

# Data Import Utilities

# Objective

- ▶ At the end of the session, you will be able to:
  - Migrate data using application import wizard and Apex data loader
  - Perform mass delete

# Data Utility

# External ID

- ▶ An external ID is a custom field that has the “External ID” attribute.
- ▶ This is a field attribute on any custom field of type text, number or email.
  - Case Insensitive
  - No Unique constraint enforced
  - Three fields per object.
- ▶ When you select this option, the import wizard will detect existing records in Salesforce that have the same external ID.
  - Note that this operation is not case-sensitive – for example, “XYZ” will be matched with “xyz”.
- ▶ This attribute signifies that the field contains unique record identifiers from a system outside of salesforce.com
- ▶ When importing custom objects, solutions, or person accounts, User can use external IDs to prevent duplicate records from being created as a result of the import operation.

# Data Migration

- ▶ Via Application import wizards
  - Accounts
  - Contact
  - Lead
  - Solutions
  - Custom Objects
- ▶ Via AppExchange API
  - AppExchange Data Loader
  - Partner Tools
  - Custom-built tools
  - Open Source tools



# SalesForce Migration

- ▶ Salesforce supports seamless migration of data from products such as Goldmine, SalesLogix, Dynamics CRM, and more, into Salesforce
- ▶ The Import wizard is an easy-to-use multi-step wizard for updating and importing new Accounts, Contacts, Leads, Custom objects and Solutions.
- ▶ Provides a full set of essential building blocks – with no need to write a single line of code.
- ▶ Whether it's a one-time data load or an ongoing migration, import wizard for Salesforce allows even the most complicated migration to be handled with ease
- ▶ Click path : Setup | Data Management

## Administration Setup

- ▶ Manage Users
- ▶ Company Profile
- ▶ Security Controls
- ▶ Communication Templates
- ▶ Translation Workbench
- ▶ **Data Management**
  - Analytic Snapshots
  - Import Accounts/Contacts
  - Import Leads
  - Import Solutions
  - Import Custom Objects
  - Storage Usage
  - Mass Transfer Records
  - Mass Delete Records
  - Mass Transfer Approval Requests
  - Mass Update Addresses
  - Data Loader

# Import wizard

- ▶ Used to update accounts, contacts, leads, custom objects and solutions based on matching ID
- ▶ Account may be updated based on Account Name, account site fields
- ▶ Contact and leads may be updated based on matching email address
- ▶ Custom objects or solutions may be updated based on custom object names, solutions titles, Salesforce ID or external ID
- ▶ Standard users are not permitted to imports leads into Salesforce
- ▶ Only System Administrator and Marketing User profile can import Leads

# Steps to import data into Salesforce

- 1) To import data into Salesforce, you first need to export the data from your existing application. This creates an export file of the information you want to import
  - a) Save your data source as a CSV file.
  - b) Every field should be single value field
  
- 2) Map your export file data with the fields available in Salesforce
  - Company Name -> Account
  - Contact -> First Name & Last Name
  - Add column for record owner
  - Prepare salesforce
    - Add custom field
    - Add picklist
    - Use Data Validation Rule



