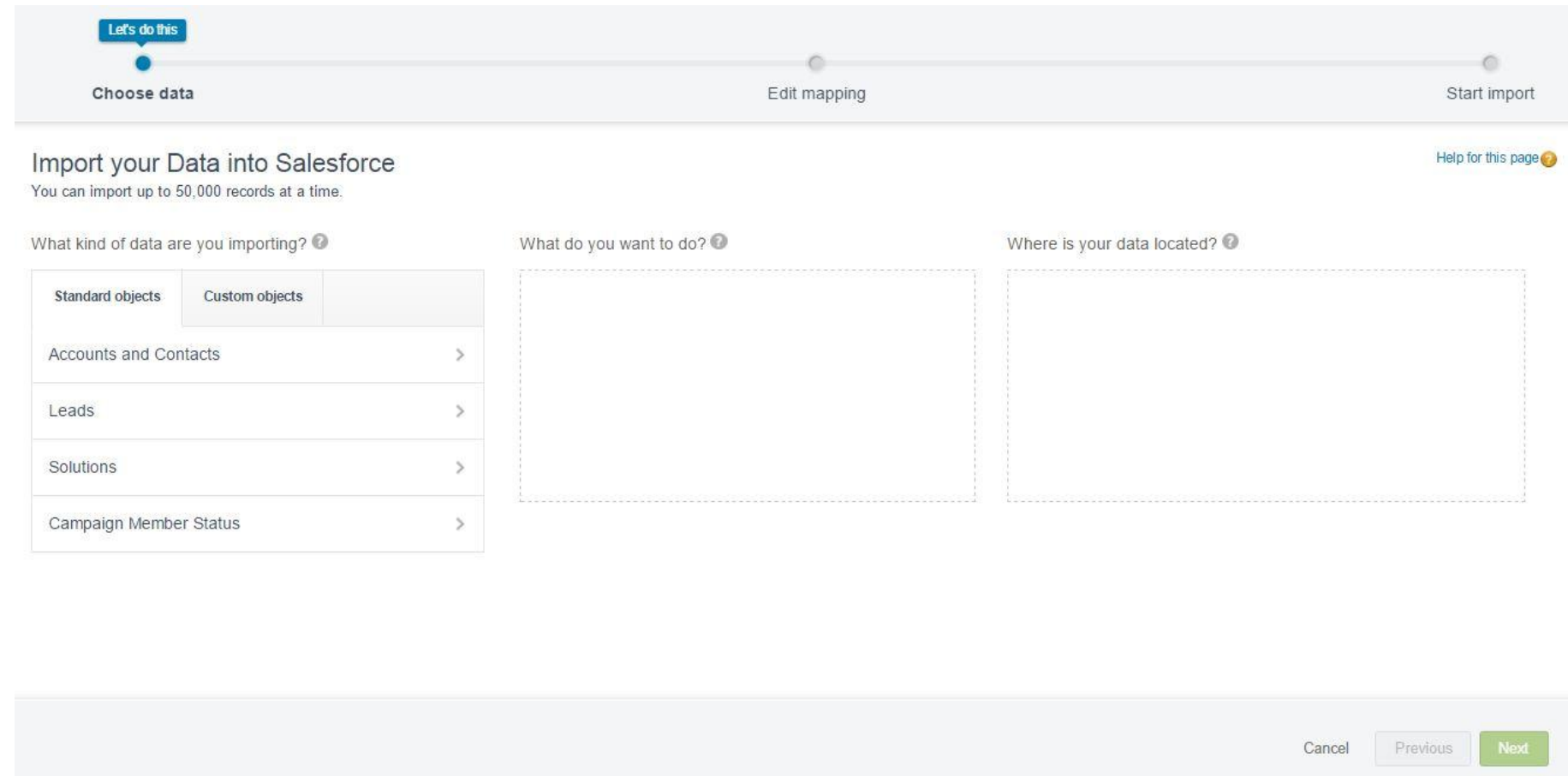# Importing Leads

Keep the following points in mind:

- If you need to import leads for your organization, you can use the Data Import Wizard as long as your lead list is 50,000 leads or less.

- Your import file needs to be a .csv file.

- The data column headings in your import file must match the fields in leads.

Choose data to import   Edit field mapping

Launch Wizard!

