

Sebastian Sieradzki

Cwiczenie 5 - Metajęzyki

1. Stworzyć plik z rozszerzeniem o nazwie "ImportAccounts.csv"
2. Zapoznać się z przykładowym plikiem .csv "Opportunity_przyklad.csv", który został eksportowany z obiektu Opportunity z czterema przykładowymi polami „Name”, „StageName”, „AccontId”, „IsWon”, „Type”.
3. Do pliku ImportAccount.csv należy dodać 5 wybranych pól z obiektu o nazwie Account
 - Account Name
 - Type
 - Phone
 - AnnualRevenue
 - Site

	A	B	C	D	E	F
1	ACCOUNT NAME,TYPE,PHONE,ANNUALREVENUE,SITE					
2						
3						
4						

4. Należy wypełnić plik przykładowymi danymi, zgodnie z przykładem

	A	B	C	D	E	F	G	H
1	Name,Type,Phone,AnnualRevenue,Site							
2	Acme Corporation,Technology Partner,5551234,10000,www.acmecorp.com							
3	XYZ Enterprises,Prospect,5555678,45000,www.xyzenterprises.com							
4	ABC Inc.,Customer,5554321,23400,www.abcinc.com							
5	123 Industries,Prospect,5558765,20000,www.123industries.com							
6	Smith & Co.,Partner,5552468,10000,www.smithco.com							
7	Jones Corporation,Customer,5551357,34000,www.jonescorp.com							

5. Po wypełnieniu pliku należy go zapisać na dysku
6. Importować plik z danymi do org

Q Data Import

Integrations

Data Import Wizard

Data Import Wizard

Help for this page ?

Recent Import Jobs

Status	Object	Records Created	Records Updated	Records Failed	Start Date	Processing Time (ms)
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Bulk Api Monitoring



Before you import
your data...

Clean up your data import file

You'll have fewer errors to resolve if your data file is clean and free of duplicates. [Watch video](#)

Make sure your field names match Salesforce field names

You'll be required to map your data fields to Salesforce data fields. Data in unmapped fields is not imported. [View a list of Salesforce data fields](#).

Don't import too many records at once

Using the Data Import Wizard, import up to 50,000 records at a time. Importing too many records can slow down your org for all users, especially during periods of peak usage.

Collapse

Standard objects	Custom objects
Accounts and Contacts >	

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
Accounts and Contacts ✓	
Leads >	
Solutions >	
Campaign Members >	

What do you want to do? [?]

Add new records ✓
Match Contact by: [?] --None--
Match Account by: [?] None
Trigger workflow rules and processes? [?] <input type="checkbox"/> Trigger workflow rules and processes for new and updated records
Assign All Contacts to Campaigns [?] <input type="checkbox"/> Assign contacts to campaigns
Update existing records >
Add new and update existing records >



CSV

File

Wybierz plik ImportAccount.csv

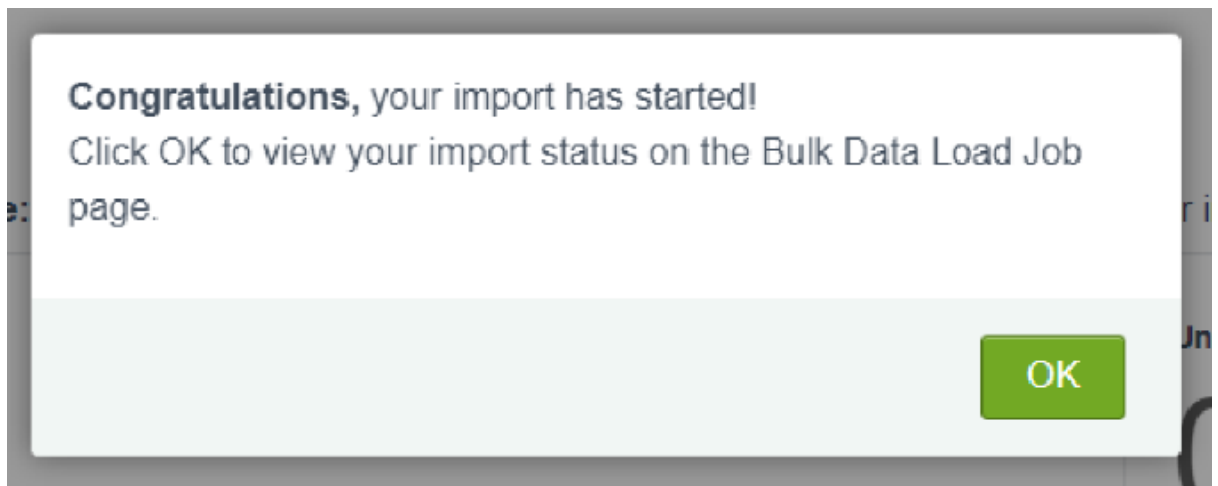
Character Code [?]

