



# Loading Data in Salesforce: Data Wizard and Data Loader

January 6<sup>th</sup>, 2025

# Loading Data in Salesforce

Data Wizard and Data Loader



# This training will help you answer the following questions:

- How important is Data Cleansing?
- Are there Data Standardization rules we should be aware of?
- Who decides the data requirements and standards?
- How do we resolve instances of duplication should one occur?
- What is Data Wizard? What is Data Loader? Which do I use and when?
- Who do I talk to if things don't go as planned?



# Part 1: Preparing Data For Loading to Salesforce



# Clean Data Starts with Data Governance!

## The role of Data Governance in a Coordinated Model



### Salesforce is a Shared Database so Data Governance is Key!

- Sets required fields for shared data like Accounts and Contacts
- Recommends naming conventions and validation rules for standardization
- Defines global picklist options
- Defines rules for identifying duplicate records
- Creates shared processes around how data is created, updated, used, and deactivated
- Identifies what data should live in what technology

### Ask Questions

- What requirements are there for my data?
- What Best Practices have been set up for me to follow?
- Do new picklist values need to be approved before import?
- Is Salesforce the best place for this data?

# Keeping Your Salesforce Data Clean:

## Data Governance Best Practices to Prevent Bad Data



- Understand required data to create a record
- Utilize Data Validation rules
- Match existing data to Uniform Picklist Values
- Use Lookup fields for Reference Data
- Avoid text fields where possible
- Proper use of formula fields
- Understand Record types and page layouts
- Use External Identifiers if needed
- Use Automations

# Data Cleaning Before Import

What should we look out for?



## Clean your data before importing into Salesforce

- Check your requirements: Each Salesforce object has a set of required fields to ensure data integrity
- Cross Reference: Verify if records in your data file already exist in Salesforce
- De-Duplicate: Remove duplicate records from the file
- Misprints & Misspells: Correct spelling and punctuation errors
- Standardize: Enforce naming conventions
- Completeness: Fill in incomplete records



### Tips for Cleaning Data:

Save the original data file as a copy to work on

## Common Data-Related Errors in Salesforce



Duplicate Records



Misprints & Misspells



Errors with Phone Numbers & Addresses



Typos Caused by Data Migration



Missing or Inconsistent Values



Outdated & Unused Fields

# Data Cleaning and Prepare Data Before Import

It's as easy as 1, 2, 3.....



## 1 Format First

- Always use the most current import template
- Apply naming conventions
- Locate blanks & incomplete records
- Ensure all required fields have data
- Use only approved picklist values
- Use external identifiers
- Always use a .CSV file format

## 2 Standardize Process

- Assign ownership of records using Salesforce ID
- Add a column for the parent record for related object
- Include the SF Id for corresponding objects
- Upload following correct order of operations
- Upload new Contacts first, then use the new Contact ID to upload additional Account Relationships

## 3 Validate Data

- Search to see if there are duplicates within your file
- Do a comparison of what is in Salesforce to avoid duplication
- Update the data if a record is found, don't import new
- Get a 2nd pair of eyes to review file before import



**TIP:** Use Tools below for Data Cleaning



**TIP:** Data Templates are available on the Salesforce Support Portal



Sort and Filter  
Vlookup



# Current Duplication Rules

## Accounts and Contacts



**Salesforce currently includes some rules for duplicate detection on upload, they are designed to provide a "failed" file to be reviewed instead of uploading the suspected data.**

- Rules for each imported data set may be slightly different depending on the business and data source. Consult your Project Team, Supervisor, and/or Salesforce Support for possible data idiosyncrasies.
- De-Duplication of Data should always be done before an upload attempt
- While we are mostly focusing on Accounts and Contacts today, this idea persists with other Salesforce objects
- Reminder to Check for Existing Accounts/Contacts using their uniqueness criteria
- Our Salesforce environment is unique to IPRO, so our rules might be slightly unique as well

# Data Management: Salesforce Data Prioritization

## Salesforce Order of Operations



All Salesforce records are assigned a unique ID when the record is created, below is the order of operations for creating new records using provided data templates:

1. Data Load Accounts and get the Account ID assigned to each Account
2. Add the Account ID to each Contact that should have a Direct association with the account to the Contact Data Load template and load the Contacts
3. Get the Contact ID and all Account IDs for each contact that have both Direct and Indirect Account relationships, populate the Account-Contact Relationship template using those IDs and assign departmental Contact Roles for each association, then load the ACR into Salesforce.

### Tips for Account and Contact Data Best Practices:



- An Account must exist in Salesforce before Contacts can be associated with the Account.
- Before adding roles to a Contact, the Contact must already exist inside of Salesforce.
- The Account that is listed in the Contact Record is what Salesforce calls the direct relationship. This is the Primary Account for the Contact. A contact can have only ONE direct account relationship.
- Any additional Account that a Contact is associated with, known as the Account-Contact Relationship, is considered an Indirect Relationship. A Contact can have many Indirect Account-Contact Relationships

# Account Contact Relationship



## How to upload the right way: Who/What/Where/How Many

Your Account Contact Relationship file will contain all the important ways to categorize your Contact, their Role(s), and affiliations.

- **WHO:** Identify the Person using the Contact Name and the Salesforce Generated Contact ID
- **WHAT:** Provide a Contact Role that the person fulfills for your department
- **WHERE:** Use the Account Name and Salesforce generated Account ID to identify where is the Relationship
- **HOW MANY:** Each Contact can have multiple Account Relationships, so you need to identify if the Account and Role are for the Direct (Primary) or Indirect (other associated) account

AccountId	Account Name	ContactId	Contact Name	IsDirect	ExternalID__c	IsActive	HQICTitles__c	X13th_SOW_Roles__c
0014x00001rizVZAAY	Corina Testing Account LLC	0034x00001gF0cvAAC	Corina Downey-Konkus	TRUE		TRUE		Administrator;Compliance
0017y00000PUJLOAAS	Task 3 Production Testing Account	0034x00001gF0cvAAC	Corina Downey-Konkus	FALSE		TRUE		Administrator

# Final Preparation Checks

Ask yourself these questions before you import data



- Do you have any External Identifiers?
- Do you need to use the External Identifiers to integrate with other systems?
- Do new picklist values need to be created in Salesforce before import?
- Did you confirm the record does not exist?
- Do you have all required fields completed?
- Are you Creating New or Updating?
- Do other departments need to review the update?



**Keep the data clean in Salesforce, the journey starts before any data imports**

# Data Wizard Vs. Data Loader

## Selecting the right tool for the right job



While Salesforce Users may create records manually, select Data Pros can utilize one of two Salesforce tools to upload large amounts of data.