4
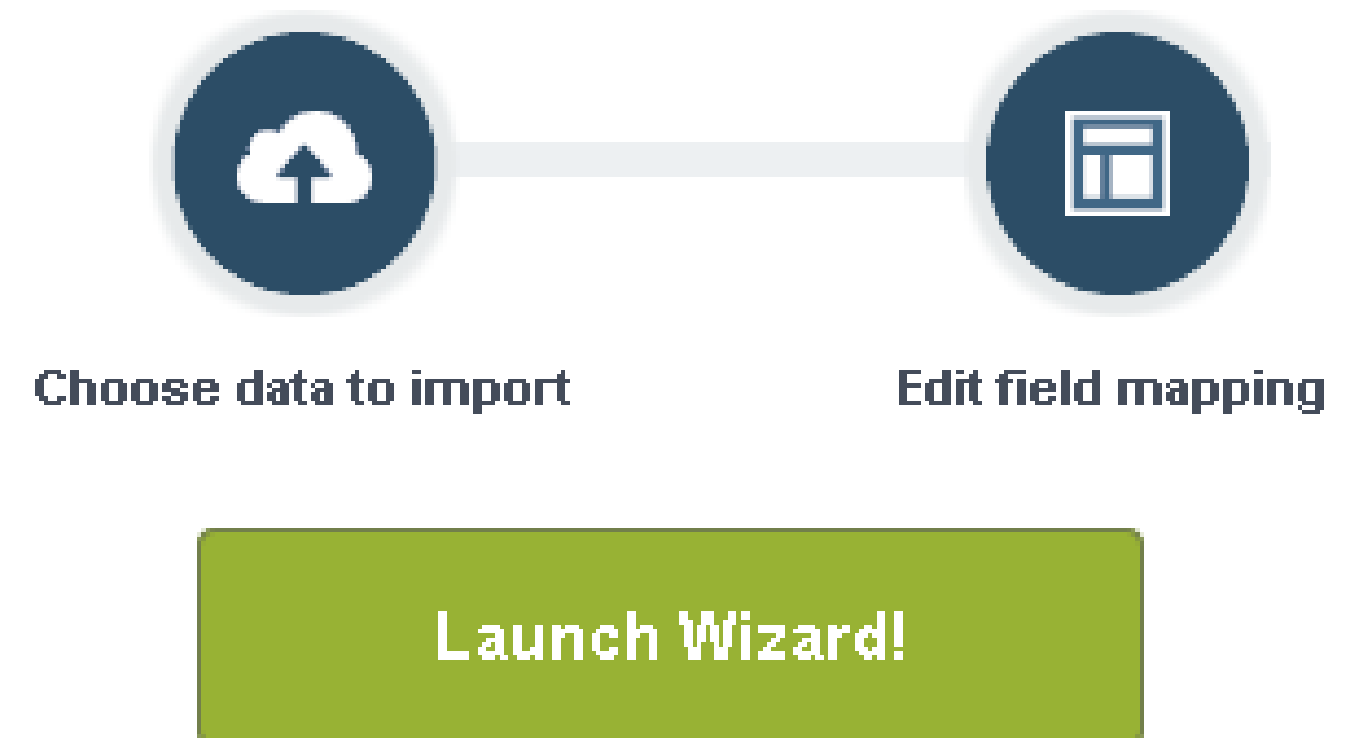
Data Import Wizard
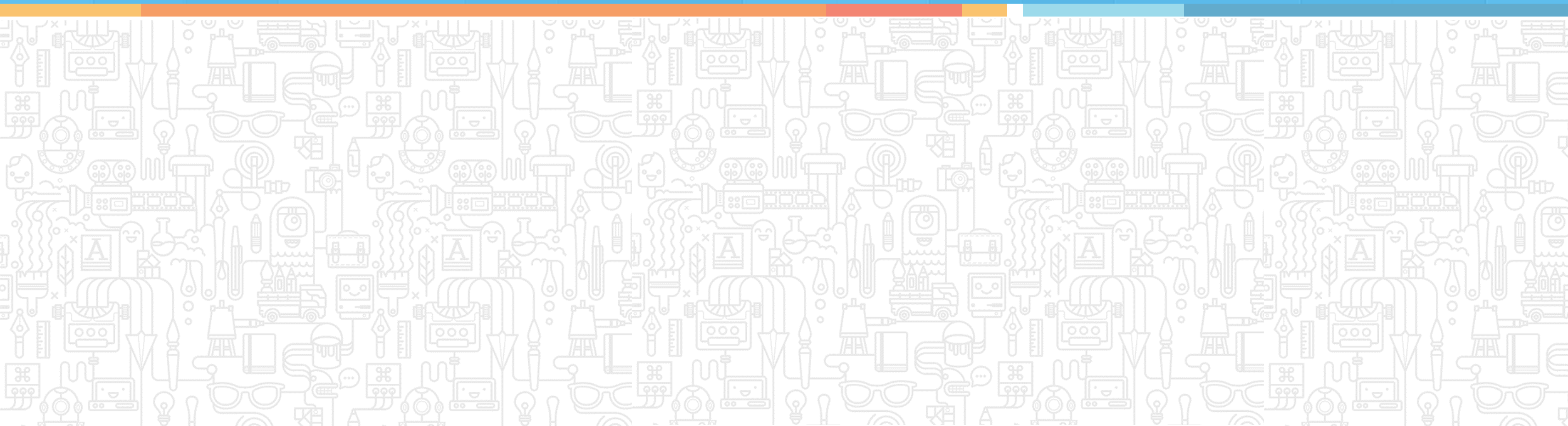
Data Import Wizard
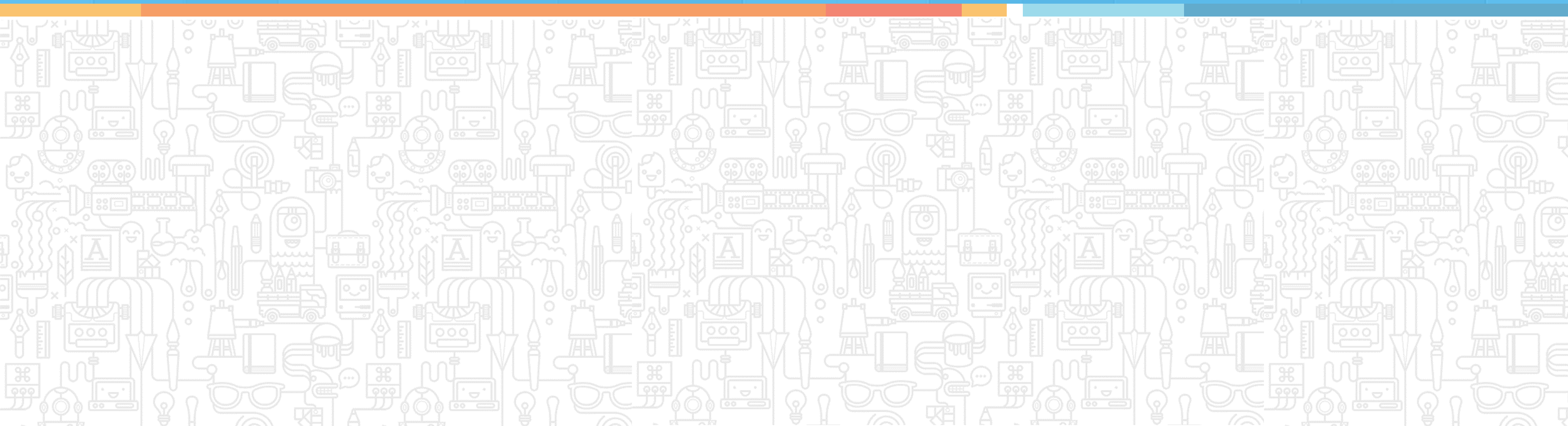
- Native tool of Salesforce that can be used to import various objects
- Can support only up to 50,000 records at a time and hence cannot be used for large-scale operations
- Works only on Accounts, Contacts, Leads, Solutions, and Custom Objects
- Provides data de-duplication facilities
- Cannot be scheduled
- Does not support field mapping
- Can also perform insert, update, and upsert operations
- Cannot export, delete, or transform data
- Accepts only .csv files

