# 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.
   Open the file in Excel.
   Check for blanks and misspellings.
   Make sure column headers match existing Salesforce values.
   Apply consistent standards for data formats.
   Save it as a CSV file.

**Time:**

10 minutes

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**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 Me tab below your user photo 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 **More Actions** link.
   E. Choose `Download xlxs.`
   F. Select the `Save File` radio button and save it to your desktop with the same name.
   G. Click **OK.**

   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.
   D. Click **Open.**

   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`).

   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 Wizard**

**Goal:**

Import a batch of tradeshow leads for the Marketing team.

**Tasks:**

1. Start the Lead Import wizard.
   Set the import parameters.
   Import the file.
   Check the Leads tab for new leads.

**Time:**

5 minutes

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**Instructions:**

1. Start the Lead Import wizard.
   A. Click ***Your Name* | Setup | Data Management | Import Leads.**
   B. Click **Start the Import Wizard.**

   Set the import parameters

   A. In step 5 of the wizard, click **Browse** and open the `Module6 Lead Import.csv` file.
      i. **Assign all new leads to this lead source:** `Trade Show`
      ii. **Matching Type:** `Name`
      iii. **Choose Record Type:** `Tradeshow Lead`
   B. Click **Next.**
   C. Check the field mapping and make the following corrections.
      i. **Full Name:** `--none selected--`
      ii. **First Name:** `First_Name (col 0)`
      iii. **Last Name:** `Last_Name (col 1)`
      iv. **Postal Code:** `Postal_Code (col 11)`
   D. Click **Next.**

   Import the lead file.

   A. Click **Import Now!**
   B. Click **Finish**.

   Check the Leads tab for new leads.

   A. Click the Leads tab.
   B. From the **View** picklist, choose **`All Open Leads`** and click **Go!**
   C. Click the **Created Date** heading column to sort the leads newest to oldest.
   D. 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).
    Log the data loader into the correct org.
    Change the default save location and file name for the export file.
    Create the SOQL query, to extract the ID field and account name where **Industry** equals `Technology.`
    Export the extracted records to a CSV file and view in Excel.
    Sort the account name column A–Z and save the file.

**Time:**

10 minutes

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**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 ***Your Name* | Setup | Data Management | Data Loader.**
    B. Click **Download the Data Loader.**
    C. Click **Save File.**
    D. Double-click on `ApexDataLoader.exe` to execute it.
    E. Click **OK** at the security warning.
    F. Click **Run.**
    G. Follow the instructions in the Windows Install Shield Wizard.
    H. Click **Next.**
    I. Select the `I accept the terms in the license agreement` radio button.
    J. Click **Next.**
    K. Accept the default folder location and click **Next.**
    L. Click **Install.**
    M. Click **Finish.**

    Log the data loader into the correct org.

    A. Click **Start | All Programs | salesforce.com | Apex Data Loader *xx.x* | Apex Data Loader *xx.x*** (Note: *xx.x* refers to the version number. If more than one version is listed, select the most recent.)
    B. Click **Export.**
    C. Enter the login credentials provided to you at the start of class:
        i. **Username:** `admin@aw####.com`
        ii. **Password:** `password1`
    D. Click **Log In**. If you see a success message, jump to step F.

E. 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* | Setup | My Personal Information | 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.**

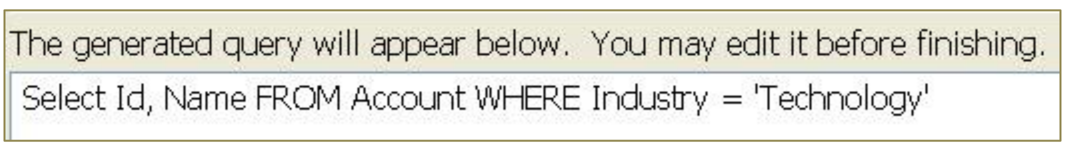
F. Once verified, click **Next.**

   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.**

   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.**

   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.

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

A. Click in 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

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**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 **My Chatter** filter.
   C. Scroll down to Yuko's post containing the Region and Zone file.
   D. Click the **More Actions** link.
   E. Choose `Download xlxs.`
   F. Select the **Save File** radio button and save it to your desktop with the same name.
   G. Click **OK.**

   Copy and paste the **ID** column from the export file into Yuko's file.
   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.**

   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 `Yukos File.`
   Save the success and error files to your desktop.
   Review the success and error files.
   Create a list view to check the import.

**Time:**

5 minutes

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**Instructions:**

1. Perform an update in the data loader using `Yukos 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.**

   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.

   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.**

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.

   i. `Industry`
   ii. `Region`
   iii. `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: Mass Transfer Records, Deactivate a User**

**Goal:**

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

**Tasks:**

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

**Time:**

10 minutes

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**Instructions:**

1. Access Mass Transfer Accounts.

   A. Click ***Your Name* | Setup | Data Management | Mass Transfer Records.**
   B. Click **Transfer Accounts.**

   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:** (selected)
      ii. `Billing State/Province equals 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.**

   Deactivate Phil Smith's user record.

   A. Click ***Your Name* | 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. In the user deactivation screen, select all three options:

      i. `Remove user from account teams.`
      ii. `Remove user from predefined case teams.`

iii. `Remove user from ad hoc case teams.`

G. Click **Save.**

## 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.
   Set export parameters.
   Schedule an export every Sunday for the next month.

**Time:**

5 minutes

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**Instructions:**

1. Access Data Export.
   A. Click ***Your Name* | Setup | Data Management | Data Export.**
   B. Click **Schedule Export.**

   Set export parameters.

   A. **Export File Encoding:** `ISO-8859-1` (the default encoding)
   B. **Include images, documents and other attachments:** (deselected)
   C. **Replace carriage returns with spaces:** (selected)

   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.
   Search for leads that meet specific criteria.
   Mark and delete all matching leads.

**Time:**

5 minutes

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**Instructions:**

1. Access Mass Delete Leads.
   A. Click ***Your Name* | Setup | Data Management | Mass Delete Records.**
   B. Click **Mass Delete Leads.**

   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.**

   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.

## Module 6 Review

Which users have access to import wizards?

> Users need to “Import Personal Contacts” perm to use the Personal Accounts/Contact wizard. (Standard User profile)
>
> Users need “Import Leads” perm to use the Leads wizard (Marketing User checkbox on the User record and/or the Import Leads perm on the profile – Marketing User profile)

Describe the benefits of the import wizards.

> Data can be imported from any CSV file.
>
> You can choose whether or not to trigger workflow with the import.
>
> Match on Name, Email or Salesforce ID to prevent duplicate records.

List the benefits of the data loader.

> Import large files (50,000 or greater.)
>
> Load objects such as products or opportunities
>
> Save field mappings for later use.
>
> Update, upsert, export or delete data.

Can a bad import be undone?

> Yes – using mass delete records.

Can user records be deleted? If yes, describe the implications. If not, why?

> User records cannot be deleted.

List three ways to back up data.

> Reports, scheduled backup service, manual backup

What can you do with users’ records when they leave the company?

> Closed records such as opportunities and cases can be left assigned to their respective users, while open records can be transferred to new owners using the mass transfer tool.