### Data Wizard

- Data Wizard is the default tool being used by all Data Pros
- Used for uploading Accounts, Contacts, Payments, and future custom objects; No access to upload Salesforce Cases or Account/Contact Relationship
- Narrow permissions clearance
- Does not allow for deletion of existing records
- Has less potential to overwrite existing data and eliminate previous rows from the systems

### Data Loader

- Access to Data Loader is Limited to select Data Pros.
- Ability to upload to all Objects, including standard objects like Cases and IPRO Custom Objects
- Robust permissions clearance
- Allows for deletion and overwrite of existing records
- Existing data can be overwritten or eliminated from the system using this tool

# Part 2: Uploading Using Data Wizard



# Data Wizard

Select the environment you are working in



If you are loading data to support user acceptance testing for a new build

Click the “Launch Wizard” button on that landing page

If you are performing ongoing data refreshes for an existing project

User Acceptance Testing

<https://ipro3--uat.sandbox.lightning.force.com/lightning/setup/DataManagementDataImporter/home>

Production

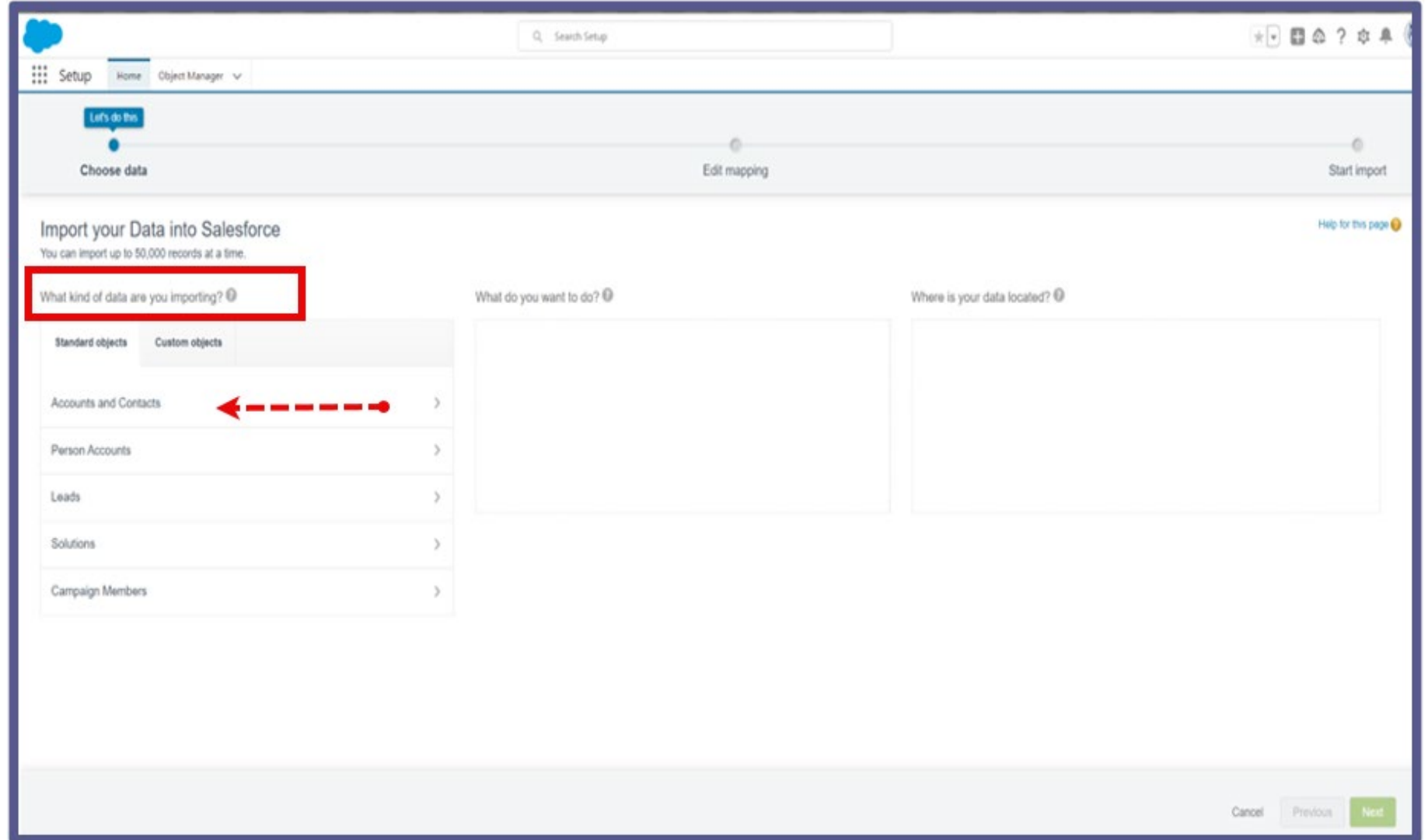
<https://ipro3.lightning.force.com/lightning/setup/DataManagementDataImporter/home>

# Data Wizard Import

What kind of data are you importing?

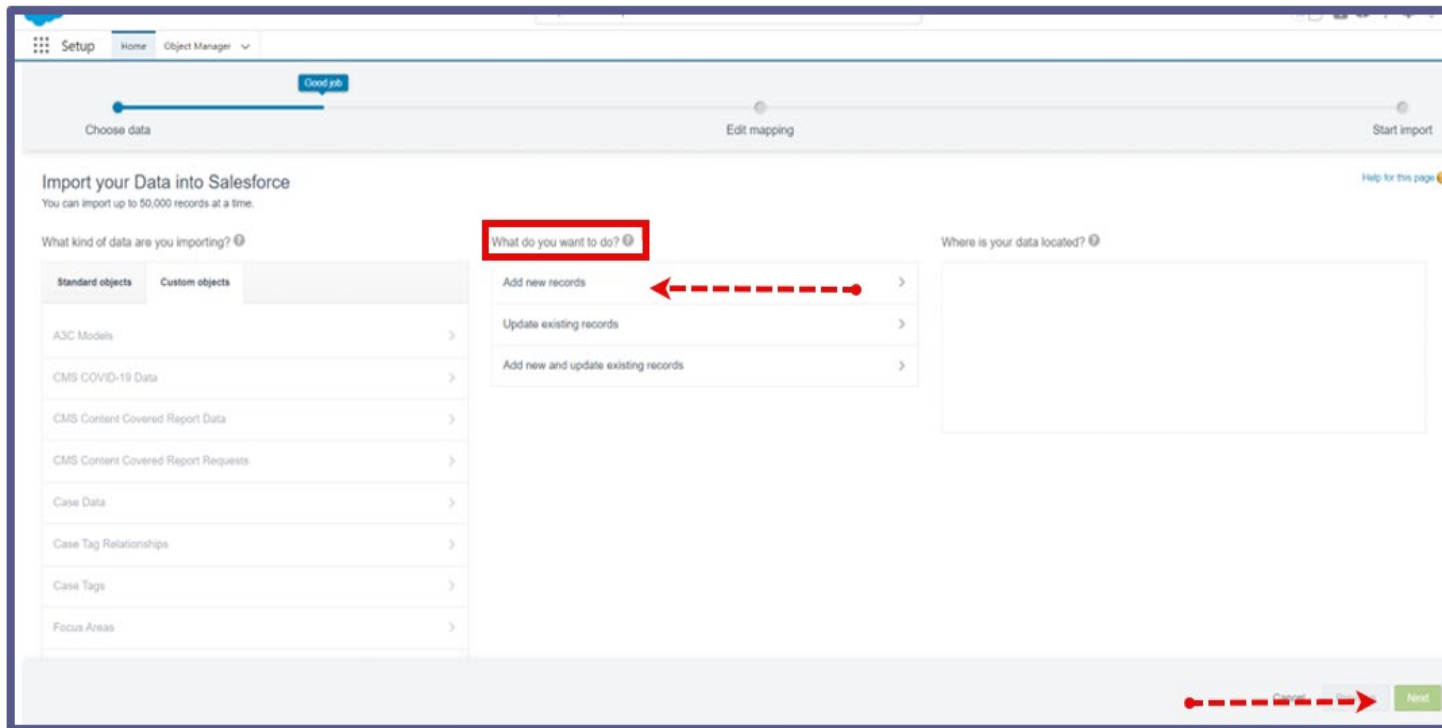


- Select the kind of data you will be importing.
- For this example, click on “Accounts and Contacts” and click Next.



# Data Wizard

What do you want to do with the data?



