



# Setting Up Curated Import in Salesforce Lightning Experience

[www.provenworks.com](http://www.provenworks.com)



## Overview

SimpleImport comes packaged with a Curated Import lightning component that allows you to drag and drop an importing widget into any Salesforce Lightning App Page, as well as a Salesforce Partner Community. This provides your internal and community users the ability to import and update records into an object and its fields that are pre-determined by the user configuring Curated Import.

## Creating a Saved Mapping

This is the pre-step required for Curated Import so that the wizard knows what object and fields you want your users to import into.

1. Create a **new template spreadsheet file** for use with Curated Import. The file must contain column headings that will match up to fields within your Salesforce Org followed by a row of sample data underneath each column header.

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	First Name	Middle Name	Last Name	Status	Company	Email	Phone	Rating	Street	City	Zip	State	Country
2	Callum	Ericson	Hurry	New	ProvenWorks	churry@provenworks.com	01183217405	Hot	ProvenWorks, Reading Enterprise Centre	Reading	RG66BU	Berkshire	United Kingdom

2. Navigate to the **SimpleImport Tab** within Salesforce and upload a created spreadsheet file.

Import Files									
Upload Files ...or drop files here <span style="float: right;"><input type="checkbox"/> Advanced options</span>									
Description	Sheets	Uploaded	Uploaded By	Size	Status	Results	Action		
Curated Import Lead Template.xlsx	1 sheets 0 mapped	8/21/2018 4:44 PM	Callum Hurry	26.2 KB	Uploaded	<a href="#">Map to records</a>	<a href="#">Delete</a>	<a href="#">File</a>	<a href="#">Download</a>

3. Once the file has uploaded, select the **Map to records** button and select your Object(s) of choice. Once chosen, press **Continue**.

Filename: **Curated Import Lead Template.xlsx**  
 Sheet Name: **Sheet1** (sheet 1 of 1)

Please select which object you would like to import your data into.

Leads  
 Accounts & Contacts  
 Other (advanced)

Select the object to import into from the list below

**Master Object:**

If you are only importing into a single object select <none> in the list below, otherwise select the child/detail object with the appropriate master field name for the relationship.

**Detail Object:**

**Continue**

4. **Map each of the column headers** to the appropriate Salesforce fields, then **choose any additional settings** such as **Update existing record**.

### Mapping Area D

1 Lead will be inserted

File Column	Salesforce Lead Field
<b>First Name</b>	First Name (FirstName) <span style="float: right;">⌵</span>
<b>Last Name</b>	Last Name (LastName) * <span style="float: right;">⌵</span>
<b>Company</b>	Company (Company) * <span style="float: right;">⌵</span>
<b>Phone</b>	Phone (Phone) <span style="float: right;">⌵</span>
<b>Middle Name</b>	Middle Name (MiddleName) <span style="float: right;">⌵</span>
<b>Status</b>	Status (Status) <span style="float: right;">⌵</span>
<b>Email</b>	Email (Email) <span style="float: right;">⌵</span>
<b>Rating</b>	Rating (Rating) <span style="float: right;">⌵</span>
<b>Street</b>	Street (Street) + <span style="float: right;">⌵</span>
<b>City</b>	City (City) <span style="float: right;">⌵</span>
<b>Zip</b>	Zip/Postal Code (PostalCode) <span style="float: right;">⌵</span>
<b>State</b>	State/Province (State) <span style="float: right;">⌵</span>
<b>Country</b>	Country (Country) <span style="float: right;">⌵</span>