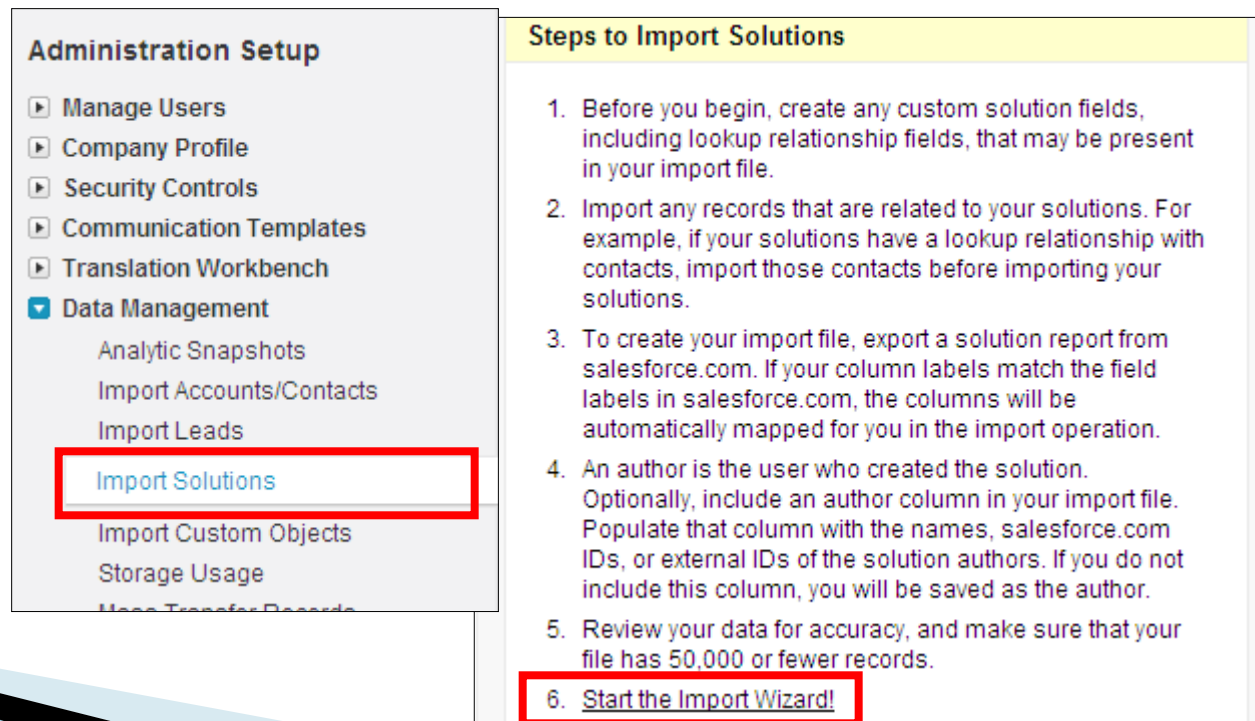
# Steps to import data into Salesforce

3) Import wizards for records you personally own (contact , My personal Account) are located at

**Setup | Import | Import My Accounts & contacts**

Import wizards for organization-wide data are located at **Setup | Data Management**

**Eg: Setup | Data Management | Import solutions**



The image shows a screenshot of the Salesforce Administration Setup interface. On the left, the 'Administration Setup' sidebar is visible, with 'Data Management' expanded and 'Import Solutions' highlighted with a red rectangle. On the right, the 'Steps to Import Solutions' page is displayed, listing six steps. The final step, '6. Start the Import Wizard!', is also highlighted with a red rectangle.

**Administration Setup**

- Manage Users
- Company Profile
- Security Controls
- Communication Templates
- Translation Workbench
- ▣ **Data Management**
  - Analytic Snapshots
  - Import Accounts/Contacts
  - Import Leads
  - Import Solutions**
  - Import Custom Objects
  - Storage Usage
  - Usage Transfer Records

**Steps to Import Solutions**

1. Before you begin, create any custom solution fields, including lookup relationship fields, that may be present in your import file.
2. Import any records that are related to your solutions. For example, if your solutions have a lookup relationship with contacts, import those contacts before importing your solutions.
3. To create your import file, export a solution report from salesforce.com. If your column labels match the field labels in salesforce.com, the columns will be automatically mapped for you in the import operation.
4. An author is the user who created the solution. Optionally, include an author column in your import file. Populate that column with the names, salesforce.com IDs, or external IDs of the solution authors. If you do not include this column, you will be saved as the author.
5. Review your data for accuracy, and make sure that your file has 50,000 or fewer records.
6. **Start the Import Wizard!**

# Steps to import data into Salesforce

## 4) Give inputs for duplicate records

Welcome to the Solution Import Wizard

To prevent duplicate Solution records from being created as a result of this import, choose Yes below.

Do you want to prevent duplicates from being created?

☐ No - insert all records in my import file.

☒ Yes - prevent duplicate records from being created. Note: You must select this option if you want to update existing records.

Which field on Solution do you want to use for matching? [i](#)

☒ Solution Title

☐ Salesforce.com ID [i](#)

☐ External ID [i](#)

If existing records are found, what do you want to do? [i](#)

☒ Do not update existing records and only insert new records

☐ Update existing records and do not insert any new records

☐ Update existing records and insert new records

# Steps to import data into Salesforce

## 5) Designate solution author

Author: If you have not included authors in your import file

None: you will be saved as the author of the solutions

Otherwise, specify the field you have included in your import file to identify solution authors.

