

PHASE 8

Data Export

Go to Setup

- Click the gear icon () in the top-right corner of Salesforce.
- Click **Setup**.

Search for Data Export

- In the Quick Find box (top-left), type: Data Export.
- Click **Data Export** under *Data Management*.

Choose Export Type

- **Export Now** → one-time backup.
- **Schedule Export** → automatically back up weekly/monthly.
 - Only available in certain Salesforce editions.

Select Objects to Backup

- Check “Select All” to include all standard and custom objects.
- **Include attachments, documents, Salesforce Files** if needed.

Start the Export

- Click **Start Export**.
- Salesforce will prepare a ZIP file with your data.
- **Note:** This may take hours depending on how much data you have.

Download & Store Safely

- You will get an email when the export is ready.
- Go to the link, download the ZIP file.

- Store it securely: local machine, external drive, or cloud storage.

The screenshot shows the 'Data Export' page in Salesforce. At the top, there's a search bar with 'data ex' and navigation links for 'Setup', 'Home', and 'Object Manager'. Below the header, a sidebar on the left has 'Data' and 'Data Export' selected. A message says 'Didn't find what you're looking for? Try using Global Search.' The main content area is titled 'Monthly Export Service' and includes a note: '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.' A yellow banner at the top of the main content area says 'Next scheduled export: A data export is currently in progress for your organization.' Below this, there are buttons for 'Export Now' and 'Schedule Export'. Underneath, it shows the export details: 'Scheduled By: PAMELA LALI', 'Schedule Date: 9/26/2025', and 'Export File Encoding: ISO-8859-1 (General US & Western European, ISO-LATIN-1)'. There are also sections for 'File Types' and 'Fields' with checkboxes.

- After this export I got the email like this.

The screenshot shows an email in the inbox. The subject is 'Your Organization Data Export has completed - MyRestaurant Pvt Ltd'. The sender is 'Do not reply <noreply@salesforce.com>' with a note 'to me'. The email body says: 'The export of your organization's data has been completed. Please click on the following link within the next 48 hours to receive the export.' followed by a link: 'https://orgfarm-f65ecccdf-dev-ed.develop.my.salesforce.com/ui/setup/export/DataExportPage/d'. At the bottom, it says 'Thank you, Salesforce'. There are standard email controls for reply, forward, and smiley face.

Data Import

Go to Setup → Data Import Wizard

- Click the gear icon → Setup → Quick Find: Data Import Wizard → Launch Wizard.

Choose Object

- Select the object you want to import (e.g., Contacts, Accounts, Orders).

Select Operation

- **Add New Records** → only insert.
- **Update Existing Records** → update by matching Salesforce ID or External ID.
- **Upsert** → create or update using External ID (recommended if updating historical data).

Upload CSV File

- Prepare CSV: include required fields and External ID fields if needed.
- Click **Choose CSV file** and upload it.

Map Fields

- Salesforce will attempt to auto-map fields from your CSV.
- Verify all important fields (Name, Email, Order Number, Dates, etc.) are mapped correctly.

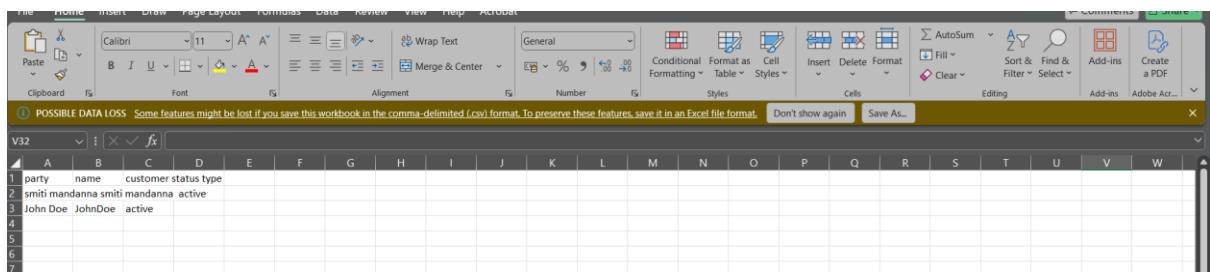
Run Import

- Click **Start Import**.
- Wait for it to finish; you can **monitor status** in Data Import Wizard.