Importing Contacts and Accounts

Keep in mind the following key points:

- The Data Import Wizard can also import your

  contacts and accounts.

- Import file can be 50,000 or less.

- Import file needs to be a .csv file.

- Click Data Management.

- Click Launch Wizard.

- The Data Wizard will prompt you on what you need

  to do next.

Standard objects	Custom objects	
Accounts and Contacts		✔

Using Mass Delete

Using Mass Delete

Please keep in mind the following:

- You can delete Accounts, Leads, Activities, Contacts, Cases, Solutions, Products, and Reports with mass delete.

- It is strongly advised to run a report to archive your data before any deletion.

- You will be able to delete 250 records at a time.

- You will have the option to send deleted records to the recycle bin or permanently delete them.

Mass Delete Records

Mass Delete Accounts
   Delete multiple accounts at one time

Mass Delete Leads
   Delete multiple leads at one time

Installing Data Loader

Remember the following when installing the data loader:

- The Data Loader is an app for the bulk import or export of data.

- Choose the Data Loader when your import list is 50,000 or more.

- Data Loader can insert, update, delete, or extract salesforce.com records.

- To install the data loader, go to setup and click Data Management.

- Click Data Loader.

- Click on the link to download.

Download the Data Loader for Windows

Download the Data Loader for Mac

Importing Records with Data Loader

Remember these important facts:

- Use Data Loader when you need to load 50,000 to 5,000,000 records.

- Data Loader supports loads of up to 5 million records.

- You need to load into an object that is not yet supported by the import wizards.

- You have to schedule regular data loads, such as nightly imports.

- You have to export your data for backup purposes.

- The Data Loader requires the use of the Force.com API.
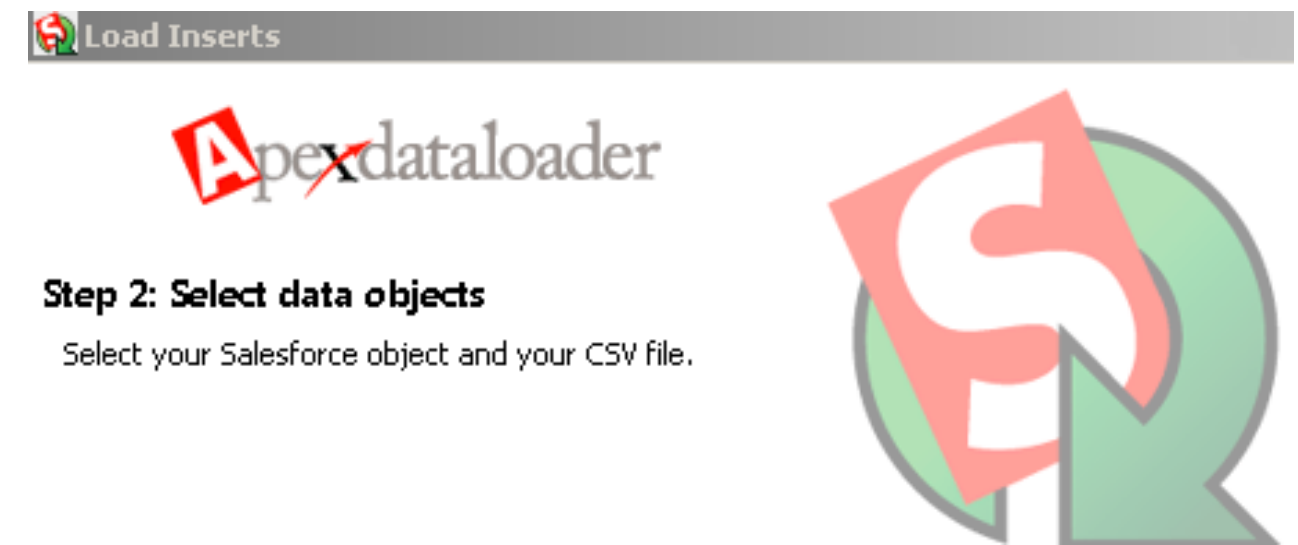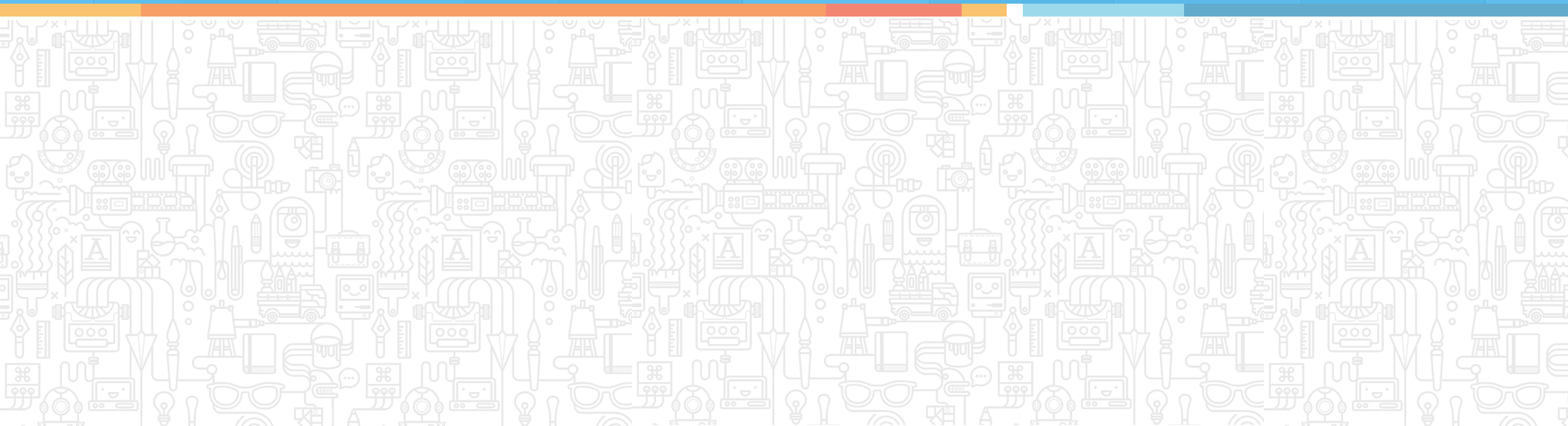
Updating Records with Data Loader
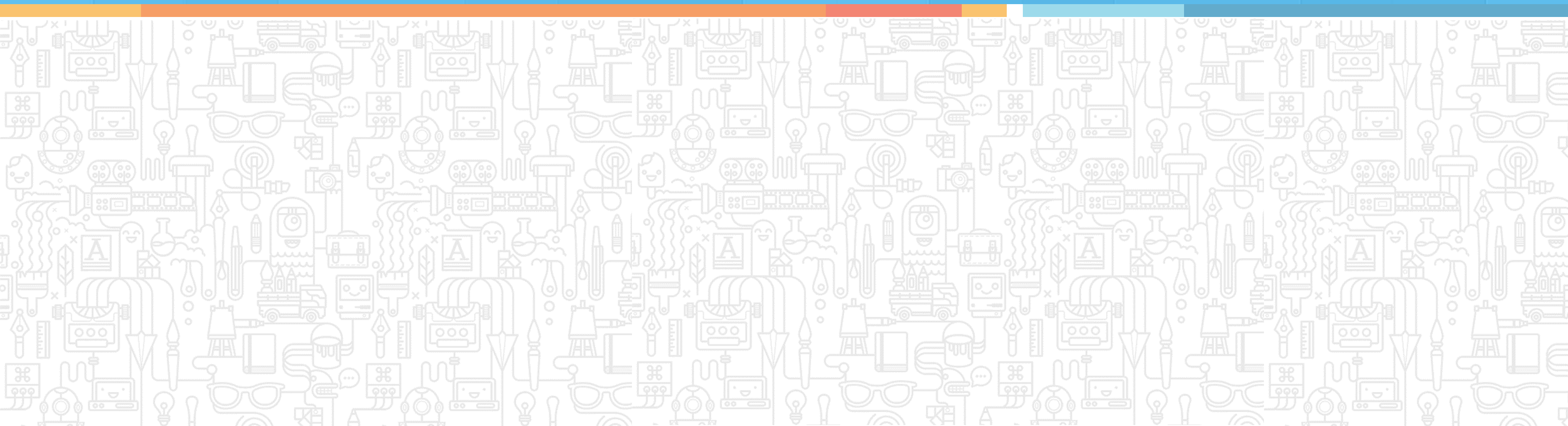
Keep in mind the following points:

