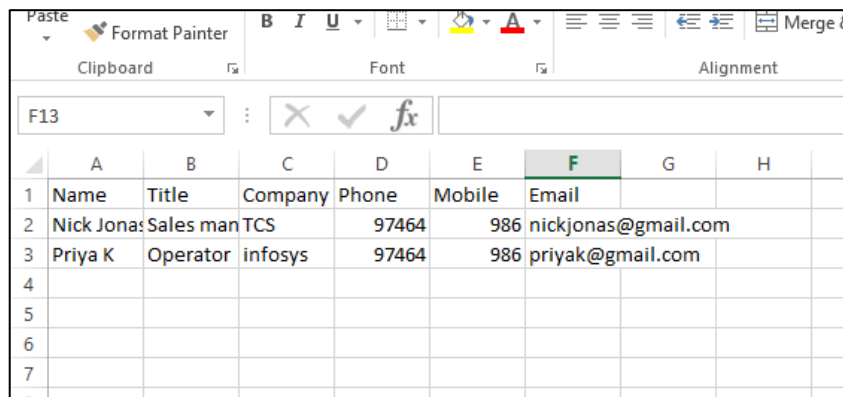


Problem statement: Having the knowledge to deal with data efficiently is part of what makes an admin awesome. Sam wants you to add and update records as he is collecting data on new accounts, leads, opportunities, and more. The faster you get it done, the faster he can make sales. When you're talking about more than a few records, entering or updating them one by one just doesn't cut it. The process is slow and allows room for errors. You have to use tools that allow you to upload and update many records at a time, getting the job done quickly and with less effort than doing it manually.

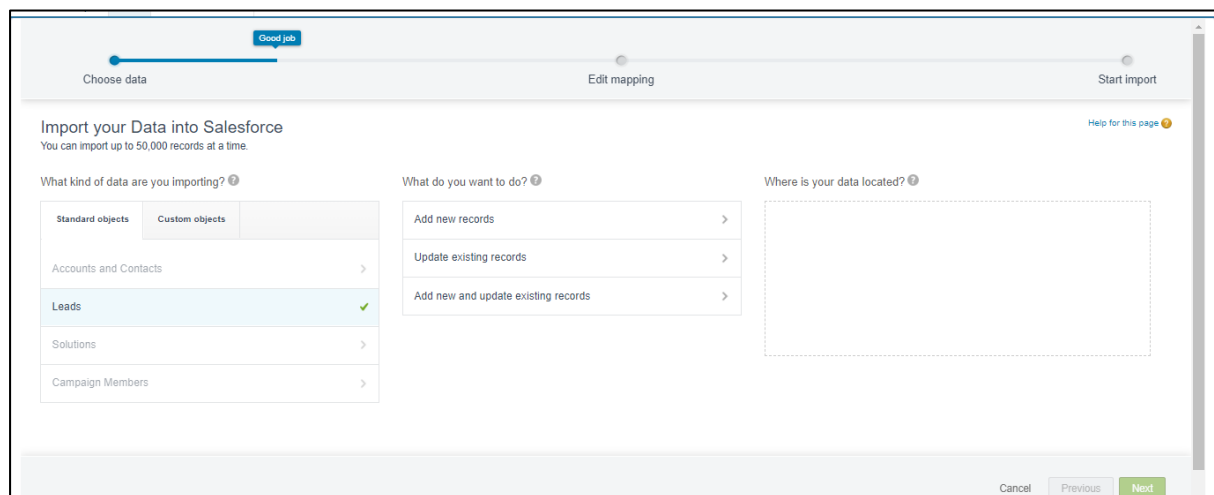
1. Prepare a file for import

Ans-



| | A | B | C | D | E | F | G | H |
|---|-----------|-----------|---------|-------|--------|---------------------|---|---|
| 1 | Name | Title | Company | Phone | Mobile | Email | | |
| 2 | Nick Jona | Sales man | TCS | 97464 | 986 | nickjonas@gmail.com | | |
| 3 | Priya K | Operator | infosys | 97464 | 986 | priyak@gmail.com | | |
| 4 | | | | | | | | |
| 5 | | | | | | | | |
| 6 | | | | | | | | |
| 7 | | | | | | | | |

a. Launch Data Import Wizard



Good job

Choose data Edit mapping Start import

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 >

Update existing records >

Add new and update existing records >

Where is your data located? ⓘ

Cancel Previous Next

Adding CSV file in Data import wizard-

Getting closer...

Choose data Edit mapping Start import

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 Lead by: --None--

Assign New Leads to this Source: --None--

Assign All Leads Using this Assignment Rule: --None--

Use Assignment Rules to Email Owners?

Assign All Leads to Campaigns

Where is your data located?