## 6) Browse and upload the file

Which user field are you including in your file to designate Solution authors?

☐ Author

☐ Salesforce.com ID

☐ External ID [i](#)

☒ None

**Step 3. File Upload**

1. Click Browse and find your import CSV file.

2. Specify the character encoding of your CSV file. In most cases, you can accept the default value provided.

3. Additional settings:  
☐ Trigger workflow rules for new and updated records.

# Steps to import data into Salesforce

7) Map fields of Salesforce with fields of imported files

Use the drop-down lists below to specify the salesforce.com fields that correspond to the columns in your import file. For your convenience, identically matching labels will be automatically selected.

Import Field	Salesforce.com Field
ABC Service Request - Phone Can I call in a Service Request? Yes. You can call our 24 hour service center at 1-800-ABC-PROD Final Solution (col 0)	<input type="text" value="Solution Title"/>

[Previous](#) [Next](#)

**Step 5. Verify Import Settings****Step 5 of 6**

[Previous](#) [Import Now!](#)

Click **Import Now!** to submit this import request to salesforce.com.

[Previous](#) [Import Now!](#)

# Steps to import data into Salesforce

## 9) Verify the result against the import queue

Click path : Setup | Monitoring | Imports

Step 6. Import Initiated

Step 6 of 6

Finish

Salesforce.com will now begin to import your file. You will be notified by email at [bdipti@techmahindra.com](mailto:bdipti@techmahindra.com) when your import is completed. Based on the current volume of import activity, we estimate that your import will be completed in approximately 1 minute. You can check on the status of your import by viewing the [Import Queue](#).

Finish

Monitoring

Imports

Outbound Messages


Time-Based Workflow

Automated Process Actions

Import Queue for My Organization									Help for this Page ?	
Action	Filename	Submitted By	Records	Submitted	Status	Started	Completed	Import Type		
	<a href="#">solution.txt</a>	<a href="#">Dipti Anjarlekar</a>	6	3/28/2011 5:35 AM	Completed	3/28/2011 5:35 AM	3/28/2011 5:35 AM	Solutions		

# Steps to import data into Salesforce

## 9) Verify the result against object and mails



All Unreviewed Solutions 

▼

New Solution

Create New View | Edit | Delete | Refresh

<input type="checkbox"/>	Action	Solution Title ↑	Solution Number	Status	Author Alias
<input type="checkbox"/>	Edit   Del	ABC Copier - Low Toner	00000012	Draft	DAnja
<input type="checkbox"/>	Edit   Del	ABC Copier - Not Working	00000013	Draft	DAnja
<input type="checkbox"/>	Edit   Del	ABC FAX - Copying a Doc.	00000014	Draft	DAnja
<input type="checkbox"/>	Edit   Del	ABC FAX - Speed Dialing	00000015	Draft	DAnja
<input type="checkbox"/>	Edit   Del	ABC FAX - Tracking Status	00000016	Draft	DAnja
<input type="checkbox"/>	Edit   Del	ABC Service Request - e...	00000011	Draft	DAnja

From: support@emea.salesforce.com  
To: Dipti Belwalkar  
Cc:  
Subject: Salesforce.com import of file solution.txt has finished, processed 7 lines.

Sent: Mon 3/28/2011 11:11 AM

Alert: Salesforce.com has just completed your import process!

Result:  
Number of Solutions created: 0  
Number of Solutions updated: 0  
Number of locked Solution IDs: 0

We strongly recommend that you check a few of your imported records to verify that your information was imported as expected.

If you encounter any problems or have any questions, please contact us by clicking Help & Training at the top right of any salesforce.com page and choosing the My Cases tab.

Thank you!

Customer Support  
salesforce.com

# Mass Deleting Records

- ▶ Your organization can sign up to receive backup files of your data. You can export all of your organization's data into a set of comma-separated values (CSV) files.
- ▶ Click path : Setup | Data Management | Mass Delete Records

The image shows a screenshot of the Salesforce Administration Setup interface. On the left, the 'Administration Setup' sidebar is visible, with 'Data Management' expanded and 'Mass Delete Records' highlighted with a red rectangle. On the right, the 'Mass Delete Records' page is displayed, listing various data types that can be deleted in bulk.

