

SALESFORCE DEVELOPER

PROJECT TITLE : WORKFORCE ADMINISTRATION SOLUTION

TEAM ID : NM2023TMID0250

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IMPORT DATA

<https://tinyurl.com/SF-Employee-Data>

Data Import lets you upload data from external sources and combine it with data you collect via Analytics. You can then use Analytics to organize and analyze all of your data in ways that better reflect your business.

The Data Import Wizard is a Tool makes it easy to import data for many standard Salesforce objects, including accounts, contacts, leads, solutions, campaign members, and person accounts. You can also import data for custom objects.

In order to complete this milestone, you need to create CSV files and give them data given in the picture below. After that from these CSV files we will import data for the Employee object.

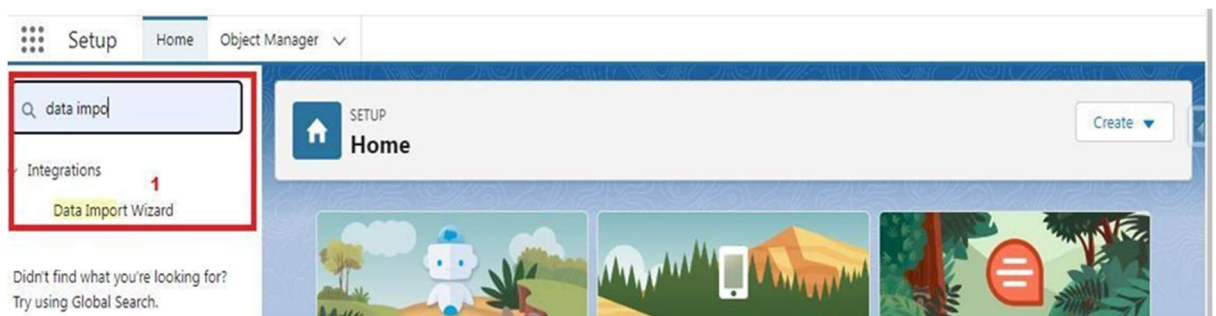
USE CASE:

Congrats you have successfully made an app with all the default settings for the organization. Now here comes the real admin work, to import the old data of TheSmartBridge organization which was in CSV format into the salesforce org without failing any of the record.

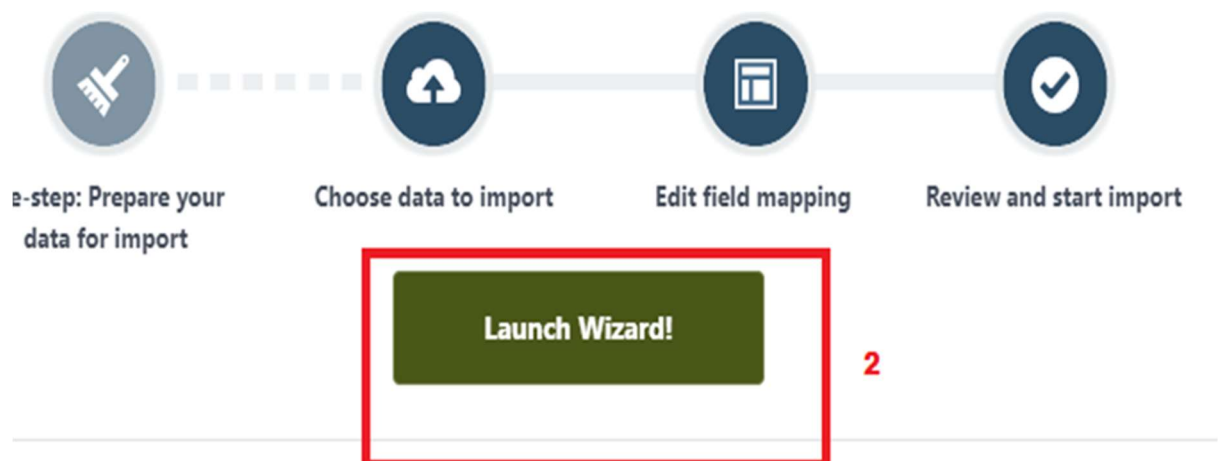
Note in real time you might also facing some additional task such as data cleaning, elimination of duplicate values or records, etc.,

