ADMINISTRATION ESSENTIALS FOR NEW ADMINS (MANAGING DATA)

Exercise Guide

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6-1: Prepare the Import File

Goal:

Since the import file was prepared by sales reps at tradeshows, it is likely that there are inaccuracies. You'll need to check the data for accuracy. Once clean, you'll need to save the file as a CSV file.

Tasks:

1. Download and save the leads import file from Conner McCoy.
2. Open the file in Excel.
3. Check rows and columns for accuracy.
4. Save it as a CSV file.

Time:

10 minutes

Instructions:

1. Download and save the leads import file from Conner McCoy.
   A. Click the **Chatter** tab. (If prompted to watch a video, click **Skip | Skip | Skip, Go to Chatter**.)
   B. Click the **To Me** link on the left to filter for Chatter posts directed to you.
   C. Scroll down to locate the post from Conner McCoy containing a list of leads from our last two trade shows in North America.
   D. Click the **Download xlxs** link.
   E. Save the file to your desktop with the same name.
   F. Click **OK**.
2. Open the file in Excel.
   A. Open Microsoft Excel.
   B. Click the **Office** button, and then click **Open**.
   C. Browse to the saved file **Module 6 Lead Import File** and click to select it.
   D. Click **Open**.
3. Check rows and columns for accuracy.
   A. Replace any instances of `SF` with `San Francisco`.
   B. Replace any instances of `Calif` or `Cali` with `CA`.
   C. Replace any inconsistent Rating values with equivalent picklist values already present in Salesforce (`Cold`, `Warm`, `Hot`).
4. Save it as a CSV file.
   A. Click the **Office** button and choose **Save As**.

B. Name the file `Mod6 Lead Import`.
C. In the Save as type picklist, scroll down and click **CSV (Comma delimited)(*.csv)**.
D. Click **Save**.
E. Click **Yes**.
F. Close the file.

6-2: Import Leads Using the Data Import Wizard

Goal:

Import the scrubbed file of tradeshow leads for the Marketing team.

Tasks:

1. Start the Data Import Wizard.
2. Choose the data to import.
3. Edit the field mapping.
4. Start the import.
5. Check the Leads tab for new leads.

Time:

10 minutes

Instructions:

1. Start the Data Import Wizard.
   A. Click **Setup | Data Management | Data Import Wizard**.
   B. Click **Launch Wizard**.
2. Choose the data to import.
   A. Under What kind of data are you importing? click **Leads**.
   B. Under What do you want to do? click **Add New Records** and select the options.
      i. Match Lead by: **Email**
      ii. Assign New Leads to this Source: **Trade Show**
      iii. Record type: **Tradeshow Lead**
   C. Under Where is your data Located? click **CSV**.
   D. If you are using the Chrome browser, click **Choose File**. If you are using Firefox or Internet Explorer, click **Browse**.
   E. Select the **Mod6 Lead Import.csv** file from the Desktop and click **Open**. (Note: If you can't see the file, make sure **All Files** is selected from the drop down above the Open button in the file window.)
   F. Click **Next**.
3. Edit the field mapping.
   A. Map the Address Line 1 column to the Street field as follows:
      i. In the Edit column, click **Map**.
      ii. From the field list, select **Street**.
      iii. Click **Map**. (Note: If you don't see the Map button, zoom out in your browser

using CTRL –, and you should be able to see it.]

B. Map the Owner column to the Lead Owner field as follows:
   i. In the Edit column, click **Map**.
   ii. From the field list, select **Lead Owner**.
   iii. Click **Map**.
C. Click **Next**. You will see an error message notifying you that the required Lead Currency field has not been mapped.
D. Click **OK**.
E. Map the Currency column to the Lead Currency field as follows:
   i. In the Edit column, click **Map**.
   ii. From the field list, select **Lead Currency**.
   iii. Click **Map**.

4. Start the import.
   A. Click **Next**.
   B. Click **OK.**
   C. Click **Start Import**.
   D. Click **OK**. You will see the details of the bulk data load job.
5. Check the Leads tab for new leads.
   A. Click the **Leads** tab.
   B. From the View picklist, select **Today's Leads**.
   C. Review the leads you just imported.