**Administration Setup**

- Manage Users
- Company Profile
- Security Controls
- Communication Templates
- Translation Workbench
- ▣ **Data Management**
  - Analytic Snapshots
  - Import Accounts/Contacts
  - Import Leads
  - Import Solutions
  - Import Custom Objects
  - Storage Usage
  - Mass Transfer Records
  - Mass Delete Records**
  - Mass Transfer Approval Requests
  - Mass Update Addresses
  - Data Loader

**Mass Delete Records**

- Mass Delete Accounts  
Delete multiple accounts at one time
- Mass Delete Leads  
Delete multiple leads at one time
- Mass Delete Activities  
Delete multiple activities at one time
- Mass Delete Contacts  
Delete multiple contacts at one time
- Mass Delete Cases  
Delete multiple cases at one time
- Mass Delete Solutions  
Delete multiple solutions at one time
- Mass Delete Products  
Delete multiple products at one time



# Mass Deleting Records

- ▶ Specify the matching criteria to delete the records
- ▶ Set the permanently delete flag true to delete the records permanently from recycle bin

Mass Delete Solutions Help for this Page

▼ Step 1: Review what will happen when you mass delete your Solutions:

This screen allows you to delete a list of Solutions from salesforce.com. The following data will also be deleted:

- All Solution Category associations with the Solutions
- All Case associations with the Solutions
- All Attachments associated with the Solutions
- All History for the Solutions

Once data is deleted, it will be moved to the Recycle Bin.

▼ Step 2: Find Solutions that match the following criteria:

▼ Step 3: Find Solutions that match the following criteria:

Solution Title	▼	contains	▼	ABC	AND
--None--	▼	--None--	▼		AND
<input type="text" value="--None--"/>	▼	--None--	▼		AND
--None--	▼	--None--	▼		AND
--None--	▼	--None--	▼		AND

Filter By Additional Fields (Optional):

▼ Permanently delete


☐ Permanently delete the selected records. When this option is selected, you cannot restore deleted records from the Recycle Bin. Please be careful when selecting this option.

<input type="checkbox"/>	Solution Title	Solution Number	Status	Author Alias	Last Modified Date
<input checked="" type="checkbox"/>	ABC Service Request - eMailCan	00000011	Draft	DAnja	3/28/2011 6:13 AM
<input type="checkbox"/>	ABC Copier - Low Toner	00000012	Draft	DAnja	3/28/2011 6:13 AM
<input checked="" type="checkbox"/>	ABC Copier - Not Working	00000013	Draft	DAnja	3/28/2011 6:13 AM
<input type="checkbox"/>	ABC FAX - Copying a Document	00000014	Draft	DAnja	3/28/2011 6:13 AM
<input checked="" type="checkbox"/>	ABC FAX - Speed Dialing	00000015	Draft	DAnja	3/28/2011 6:14 AM
<input type="checkbox"/>	ABC FAX - Tracking Status	00000016	Draft	DAnja	3/28/2011 6:14 AM



# Mass Deleting Records

## ► Verify the result against object



All Unreviewed Solutions ▼ New Solution

Create New View | [Edit](#) | [Delete](#) | [Refresh](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W

<input type="checkbox"/>	Action	Solution Title ↑	Solution Number	Status	Author Alias
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	ABC Copier - Low Toner	00000012	Draft	<a href="#">DAnia</a>
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	ABC FAX - Copying a Doc...	00000014	Draft	<a href="#">DAnia</a>
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	ABC FAX - Tracking Status	00000016	Draft	<a href="#">DAnia</a>
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	Electrical wiring installatio...	00000007	Draft	<a href="#">DAnia</a>
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	Electronic panel fitting loose	00000009	Draft	<a href="#">DAnia</a>
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	Generator assembly instr...	00000002	Draft	<a href="#">DAnia</a>
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	Maintenance guidelines f...	00000003	Draft	<a href="#">DAnia</a>
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	Starting generator after el...			