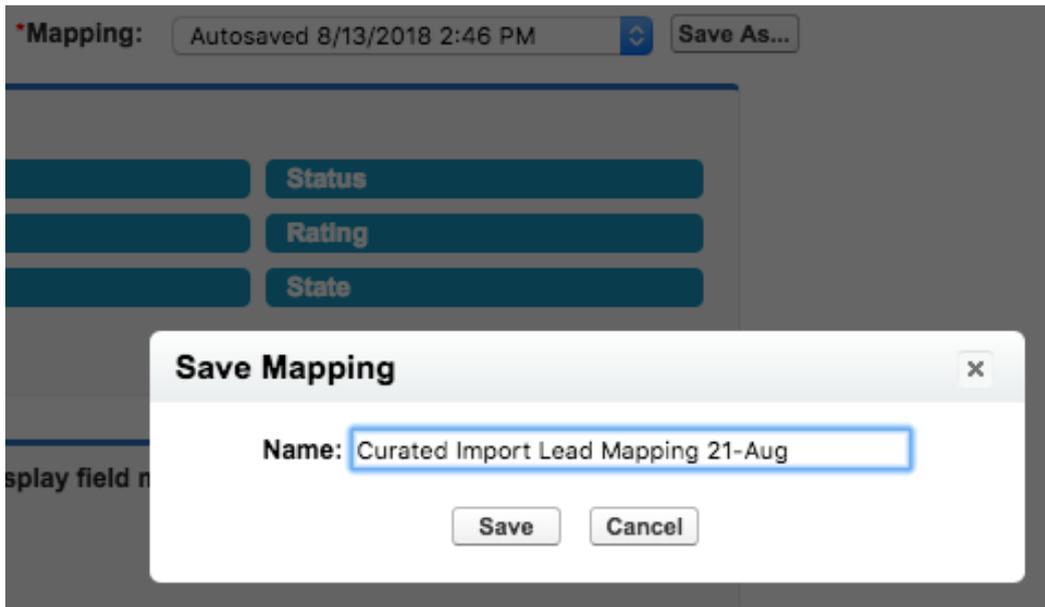
Update existing records
   
 Enable Assignment Rule for **Master** Use Active Rule ⌵

5. Once the configuration has been completed in the Mapping Area, select **Save As...** next to the mapping selection dropdown.

destination Salesforce object(s). Use the mapping selector to reload a previously s

**Mapping:** Default Mapping ⌵

6. Name your mapping something that you'll be able to identify and select **Save**.



7. After saving the mapping, simply **Cancel** the import which will return you to the main screen.



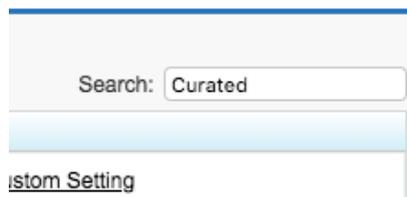
8. Now select **Preferences** in the top-right of the screen and scroll to the **Saved Mappings** section.

Saved Mappings				
Name	ID	Target Object(s)	Last Used	
Curated Import Lead Mapping 21-Aug	33657	Lead	8/21/2018 5:06 PM	<a href="#">Delete</a> <a href="#">Import JS</a> <a href="#">Create Custom Setting</a>

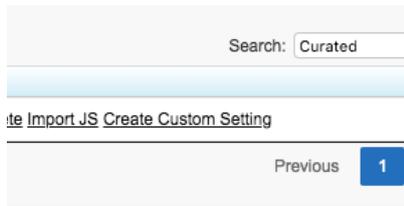
Showing 1 to 1 of 1 entries

Previous **1** Next

9. Search for your mapping that you had just saved by using the **search box** provided.



10. Select **Create Custom Setting** and wait for the browser confirmation.



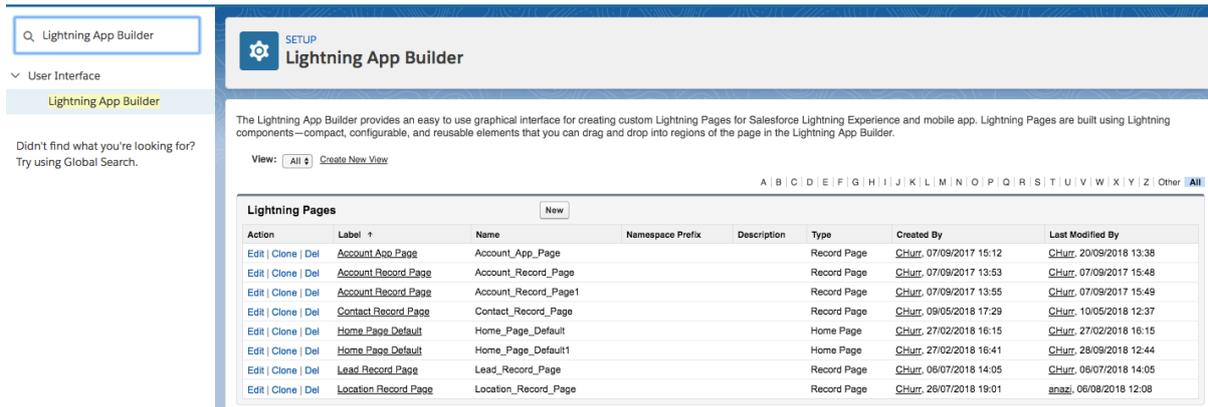
11. Keep a note of the **Mapping ID** from the row which will be used in the next step.