- Occasionally, you will need to update your existing records.

- Run a report or export the data you wish to update.

- Make sure you include the Record ID.

- Update your CSV file in preparation for import.

Deleting Records with Data Loader

Keep the following points in mind:

- Use the Data Loader when you have large amounts of data to delete.

- Run a report or export the data you wish to delete.

- Include the Record ID.

- Import your file with the Data Loader and use the ID column to select records for deletion.

- The Data Loader has a hard delete button.

- Hard deleted records are deleted immediately.

- To use the hard delete button, you must have the Bulk API Hard Delete permission enabled on your user profile.

Current Field Mapping:	
File Column Header	**Name**
SYSTEMMODSTAMP	
NAME	
ISDELETED	
ID	
LASTMODIFIEDBYID	
TYPE	

Exporting Records with Data Loader

Remember the following points:

- You can use the Data Loader to export large volumes of data.

- Reports can time out if you try and work with too many fields and records.

- The Data Loader does not have these limitations.

- Salesforce archives some records automatically.

- To include archived records in the Data Loader, choose Export All.

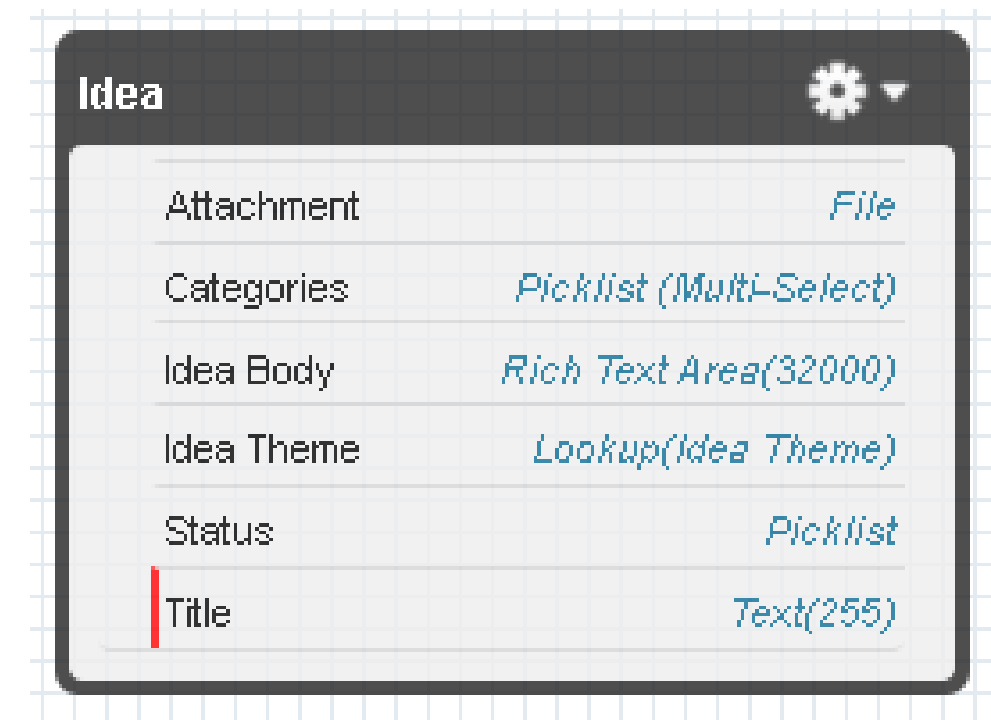# Adding a Field in the Schema Builder

Adding a Field in the Schema Builder

Remember the following points:

- Schema Builder provides a dynamic environment to add new custom objects, custom fields, and relationships to your schema.

- This eliminates the need to click from page to page to find the details of a master-detail relationship or to add a new custom field to an object in your schema.

- You can use its drag and drop interface to view record and field relationships graphically, and modify them with little effort.

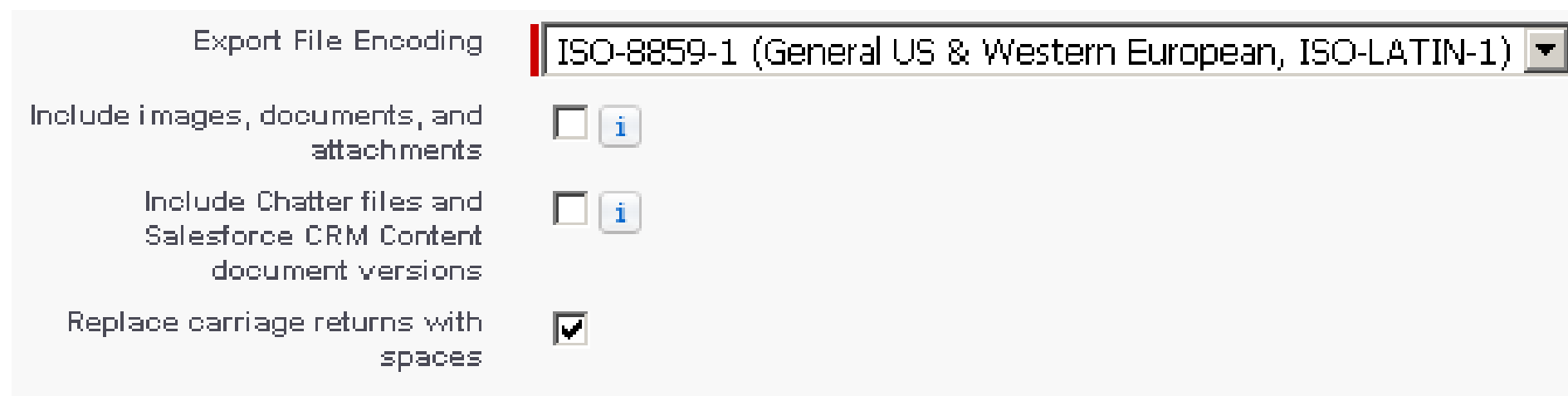- The full set of relationships is called a schema.