- In the “What do you want to do?” section, select one of the following:
  - Add new records
  - Update existing records
  - Add new and update existing records



**Tip:** Add new records is typically used when you are initially loading new data. Add new and update existing records is a best practice to use when you are refreshing data for an existing business area

# What do you want to do with the data?

## Adding New Records



- In the “match by” drop down, select “Name” (Note: this selection will allow the wizard to check for potential duplicate rows)
- For Record Owners Select “Salesforce.com ID” to relate records on creation, otherwise select “None”. A selection of None will default to you
- Finally, click on the Checkbox for “Trigger workflow”

The screenshot shows a wizard interface titled "What do you want to do?". It has three main sections:

- Add new records**: This section is highlighted with a green checkmark. It contains a "Match by:" dropdown menu with options "--None--", "Name", and "Salesforce.com ID". A red dashed arrow labeled "1" points to the "Name" option.
- Which Case field in your file do you want to match against to set the Case lookup field?**: This section has a dropdown menu with "Salesforce.com ID" selected. A red box highlights this dropdown, and a red number "2" is next to it.
- Trigger workflow rules and processes?**: This section has a checked checkbox labeled "Trigger workflow rules and processes for new and updated records". A red dashed arrow labeled "3" points to this checkbox.

At the bottom of the wizard, there are two options with right-pointing chevrons: "Update existing records" and "Add new and update existing records".

# What do you want to do with the data?

## Updating existing records



- When Updating existing records for an object, "Match by" will have a new value available: "Salesforce.com ID"
- "Name" maybe selected when selecting the "Match By" criteria.

A screenshot of a Salesforce configuration page for updating records. The page has a light blue background. At the top, there are two tabs: "Add new records" (with a right arrow) and "Update existing records" (with a green checkmark). Below the tabs, there is a "Match by:" label with a help icon. A dropdown menu is open, showing three options: "Name" (highlighted with a red box), "Name", and "Salesforce.com ID". A red dashed arrow points from the "Name" option in the dropdown to the "Match by:" label. Below the dropdown, there is a question: "Does your file designate record owners?" with a help icon. Further down, there is another question: "Which Case field in your file do you want to match against to set the Case lookup field?" with a help icon, and a dropdown menu showing "--None--". At the bottom, there is a section titled "Trigger workflow rules and processes?" with a help icon, and a checked checkbox labeled "Trigger workflow rules and processes for new and updated records".

# What do you want to do with the data?

## Adding new and update existing records



- When utilizing the add new and update existing records, also known as “Upsert” function, continue to select the “Salesforce.com ID”

**Note:** In the source file for the record Id, rows that need to be ‘inserted’ would have NULL values in the ID column, and rows that need to be “updated” would have Salesforce.com Ids in the column.

A screenshot of the Salesforce 'What do you want to do?' configuration screen. The screen is titled 'What do you want to do?' with a help icon. It features three main options: 'Add new records', 'Update existing records', and 'Add new and update existing records'. The third option is selected and highlighted in light blue, with a green checkmark on the right. Below these options, there are three dropdown menus, each with a red box around it. The first dropdown is labeled 'Match by:' and is set to 'Salesforce.com ID'. The second dropdown is labeled 'Which User field in your file designates record owners?' and is also set to 'Salesforce.com ID'. The third dropdown is labeled 'Which Case field in your file do you want to match against to set the Case lookup field?' and is set to 'Salesforce.com ID'. At the bottom, there is a checkbox labeled 'Trigger workflow rules and processes?' which is checked.

# Where is your data located?

## File Selection



- There are two ways to upload a file, either Drag and Drop your '.csv' file in the appropriate section or, click on the "Choose File" option to select the proper file from your computer
- "Character code" and "Values Separated By" should default to the correct selections

Where is your data located? ?

Drag CSV file here to upload

CSV

File

Choose File payment restore 9.30.2.csv

Character Code ?

ISO-8859-1 (General US & Western European, ISO-LATIN-1) ▼

Values Separated By

Comma ▼

OR

✓

# Where is your data located?

## File Mapping



The below landing page now displays the .csv column headers and buttons for the Salesforce mapping

The screenshot shows the 'Edit Field Mapping: Payments' page in Salesforce. A progress bar at the top indicates the current step is 'Edit mapping', with 'Choose data' and 'Start import' as previous and next steps respectively. A red box highlights the 'Mapped Salesforce Object' column header in the table below.

Edit	Mapped Salesforce Object	CSV Header	Example	Example	Example
Map	Unmapped @	CASE_ID__C	5004x0000YRqrZAA	5007y0000TQV16AA	5007y0000TQxa1AAD
Map	Unmapped @	IDRD__C	198005	500000	500197
Map	Unmapped @	IPADMINFEERECEIVED__C			
Map	Unmapped @	IPENTITYFEERECEIVED__C			
Map	Unmapped @	IPPAYMENTRECEIVEDDATE__C			
Map	Unmapped @	NPADMINFEERECEIVED__C			
Map	Unmapped @	NPENTITYFEERECEIVED__C			
Map	Unmapped @	NPAYMENTRECEIVEDDATE__C			
Map	Unmapped @	AMOUNT_DUE_TO_GMS_IDR__C			
Map	Unmapped @	DATEADMINFEERPAIDTOGMS__C			
Map	Unmapped @	DATEFEERETURNEDTOPREVALINGPARTY__C			
Map	Unmapped @	DATEFEESANDOFFERSREQUESTED__C			

At the bottom right, there are 'Cancel', 'Previous', and 'Next' buttons.

# Where is your data located?

## File Mapping



- In the “Edit Field Mapping” page, select the field you would like to map
- Map your field in exhibit 2
- Click on “Map” to complete the process

The screenshot shows the 'Edit Field Mapping: Payments' interface. A table lists various CSV headers and their corresponding Salesforce objects. The row for 'IPPAYMENTRECEIVEDDATE\_\_C' is highlighted in red. A 'Select field' dialog is open, showing a list of fields with 'IP Payment Received Date' selected. A red arrow labeled '1' points to the 'Map' button in this dialog. A second dialog, 'Map your field: IPPAYMENTRECEIVEDDATE\_\_C', is also open, showing a list of fields with 'IP Payment Received Date' selected. A red arrow labeled '2' points to the 'Map' button in this dialog. A third red arrow labeled '3' points to the 'Map' button in the second dialog.

Edit	Mapped Salesforce Object	CSV Header
Map	Unmapped	CASE_ID__C
Map	Unmapped	IDRID__C
Change	IP Admin Fee Received	IPADMINFEERECEIVED__C
Change	IP Entry Fee Received	IPENTITTYFEERECEIVED__C
Map	Unmapped	IPPAYMENTRECEIVEDDATE__C
Map	Unmapped	NIPADMINFEERECEIVED__C
Map	Unmapped	NIPENTITTYFEERECEIVED__C
Map	Unmapped	NIPPAYMENTRECEIVEDDATE__C
Map	Unmapped	AMOUNT_DUE_TO_CMS_IDR__C
Map	Unmapped	DATEADMINFEEPAIDTOCMS__C
Map	Unmapped	DATEFEERETURNEDTOPREVAILINGPARTY__C
Map	Unmapped	DATEFEESANDOFFERSREQUESTED__C

# Where is your data located?

## File Mapping



Completing “Mapping” for every Column or field that is needed for your business unit.

Fields not used by your business unit are not required.