	ID	Target Object(s)	
<a href="#">Linking 21-Aug</a>	33657	Lead	{

## Adding the Curated Import Lightning Component to your Page

The lightning component can be added to any Lightning App Page or Community layout across your Salesforce Org. This following steps will show configuration of the component on the home app page, but similar steps can be replicated across any app or lightning community page.

1. Navigate to **Setup**  and select **Lightning App Builder** from the setup menu.



The screenshot shows the Salesforce Setup interface for Lightning App Builder. The left sidebar contains a search bar with 'Lightning App Builder' and a navigation menu with 'User Interface' and 'Lightning App Builder'. The main content area has a header 'SETUP Lightning App Builder' and a description: 'The Lightning App Builder provides an easy to use graphical interface for creating custom Lightning Pages for Salesforce Lightning Experience and mobile app. Lightning Pages are built using Lightning components—compact, configurable, and reusable elements that you can drag and drop into regions of the page in the Lightning App Builder.' Below this is a 'View:' dropdown set to 'All' and a 'Create New View' link. A table titled 'Lightning Pages' is displayed with columns: Action, Label, Name, Namespace Prefix, Description, Type, Created By, and Last Modified By. The table lists several Lightning Pages, including Account App Page, Account Record Page, Contact Record Page, Home Page Default, Lead Record Page, and Location Record Page.

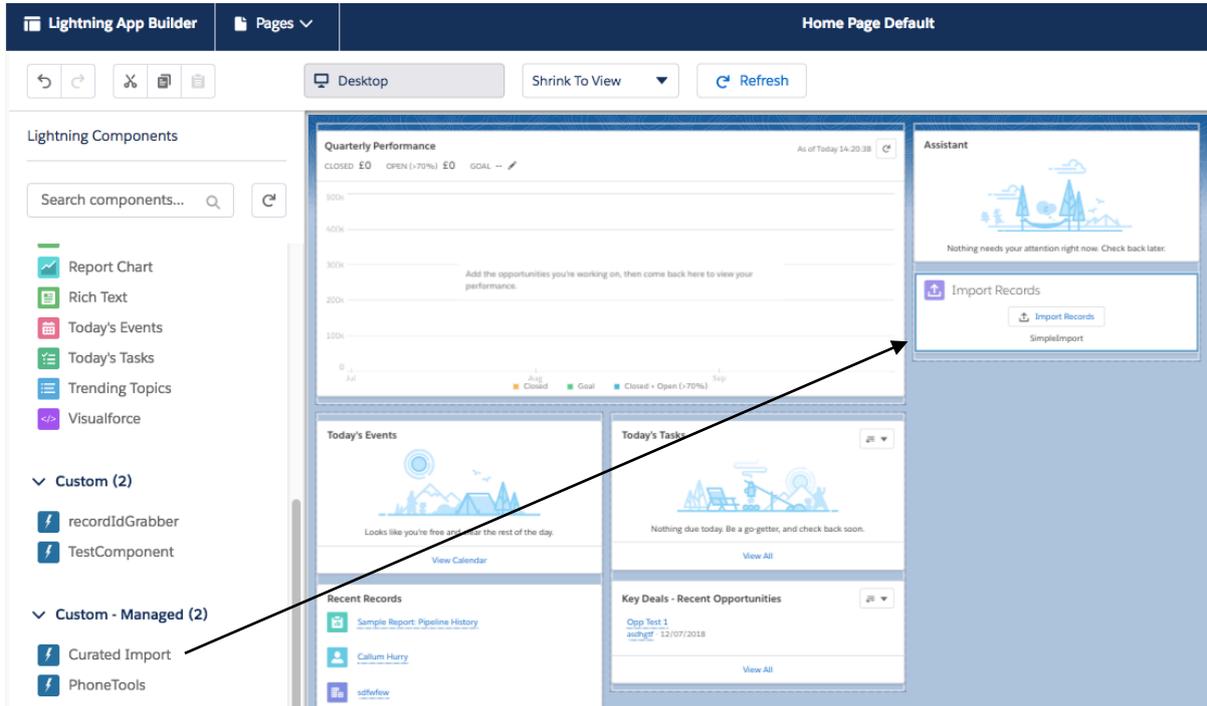
Action	Label	Name	Namespace Prefix	Description	Type	Created By	Last Modified By
<a href="#">Edit</a>   <a href="#">Clone</a>   <a href="#">Del</a>	<a href="#">Account App Page</a>	Account_App_Page			Record Page	CHurr, 07/09/2017 15:12	CHurr, 20/09/2018 13:38
<a href="#">Edit</a>   <a href="#">Clone</a>   <a href="#">Del</a>	<a href="#">Account Record Page</a>	Account_Record_Page			Record Page	CHurr, 07/09/2017 13:53	CHurr, 07/09/2017 15:48
<a href="#">Edit</a>   <a href="#">Clone</a>   <a href="#">Del</a>	<a href="#">Account Record Page</a>	Account_Record_Page1			Record Page	CHurr, 07/09/2017 13:55	CHurr, 07/09/2017 15:49
<a href="#">Edit</a>   <a href="#">Clone</a>   <a href="#">Del</a>	<a href="#">Contact Record Page</a>	Contact_Record_Page			Record Page	CHurr, 09/05/2018 17:29	CHurr, 10/05/2018 12:37
<a href="#">Edit</a>   <a href="#">Clone</a>   <a href="#">Del</a>	<a href="#">Home Page Default</a>	Home_Page_Default			Home Page	CHurr, 27/02/2018 16:15	CHurr, 27/02/2018 16:15
<a href="#">Edit</a>   <a href="#">Clone</a>   <a href="#">Del</a>	<a href="#">Home Page Default</a>	Home_Page_Default1			Home Page	CHurr, 27/02/2018 16:41	CHurr, 28/09/2018 12:44
<a href="#">Edit</a>   <a href="#">Clone</a>   <a href="#">Del</a>	<a href="#">Lead Record Page</a>	Lead_Record_Page			Record Page	CHurr, 06/07/2018 14:05	CHurr, 06/07/2018 14:05
<a href="#">Edit</a>   <a href="#">Clone</a>   <a href="#">Del</a>	<a href="#">Location Record Page</a>	Location_Record_Page			Record Page	CHurr, 26/07/2018 19:01	anazi, 06/08/2018 12:08

