

How can I set the owner of individual records to different users when importing?

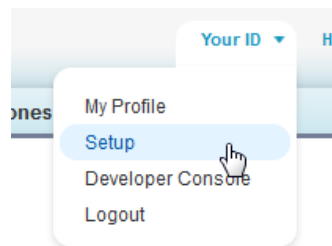
This guide will cover:

- ✓ Locating a user's ID
- ✓ Assigning the user to the record

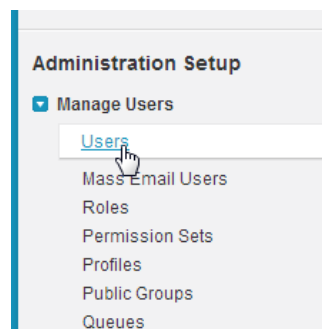
Locating user ID

When importing a file with SimpleImport you can specify the owner of each record so that it is assigned to them once imported. To complete this you will first need the user ID, the following steps explain how to obtain this.

1. Visit the **Salesforce Setup** page, by selecting it from the pick-list underneath your Salesforce ID.



2. Within the **Administration Setup** section, expand **Manage Users** and then select the **Users** option.



3. This will then populate a list of the users within your Salesforce organisation. Select the desired user that you wish to find the ID for.



- The user profile page will show, within the URL copy the 15 character user ID as shown highlighted below. Ensure you paste this somewhere safe as you will require it again shortly.

- Repeat stages 3 and 4 to obtain the user ID of additional users if required.

Mapping the record owner ID


- You now need to add the desired owner ID to each record within your spreadsheet, all rows must have a valid ID otherwise an error will occur when importing.

	A	B	C	D	E	F
1	Owner ID	Country	First Name	Last Name	Job Title	Email Address
2	005b0000000oblX	United Kingdom	Geoff	Mchugh	Sales	fdfwe@aol.com
3	005b0000000oblX	United Kingdom	Dave	Jones	Web Design	wrhekjr@aol.com
4	005b0000000oblX	United Kingdom	Julia	Rees	Technical	rfewkrw@aol.com
5	005b0000000oblX	United States	Rebecca	Martin	Sales	wqrgheiurw@aol.com
6	005b0000000aJkP	Canada	Claire	Mason	Accountant	sdkjhbqewq@aol.com
7	005b0000000aJkP	Brazil	Trev	Foster	Web	sdjhsuidehqewe@aol.com
8						
9						

- Now in SimpleImport map the new 'owner' spreadsheet column with the 'Owner ID' Salesforce field.

- Once your data has been imported the owner of each individual record will be set to the user whose ID was entered.

Lead Detail Edit Delete Convert

Lead Owner	 Ludwig Brent [Change]
Name	Geoff Mchugh
Company	
Title	Sales

Address Information

Address

Contact Us

If you are still having problems with setting the owner of individual records, or require more assistance with SimpleImport, please contact us at:

support@provenworks.com