From: support@emea.salesforce.com

To: Dipti Belwalkar

Cc:

Subject: Salesforce.com import of file solution.txt has finished, processed 7 lines.

Sent: Mon 3/28/20

Alert: Salesforce.com has just completed your import process!

Result:

Number of Solutions created: 6

Number of Solutions updated: 0

Number of locked Solution IDs: 0

We strongly recommend that you check a few of your imported records to verify that your information was imported as expected.

If you encounter any problems or have any questions, please contact us by clicking [Help & Training](#) at the top right of any salesforce.com page and choosing the [My Cases](#) tab.

Thank you!

Customer Support  
salesforce.com

Prepared by Dipti Anjarlekar

# Mass Deleting Records

- ▶ You can recover deleted records from recycle bin
- ▶ If your organization reaches 'Recycle Bin' storage limit, Salesforce automatically removes the oldest records.

Home Chatter Start Here

Create New...

Recent Items

- ABC FAX - Tracking Status
- ABC FAX - Copying a Document
- ABC Copier - Low Toner
- GC1020 Portable Generator Switch Malfunctioning
- Burlington Textiles Corp of America
- Dipti Anjarlekar

Recycle Bin

Help for this Page ?

View: My recycle bin Search

Undelete Empty your recycle bin Empty your organization's recycle bin

Action	Name	Type	Deleted By	Deletion Date ↓
<input type="checkbox"/>	ABC Service Request - eMailCan	Solution	Anjarlekar, Dipti	3/28/2011 6:30 AM
<input type="checkbox"/>	ABC Copier - Not Working	Solution	Anjarlekar, Dipti	3/28/2011 6:30 AM
<input type="checkbox"/>	ABC FAX - Speed Dialing	Solution	Anjarlekar, Dipti	3/28/2011 6:30 AM

Recycle Bin

Undelete Empty your recycle bin Empty your organization's recycle bin

# Salesforce Data Loader

- ▶ The Data Loader is a client application for the bulk import or export of data.
- ▶ Use it to insert, update, delete, or export Salesforce records.
- ▶ When importing data, the Data Loader reads, extracts, and loads data from comma separated values (CSV) files or from a database connection.
- ▶ When exporting data, it outputs CSV files.
- ▶ Features:
  - Easy to use wizard interface
  - Support for large files with millions of rows
  - Drag and Drop field mapping
  - Support for all Objects, including custom objects.
  - Detailed success and error log files in 'csv' format.
  - Platform independence, by virtue of being written in Java.

# Steps for data load using Apex Data Loader

## Administration Setup

- ▶ Manage Users
- ▶ Company Profile
- ▶ Security Controls
- ▶ Communication Templates
- ▶ Translation Workbench
- ☒ Data Management
  - Analytic Snapshots
  - Import Accounts/Contacts
  - Import Leads
  - Import Solutions
  - Import Custom Objects
  - Storage Usage
  - Mass Transfer Records
  - Mass Delete Records
  - Mass Transfer Approval Requests
  - Mass Update Addresses
  - [Data Loader](#)

## Data Loader Setup

[Help for this Page](#) ?

The Data Loader is a client application for the bulk import or export of data. Use it to insert, update, delete, or extract salesforce.com records.

The Apex Data Loader can move data into or out of any type of salesforce.com record, including opportunities and custom objects. When importing data, it reads, extracts, and loads data from comma separated values (CSV) files. When exporting data, it outputs CSV files.