The screenshot displays the IPRO File Mapping interface. At the top, there is a navigation bar with 'Setup', 'Home', and 'Object Manager'. A progress indicator shows 'Almost done' with a blue dot. Below the navigation bar, there are three main sections: 'Choose data', 'Edit mapping', and 'Start import'. The 'Choose data' section contains a table with the following rows:

Change	Field Name	System Code
Change	IP Entity Fee Received	IPENTITYFEERECEIVED__C
Change	IP Payment Received Date	IPPAYMENTRECEIVEDDATE__C
Change	NIP Admin Fee Received	NIPADMINFEERECEIVED__C
Change	NIP Entity Fee Received	NIPENTITYFEERECEIVED__C
Change	NIP Payment Received Date	NIPPAYMENTRECEIVEDDATE__C
Map	Unmapped @	AMOUNT_DUE_TO_CMS_IDR__C
Change	Date Admin Fee Paid to CMS	DATEADMINFEEPAIDTOCMS__C
Change	Date Fee Returned to Prevailing Party	DATEFEERETURNEDTOPREVAILINGPARTY__C
Change	Date Fees and Offers Requested	DATEFEESANDOFFERSREQUESTED__C
Change	Expected Admin Fee Amount	EXPECTED_ADMIN_FEE_AMOUNT__C
Change	Expected Entity Fee Amount	EXPECTED_ENTITY_FEE_AMOUNT__C
Map	Unmapped @	EXPECTED_ENTITY_FEE_AMOUNT_F__C
Change	Offers/Payments Due Date	OFFERSPAYMENTSDUEDATE__C
Change	Refund	REFUND__C
Change	Revenue	REVENUE__C

At the bottom right of the interface, there are three buttons: 'Cancel', 'Previous', and 'Next'.

# Where is your data located?

## File Mapping



- Upon completing mapping, the displayed summary screen summarizes your:
  - Object selections
  - Mapped Fields
  - Unmapped Fields
- Click on “Start Import”



**Tip:** Review the mapped vs unmapped fields. Confirm the number of mapped fields matches the number of fields imported for your business area. If there is a difference investigate the reason.

Setup Home Object Manager

Choose data Edit mapping Start import

Review & Start Import

Review your import information and click Start Import.

Your selections: 1

Your import will include: 2

Your import will not include: 3

Cancel Previous Start Import

# Bulk Data Load Jobs

## Viewing the results



- Under “Batches” Click on “View Request” to view a copy of the import file you’ve selected
- Click on “View Results” to view .csv file that contains the IDs for the newly inserted records, Status of the import and Error messages (if errors).



**Bulk Data Load Job Detail**

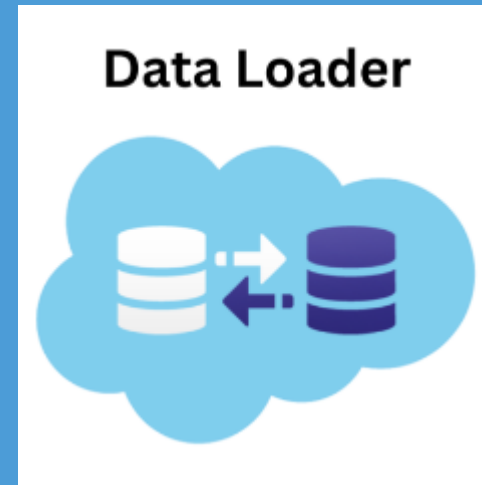
Job ID	750bf000002QBoM	Job Type	Bulk V1	Status	Closed
Submitted By	NICHOLE BAIRD	Operation	Insert	Total Processing Time (min)	2068
Start Time	10/2/2024, 4:07 PM EST	Queued Batches	0	API Active Processing Time (min)	1653
End Time	10/2/2024, 4:07 PM EST	In Progress Batches	0	Apex Processing Time (min)	781
Time to Complete (min)	00:04	Completed Batches	1	Failed Batches	0
Object	Payment	Progress	100%	Records Processed	44
External ID Field		Records Failed	0	Retries	0
Content Type	CSV				
Concurrency Mode	Parallel				
API Version	61.0				

**Batches**

	Batch ID	Start Time	End Time	Total Processing Time (min)	API Active Processing Time (min)	Apex Processing Time (min)	Records Processed	Records Failed	Retry Count	State Message	Status
<a href="#">View Request</a>	<a href="#">View Result</a>	750bf000002QBoM	10/2/2024, 4:07 PM	10/2/2024, 4:07 PM	2068	1653	781	44	0	0	Completed

- If you have error messages, review and fix the errors
- Re-upload the file
- Additional error messages may be shown after additional import, review and fix the errors
- Re-upload the file
- Continue this cycle until your upload is error free

# Part 3: Uploading Using Data Loader



# Data Loader

A More Powerful Tool, With More Risk



## Uploading Data to All Objects

- Intended for High Complexity situations and users with specific needs and significant data experience
- File Field Mappings Need to be one to one with intended fields

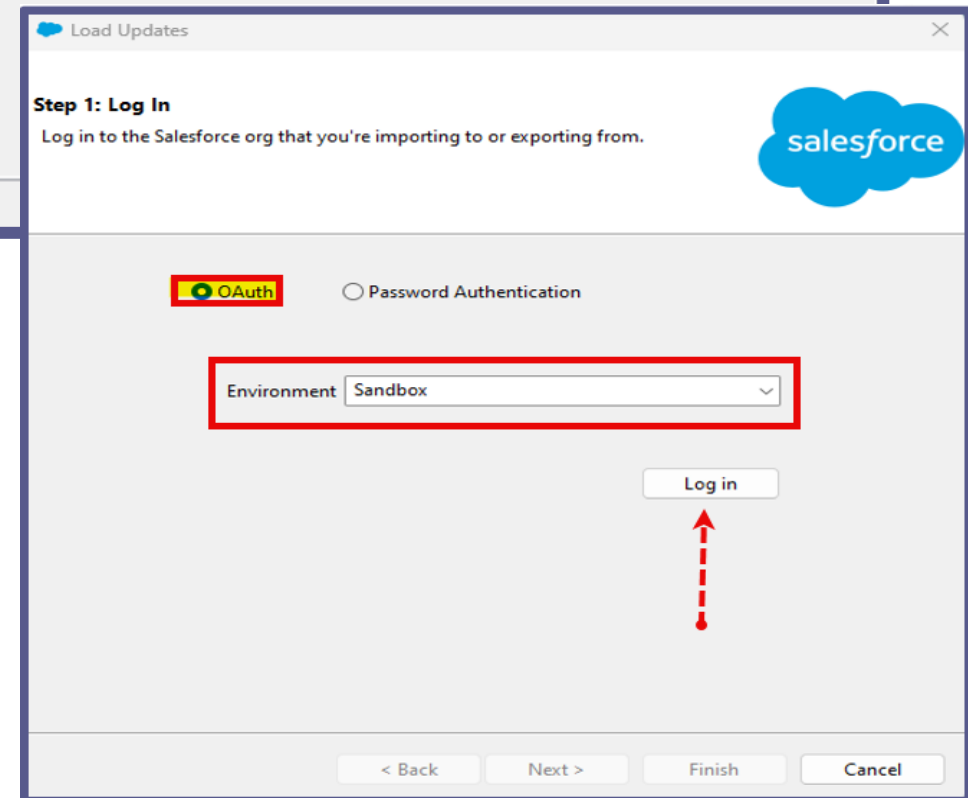
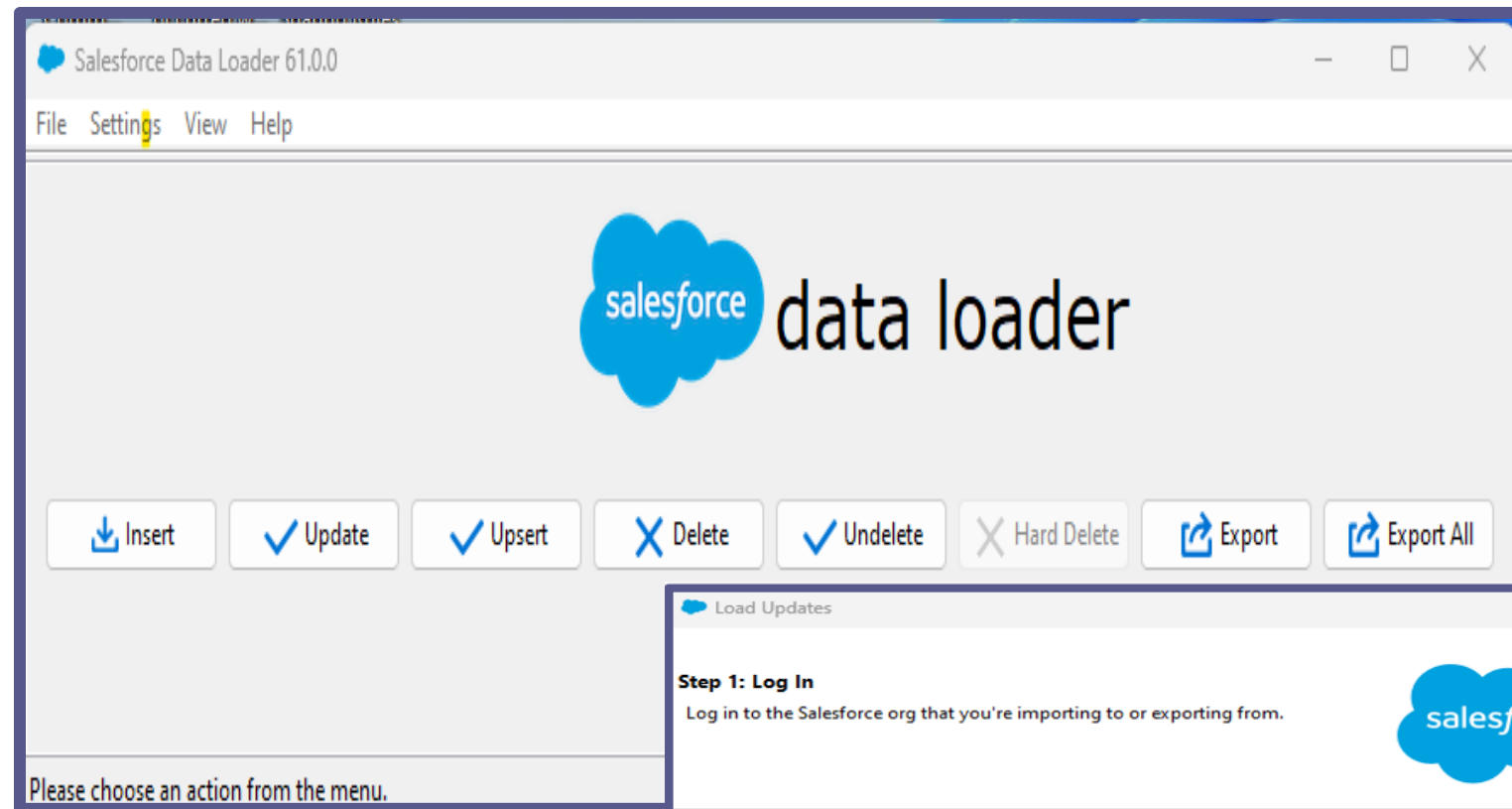


