



provenworks™

**Getting Started with  
SimpleImport for  
Salesforce**

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

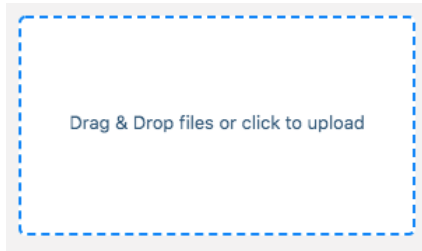


Welcome to SimpleImport for Salesforce. This document covers the key features of the solution. Follow each section in the guide to take you through the importing process. Should you have any questions, feel free to reach out to our support team at [support@provenworks.com](mailto:support@provenworks.com).

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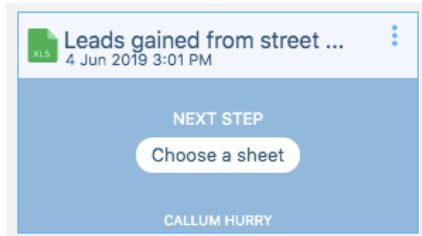
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## Uploading Files

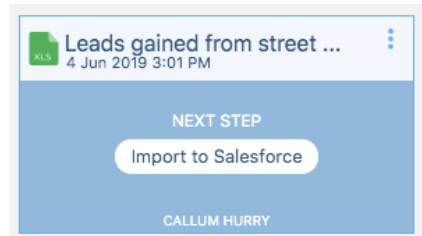
**Drag & Drop** a CSV, XLS, XLSX, XLSM or ODS file into the main page or select **click to upload**.



## Choosing a Sheet (if multi-sheet file)

Select **Choose a Sheet**.

**Choose** the sheet you wish to import.

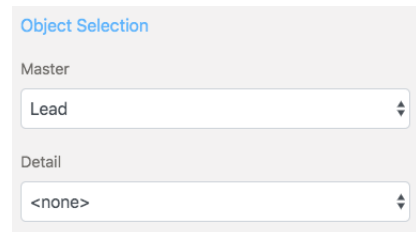


## Choosing Object(s) and Import Settings

Select **Import to Salesforce**.

Select **Master** object.

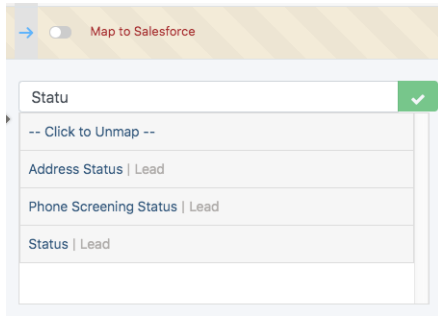
Select **Detail** object if required.



Under **Import Settings**, select **Import to campaign** and/or **Use assignment rule** if required, then select options on screen.

Select **Continue**.





## Field Mapping

Select **Map to Salesforce** on an unmapped row.

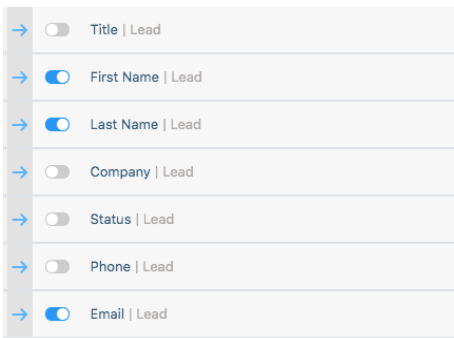
Use the **Field Finder** text box to search for your field or scroll through the available list.

Select the **field name** from the list.

Repeat this process for all **unmapped** or **incorrectly mapped** rows.

You can un-map a field by selecting **Click to Unmap**.

Your file headings	Sample Data	Salesforce headings
Title	Mr	Title   Lead
First Name	Callum	First Name   Lead
Last Name	Hurry	Last Name   Lead
Company	ProvenWorks	Company   Lead
Lead Status	Contacted	Status   Lead
Phone	01254856987	Phone   Lead
Email	c.hurry@proven...	Email   Lead



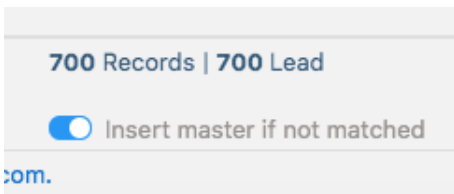
## Updating Records

Toggle the **switch on a mapped row** to use it as matching criteria for an update.

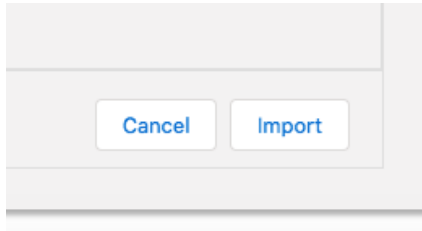
**Multiple rows** can be enabled for multi-criteria matching. *i.e. First Name, Last Name and Email.*

Toggle **Insert master if not matched** to insert new records if no existing record is matched.

Matched records will be updated with data from mapped rows with their matching toggles disabled.



## Importing & Job Summary



Select **Import**.

A **Job summary** is provided on the file's tile.

	LEAD
INSERTS	699
UPDATES	0
ERRORS	1

CALLUM HURRY

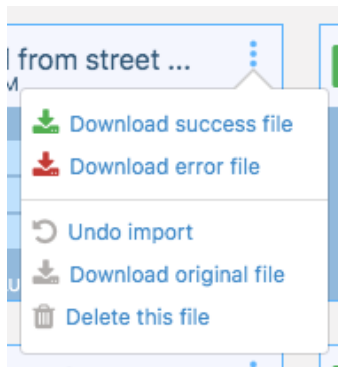
To download .CSV **summary reports**, select to display more options.

Select **Download success file** or **Download error file**.

**Success file** adds a **Salesforce Record ID column** to each successful row from in the sheet simplifying future update processes.

SimpleImport: error
Lead: Required fields are missing: [LastName]

**Error file** adds a **Salesforce Error** column to each failed row allowing you to diagnose and correct the errors in the sheet. This file can then be re-uploaded to SimpleImport after changes are have been made to resolve the errors.



## Undoing a Job

Select to display more options.

Select **Undo import**.

**Undo summary** is provided on the file's tile.

