Setting Up Curated Import in Salesforce Lightning Experience

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 File	...or drop files here							☐ Advanced options
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	Map to records	Delete File Download

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: Lead (Lead)   ⬍

  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: <none>   ⬍

                                                                    Continue

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

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

6. Name your mapping something that you'll be able to identify and select **Save**.
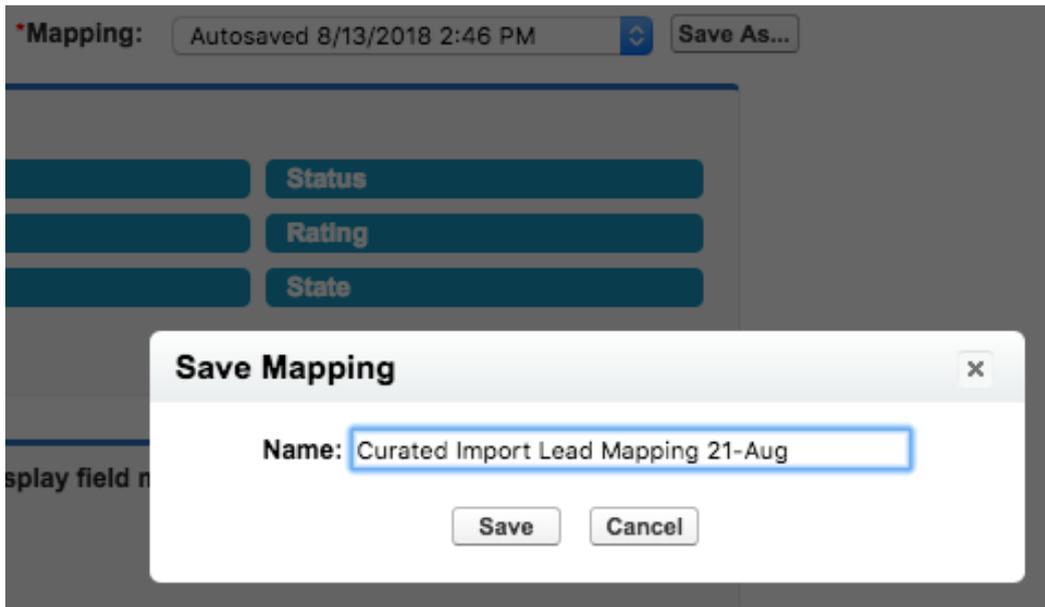
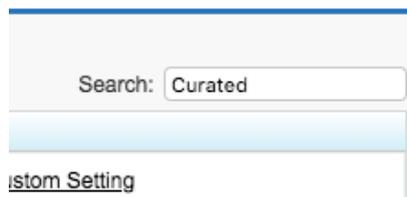7. After saving the mapping, simply **Cancel** the import which will return you to the main screen.

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

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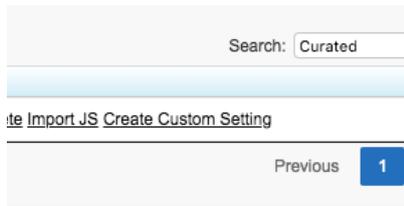
11. Keep a note of the **Mapping ID** from the row which will be used in the next step.

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.

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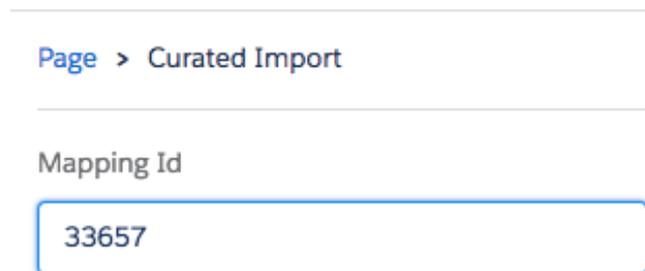
3. From the component menu on the left of the screen, **drag** the **Curated Import custom component** onto your layout.
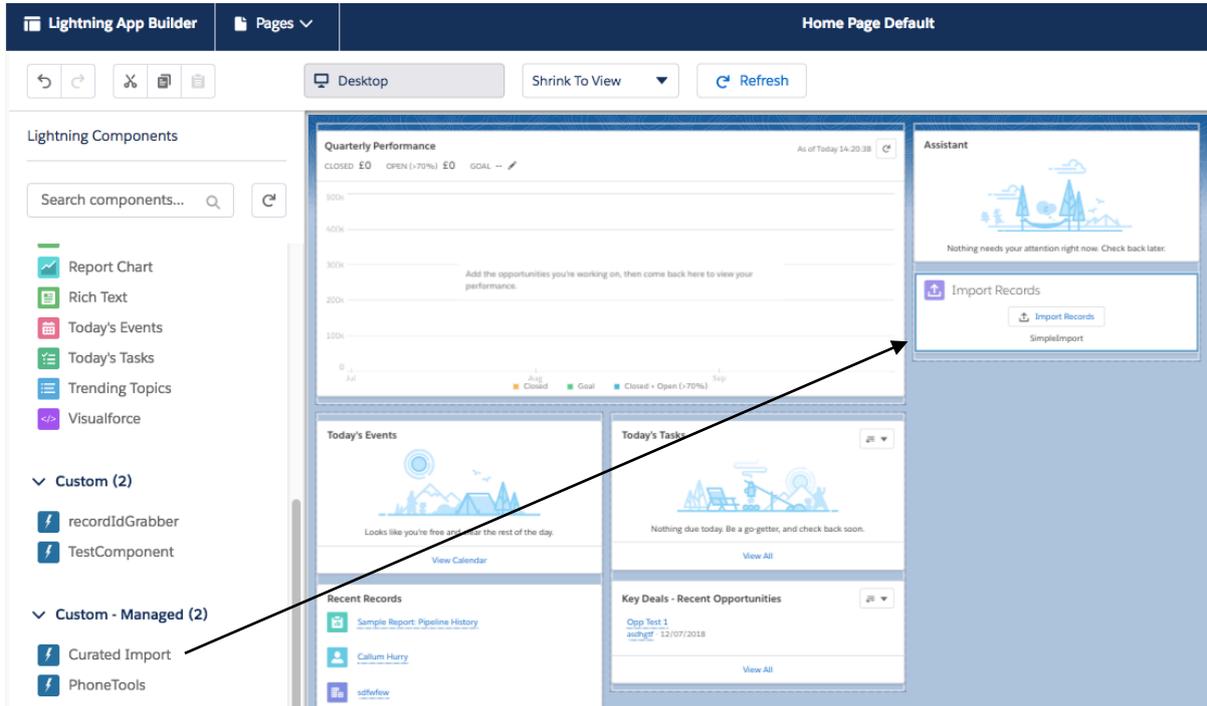

