

Smart Waste Management Tracker – Salesforce Project

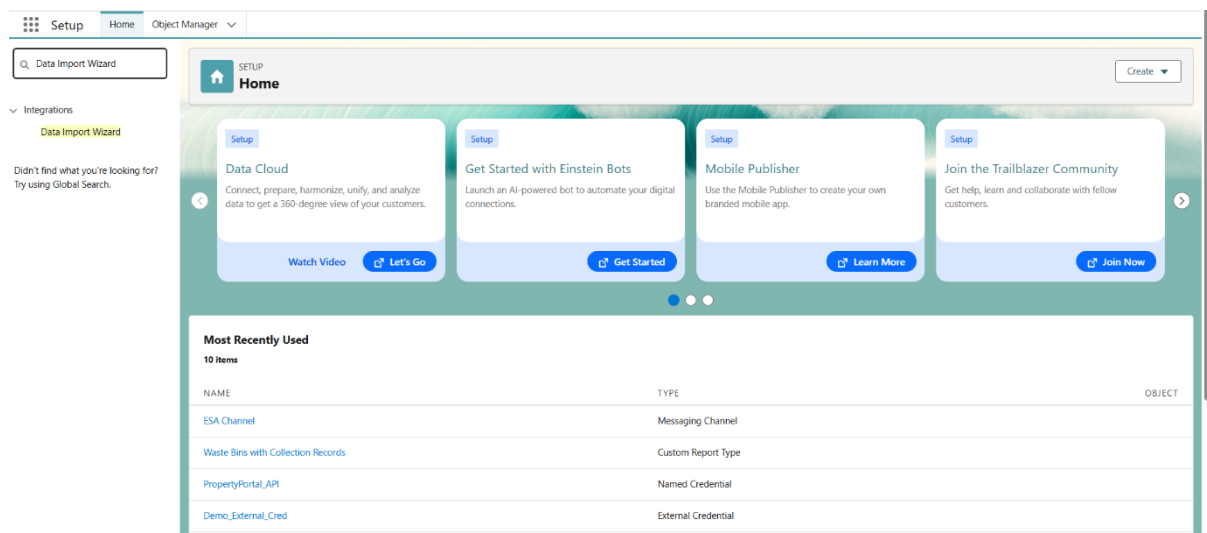
Phase 8 – Data Management & Deployment

Step 1: Prepare Data for Import

- Clean your data file (Excel / Google Sheets) → remove duplicates, ensure correct formats.
- Ensure field names in CSV match Salesforce field API names.
- Example objects for import: WasteBin__c, CollectionRecord__c.

Tips:

- Limit each import to ≤50,000 records.
- Save CSV file properly, UTF-8 format recommended.




	A	B	C	D	E	F
1	Name	Location	Type	Capacity	Status	
2	Bin A	Area 1	Organic	100	Not Full	
3	Bin B	Area 2	Recyclable	150	Not Full	
4	Bin C	Area 3	Non-Recyc	120	Full	
5						
6						
7						
8						

1	Name	WasteBin_	Quantity C	Collection	Collected By	
2	Collection	Bin A	50	#####	Staff 1	
3	Collection	Bin B	100	#####	Staff 2	
4	Collection	Bin C	120	#####	Staff 3	
5						


Step 2: Use Data Import Wizard

- Go to Setup → Quick Find → Data Import Wizard → Launch Wizard.

- Select object type: Standard or Custom (e.g., WasteBin__c, CollectionRecord__c).
- Choose operation:
 - Add new records
 - Update existing records
 - Add & Update existing records (Upsert)
- Map CSV columns → Salesforce fields carefully.
- Optional: Trigger workflow rules or processes if needed.


[Setup](#)


[Home](#)

[Object Manager](#)


Data Import Wizard [Help for this page](#)

Recent Import Jobs

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



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](#)

Import your data in 3 easy steps!


Launch the Data Import Wizard to import your data.




Pre-step: Prepare your



Choose data to import



Edit field mapping



Review and start import

Step 3: Upload CSV

- Drag & drop CSV file or browse to upload.
- Confirm field mapping:
 - Required fields mapped correctly
 - Lookup / External ID fields mapped if using Upsert

- Click **Next** → **Start Import**.
- Monitor import progress in **Recent Import Jobs** section.

The first screenshot shows an Excel spreadsheet with the following data:

Name	Location	Type	Capacity	Status
Bin A	Area 1	Organic	100	Not Full
Bin B	Area 2	Recyclable	150	Not Full
Bin C	Area 3	Non-Recy	120	Full

The second screenshot shows another Excel spreadsheet with the following data:

Name	WasteBin	Quantity	Collection	Collected By
Collection Bin A	50	#####	Staff 1	
Collection Bin B	100	#####	Staff 2	
Collection Bin C	120	#####	Staff 3	

The third screenshot shows the Salesforce 'Import your Data into Salesforce' wizard. It has three tabs: 'Choose data', 'Edit mapping', and 'Start import'. The 'Choose data' tab is active, showing a list of 'Standard objects' and 'Custom objects'. The 'Standard objects' list includes 'Accounts and Contacts', 'Leads', 'Solutions', and 'Campaign Members'. The 'Custom objects' list is empty. The 'What do you want to do?' and 'Where is your data located?' sections are empty.

Step 4: Verify Imported Data

- Check import status: Success / Failures.
- Open **View Result** for failed records → identify issues (field mismatch, missing required fields, validation rule failure).
- Correct CSV and re-import if needed.

Almost done!