6-3: Export Using Data Loader

Goal:

Use the data loader to export the account record ID so you can successfully match new information to existing Salesforce records.

Tasks:

1. Download and install the data loader (if required).
2. Log the data loader into the correct org.
3. Change the default save location and file name for the export file.
4. Create the SOQL query, to extract the ID field and account name where Industry equals Technology.
5. Export the extracted records to a CSV file and view in Excel.
6. Sort the account name column A–Z and save the file.

Time:

10 minutes

Instructions:

1. Download and install the data loader (if required.)

   Note: The exact steps will vary depending on the browser used. The following steps are for Firefox.

   A. Click **Setup | Data Management | Data Loader**.
   B. Click **Download the Data Loader** (choose Windows or Mac).

   Windows Users:
      i. Click **Save File**.
      ii. Double-click on **ApexDataLoader.exe** to execute it.
      iii. Click **OK** at the security warning.
      iv. Click **Run**.
      v. Follow the instructions in the Windows Install Shield Wizard.
      vi. Click **Next**.
      vii. Click **I agree** to accept the terms in the license agreement.
      viii. Click the **Single User** radio button.
      ix. Click **Next**.
      x. On the Choose Components screen, make sure all components are checked
      xi. Click **Next**.
      xii. Accept the default folder location and click **Install.**
      xiii. When completed, click **Next**.
      xiv. Click **Finish**.

Mac Users:

i. Click the downloaded .dmg file to execute it.
ii. Drag the Data Loader icon into the **Applications folder.**
iii. Double click the **Data Loader icon** to launch.

2. Log the data loader into the correct org.

A. Click **Start | All Programs | Data Loader**
(Note: If more than one version is listed, select the most recent.)
B. Click **Export**.
C. Select the **Password Authentication** radio button

> Note: As of Spring '16, if prompted, choose the Standard setting.. The Default setting allows login to Production OR Sandbox and requires oAuth. If a student has implemented oAuth for their org, Data Loader now supports this setting.

D. Enter the login credentials provided to you at the start of class:

i. Username: `admin@aw####.com`
ii. Password: [password provided by your instructor]

E. Click **Log In**. If you see a success message, jump to step G.
F. If you see an error message on the login screen, you may need to add your security token. Return to your training org and follow these steps:

i. Click **Your Name | My Settings | Personal | Reset My Security Token**.
ii. Click **Reset Security Token**.
iii. Go to the inbox for the email address you added to your Chatter profile at the start of the course and open the "Salesforce.com security token confirmation" email.
iv. From the body of the email, copy the security token.
v. Return to the data loader login screen and paste the security token at the end of your password.
vi. Click **Login**.

G. Once verified, click **Next**.

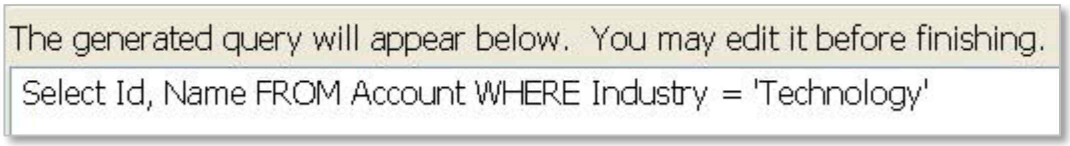
3. Select the Account object, rename the file to be extracted and save it to the desktop.

Note: All file names default to export.csv. Renaming prevents losing or overwriting the files.

A. From the Select Salesforce Object list, select **Account (Account)**.
B. In the Choose a target for extraction text box, enter `Export of Tech Account IDs.csv`

C. Click **Browse…**
D. Navigate to the desktop.
E. Click **Save**.
F. Click **Next**.

4. Create the SOQL query, including the ID field.



A. Choose the query fields.
   i. **Id**
   ii. **Name**

B. Complete the Create the where clauses to your query below fields.
   i. Fields: **Industry**
   ii. Operation: **equals**
   iii. Value: **Technology**
   iv. Click **Add Condition**.