4. Once placed, the **design parameters** menu on the right of the screen will appear. In the **Mapping ID** field, enter the value **noted from step 11 in the previous section.**

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

   a. **Button Text** – for renaming the button's text, leaving it blank will populate the button with "Import Records"
   b. **Component Title** – Give the component a title so your users can spot it, leaving it blank will hide the title and import icon.
   c. **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.
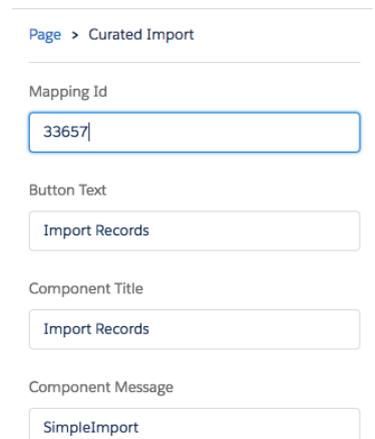
6. **Save** and **Activate** your page layout.

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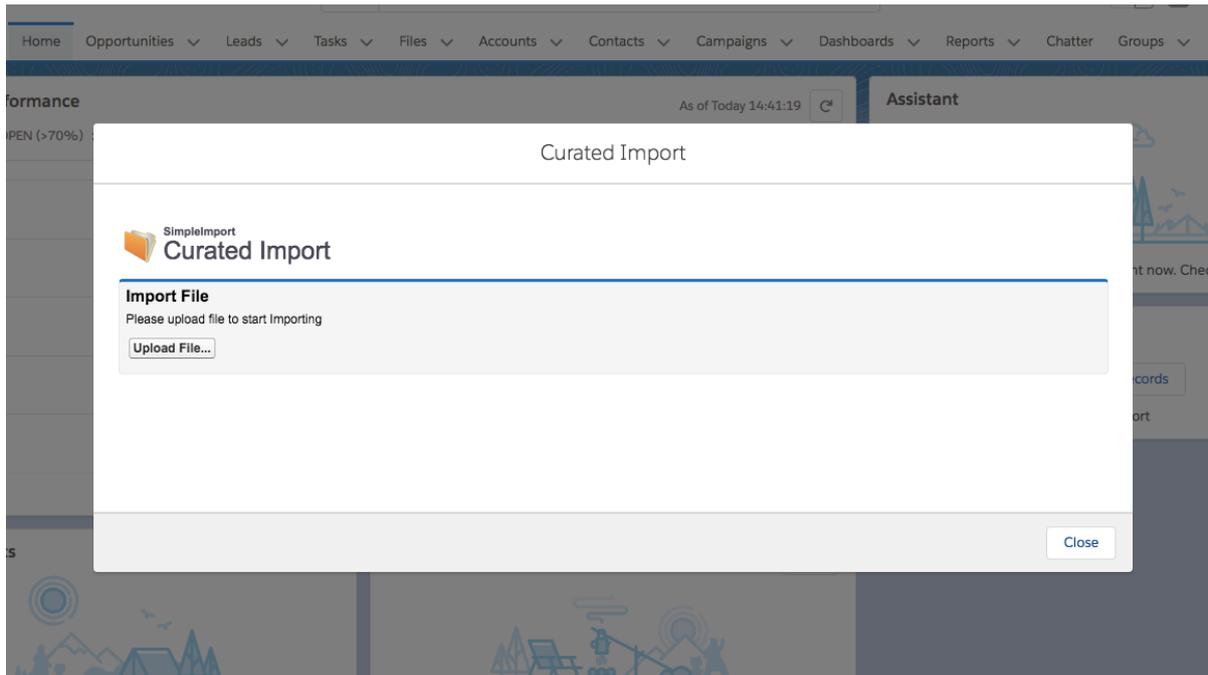
Contact Us

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