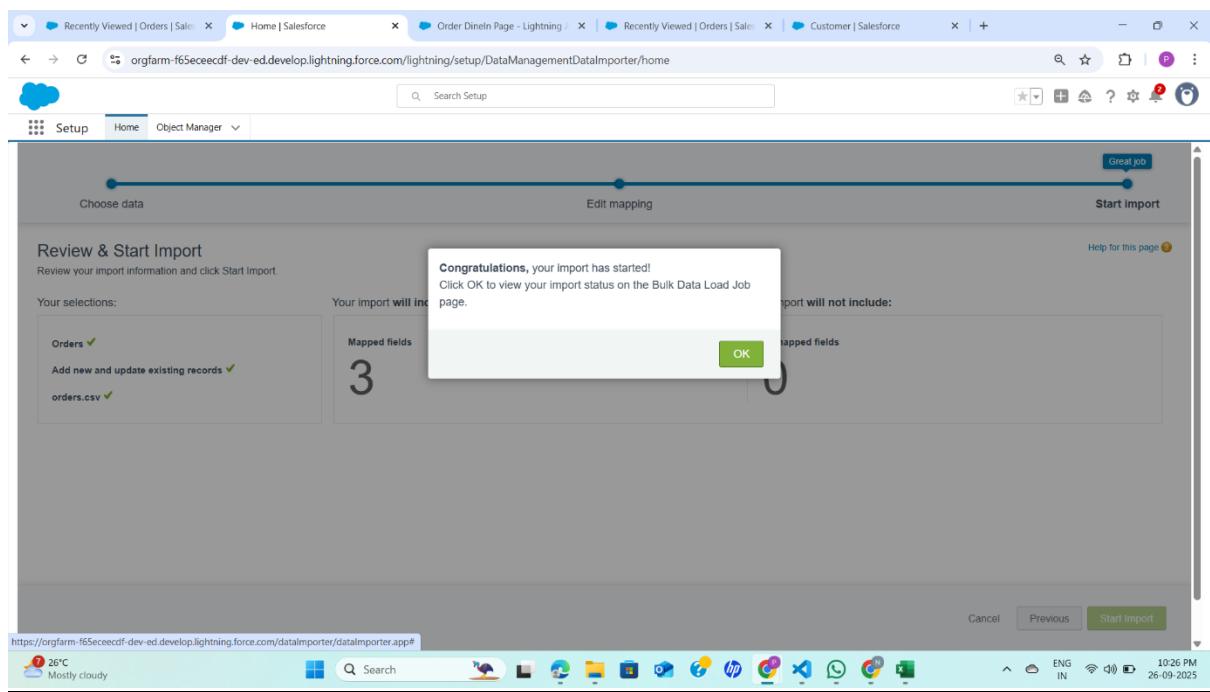
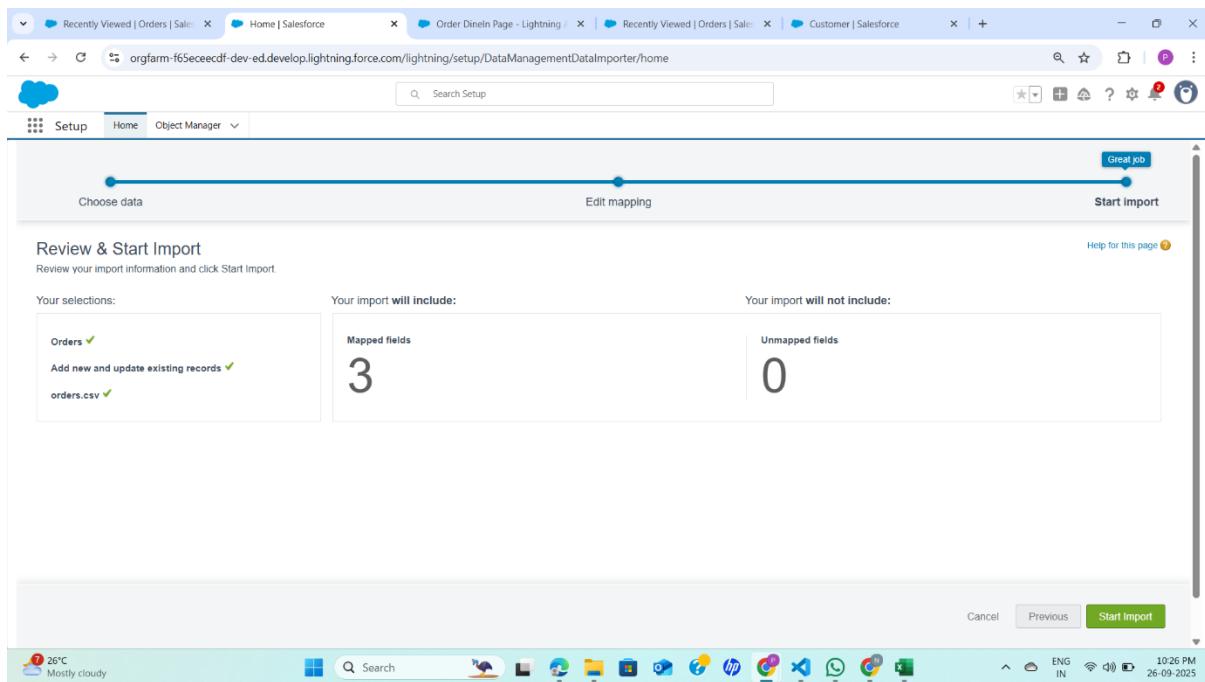
Check Results

- Download **Success** and **Error** CSVs.
- Fix any errors (required fields missing, duplicate rule conflicts, invalid picklist values) and re-import if needed.

I have created the csv file for the orders



| party | name | customer | status | type |
|-------|----------------|----------------|--------|------|
| 2 | smiti mandanna | smiti mandanna | active | |
| 3 | John Doe | JohnDoe | active | |
| 4 | | | | |
| 5 | | | | |
| 6 | | | | |
| 7 | | | | |



After importing I have received the email like this

Salesforce import of "orders.csv" has finished. 2 rows were processed.

to me

Your Orders import is complete. Here are your results:

Orders Created: 0
Orders Updated: 0
Orders Ignored: 0 (We ignored updates that we couldn't match to an existing record.)
Orders Failed: 2 (We couldn't import these due to errors.)
Orders Rejected: 0 (We rejected duplicate rows.)

Processed job information for imported Orders: <https://orgfarm-f65ecccdf-dev-ed.develop.my.salesforce.com/750gL00000EAzgUQAT?fromEmail=1>

The details of the first 1,000 errors can be found in the attachments for this email:

One attachment • Scanned by Gmail

Orders_Errors.csv

26°C Mostly cloudy

Search

10:27 PM 26-09-2025