

In today's digital age of the internet of things (IoT), huge volumes of data constantly flow into an organization via mobiles, laptops, scanners, operational and transactional systems, and inbound and outbound customer contact points. Such data is invaluable, and its importance is specific to each organization. Without the ability to successfully manage data, an organization might miss potential opportunities for growth. Proper analysis of data is essential for making faster and better decisions. Effective data management is vital for organizations to analyze data, remove duplicate and inaccurate information, and maintain reliable data.

"Master data management is an important investment for organizations as a new generation of hybrid computing emerges where data is distributed across new silos of software as a service (SaaS), applications, big data repositories, and NoSQL and relational databases in the cloud, on-premises, and in containers and serverless environments." – Stewart Bond, Director of Data Integration and Integrity Software Research at IDC

Salesforce Data Management

Data management is not an easy job. Increased usage of Salesforce, the leading CRM application, is helping organizations to track and harness customer intelligence to achieve successful customer relationships. However, organizations often face challenges managing the data in Salesforce while updating new customer accounts and leads. In addition, the applications built on Salesforce carry enormous graphic or numeric data. Data migration – importing and exporting data – is an arduous task for any Salesforce administrator, consultant, or developer. A comprehensive data loader tool makes data management easier and more efficient. Salesforce Data Loader is a client application purpose-built for Salesforce data management.

Top 3 challenges of Salesforce Data Management

Data Duplication

Data duplication arises when the same data is entered into the CRM by multiple people, resulting in more than one record containing the same information. As the quality of enterprise data is crucial for the success of strategic initiatives and the achievement of business goals, duplication of records leads to significant business loss. A single 'lead' might be contacted by the Sales personnel multiple times, proving disorderliness of the organization. As the number of duplicate records increase, lead tracking becomes chaotic, causing waste of money and time.

Data Migration

Moving data from external sources to the Salesforce CRM requires certain technicalities to be fulfilled such as:

- Mapping the user IDs accurately to ensure that the record ownership is set up correctly in the new system
- Setting up profiles, organization-wide defaults (OWDs), and page layouts
- Confirming that the Apex classes do not have any hard-coded IDs for them to behave correctly in the destination org – It is required if the migration needs to be done across two Salesforce instances.
- Making sure that the existing workflows and triggers of the related objects are deactivated to avoid unintended consequences before migrating the data
- Informing the users about the possible issues in case of massive data migration

Merging Production Orgs

At times (e.g., when an acquisition happens), organizations might want to merge their Production Orgs to have a holistic and consolidated view of their Sales pipeline. Merging Salesforce environments is no simple task. It involves large-scale migration of code and configurations. During migration, validation rules, assignment rules, workflow rules, conflicts, and issues in functionalities need to be efficiently handled so that users are minimally disrupted. Extracting large volumes of data from the source org, preparing the import file, and uploading to the Salesforce environment requires manual efforts that are error-prone.

How does AutoRABIT's Salesforce Data Loader Pro help in efficient data management?

AutoRABIT's Salesforce Data Loader Pro is a one-stop solution that manages and migrates data logically and reliably.

AutoRABIT's Salesforce Data Loader Pro offers rapid, cost-effective, and advanced data loading capabilities to benefit an organization in their data loading imperatives. It auto-handles parent-child relationships and enables data migration from source to destination org efficiently.