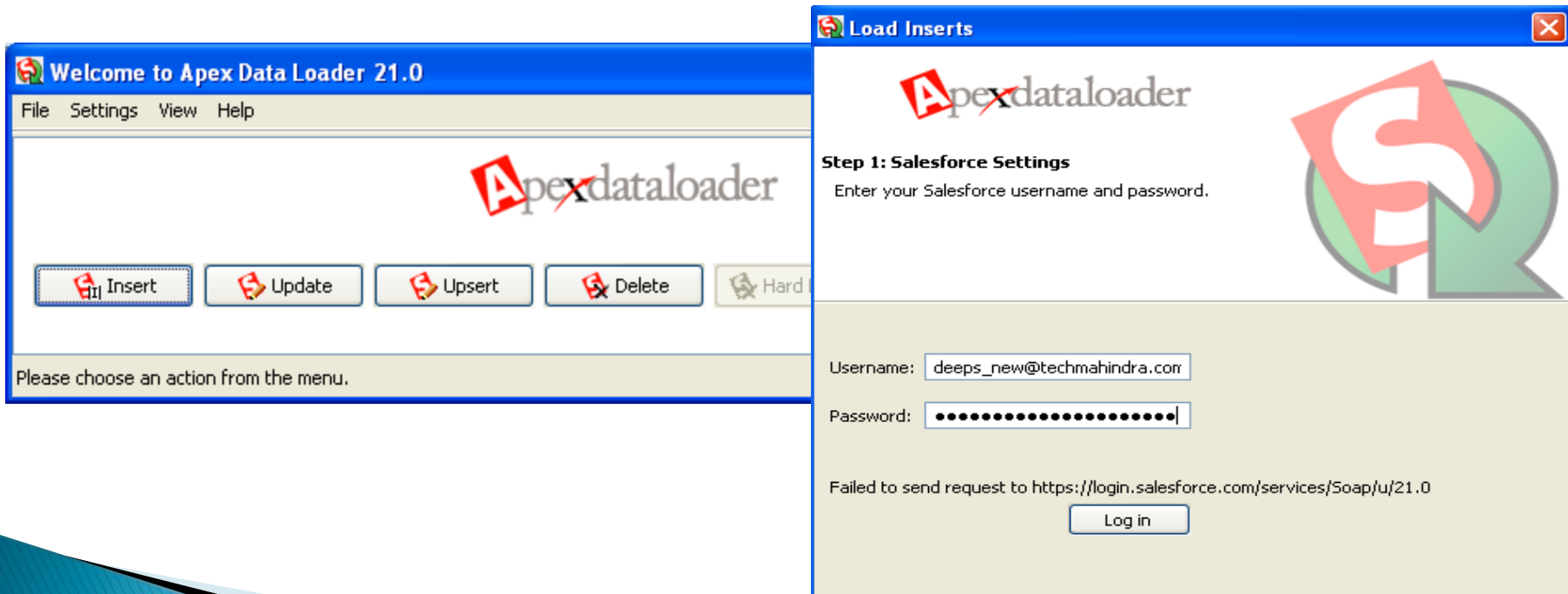
Click the link below to download the Apex Data Loader.



[Download the Data Loader](#)

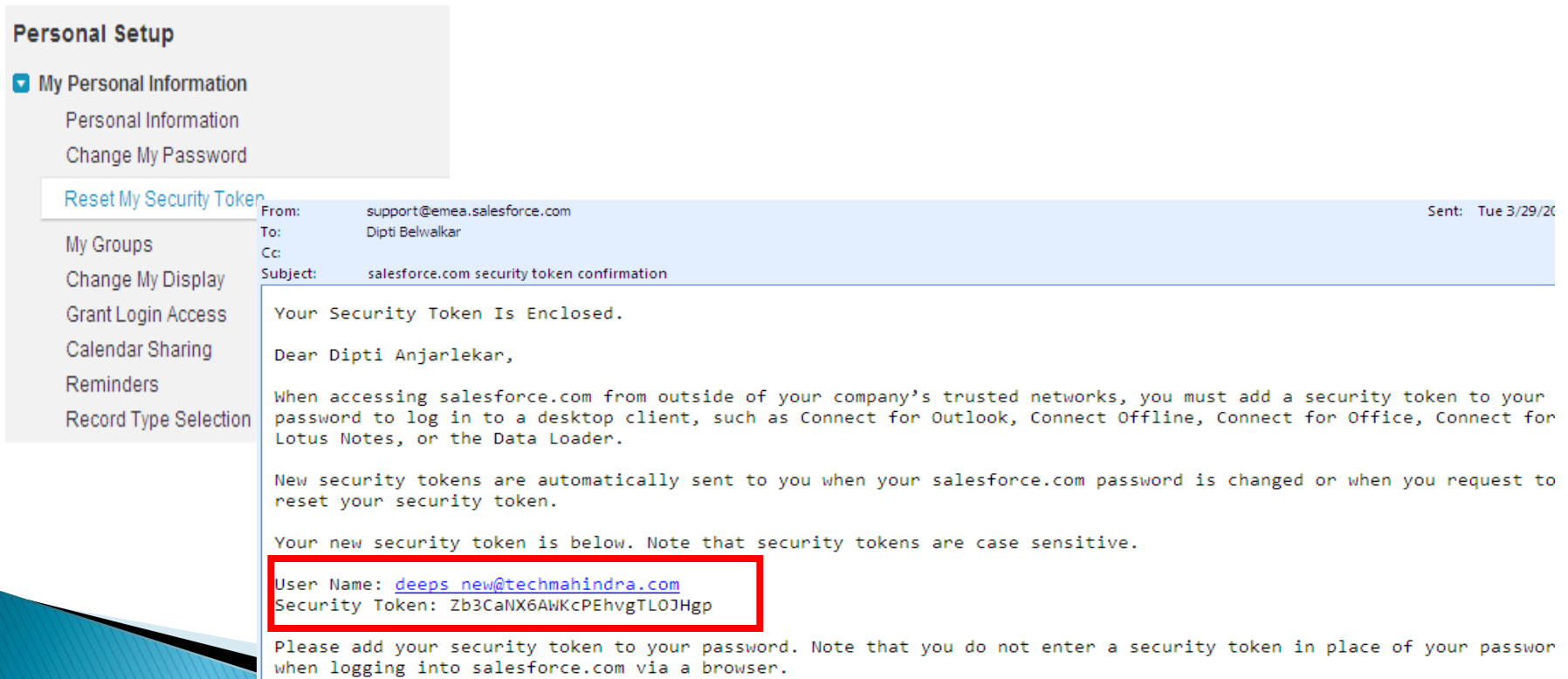
# Steps for data load using Apex Data Loader