2. If you already have a **custom Lightning Page** for your page you want the component to sit on, select **Edit** next to it, alternatively, select **New** and follow the steps through to creating a new page.

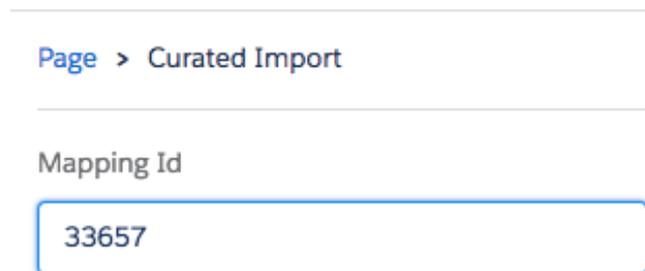
A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z |

Action	Label	Name	Namespace Prefix	Description	Type	Created By	Last Modified By
<a href="#">Edit</a>   <a href="#">Clone</a>   <a href="#">Del</a>	<a href="#">Account App Page</a>	Account_App_Page			Record Page	CHurr, 07/09/2017 15:12	CHurr, 20/09/2018 13:38
<a href="#">Edit</a>   <a href="#">Clone</a>   <a href="#">Del</a>	<a href="#">Account Record Page</a>	Account_Record_Page			Record Page	CHurr, 07/09/2017 13:53	CHurr, 07/09/2017 15:48
<a href="#">Edit</a>   <a href="#">Clone</a>   <a href="#">Del</a>	<a href="#">Account Record Page</a>	Account_Record_Page1			Record Page	CHurr, 07/09/2017 13:55	CHurr, 07/09/2017 15:49
<a href="#">Edit</a>   <a href="#">Clone</a>   <a href="#">Del</a>	<a href="#">Contact Record Page</a>	Contact_Record_Page			Record Page	CHurr, 09/05/2018 17:29	CHurr, 10/05/2018 12:37
<a href="#">Edit</a>   <a href="#">Clone</a>   <a href="#">Del</a>	<a href="#">Home Page Default</a>	Home_Page_Default			Home Page	CHurr, 27/02/2018 16:15	CHurr, 27/02/2018 16:15
<a href="#">Edit</a>   <a href="#">Clone</a>   <a href="#">Del</a>	<a href="#">Home Page Default</a>	Home_Page_Default1			Home Page	CHurr, 27/02/2018 16:41	CHurr, 28/09/2018 12:44
<a href="#">Edit</a>   <a href="#">Clone</a>   <a href="#">Del</a>	<a href="#">Lead Record Page</a>	Lead_Record_Page			Record Page	CHurr, 06/07/2018 14:05	CHurr, 06/07/2018 14:05
<a href="#">Edit</a>   <a href="#">Clone</a>   <a href="#">Del</a>	<a href="#">Location Record Page</a>	Location_Record_Page			Record Page	CHurr, 26/07/2018 19:01	anazi, 06/08/2018 12:08

- From the component menu on the left of the screen, **drag the Curated Import custom component** onto your layout.

