

## How can I simultaneously import into two standard objects with SimpleImport?

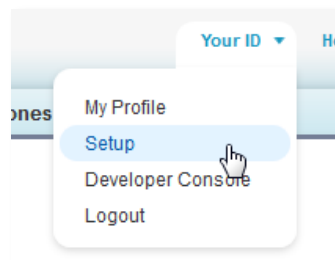
### This guide will cover:

- ✔ Creating a lookup relationship
- ✔ Importing simultaneously with SimpleImport

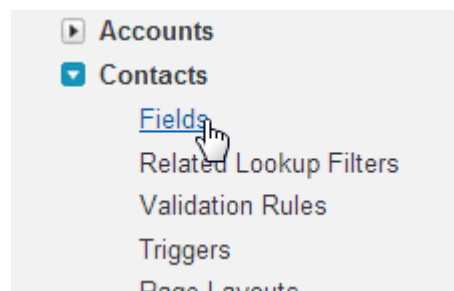
### Creating a lookup relationship

To import into two standard objects simultaneously a lookup relationship needs to first be created between the objects. The following steps detail how to do this for a Master-Detail relationship between Opportunities and Contacts:

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



2. Expand the Detail object that you wish to make the relationship with and then select **Fields**. In this example we are using Contacts.

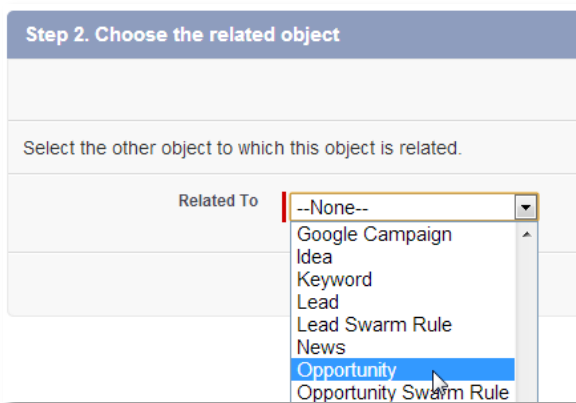


3. Scroll to the **Custom Fields & Relationships** section and select **New**.

Contact Custom Fields & Relationships			
Action	Field Label	API Name	
Edit	Contact Find Nearby	FN_Find_Nearby__c	Find Nearby
Edit	Contact Lat	FN_Lat__c	Find Nearby
Edit	Contact Lon	FN_Lon__c	Find Nearby
Edit   Replace	Contact Mapping Address	FN_Mapping_Address__c	Find Nearby



4. Select **Lookup Relationship** and then on the next step select your desired Master object.



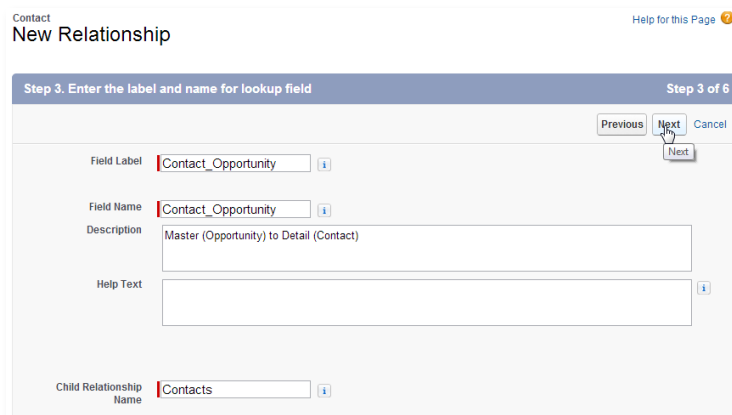
Step 2. Choose the related object

Select the other object to which this object is related.

Related To: --None--

- Google Campaign
- Idea
- Keyword
- Lead
- Lead Swarm Rule
- News
- Opportunity**
- Opportunity Swarm Rule

5. Enter suitable labels for the relationship so you can easily find it within SimpleImport.



Contact  
New Relationship

Step 3. Enter the label and name for lookup field

Field Label: Contact\_Opportunity

Field Name: Contact\_Opportunity

Description: Master (Opportunity) to Detail (Contact)

Help Text:

Child Relationship Name: Contacts

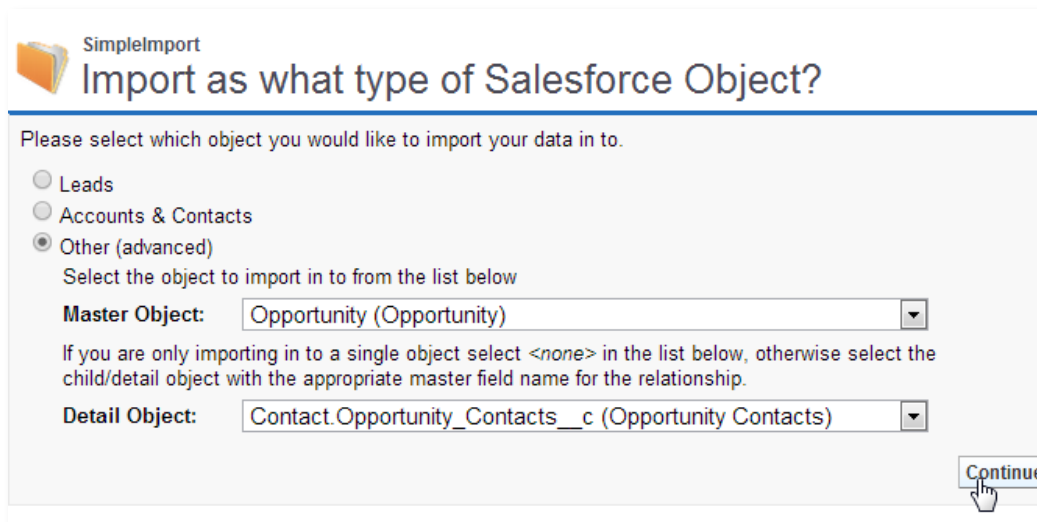
6. Continue through the remaining stages and select the options that apply to you, then finally **Save** the new custom field. The field will now be visible within the Custom Fields & Relationships list on your desired object.

Contact Custom Fields & Relationships				
Action	Field Label	API Name	Installed Package	Data Type
Edit   Del	<a href="#">Contact_Opportunity</a>	Contact_Opportunity__c		Lookup(Contact)

## Importing with SimpleImport

We will now import your Excel file into the two standard objects simultaneously with SimpleImport.

1. Back in SimpleImport upload your file and select **Map Objects**. Next select a **Master-Detail** import and choose your desired master object.



The screenshot shows the SimpleImport interface with the title 'Import as what type of Salesforce Object?'. It contains three radio button options: 'Leads', 'Accounts & Contacts', and 'Other (advanced)'. The 'Other (advanced)' option is selected. Below the options, there is a text prompt: 'Please select which object you would like to import your data in to.' followed by 'Select the object to import in to from the list below'. There are two dropdown menus: 'Master Object:' with 'Opportunity (Opportunity)' selected, and 'Detail Object:' with 'Contact.Opportunity\_Contacts\_\_c (Opportunity Contacts)' selected. A 'Continue' button is located at the bottom right of the dialog box, with a mouse cursor pointing to it.

2. For the detail object select the custom field that you created in the previous steps and then click **Continue**.
3. Follow the remaining SimpleImport steps to map and import the file. If you require any assistance with this view our demonstration video: <http://youtu.be/tRdaXhJSepp>

## Contact Us

If you are still having problems with simultaneously importing into two standard objects, or require more assistance with SimpleImport, please contact us at:

[support@provenworks.com](mailto:support@provenworks.com)