IMPORT DATA

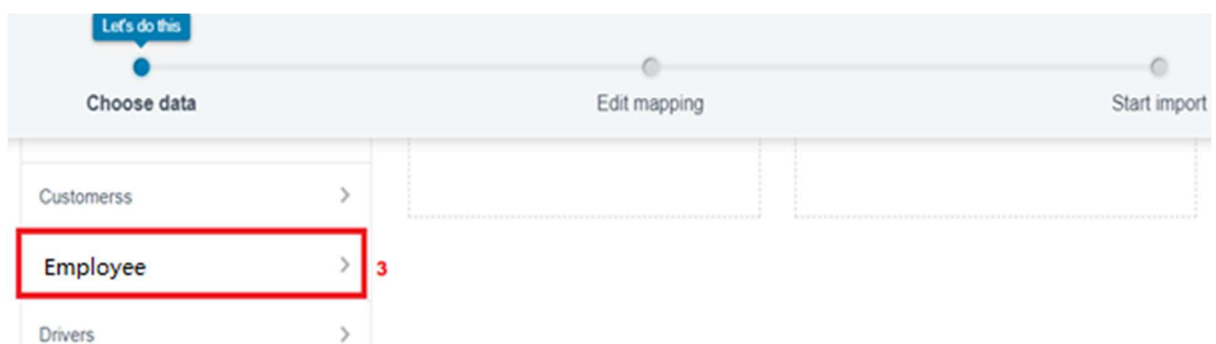
1. From Setup, click the Home tab.
2. In the Quick Find box, enter Data Import and select Data Import Wizard.



3. Click Launch Wizard!



4. Click the Custom Objects tab and select the Employee object.



5. Select Add new records.

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
Attendees	>
Buyers	>

What do you want to do? ?

Add new records	4	>
Update existing records		>
Add new and update existing records		>

Where is your data located? ?

- Click CSV and choose file Employee_CSV which we made earlier. Click Next.

Choose data Edit mapping Start import

What kind of data are you importing? ?

Standard objects	Custom objects
Attendees	>
Buyers	>
Customers	>
Departments	> ✓

What do you want to do? ?

Add new records ✓

Match by: ?
--None--

Which User field in your file designates record owners? ?
--None--

Trigger workflow rules and processes? ?
☐ Trigger workflow rules and processes for new and updated records

Where is your data located? ?

Drag CSV file here to upload

CSV

5

Cancel Previous Next

- Since the field names in the CSV file (CSV Header) are the same as the field names in your object (Mapped Salesforce Object), the fields are automatically mapped. Click Next.

Setup Home Object Manager

Search Setup

Almost done

Choose data Edit mapping Start import

Edit Field Mapping: Employees

The Data Import Wizard does not support mapping Salesforce fields to your CSV data for mappings you want to map fields that are not supported.

Edit	Mapped Salesforce Object	CSV Header	Example	Example	Example
Change	Employee Name	Employee Name	Jackie Chan	James	Benjamin
Change	Date of Birth	Date of Birth	01/01/1993	27/02/1998	16/03/1999
Change	Gender	Gender	Male	Male	Male
Change	Qualification	Qualification	B.Tech	B.Tech	B.Com
Change	Address	Address			
Change	Experience	Experience	9	6	5
Change	Phone no	Phone no	7995434750	7995434751	7995434752

Cancel Previous **Next**

Note: no need to map “Reports to” field. The Data Import Wizard is designed to handle basic data import tasks and does not support mapping relationships between records.

- The next screen gives you a summary of your data import. Click Start Import.

Setup Home Object Manager

Great job

Choose data Edit mapping Start import

Review & Start Import

Review your import information and click Start Import.

Your selections:

- Employees ✓
- Add new records ✓
- Employee - Data - Employee - Data.csv ✓

Your import will include:

Mapped fields

19

Your import will not include:

Unmapped fields

0

Cancel Previous **Start Import**

- Click OK on the popup.

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

OK

10. Scroll down the page and verify that your data has been imported under batches.

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	Status
View Request	View Result	751500000JeYH4	14/06/2023, 11:54 am	14/06/2023, 11:54 am	105	60	0	14	0	0	Completed

11. Make sure you have 0 records under the records failed column.