- 2) Download and install Salesforce data loader
- 3) Start the Data Loader by choosing **Start | Programs | salesforce.com | Data Loader | Data Loader**
- 4) To insert new records, begin by clicking **Insert**.
- 5) Enter your Salesforce username and password. Click **Log in** to log in.



# Steps for data load using Apex Data Loader

6) You need to activate your computer for connection. When you click the reset security Token button, You will receive a message with security token for connection to Salesforce



The screenshot shows the 'Personal Setup' page in Salesforce. On the left sidebar, 'My Personal Information' is selected, with 'Reset My Security Token' highlighted. The main content area displays an email from 'support@emea.salesforce.com' to 'Dipti Belwalkar' with the subject 'salesforce.com security token confirmation'. The email body states: 'Your Security Token Is Enclosed. Dear Dipti Anjarlekar, When accessing salesforce.com from outside of your company's trusted networks, you must add a security token to your password to log in to a desktop client, such as Connect for Outlook, Connect Offline, Connect for Office, Connect for Lotus Notes, or the Data Loader. New security tokens are automatically sent to you when your salesforce.com password is changed or when you request to reset your security token. Your new security token is below. Note that security tokens are case sensitive. User Name: [deeps\\_new@techmahindra.com](mailto:deeps_new@techmahindra.com) Security Token: Zb3CaNX6AWKcPEhvgTL0JHgp Please add your security token to your password. Note that you do not enter a security token in place of your password when logging into salesforce.com via a browser.'

**Personal Setup**

- My Personal Information
  - Personal Information
  - Change My Password
- Reset My Security Token**
- My Groups
- Change My Display
- Grant Login Access
- Calendar Sharing
- Reminders
- Record Type Selection

**From:** support@emea.salesforce.com **Sent:** Tue 3/29/2017 11:11 AM  
**To:** Dipti Belwalkar  
**Cc:**  
**Subject:** salesforce.com security token confirmation

Your Security Token Is Enclosed.

Dear Dipti Anjarlekar,

When accessing salesforce.com from outside of your company's trusted networks, you must add a security token to your password to log in to a desktop client, such as Connect for Outlook, Connect Offline, Connect for Office, Connect for Lotus Notes, or the Data Loader.

New security tokens are automatically sent to you when your salesforce.com password is changed or when you request to reset your security token.