ISO-8859-1 (General US & Western European, ISO-LATIN-1) ✓

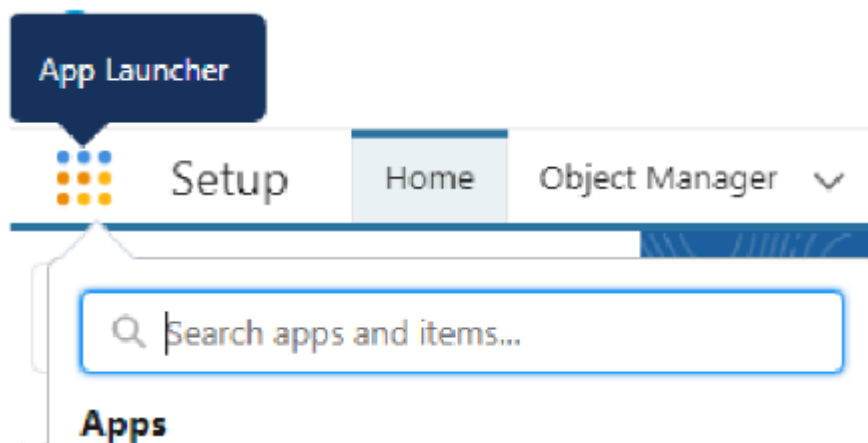
Values Separated By

Comma

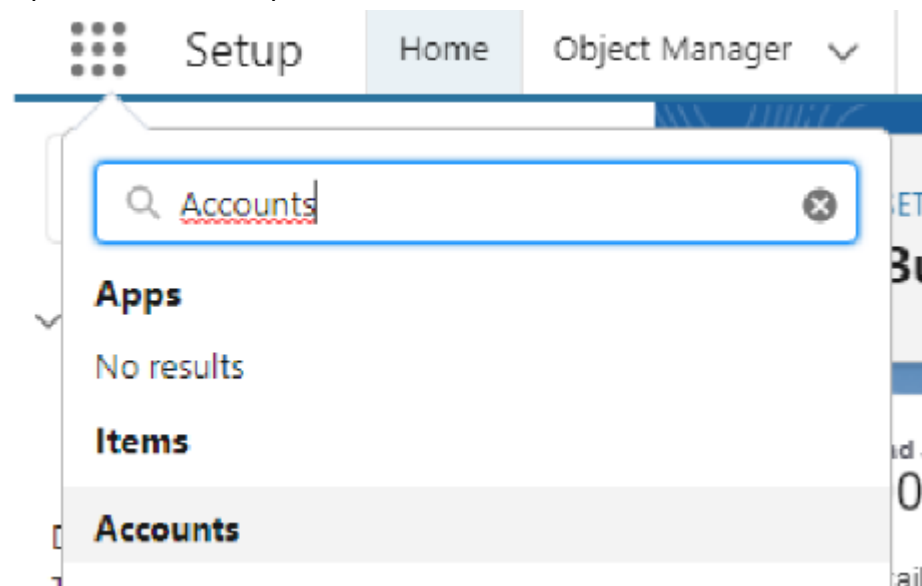
Edit	Mapped Salesforce Object	CSV Header
Change	Account: Account Name	Name
Change	Account: Type	Type
Change	Account: Phone	Phone
Change	Account: Annual Revenue	AnnualRevenue
Change	Account: Account Site	Site



7. Aby upewnić się, że importowanie przebiegło pomyślnie należy kliknąć w ikonę w lewym górnym rogu



8. Wpisać "Accounts" i potwierdzić



9. W lewym górnym rogu należy rozwinąć picklistę i wybrać "All accounts"

Accounts

All Accounts

29 items

LIST VIEWS

✓ All Accounts

1 My Accounts

2 New Last Week

3 New This Week

4 Platinum and Gold SLA Customers

5 Recently Viewed (Pinned list)

6 Recently Viewed Accounts

7

10. Sprawdzić dodane do pliku wartości

Accounts					
All Accounts					
29 items • Sorted by Account Site • Filtered by All accounts • Updated a few seconds ago					
	<input type="checkbox"/> Account Name ↑	<input type="checkbox"/> Account Site ↓	<input type="checkbox"/> Billing State/Province	<input type="checkbox"/> Phone	<input type="checkbox"/> Type
1	<input type="checkbox"/> XYZ Enterprises	www.xyzenterprises.com		5555678	Prospect
2	<input type="checkbox"/> Smith & Co.	www.smithco.com		5552468	Partner
3	<input type="checkbox"/> Jones Corporation	www.jonescorp.com		5551357	Customer
4	<input type="checkbox"/> Acme Corporation	www.acmecorp.com		5551234	Technology Partner
5	<input type="checkbox"/> ABC Inc.	www.abcoinc.com		5554321	Customer
6	<input type="checkbox"/> 123 Industries	www.123industries.com		5550765	Prospect