- Has the potential to overwrite existing data and eliminate previous rows from the systems
- Passing rows get created as overwrites, failure rows are output to a file for review
- Edit the failing rows and reupload. If failure persists, work with SF admin

# Data Loader

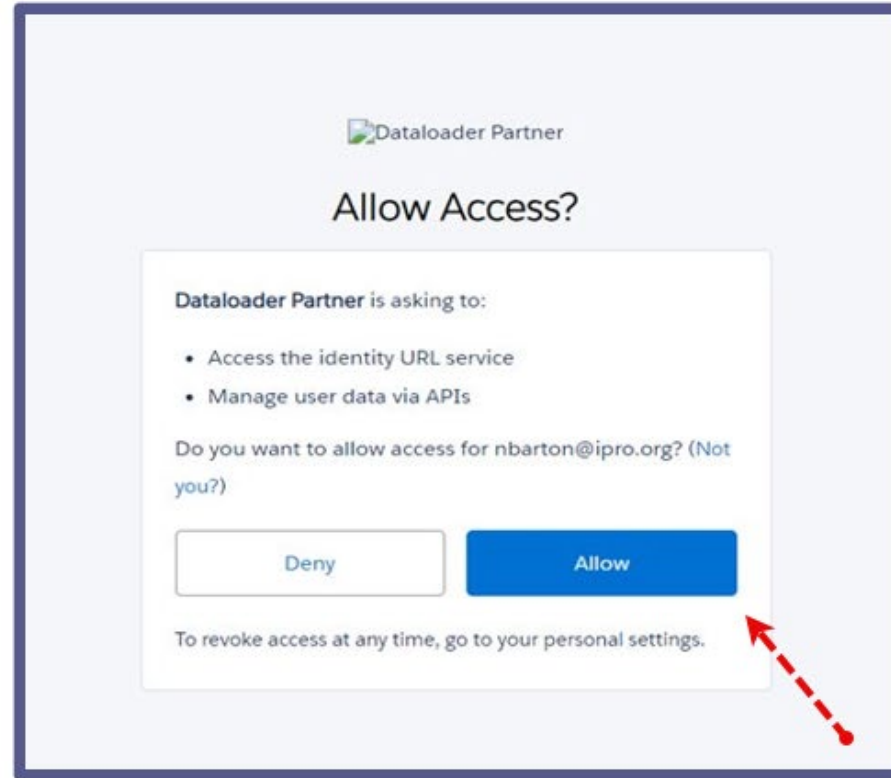
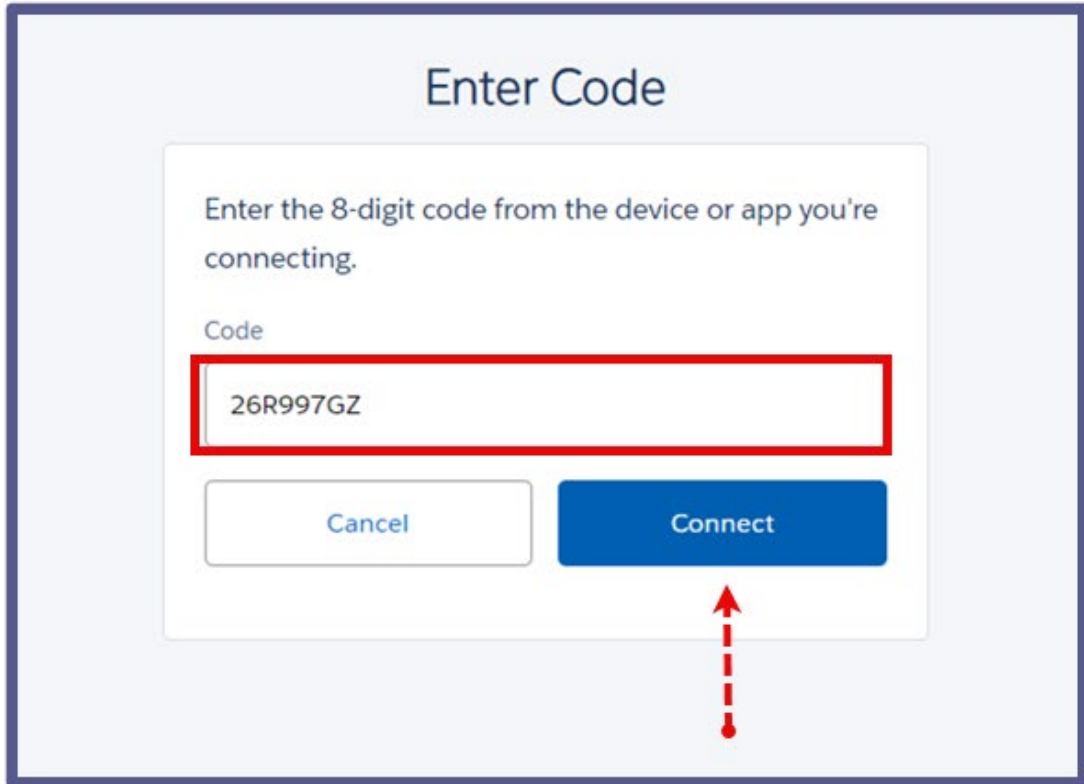
## Getting Started

- The Data Loader Tool Interface will present you with loading 'actions' to select
- After selecting an action, you will be prompted to 'Login' to the Salesforce environment
- Select the 'OAuth' Log in Setting
- Select your environment that you need for the data load, this could be a Sandbox or Production environment.
- Click the 'Log in' button.