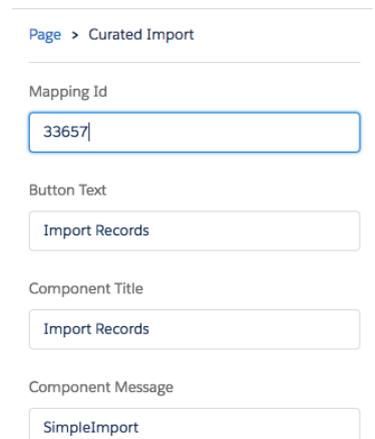


- Once placed, the **design parameters** menu on the right of the screen will appear. In the **Mapping ID** field, enter the value **noted from step 11 in the previous section**.



- Three other design parameters are available, edit them to meet your desired requirement:

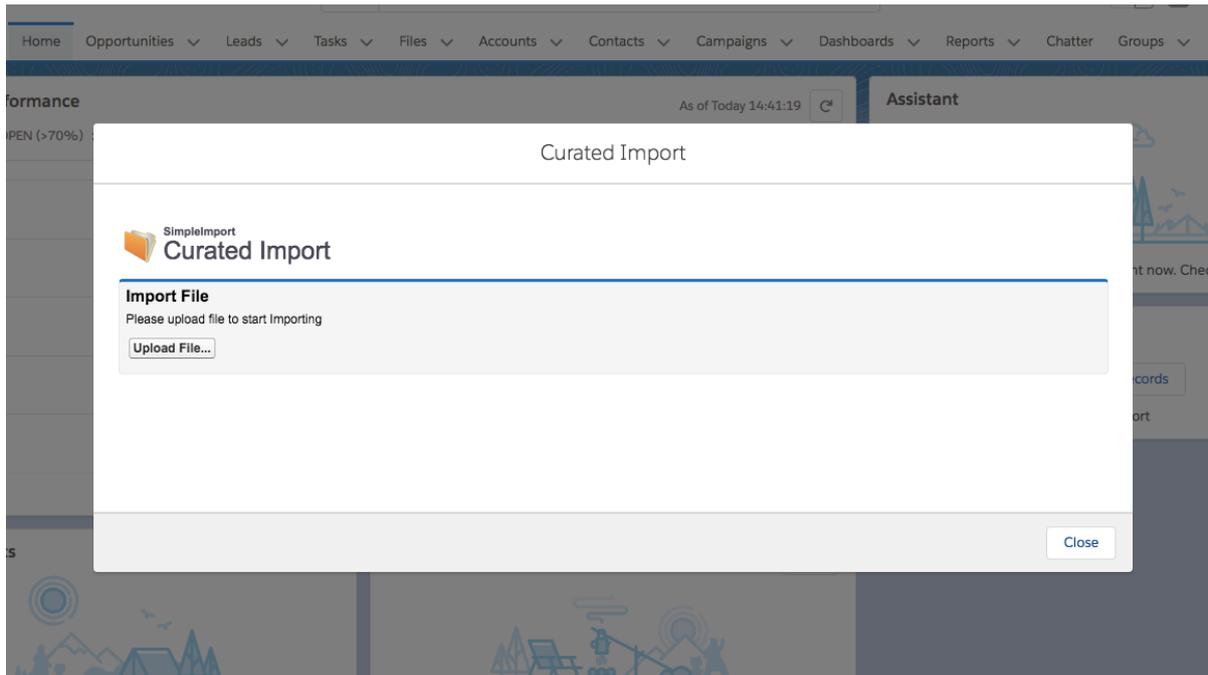
- Button Text** – for renaming the button’s text, leaving it blank will populate the button with “Import Records”
- Component Title** – Give the component a title so your users can spot it, leaving it blank will hide the title and import icon.
- Component Message** – A text area provided allowing you to write a message for your users to read, leaving it blank will hide the text area.



6. **Save** and **Activate** your page layout.



Your Curated Import component will now be configured and ready for your users to take advantage of.



## Contact Us

If you are experiencing any issues with the setup of your Curated Import component in your Org, please reach out to [support@provenworks.com](mailto:support@provenworks.com) where a member of our team will be happy to assist.

