



Test Your Knowledge – Import

Note: The word import, for this module, can mean three different operations: Insert, Update, or Upsert (both Insert and Update depending on if the records in your file match to existing records in your CRM)

Use Case 1 - Insert

DO NOT IMPORT ANY RECORDS

Your manager has provided you a list of leads that she would like assigned to specific campaigns. The Lead IDs and the Campaign IDs are provided to you within that list. If you have not been given the file yet, please ask your manager for it.

Hint: Use your resources.

*Take a screenshot of each step including the results screen.

DO NOT IMPORT ANY RECORDS

Use Case 2 - Update

DO NOT IMPORT ANY RECORDS

Your manager has provided you a specific list of Accounts where she needs the Account Rating changed. She has provided you the Account IDs and the corresponding rating she wants it changed to on the record. If you have not been given the file yet, please ask your manager for it.

*Take a screenshot of each step including the results screen.

DO NOT IMPORT ANY RECORDS

Use Case 3 - Upsert

DO NOT IMPORT ANY RECORDS

Finally, your manager has asked you to use a file to insert/update a list of records with potential leads from a Wisconsin Trade show. She wants to be sure, before the records are inserted, that there aren't any existing records in the contact or lead records. If they do exist, she wants all fields updated with the information contained on the file. Furthermore, if the company/account already exists in your salesforce instance but not the contact, she would like a contact created under that account for the record found within the file.

DO NOT IMPORT ANY RECORDS

*Take a screenshot of each step including the results screen.