C. Click **Finish**.

5. Export the extracted records to a CSV file and view in Excel.

A. Click **Yes** at the Warning box. The Operation Finished window appears reporting the number of successful extractions.

   Note: The resulting export file should contain 14 records.

B. Click **View Extraction**.
C. Click **Open in external program**. The file opens automatically in Excel.
D. Leave the Data Loader open while viewing the file.

6. Sort the account name column A–Z and save the file.

A. Click in the **Account Name** column.
B. Click the **Sort** button to sort this column A-Z.
C. Save the file and keep it open.

6-4: Match Record IDs to Accounts

Goal:

Match the Salesforce record IDs from the export file to the Region and Zone data you received from Yuko.

Tasks:

1. Open Yuko's file, Mod 6 Yukos File for Region and Zones for Technology Industry.xlsx.
2. Copy and paste the ID column from the Export of Tech Account IDs. csv into Mod 6 Yukos File for Region and Zones for Technology Industry.xlsx.
3. Save Mod 6 Yukos File for Region and Zones for Technology Industry.xlsx in CSV format with the shorter name, Yukos File.
4. Close both files.

Time:

10 minutes

Instructions:

1. Open Yuko's file, Mod 6 Yukos File for Region and Zones for Technology Industry.xlsx.

   Note: Yuko's file has already been sorted alphabetically (A-Z) by account name.

   A. Click the **Chatter** tab.
   B. Click the **To Me** filter on the left.
   C. Scroll down to Yuko's post containing the Region and Zone file.
   D. Click the **Download xlxs** link.
   E. Select the **Save File** radio button and save it to your desktop with the same name.
   F. Click **OK**.

2. Copy and paste the ID column from the export file into Yuko's file.
3. Save Yuko's file in CSV format with the shorter name, Yukos File.

   A. Click **Office button | Save As**.
   B. From the Save as type picklist, select **CSV (Comma delimited) (*.csv)**.
   C. Change the file name to `Yukos File`.
   D. Change the location to your desktop.
   E. Click **Save**.

4. Close both files.

6-5: Update Using Data Loader

Goal:

Update Region and Zone data, matching records using the record IDs obtained through the data loader.

Tasks:

1. Perform an update in the data loader using Yuko's File.
2. Save the success and error files to your desktop.
3. Review the success and error files.
4. Create a list view to check the import.

Time:

5 minutes

Instructions:

1. Perform an update in the data loader using Yuko's File.
   A. In the data loader, click **Update**.

      Note: Close any data loader windows left open from the previous exercise.

      i. Select **Salesforce object: Account (Account)**
      ii. Choose **CSV file: Yukos File** (on your desktop)

   B. Click **Next**.
   C. Click **OK** at the Initialization message. Note that 14 records will be considered.
   D. Click **Create or Edit a Map**.

      i. Click **Auto-Match Fields to Columns**.
      ii. Click **OK**.

   E. Click **Next**.

2. Save the success and error files to your desktop.
   A. Click **Browse...**
   B. Select the directory where your success and error files will be saved.
   C. Click **OK**.
   D. Click **Finish**.
   E. Click **Yes** in the Warning box.

3. Review the success and error files.
   A. View successes.

      i. Click **View Successes** to view the successful updates.

   ii. Click **Close**.

   B. View errors.

      i. Click **View Errors** to view any errors in updating.
      ii. Click **Close**.

   C. Click **OK**.

4. Create a list view to check the import.

   A. Click the **Accounts** tab in Salesforce.
   B. Click **Create New View**.
   C. Complete the Enter View Name section.

      i. View Name: `Accounts Modified Today`
      ii. View Unique Name: (This field auto-populates.)

   D. Complete the Specify Filter Criteria section.

      i. Filter By Owner: **All Accounts**
      ii. Filter By Additional Fields (Optional):

         a. Field: **Last Modified Date**
         b. Operator: **equals**
         c. Value: (today's date)

   E. Complete the Select Fields to Display section. Select fields from the Available Fields list by holding **CTRL** and clicking the field name.

