

# Group Season Creation (Data Loader)

Prior to beginning, ensure that you have Data Loader downloaded and have logged into your production org in Data Loader. You will also need to confirm that your new Season has been created and that you have the new Season's Salesforce ID available to you (Note: This can be accessed from the Season's Salesforce URL).

1. Open Data Loader
2. Click Export
3. Search for and select the Group Season object
4. Select a place to save the export and click Next
5. Search and select the following fields
  - a. Division\_Class\_\_c
  - b. Division\_Type\_\_c
  - c. Group\_\_c
  - d. Name
  - e. Season\_\_c
  - f. Primary\_Contact\_\_c & PC City, State
  - g. Secondary\_Contact\_\_c
  - h. Financial\_Contact\_\_c
  - +Group ID #

Under Logistics:

- +Insurance Info - check mark, expiration date, general, general exp, accident med., accident exp (keeping anything that expires after May 1?)
- +University (rename this Educational Institution)

Contacts

- +Independent management contacts - save all three

6. Add Criteria to Season (field: Season\_\_c EQUALS [Salesforce ID of previous season])
7. Click Finish
8. Open Extract from where you determined to save it
9. In the Season\_\_c Column, replace the ID of previous season with new, upcoming season ID
10. Save as CSV
11. Return to Data Loader and select Insert
12. Search for and select the Group Season object
13. Choose the CSV saved with new, upcoming season ID
14. Click Next
15. Click Create or Edit a Map
16. Drag and drop fields from list to coordinating fields in mapping below
17. Once complete, click Ok
18. Click Finish