**DAILY ASSESSMENT FORMAT**

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| **Date:** | **20/07/2020** | **Name:** | **Lavanya B** |
| **Course:** | **Basic statistics** | **USN:** | **4al17ec043** |
| **Topic:** | **Module 01** | **Semester & Section:** | **6th A** |
| **Github Repository:** | **Lavanya-B** |  |  |

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| **FORENOON SESSION DETAILS** |
| **Image of session** |
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| **Date:** | **20/07/2020** | **Name:** | **Lavanya B** | |
| **Course:** | **Salesforce** | **USN:** | **4al17ec043** | |
| **Topic:** | **Trialhead** | **Semester & Section:** | **6th A** | |
| **AFTERNOON SESSION DETAILS** | | | |
| **Image of session** | | | |
| **Report**  **Prepare for Data Import**  **Cloud Kicks manufactures custom sneakers, designed and personalized for their customers. Sales superstars Candace and Jose are always eager to get fresh air and exercise, so they schedule a walking meeting with Linda, the company’s Salesforce admin. They want Linda’s help to bring their CRM data into Salesforce. Because they have fewer than 50,000 records, Linda decides to use the Data Import Wizard. When she gets back to her desk after the walk, she preps the data for import.**  **Follow these steps before you start importing any data.**  **Use your existing software to create an export file.**  **Clean up the import file for accuracy and consistency. This involves updating the data to remove duplicates, delete unnecessary information, correct spelling and other errors, and enforce naming conventions.**  **Compare your data fields with the Salesforce fields you can import into, and verify that your data will be mapped into the appropriate Salesforce fields. You might need to fine-tune the mapping before starting the import. For details, see Field Mapping for Data Sources in the online help.**  **Make any configuration changes required in Salesforce to handle the imported data. For example, you might need to create new custom fields, add new values to picklists, or temporarily deactivate workflow rules.**  **ta Management**  **Import Data**  **Import Data**  **Learning Objectives**  **After completing this unit, you'll be able to:**  **Describe and compare the different options for importing data into Salesforce.**  **List the steps involved in preparing and importing data from a sample .csv file using the Data Import Wizard.**  **Introduction to Data Import**  **You can easily import external data into Salesforce. Supported data sources include any program that can save data in the comma delimited text format (.csv).**  **Salesforce offers two main methods for importing data.**  **Data Import Wizard—this tool, accessible through the Setup menu, lets you import data in common standard objects, such as contacts, leads, accounts, as well as data in custom objects. It can import up to 50,000 records at a time. It provides a simple interface to specify the configuration parameters, data sources, and the field mappings that map the field names in your import file with the field names in Salesforce.**  **Data Loader—this is a client application that can import up to five million records at a time, of any data type, either from files or a database connection. It can be operated either through the user interface or the command line. In the latter case, you need to specify data sources, field mappings, and other parameters via configuration files. This makes it possible to automate the import process, using API calls.**  **With both methods, the number of records you can import depends on your permissions, the type of data you’re importing, and the overall data storage limits for your organization. The type of objects you can import depends on your edition.**  **Use the Data Import Wizard When:**  **You need to load less than 50,000 records.**  **The objects you need to import are supported by the wizard.**  **You don’t need the import process to be automated.**  **Use Data Loader When:**  **You need to load 50,000 to five million records. If you need to load more than 5 million records, we recommend you work with a Salesforce partner or visit the AppExchange for a suitable partner product.**  **You need to load into an object that is not supported by the Data Import Wizard.**  **You want to schedule regular data loads, such as nightly imports.**  **Note**  **Note**  **Data Loader uses the SOAP API to process records. For faster processing, you can configure it to use the Bulk API instead. The Bulk API is optimized to load a large number of records simultaneously. It is faster than the SOAP API due to parallel processing and fewer network round-trips.**  **Prepare for Data Import**  **Cloud Kicks manufactures custom sneakers, designed and personalized for their customers. Sales superstars Candace and Jose are always eager to get fresh air and exercise, so they schedule a walking meeting with Linda, the company’s Salesforce admin. They want Linda’s help to bring their CRM data into Salesforce. Because they have fewer than 50,000 records, Linda decides to use the Data Import Wizard. When she gets back to her desk after the walk, she preps the data for import.**  **Jose and Candace talk to Linda about importing their data**  **Follow these steps before you start importing any data.**  **Use your existing software to create an export file.**  **Clean up the import file for accuracy and consistency. This involves updating the data to remove duplicates, delete unnecessary information, correct spelling and other errors, and enforce naming conventions.**  **Compare your data fields with the Salesforce fields you can import into, and verify that your data will be mapped into the appropriate Salesforce fields. You might need to fine-tune the mapping before starting the import. For details, see Field Mapping for Data Sources in the online help.**  **Make any configuration changes required in Salesforce to handle the imported data. For example, you might need to create new custom fields, add new values to picklists, or temporarily deactivate workflow rules.**  **Note**  **Note**  **Salesforce recommends you import using a small test file first to make sure you’ve prepared your source data correctly.**  **View this video for more information on cleaning up your import file.**  **Use the Data Import Wizard**  **Once you have created an export file and cleaned up the data for import, follow these steps to import data using the Data Import Wizard.**  **Start the wizard.**  **From Setup, enter Data Import Wizard in the Quick Find box, then select Data Import Wizard.**  **Review the information provided on the welcome page, then click Launch Wizard!**  **Choose the data that you want to import.**  **To import accounts, contacts, leads, solutions, person accounts, or campaign members, click Standard Objects. To import custom objects, click Custom Objects.**  **Specify whether you want to add new records to Salesforce, update existing records, or add and update records simultaneously.**  **Specify matching and other criteria as necessary. Hover over the question marks for more information about each option.**  **Specify the file that contains your data.**  **You can specify your data file by dragging the CSV to the upload area of the page or by clicking the CSV category you’re using and then navigating to and selecting the file.**  **Choose a character encoding method for your file. Most users can accept the default character encoding.** | | | |