# Data Loader

## Getting Started



- A new browser window prompt to log into salesforce appears (This requires IPRO's standard 2-factor login for Salesforce with your Microsoft credentials).
- Enter your credentials. You will be prompted to connect by entering a code. The Code will autogenerate. Click “Connect” and then “Allow”

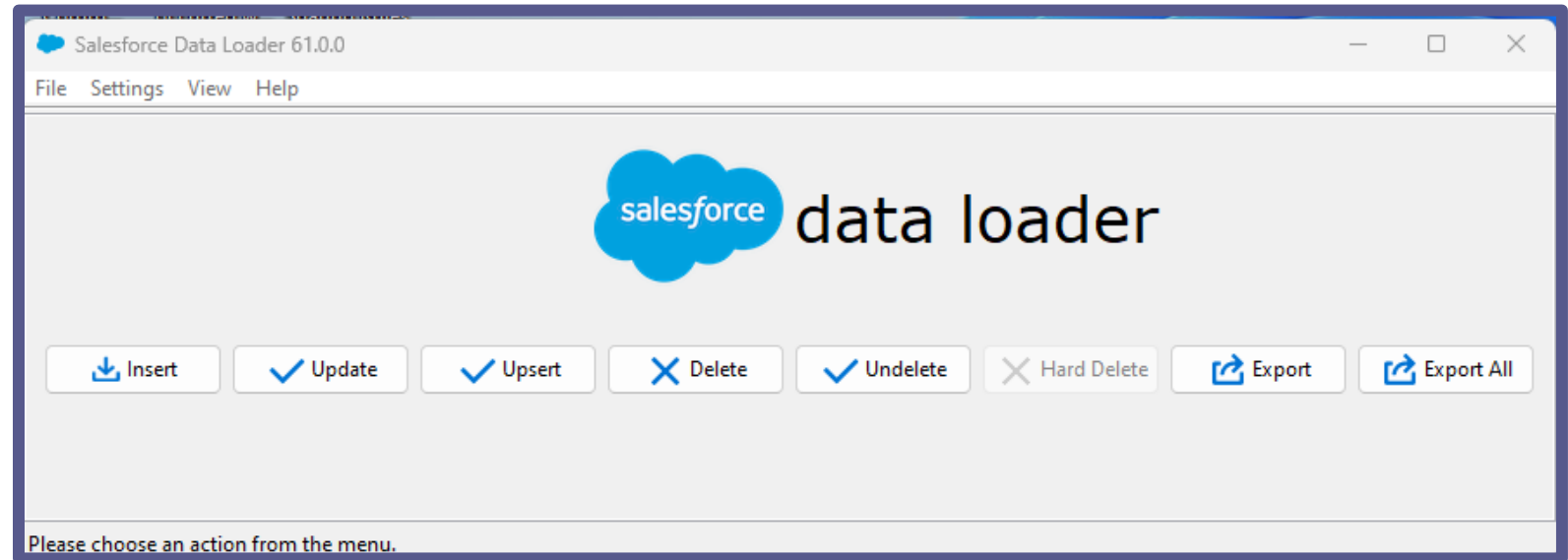
# Data Loader

## Insert, Update, Upsert or Delete Actions



When Data Loader is fully connected to your environment, you will need to select the action you want to take to start the loading process:

- Insert – Adds new data
- Update – Updates existing data
- Upsert - Updates existing data and adds new data
- Delete action - **DO NOT USE THIS!** Deleted data cannot be recovered. If you need to delete data, discuss it with your Salesforce team **FIRST!**



# Data Loader

## Select the Salesforce Object to Modify



Load Updates

**Step 2: Select Salesforce object**

Import batch size: 200 Start at row: 0  
Current API usage for the org: 30,993  
API Limit for the org: 1,330,000

Select Salesforce object to import:

payment

- Payment (Payment\_c)
- Payment Account (VisualAntidote\_Payment\_Account\_c)
- Payment Currency (VisualAntidote\_Payment\_Currency\_c)
- Payment Field (VisualAntidote\_Payment\_Field\_c)
- Payment Old (PaymentOld\_c)

Show all Salesforce objects

Import from (CSV file): >RDupPayments\_09232024(Update).csv **Browse...**

< Back Next > Finish Cancel

- You will be prompted to select your Salesforce Object (Data Table) that you would like to modify.
- Use the Search box to find the correct Object.
- Use the 'Browse' button to select your .csv file for the Data Load process.



**Tip:** Data Loader accepts '.csv' files only\*\*

# Data Loader

## Load Updates



Load Updates

**Step 2b: (Optional) relate using lookup field**

Relationships of Payment\_c are listed below.  
Select a related object and its lookup field if the CSV refers to the related object using the selected lookup field.

Relationship	Related Object	Lookup Field of Related Object
Case_r	Case	<Not selected>
Owner	Group	<Not selected>

**Next >**

- After Loading your file, you will be prompted with an Optional Step.
- Click “Next” to Skip this ‘Optional’ step for relating objects, as it is not needed at this time.

# Data Loader

## A More Powerful Tool, With More Risk



### Uploading Data to All Objects

File Field Mappings should be specific one to one with intended fields

	A	B	C	D		A	B	C
1	Account Name	Account Site			1	Id	Name	Site
2	Burlington Textiles Corp of America	US-East			2	0013t00001YG11eAAD	Burlington Textiles Corp of America	
3	Dickenson plc	US-Midwest			3	0013t00001YG11gAAD	Dickenson plc	
4	Edge Communications	US-South			4	0013t00001YG11dAAD	Edge Communications	
5	Express Logistics and Transport	US-West			5	0013t00001YG11jAAD	Express Logistics and Transport	
6	GenePoint	US-West			6	0013t00001YG11nAAD	GenePoint	
7	Grand Hotels & Resorts Ltd	US-Midwest			7	0013t00001YG11hAAD	Grand Hotels & Resorts Ltd	
8	Pyramid Construction Inc.	EMEA			8	0013t00001YG11fAAD	Pyramid Construction Inc.	
9	United Oil & Gas Corp.	US-East			9	0013t00001YG11iAAD	United Oil & Gas Corp.	
10	United Oil & Gas, Singapore	APAC			10	0013t00001YG11mAAD	United Oil & Gas, Singapore	
11	United Oil & Gas, UK	EMEA			11	0013t00001YG11iAAD	United Oil & Gas, UK	
12	University of Arizona	US-West			12	0013t00001YG11kAAD	University of Arizona	
13					13			

- In this example, the exhibit on the left displays the business file "Account Site", and on the right-hand side exhibit, Data Loader would use "site".