Scheduling a Data Export

Keep in mind the following when scheduling a data export:

- Schedule data exports to create regular backups of your data.

- You can export your data daily, weekly, and monthly.

- Many Salesforce customers export weekly.

- You can select the monthly option, but losing a full month of data is not recommended.

- A full export can take between 30 minutes and a day depending on the size and complexity of your records.

- Try and schedule exports during off hours.

Creating and Using Sandbox

Keep in mind the following points:

- Create a sandbox for development, testing, and training.

- Refresh an existing sandbox to update it with the latest data from your production organization.

- This option is available for Enterprise, Performance, Unlimited, and Database.com Editions.

- You can use the sandbox to test and implement new features and code.

- Salesforce provides three free options for sandboxes.

Developer	Developer Pro	Partial Copy
0 Available (1 in use)	0 Available (0 in use)	0 Available (0 in use)

Mass Transferring Records

Remember the following points:

- Use the Mass Transfer tool to transfer accounts, leads, and others, from one user to another.

- If you are transferring leads, you can transfer to a user or queues.

- Click Data Management.

- Click Mass Transfer Records.

Mass Transfer Accounts

Transfer from   Justin Davis

Transfer to   John Adams

☐ Transfer open opportunities not owned by the existing account owner
☐ Transfer closed opportunities
☐ Transfer open cases owned by the existing account owner
☐ Transfer closed cases

Reporting Snapshots

Remember the following points:

- Create a report that includes the fields you want as records into a target object.

- Create a custom object to store the records loaded from the source report.

- Create fields on the object that will receive the source report's results when the reporting snapshot runs.

- Click Data Management.

- Click Reporting Snapshots.

- Click New Reporting Snapshot.

- Enter a name and description for the snapshot.
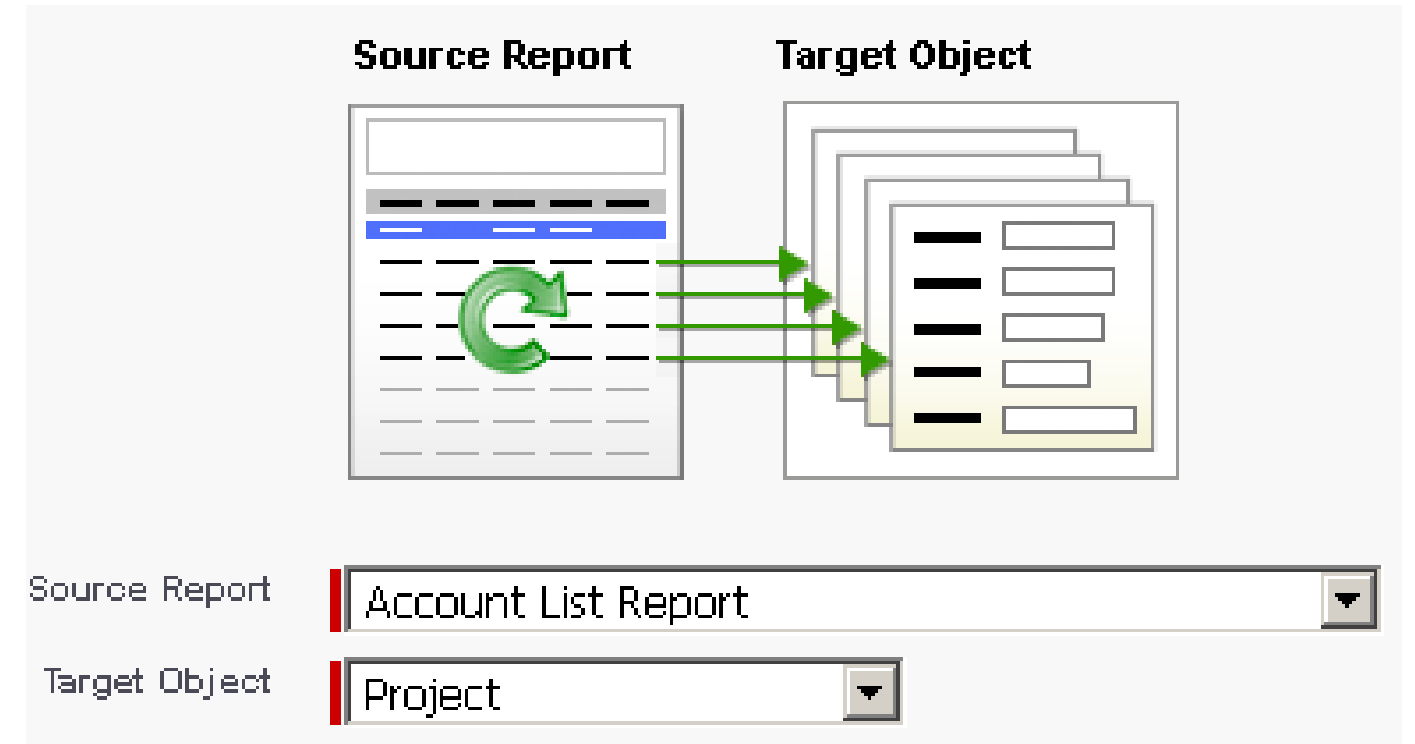
Working with Tags

