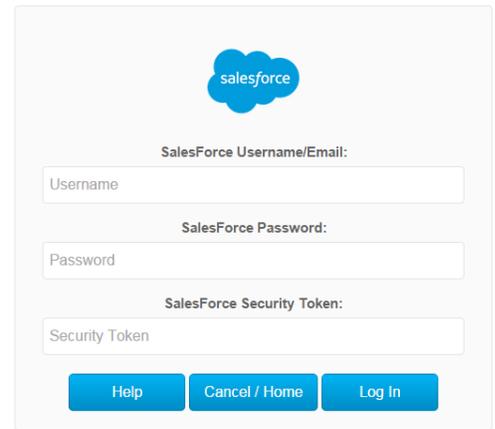


In order to use the import wizard you must log into Salesforce by using your username and password. A security token is required by Salesforce in order to access your account from outside the Salesforce website. Use the help button to determine your security token.



The image shows a Salesforce login form with the following fields and buttons:

- Header: Salesforce logo
- Label: Salesforce Username/Email:
- Field: Username
- Label: Salesforce Password:
- Field: Password
- Label: Salesforce Security Token:
- Field: Security Token
- Buttons: Help, Cancel / Home, Log In

Once successfully logged into your Salesforce account you will be presented with field mappings. These mapping allow you to customize the information that is imported into your Salesforce account. The system will automatically map known Salesforce field to captured lead information fields. These auto generated mappings can be modified or deleted if needed. Important: Salesforce requires there to be a last name and a company field present when importing.

+	Lead Field: [First Name]	→	SalesForce Field: [FirstName]	
+	Lead Field: [Last Name]	→	SalesForce Field: [LastName]	
+	Lead Field: [Company]	→	SalesForce Field: [Company]	
+	Lead Field: [Title]	→	SalesForce Field: [Title]	
+	Lead Field: [Street]	→	SalesForce Field: [Street]	
+	Lead Field: [City]	→	SalesForce Field: [City]	
+	Lead Field: [State]	→	SalesForce Field: [State]	
+	Lead Field: [Zip]	→	SalesForce Field: [PostalCode]	
+	Lead Field: [Phone]	→	SalesForce Field: [Phone]	
+	Lead Field: [Country]	→	SalesForce Field: [Country]	
+	Lead Field: [Email]	→	SalesForce Field: [Email]	
+	Create New Field Mapping	→	Press the file icon to commit new mapping.	

Creating/Modifying a new field mapping is very easy. Create a new mapping by scrolling to the bottom of the page and locate the green header. Modifying a mapping can be done by clicking the mapping header to expand the mapping properties.

Lead Field: [First Name] → Salesforce Field: [FirstName]

Select a Lead field from your Salesforce account that you would like to map captured lead data to.

SalesForce Lead Field

FirstName

SalesForce Field Data Type: string

Select the type of data captured lead data will populate the above Salesforce Field

Captured Lead Data Types

Information Field

Specify exactly what type of data will be populated in the Salesforce field.

Select a source captured lead field

First Name

This is typically captured lead contact information.

Replace any value with another value to fit your needs.

Find:

Any value matching this will be replaced with the below value. Blanks are allowed. Not case sensitive.

Replace With:

The value that will replace the found value above. Blanks are allowed.

Find and Replace Table

Delete F-R

Add F-R

Lead Field: [Last Name] → Salesforce Field: [LastName]

Select a Salesforce lead field from the drop down that you want to map information to.

SalesForce Lead Field

CustomField1__c

- Longitude
- Phone
- Email
- Website
- Description
- LeadSource
- Status
- Industry
- Rating
- AnnualRevenue
- NumberOfEmployees
- OwnerId
- IsConverted
- IsUnreadByOwner
- Jigsaw
- SFGA__CorrelationID__c
- SFGA__Correlation_Data__c
- SFGA__Web_Source__c
- CustomField1__c**
- Multi__c

Select the type of information you would like to map to the selected Salesforce lead field from the previous step.

Captured Lead Data Types

Information Field

- Information Field**
- Custom Qualifier
- Notes
- Server Capture Date Time
- Session
- Access Control
- Static Value
- Capture Device ID
- Exhibitor Booth
- Exhibitor Company
- Device Capture Date Time

Some information types require additional information in order to be mapped. The header will turn red to indicate the mapping has not been completed yet. The header will turn gray if everything is in working order.

Step 7: Each mapping allows values to be replaced if found. This is a useful tool in the case information needs to be formatted a certain way.

Find:

Tim

Any value matching this will be replaced with the below value. Blanks are allowed. Not case sensitive.

Replace With:

Timmy

The value that will replace the found value above. Blanks are allowed.

Find and Replace Table

tim -> Timmy
joe -> Joseph

Add F-R

Delete F-R

Step 8: Once fields have been mapped you may proceed to the next step by press the “Next” button in the top right corner header.

Step 9: The system will need you to confirm the amount of leads that will be imported into your Salesforce account.

Back **Confirm Import** Log Out

Pressing confirm you acknowledge 2 leads will be imported into your Salesforce Account. **Confirm**

Step 10: Once prompted, press “Import Records”. A progress bar will indicate the process of the import. It should only take matter of seconds to complete.

Import Records Into Salesforce? [X]

⚠ These Records will be imported into your Salesforce Account. Are you sure?

Import Records Cancel

Step 11: If any leads/records failed to import, there will be an option to download those records in Excel for manual import through SalesForce. Reason a record would fail are typically invalid email format, empty company name, empty last name or data type mismatch (Letters in a number only field).

Successfully Imported All Records Into Your Salesforce Account.

Finish