Drag CSV file here to upload

CSV

File: Choose File Leads.csv

Character Code: ISO-8859-1 (General US & Western European, ISO-LATIN-1)

Values Separated By: Comma

Outlook CSV

Cancel Previous Next

Almost done

Choose data Edit mapping Start import

Edit Field Mapping: Leads

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.

| Edit | Mapped Salesforce Object | CSV Header | Example | Example |
|--------|--------------------------|------------|---------------------|------------------|
| Change | Name | Name | Nick Jonas | Priya K |
| Change | Title | Title | Sales man | Operator |
| Change | Company | Company | VT | VT |
| Change | Phone | Phone | 97464 | 97464 |
| Change | Mobile | Mobile | 986 | 986 |
| Change | Email | Email | nickjonas@gmail.com | priyak@gmail.com |

Search...

Sales Home Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards Reports Chatter Groups Calendar People Cases Forecasts

Leads Today's Leads

New Import Add to Campaign Change Status Change Owner

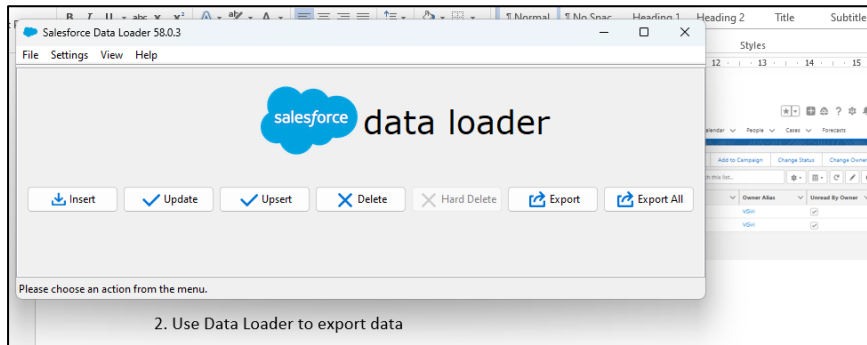
2 items • Sorted by Name • Filtered by All leads • Created Date • Updated a few seconds ago

Search this list...

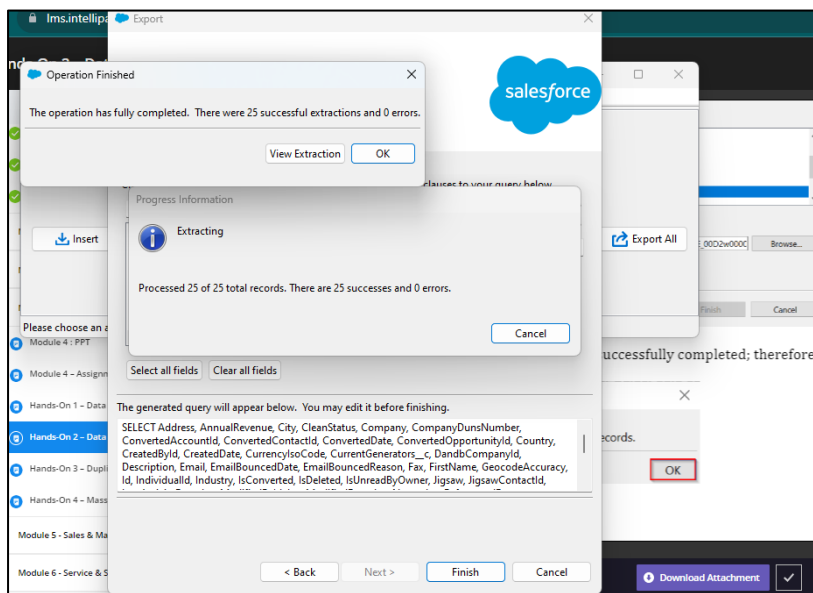
| | Name | Company | State/Province | Email | Lead Status | Created Date | Owner Alias | Unread By Owner |
|---|------------|---------|----------------|---------------------|----------------------|--------------------|-------------|-------------------------------------|
| 1 | Nick Jonas | VT | | nickjonas@gmail.com | Open - Not Contacted | 8/18/2023, 9:48 PM | VGiri | <input checked="" type="checkbox"/> |
| 2 | Priya K | VT | | priyak@gmail.com | Open - Not Contacted | 8/18/2023, 9:48 PM | VGiri | <input checked="" type="checkbox"/> |

