

ENTERPRISE SYSTEMS

LAB ASSIGNMENT-6

UCT642



THAPAR INSTITUTE
OF ENGINEERING & TECHNOLOGY
(Deemed to be University)

Submitted to:

Ms. Tanya Garg

Submitted by:

Divija

CSBS-3

102018056

Import and Export the data in salesforce. Generate reports from that data

The screenshot displays the Salesforce Setup interface during the data import process. The top navigation bar includes links for 'Get Started', 'Check Out Top Features', 'Leave Feedback', 'Days left in trial' (30), and a 'Subscribe Now' button. The main navigation menu shows 'Setup', 'Home', and 'Object Manager'. A progress bar at the top indicates the current step is 'Edit mapping', with 'Choose data' and 'Start import' as previous and next steps respectively. The 'Almost done' status is shown above the progress bar.

Edit Field Mapping: Leads

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. [Help for this page](#)

Edit	Mapped Salesforce Object	CSV Header	Example	Example	Example
Change	First Name	First Name	5.1	4.9	4.7
Change	Middle Name	Middle Name	3.5	3	3.2
Change	Last Name	Last Name	1.4	1.4	1.3
Change	City	City	0.2	0.2	0.2
Change	Company	Company	a	ab	abc

At the bottom of the mapping table, there are buttons for 'Cancel', 'Previous', and 'Next'.

Review & Start Import

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

Your selections:

- Leads ✓
- Add new records ✓
- iris.csv.xls ✓

Your import **will include**:

Mapped fields: **5**

Your import **will not include**:

Unmapped fields: **0**

At the bottom of the review section, there are buttons for 'Cancel', 'Previous', and 'Start Import'.

Get Started

Check Out Top Features

Leave Feedback

Days left in trial30

Subscribe Now

Search Setup

SetupHomeObject Manager

Choose data

Edit mapping

Start import

Great job

Review & Start Import

Review your Import Information and click Start Import.

Your selections:

Leads

Add new records

iris.csv.xls

Your import will include:

Mapped fields

5

Your import will not include:

Fields not included

0

OK

Cancel

Previous

Start Import

Search Setup

SetupHomeObject Manager

Quick Find

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Release Updates

Salesforce Mobile App

Lightning Usage

Optimizer

Manage Subscription

ADMINISTRATION

Users

Data

Big Objects

Data Export

Data Integration Metrics

Data Integration Rules

SETUP

Data Export

Monthly Export Service

Help for this Page

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

Start Export

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

Contract

Approval

BusinessProcess

EmailRoutingAddress

Account

Opportunity

Order

ContractContactRole

EntityHistory

Campaign

Contact

OpportunityContactRole

OrderItem

RecordType

FieldHistory

CampaignMember

Lead

OpportunityHistory

Object Manager

SETUP

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

Schedule Data Export

Frequency

On day 1 of every month

On the 1st of every month

Sunday of every month

Start

23/03/2023

End

23/04/2023

Preferred Start Time

12:00 pm

Exact start time will depend on job queue activity.