**Tip:** Column headers matter when mapping. Mapping Null values in data loader will overwrite Data in the system

# Data Loader

## Creating a Data Map



For first time users, create a Data Map by mapping your Column Headers in your .csv file to the Salesforce Object

- Data Maps can be saved for future use for recurring data loader work.
- Select “Create or Edit a Map” to Save your new Map.
- These Data Map Files are known as ‘.sdl’ files or ‘Salesforce Data Load’ file.
- Reuse these .sdl files by clicking ‘Choose an Existing Map’

The screenshot shows two windows from the Salesforce Data Loader. The 'Mapping Dialog' window on the left is titled 'Match the Salesforce object fields to your CSV column headers.' It features a search bar, a 'Clear Mapping' button, and an 'Auto-Match Fields to Columns' button. Below these are two tables. The top table lists CSV Column Headers and their corresponding Salesforce Object Field Names. The bottom table shows the mapping process, with a red dashed arrow pointing to the 'Field Name/Relationship' column. The 'Load Updates' window on the right is titled 'Step 3: Mapping' and displays 'Import batch size: 200', 'Start at row: 0', 'Current API usage for the org: 30,999', and 'API Limit for the org: 1,330,000'. It has a 'salesforce' logo and two buttons: 'Choose an Existing Map' and 'Create or Edit a Map', with the latter highlighted by a red box. At the bottom, there are navigation buttons: '< Back', 'Next >', 'Finish', and 'Cancel'.

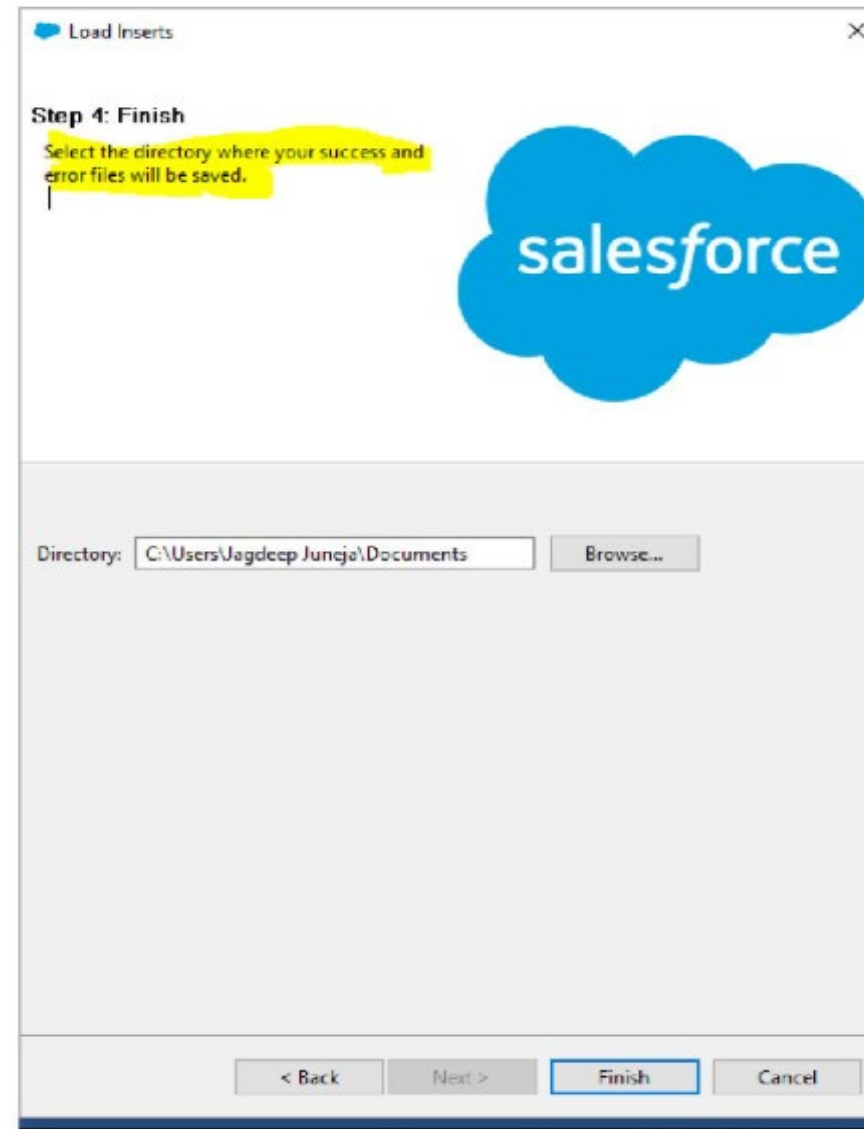
The screenshot shows a Windows File Explorer window titled 'Save As' with the path 'This PC > Downloads'. The file list contains various .sdl files, including 'HCA Accounts Import Mapping.sdl', 'task 3 account data updates.sdl', '13thscopeCaseLoadMapping(UAT).sdl', 'HCA Contacts Import Mapping.sdl', 'payment record Insert Mapping.sdl', '40thanni mapping.sdl', 'SHCA case upsert Mapping2.sdl', 'SHCA case upsert Mapping.sdl', 'SHCA Account Facility Mapping.sdl', 'Weekly T3 Case Upload Template.sdl', 'case import seeding t3phase2.sdl', 'Task Mapping Import2.sdl', 'Task Mapping Import.sdl', 'Weekly Upload for Task 3 Cases.sdl Temp...', 'Case PROD Error Re-import.sdl', 'Case PROD Upsert(dates).sdl', 'Case PROD Upsert(minimum).sdl', 'Case PROD Upsert2.sdl', 'Case PROD Upsert.sdl', and 'Task3Phase2TimeSheetImportMapping.sdl'. At the bottom, the 'File name' field is 'Payment Updates' and the 'Save as type' is set to '\*.sdl', both highlighted with red boxes. 'Save' and 'Cancel' buttons are at the bottom right.

# Bulk Data Load Jobs

## Viewing the results



- Before running your Data Loader job, you are given the option to select where you would like your "Success" and "Error" files to be stored. Use the Browse button to select your preferred location.
- Once Data Loader completes the job, you will need to open this location to view your Error files to make any necessary adjustments prior to re-upload.



**TAKE ACTION**

- If you have error messages, review and fix the errors
- Re-upload the file
- Additional error messages may be shown, review and fix the errors
- Re-upload the file
- Continue this cycle until your upload is error free