Working with Tags

Keep the following points in mind when working

with tags:

- You can personalize records by enabling Tags.

- You can use tags to group records from various

  objects by a common theme or use, and then

  use those tags in search to make finding

  information fast and intuitive.

Salesforce supports two types of tags:

- *Personal* and *Private tags*.

- Any user with access to the record can view the public tags that you add.

- To enable Tags go to setup and click on Customize.

- Click Tag Settings.

Tags

☑ Enable Personal Tags

Automatically add a personal tag section to:

☑ Reports

☑ Documents

☑ Notes

☑ Dashboards

Quiz

QUIZ 1

How many records can you delete at one time using the Mass Delete tool?

a.   150

b.   200

c.   250

d.   350

QUIZ 1

How many records can you delete at one time using the Mass Delete tool?

a. 150

b. 200

c. 250

d. 350

The correct answer is c.

You can mass delete 250 records at a time.

QUIZ 2

Where can you transfer record ownership to?

a. Inactive Users

b. Active Users

c. Inactive Queues

d. Dashboards

QUIZ 2

Where can you transfer record ownership to?

a. Inactive Users

b. Active Users

c. Inactive Queues

d. Dashboards

The correct answer is **b**.

You can only transfer records to active users.

QUIZ 3	What feature requires the API to be enabled?

a. Mass Data Transfer

b. Mass Data Delete

c. Apex Data Loader

d. Exporting Data

QUIZ 3

What feature requires the API to be enabled?

a. Mass Data Transfer

b. Mass Data Delete

c. Apex Data Loader

d. Exporting Data

The correct answer is **c**.

The Apex Data Loader requires the API to be enabled.

QUIZ 4

Data exports are in _____ formats.

a.   .xls

b.   .txt

c.   .zip

d.   .rar

QUIZ 4

Data exports are in _____ formats.

a. .xls

b. .txt

c. .zip

d. .rar

The correct answer is **c**.

Data exports are created as .zip files to be downloaded.

QUIZ 5

Which sandbox brings over all the records from production?

a.   Full Copy

b.   Developer

c.   Developer Pro

d.   Partial Copy

QUIZ 5

Which sandbox brings over all the records from production?

a.   Full Copy

b.   Developer

c.   Developer Pro

d.   Partial Copy

The correct answer is **a**.

Only Full Copy sandbox version will bring over all records from production.

Knowledge Check

Scenario | Analysis | Solution

United Containers wants to implement a new integration and custom programming,

but doesn't have a good environment for programming. Changes made in Salesforce Production

are causing disruptions with users, managers, and executives. United Containers needs a

way to test changes before they're rolled out to all other users.

Scenario | Analysis | Solution

United Containers decided to implement a Full Copy Sandbox for the following reasons:

1. Full Copy sandboxes copy all data from production.

2. All configuration and setup changes are re-created.

3. All code such as apex, Visualforce, and static resources are re-created.

Scenario | Analysis | **Solution**

To implement this solution, the System Administrator of United Containers took the following steps:

1. Navigate to Setup, Deploy, then Sandboxes.

2. Click the New Sandbox button.

3. Name the New Sandbox.

4. Click the Create button under the Full Copy option.

- The Data Import Wizard is a fast and easy way to import records.

- The Apex Data Loader is useful for large data loads.

- The Salesforce Sandbox is the perfect test environment for your changes.

This concludes 'Data Management.'

The next lesson is 'AppExchange.'