Choose data

Edit mapping

Start import

Edit Field Mapping: Accounts and Contacts

Your file has been auto-mapped to existing Salesforce fields, but you can edit the mappings if you wish. Unmapped fields will not be imported.

Help for this page

Edit	Mapped Salesforce Object	CSV Header	Example	Example	Example
Change	Account: Account Name	Name	Bin A	Bin B	Bin C
Change	Account: Number of Locations	Location	Area 1	Area 2	Area 3
Change	Account: Type	Type	Organic	Recyclable	Non-Recyclable
Change	Account: Rating	Capacity	100	150	120
Change	Account: Clean Status	Status	Not Full	Not Full	Full

Step 5: Bulk Data Load (Advanced / Large Records)

- For >50,000 records, use **Data Loader**:
 - Install Salesforce Data Loader (Windows/Mac)
 - Login → Select Object → Operation (Insert / Update / Upsert)
 - Map fields → Run job
 - Review **success & error CSV files** for troubleshooting

Setup

Home

Object Manager

Great job!

Choose data

Edit mapping

Start import

Review & Start Import

Review your import information and click Start Import.

Help for this page

Your selections:

Accounts and Contacts ✓

Add new and update existing records ✓

Untitled spreadsheet - Sheet1.csv ✓

Your import will include:

Mapped fields

5

Your import will not include:

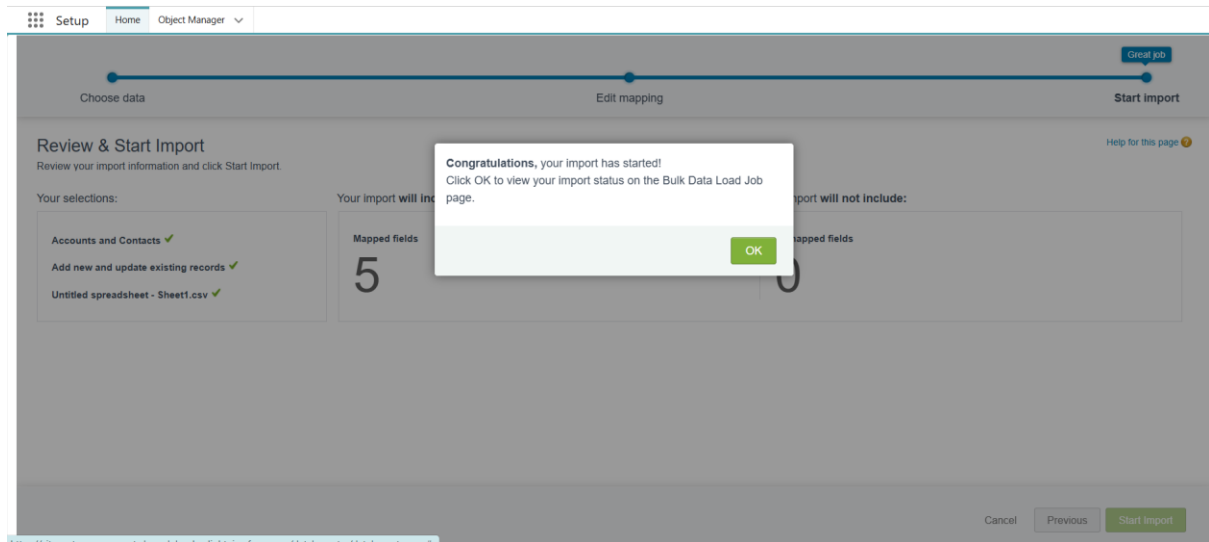
Unmapped fields

0

Cancel

Previous

Start Import



Step 6: Deployment Basics

- Use **Change Sets**, **ANT Migration Tool**, or **VS Code + SFDX** for moving configurations from Dev/Sandbox → Production.
- Steps:
 1. Create Outbound Change Set (Sandbox) → add components (Objects, Flows, Reports, Dashboards, etc.)
 2. Upload → Deploy to Production
 3. Validate deployment → Test functionality in Production

Setup

Home

Object Manager

Quick Find

Setup Home

Salesforce Go

Service Setup Assistant

Service Cloud Reports

Commerce Setup Assistant

Field Service Setup Home (Beta)

Hyperforce Assistant

Release Updates

Salesforce Mobile App

Lightning Usage

Optimizer

Sales Cloud Everywhere

ADMINISTRATION

> Users

> Data

> Email

PLATFORM TOOLS

> Subscription Management

> Apps

SETUP

Bulk Data Load Jobs

Bulk Data Load Job

750NS00000Wmv81

View the details of a bulk data load job.

< Back to List: Bulk Data Load Jobs

Help for this Page

Bulk Data Load Job Detail

Reload

Job ID	750NS00000Wmv81	Job Type	Bulk V1	Status	Closed
Submitted By	Kiran kumar Thattai	Operation	Upsert	Total Processing Time (mins)	245
Start Time	24/09/2025, 10:58 pm IST	Queued Batches	0	API Active Processing Time (mins)	0
End Time	24/09/2025, 10:58 pm IST	In Progress Batches	0	Apex Processing Time (mins)	0
Time to Complete (hh:mm:ss)	00:00	Completed Batches	1		
Object	Account	Failed Batches	0		
External ID Field	Id	Progress	100%		
Content Type	CSV	Records Processed	3		
Concurrency Mode	Parallel	Records Failed	3		
API Version	64.0	Retries	0		

Reload

Batches

Step 7: Expected Outcome

- Data for WasteBins and CollectionRecords imported successfully.

- Deployment to production environment completed.
- Org ready for Phase 9: Reporting, Dashboards & Security Review.