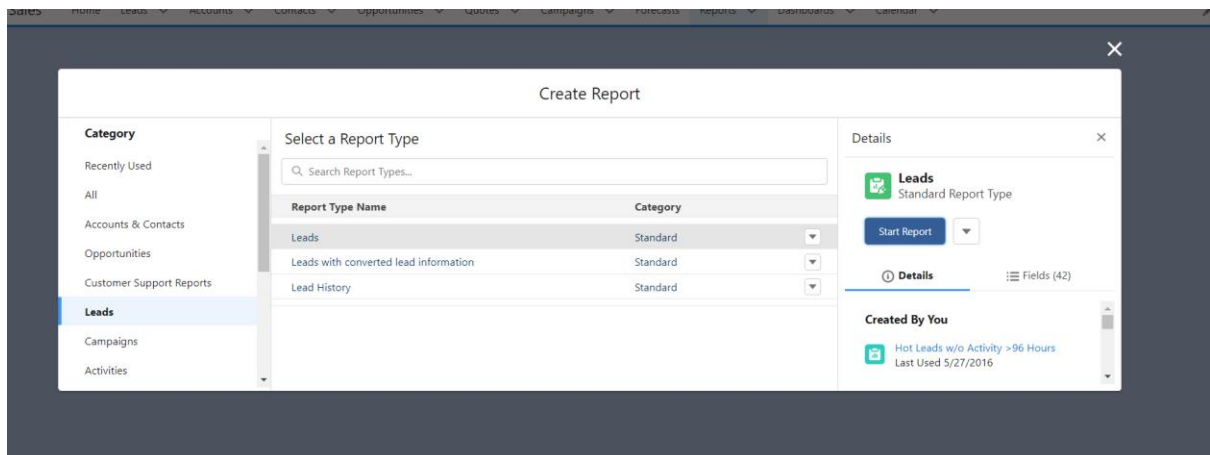
Save

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

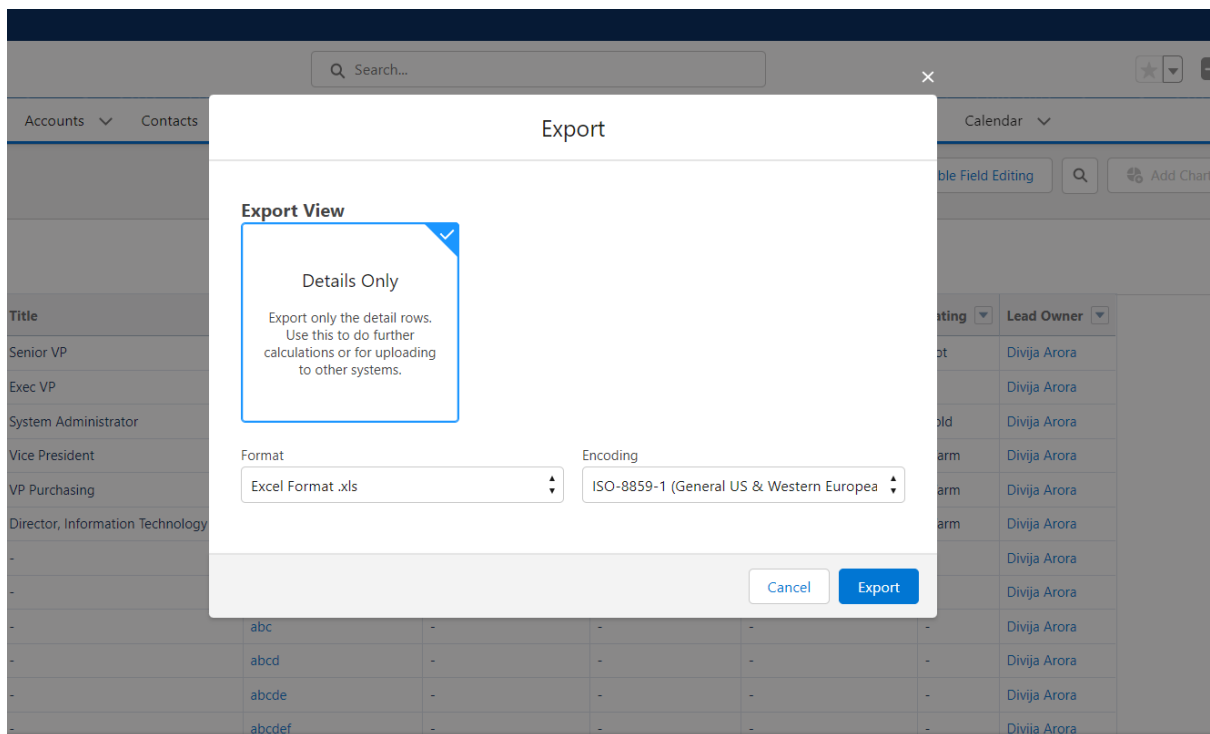


REPORT
New Leads Report **Leads**


Previewing a limited number of records. Run the report to see everything.

Update Preview Automatically

	First Name	Last Name	Title	Company / Account	Email	Lead Source	Street	Rating	Lead Owner
7	5.1	1.4	-	a	-	-	-	-	Divija Arora
8	4.9	1.4	-	ab	-	-	-	-	Divija Arora
9	4.7	1.3	-	abc	-	-	-	-	Divija Arora
10	4.6	1.5	-	abcd	-	-	-	-	Divija Arora
11	5	1.4	-	abcde	-	-	-	-	Divija Arora
12	5.4	1.7	-	abcdef	-	-	-	-	Divija Arora
13	4.6	1.4	-	acmdxnhb	-	-	-	-	Divija Arora
14	5	1.5	-	a	-	-	-	-	Divija Arora
15	4.4	1.4	-	ab	-	-	-	-	Divija Arora
16	4.9	1.5	-	abc	-	-	-	-	Divija Arora
17	5.4	1.5	-	abcd	-	-	-	-	Divija Arora
18	4.8	1.6	-	abcde	-	-	-	-	Divija Arora
19	4.8	1.4	-	abcdef	-	-	-	-	Divija Arora




Recent Downloads

 report1679547550154.xls

31.2 KB • Done

Show all downloads



Calendar 