

Creating new Project Listings using Import Wizard

- 1) Prepare your file with **Project IDs** through a Report, example attached. You can get the Project ID from the URL of the record and insert this as a column into your import file.

	A	B	C	D	E	F	G	H
1	Project ID	Title	Listing status	Currency Code				
2	a0C900000W7zl	Listing 1	Available	AUD				
3								
4								
5								
6								
7								
8								
9								
10								
11								
12								
13								
14								

Click on **Listings** > Quick Access Menu > **Import Data**

The screenshot shows the Salesforce interface with the 'Listings' tab selected. The main content area displays a table of listings with columns: Title, Listing Status, Listing Type, Price, and Bedrooms. A dropdown menu is open on the right side, showing options like 'View Fields', 'View Object', 'View Record Types', 'View Validation Rules', 'View Approvals', 'Edit App', 'Edit Tab', 'Edit Columns', and 'Import Data' (which is highlighted with a red box). The 'force.com' logo is visible in the top right corner of the dropdown menu.

Title	Listing Status	Listing Type	Price	Bedrooms
320 Unwins Bridge Road...	Sold	Sale	AUD 1,795,000.00	3
20 Norma Road, Palm Bea...	Reserved	Sale	AUD 1,050,000.00	4
1801 / 22 Gadigal Ave, Zet...	Active	Sale	AUD 2,300,000.00	3
1802 / 22 Gadigal Ave Zetf...	Sold	Sale	AUD 1,450,000.00	3
Southern Lot on the Island	Active	Sale	AUD 160,000.00	
Prime Office Space	Active	Sale	AUD 6,000,000.00	
Bird Key Bayfront Masterp...	Active	Sale	AUD 4,900,000.00	4
Tropical oasis in Honolulu	Active	Sale	AUD 2,880,000.00	4
10 Acre 7 + 7 at great pric...	Active	Sale	AUD 929,000.00	7
8/76 Manahan Street, CO...	Active	Sale	AUD 620,000.00	3
Marview home with great v...	Active	Sale	AUD 1,095,000.00	3
Amazing Lake Hills Reserv...	Active	Sale	AUD 849,000.00	5

- 2) **Step 2** Start Import Wizard > Select Listing > Next

The screenshot shows the 'Step 1. Choose Record' screen in the Salesforce Import Wizard. The page title is 'Step 1 of 3' and there is a 'Next' button. The main content area says 'Welcome to the custom object import wizard.' and 'From the list below, choose the type of record that you are importing.' Below this is a table with columns: Label, Master Object, and Description. The 'Listing' option is selected with a radio button.

Label	Master Object	Description
<input type="radio"/> SystemCommand		
<input type="radio"/> Facebook Page		
<input type="radio"/> Facebook User		
<input type="radio"/> Closing		
<input checked="" type="radio"/> Listing		

No insert all records > Next

Step 2. Prevent Duplicates

To prevent duplicate Listing records from being created as a result of this import, choose Yes below.

Do you want to prevent duplicates from being created?

- No - insert all records in my import file.
- Yes - prevent duplicate records from being created. Note: You must select this option if you want to update existing records.

3) Step 3 Record owner > None if you are not assigning it through the import. Look up relationship > Project

Step 3. Specify Relationships

Listing records are owned by users. If there is a record owner column in your file, specify below the user field that it represents. If you do not include a record owner column in your file, you will be saved as the owner of all created records.

Which user field are you including in your file to designate record owners?

- Name
- Salesforce.com ID
- External ID [i](#)
- None

Listing records have lookup relationship fields that you can set to link Listings with existing records in salesforce.com.

Note: Only Listing records will be created or updated as a result of this import operation.

Which lookup fields, if any, are included in your import file?

- Object Access Level
- Property
- Property Owner
- Project
- Building

4) Step 4 Match the Property/Project > Salesforce ID

Step 4. Define Lookup Matching

You have indicated that the import file contains additional lookup field information. For each lookup field listed below, you must indicate which field on the related record you have included in your file.

Which field on Property do you want to match against to set the Property lookup field?

- Title
- Salesforce.com ID
- External ID [i](#)

5) Step 5 Select Record Type > Sale

Step 5. Select Record Type

Listing records have record types. Please select the record type you want to assign to your records from the list below.

Choose Record Type:

6) **Step 6** upload file

7) **Step 7** Make sure the columns in your file are mapped correctly, for example **Project ID > Project** and **Title (Listing) > Title** etc. The mapping an important step for the upload.

Step 7. Field Mapping Step 7 of 9

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Use the drop-down lists below to specify the salesforce.com fields that correspond to the columns in your import file. For your convenience, identically matching labels will be automatically selected.

Import Field	Salesforce.com Field
Project ID (col 0)	Project
Title (col 1)	Title
Listing status (col 2)	Listing Status
Currency Code (col 3)	Currency

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8) **Step 8** Import now!

Once imported, go back to the Project and ensure your new Listings are linked back to the Project

Listing 1 Customize Page

[Show Feed](#)

[Back to List: Listings](#) [Portal Feeds \[0\]](#) | [Listed on these portals \[0\]](#) | [Open Activities \[0\]](#) | [Activity History \[0\]](#) | [Enquiry Schedule \[0\]](#) | [Offers \[0\]](#) | [Inspections \[0\]](#) | [Notes & Attachments \[0\]](#) | [Listing History \[2\]](#)

Listing Detail [Edit](#) [Clone](#) [Send](#) [Match Requests](#) [Print Pdf](#)

Title	Listing 1	Owner	Aus Testing [Change]
Property	Listing 1	Project	550 Dulwich Hill
Listing Status	Available		
Website			

and your Listings are linked to a Unit/Property.

Units in this Project [New Property](#)

Action	Title	Building
Edit Del	Listing 1	
Edit Del	Unit 1 - 550 Dulwich Hill	
Edit Del	Unit 2 - 550 Dulwich Hill	
Edit Del	Unit 3 - 550 Dulwich Hill	
Edit Del	Unit 4 - 550 Dulwich Hill	

[Show 1 more »](#) | [Go to list \(6\) »](#)

Listings for this Project [New Listing](#)

Action	Title	Listing Type	Property Type
Edit Del	Listing 1	Sale	
Edit Del	Unit 1 - 550 Dulwich Hill	Sale	Apartment
Edit Del	Unit 2 - 550 Dulwich Hill	Sale	Apartment
Edit Del	Unit 3 - 550 Dulwich Hill	Sale	Apartment
Edit Del	Unit 4 - 550 Dulwich Hill	Sale	Apartment