      Industry
      Region
      Zone

   F. Click **Add**. These fields are added to the Selected Fields list.
   G. In the Restrict Visibility section, select the **Visible only to me** radio button.
   H. Click **Save**.
   I. Check to make sure that 14 records were updated.

6-6: Deactivate a User, Mass Transfer Records

Goal:

Deactivate Phil as a Salesforce user and transfer Phil Smith's California accounts and open opportunities to Matt Wilson.

Tasks:

1. Deactivate Phil Smith's User record.
2. Access Mass Transfer Accounts.
3. Transfer Phil Smith's California accounts to Matt Wilson.

Time:

10 minutes

Instructions:

1. Deactivate Phil Smith's user record.
   A. Click **Setup | Manage Users | Users**.
   B. Click **S** in the alphabetical locator. (If the rows aren't already arranged alphabetically by name, click the **title** of the Full Name column to rearrange them.)
   C. Beside Phil Smith, click **Edit**.
   D. Clear the **Active** checkbox.
   E. Click **OK** in the warning box.
   F. Click **Save**.
   G. In the user deactivation screen, select all three options:

      Remove user from account teams
      Remove user from predefined case teams
      Remove user from ad hoc case teams

   H. Click **Save**.
2. Access Mass Transfer Accounts.
   A. Click **Setup | Data Management | Mass Transfer Records**.
   B. Click **Transfer Accounts**.
3. Transfer Phil Smith's California accounts to Matt Wilson.
   A. Click the **Transfer from lookup** icon.
   B. Enter `Phil` and click **Go!**
   C. Click **Phil Smith** in the search results.
   D. Click the **Transfer to lookup** icon.

E. Enter `Matt` and click **Go!**
F. Click **Matt Wilson** in the search results.
G. Find accounts that match the following criteria:

   i. Keep Account Team: **Select**

      a. Field: **Billing State/Province**
      b. Operator: **equals**
      c. Value: `CA`

H. Click **Find**.
I. After reviewing the matching accounts, select the **checkbox** beside the Account Name column to select all of the accounts.
J. Click **Transfer**.

6-7: Schedule Weekly Backup

Goal:

Schedule a weekly data export to back up all of AW Computing's data as a general best practice and to meet compliance requirements.

Tasks:

1. Access Data Export.
2. Set export parameters.
3. Schedule an export every Sunday for the next month.

Time:

5 minutes

Instructions:

1. Access Data Export.
   A. Click **Setup | Data Management | Data Export**.
   B. Click **Schedule Export**.
2. Set export parameters.
   A. Export File Encoding: **ISO-8859-1** (the default encoding)
   B. Include images, documents and other attachments: **Deselect**
   C. Replace carriage returns with spaces: **Select**
3. Schedule an export every Sunday for the next month.
   A. Frequency: **Weekly**
   B. Recurs every week on: **Sunday**
   C. Preferred Start Time: **7:00 PM**
   D. Exported Data: **Include all data**
   E. Click **Save**.

6-8: Mass Delete Records

Goal:

Identify the practice leads that the sales reps created while training for the trade show. Delete these invalid leads so that the data in Salesforce remains accurate.

Tasks:

1. Access Mass Delete Leads.
2. Search for leads that meet specific criteria.
3. Mark and delete all matching leads.

Time:

5 minutes

Instructions:

1. Access Mass Delete Leads.
    A. Click **Setup | Data Management | Mass Delete Records**.
    B. Click **Mass Delete Leads**.
2. Search for leads that meet specific criteria.
    A. Complete the Find Leads that match the designated criteria.
        i. Enter the details of the first criterion.
            a. Picklist 1: **Company**
            b. Picklist 2: **contains**
            c. Picklist 3: `AW Computing`
        ii. Enter the details of the second criterion.
            a. Picklist 1: **Created Date**
            b. Picklist 2: **equals**
            c. Picklist 3: (today's date)
    B. Click **Search**.
3. Mark and delete all matching leads.
    A. Review the list of matching records.
    B. Once you are satisfied these are the correct leads to delete, select the first **checkbox** beside the Name column to select all of the records.
    C. Click **Delete**.

    Note: There should be 5 leads.