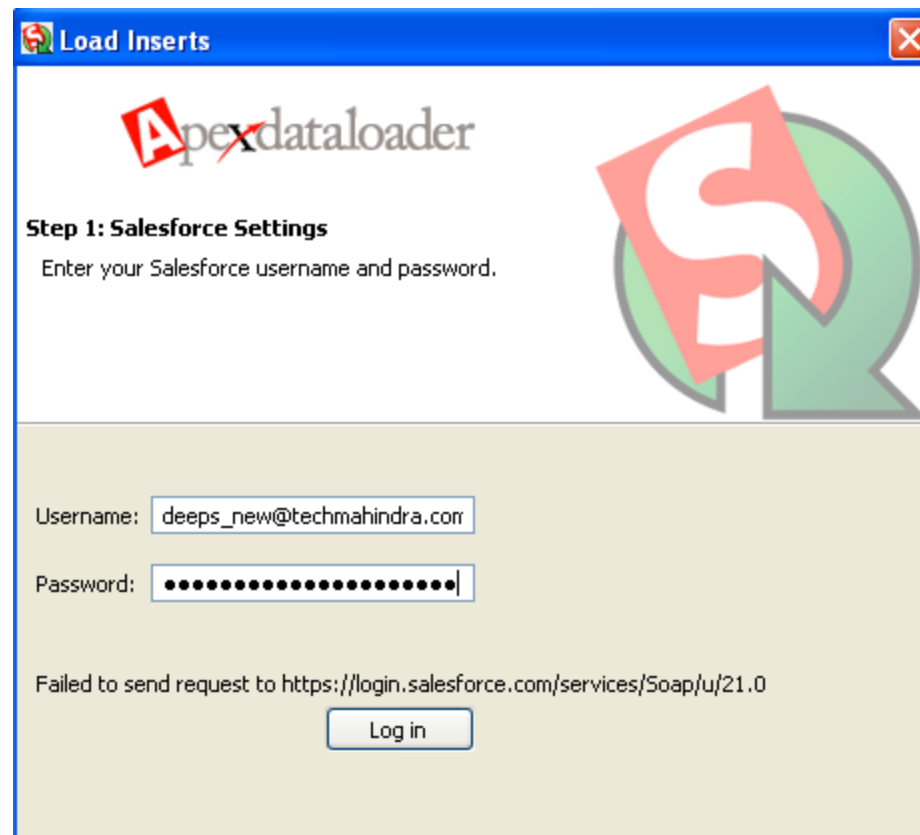
Your new security token is below. Note that security tokens are case sensitive.

User Name: [deeps\\_new@techmahindra.com](mailto:deeps_new@techmahindra.com)  
Security Token: Zb3CaNX6AWKcPEhvgTL0JHgp

Please add your security token to your password. Note that you do not enter a security token in place of your password when logging into salesforce.com via a browser.

# Steps for data load using Apex Data Loader

7) Enter your password and paste the newly generated token after then and try to login



The screenshot shows a window titled "Load Inserts" with a blue header bar. Inside the window, the "Apexdataloader" logo is visible at the top left. Below it, the text "Step 1: Salesforce Settings" is displayed, followed by the instruction "Enter your Salesforce username and password." To the right of this text is a large, stylized graphic of a red 'S' and a green 'Q' intertwined. Below the instruction, there are two input fields: "Username:" with the value "deeps\_new@techmahindra.com" and "Password:" with a masked password represented by dots. Below these fields, an error message states: "Failed to send request to https://login.salesforce.com/services/Soap/u/21.0". At the bottom center, there is a "Log in" button.

# Steps for data load using Apex Data Loader








- 8) Choose an object
- 9) Click **Browse...** to select your CSV file
- 10) Click **Next**. After the object and CSV file are initialized, click **OK**
- 11) Map fields
- 12) Review success logs

Note: Profession edition does not generally have APIs to access data loader.

- ▶ Admin of professional edition can generally raise TT to get the data loader done



# Comparison between Data loader and Import wizard

USE CASE	Application Import Wizard	Apex Data Loader
Importing 50K+ records		
Loading into an object such as Opportunities or Products		
Need to schedule Reports		
Need to prevent duplicates		
Need to choose whether to trigger Workflow rules		
Need to save mapping for later use		
Need to Export Data		

# Summary

- ▶ This module showed you how to :
  - Migrate data using application import wizard and Apex data loader
  - Perform mass delete

**Thank you**