2. Use Data Loader to export data

Ans- Steps



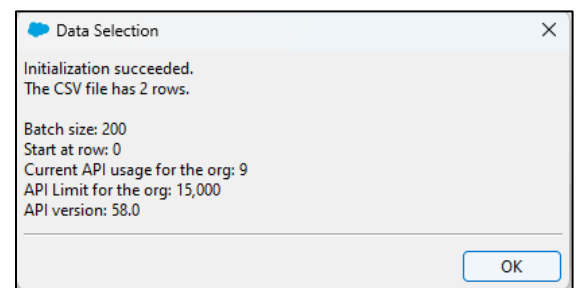
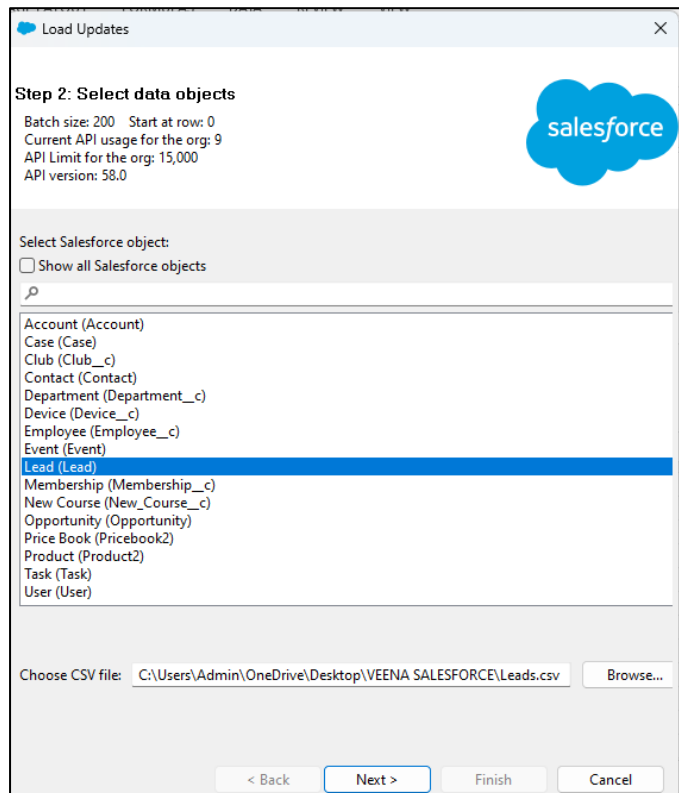
2. Use Data Loader to export data



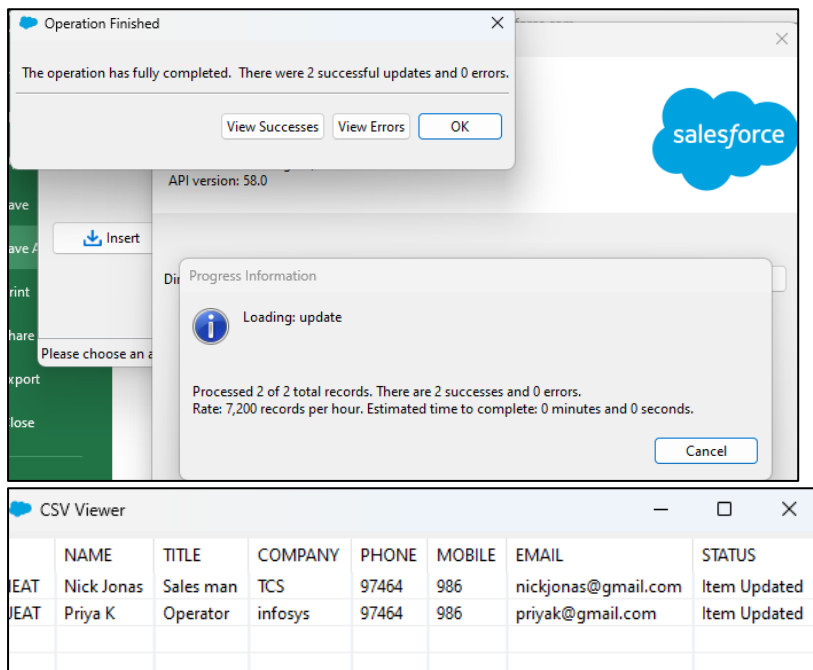
Click on View extract and download external file

- a. Use Data Loader to update the records you have exported in the previous step, filling in site information for the companies on the list to allow the sales team to identify those firms by their regions

Ans-Data Loader> Update>



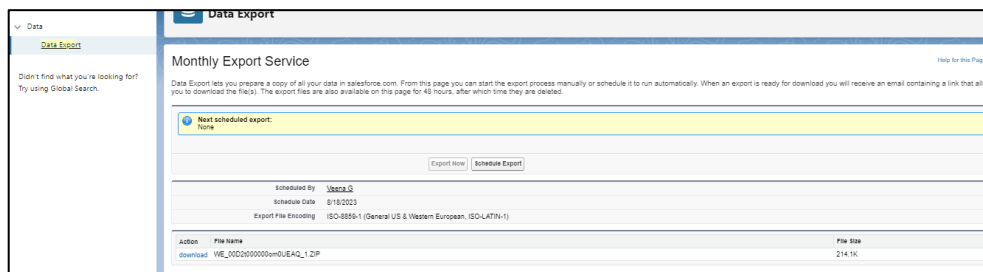
Leads Updated-



3. Use Data Export Services of Salesforce to export your organizations' data

Ans- Setup> Data> Data Export

Click on Export Now And after some time via email a link will be provide to extract whole find and download it from same data export page as below-



File will be download-