# Part 4: Tips for Success



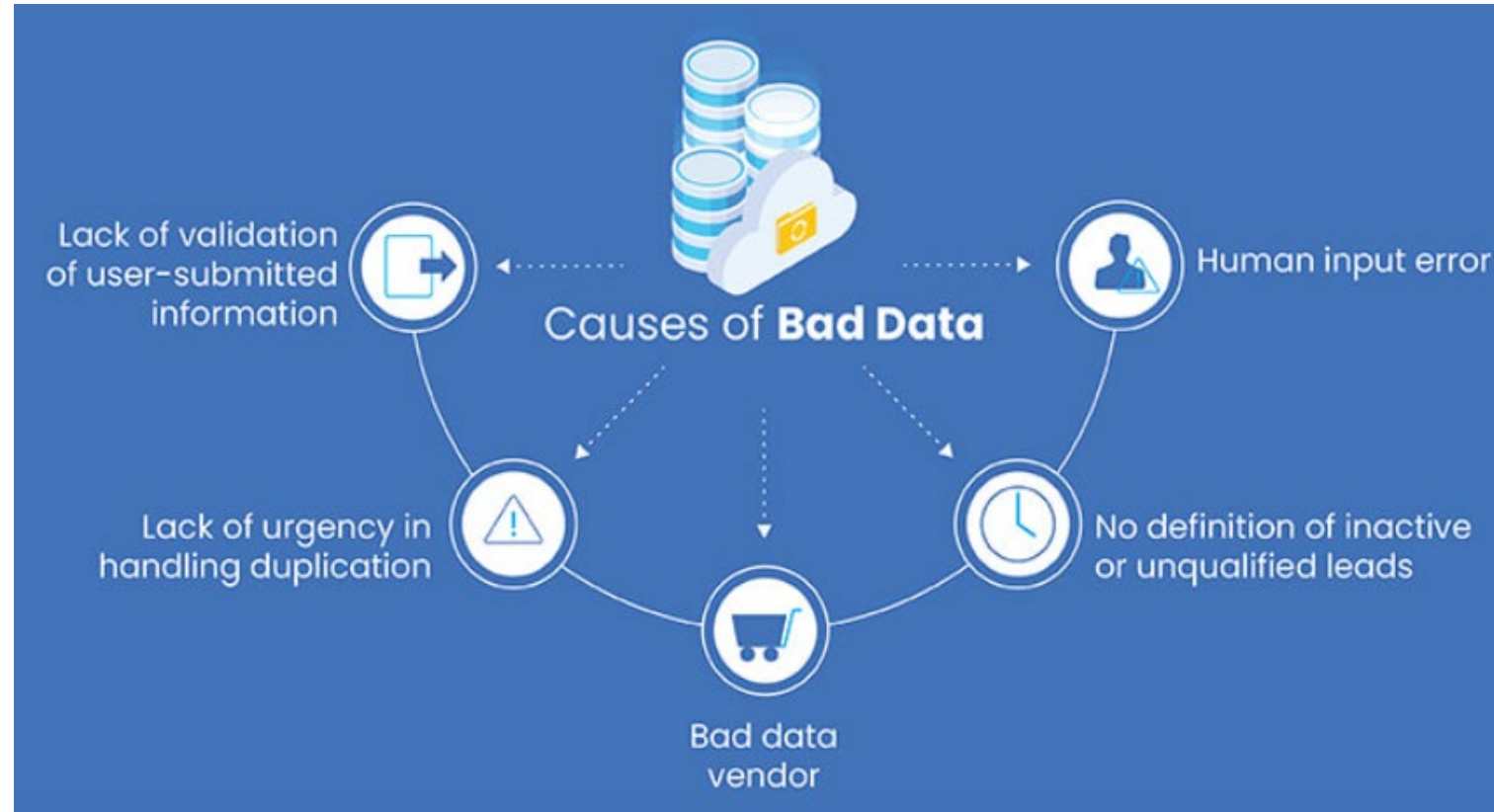
# Data Cleaning Before Import

Why it is important?



## Benefits of Salesforce Data Hygiene:

- Accuracy: No need to question if you have the "right" data
- Usability: Dirty data makes the existing data unusable
- Credibility: Data Integrity drives user adoption
- Reporting: Accurate assessment leads to better business decisions
- Productivity: Clean data allows for time saving automation
- Single source of truth: Less fragmentation, more organization



Let's take action to clean up data!



# Familiarize yourself with Data Governance Standards

Review Data Dictionaries on the IPRO Salesforce Support Portal



<https://salesforce.ipro.help/hc/en-us>

## IPRO Salesforce Support

Search the helpcenter...

Search

### Knowledge Base



Frequently Asked Questions



User Guides & Training



Data Governance (Data Management)

- Submit a request to add to existing picklist by submitting a support request for Data Governance review

- Review the Picklist definitions on the Salesforce Support Portal
- Match your business area data to these picklist definitions

### Data Governance (Data Management)

#### Contact Management Data Dictionary

- Contact Role Definitions

#### Account Management Data Dictionary

- Account Types and Account Subtypes Definitions
- Facility Account Subtype Definitions
- Community Organization Account Subtype Definitions
- Government Account Subtype Definitions
- Professional Association Account Subtype Definitions
- Account Designation(s)

# Final Preparation Checks

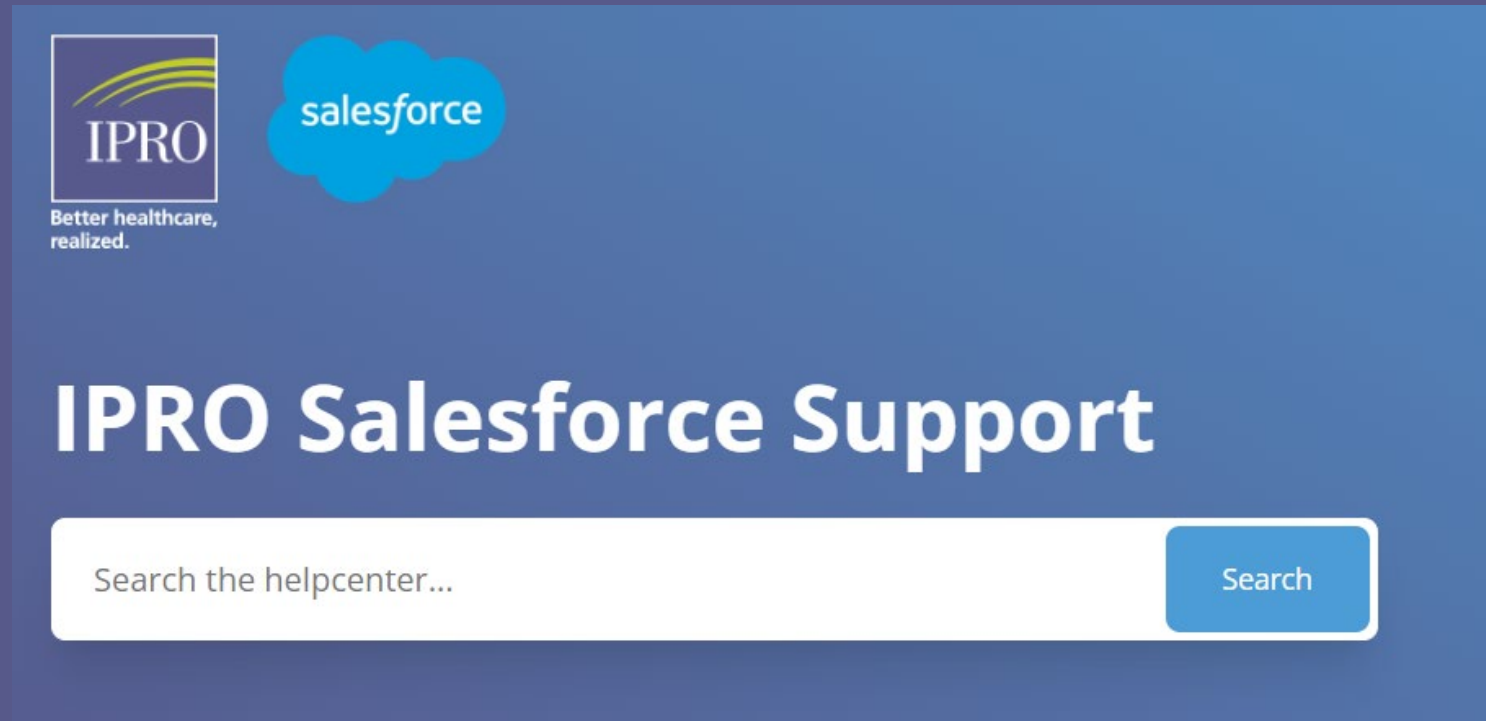
Ask yourself these questions before you import data



- Do you need to use the external identifiers to integrate with other systems?
- Do you have all required fields populated for your business area?
- Are you creating new records only or updating existing records and creation new records?
- Do other departments need to review the update (account identifiers should be reviewed by other departments and data governance)?
- Do you know where the success and errors files are stored on your computer?
- Did you review the success and error files and address any errors that require correction?
- If you aren't sure, ASK! Your Salesforce support team is here to help!



# Questions?



IPRO  
Better healthcare,  
realized.

salesforce

## IPRO Salesforce Support

Search the helpcenter... Search



Better healthcare,  
realized.

Corporate Headquarters  
1979 Marcus Avenue  
Lake Success, NY 11042-1072

<http://ipro.org>

<https://salesforce.ipro.help/hc/en-us>