

Update the Amity Sync field in multiple accounts

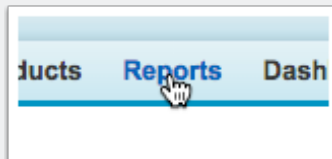
This article illustrates how to update the Amity Sync field in multiple existing Salesforce accounts.

In this demonstration, we assume that you want to Amity to synchronize with accounts that have a Closed Won opportunity.

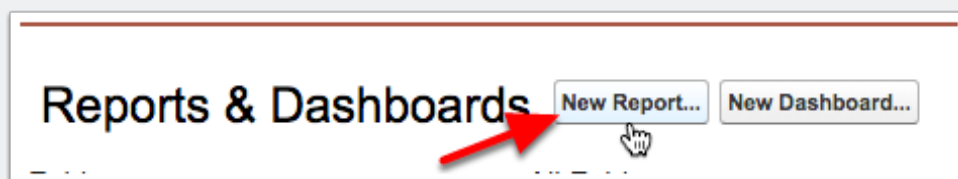
We use a Salesforce report to export a list of accounts into a CSV file. We then update the Amity Sync field in the CSV file using a spreadsheet to update the Amity Sync field in the CSV file. Finally, the CSV file is imported into Salesforce to update the existing accounts.

1. Login into Salesforce

2. Click the Reports tab



3. Click the New Report button



Update the Amity Sync field in multiple accounts

4. Create an Opportunities report

1. Expand the **Opportunities** folder.
2. Click the **Opportunities** item.
3. Click the **Create** button.

Select Report Types to Hide i

Select Report Type

Quick Find

- Accounts & Contacts
- Opportunities**
- Opportunities with Products
- Opportunities with Products and Schedules
- Opportunities with Contact Roles
- Opportunities with Partners
- Opportunities with Competitors
- Opportunity History
- Opportunity Field History
- Opportunity Trends
- Opportunities with Contact Roles and Products
- Customer Support Reports
- Leads
- Campaigns
- Activities
- Contracts and Orders

Preview

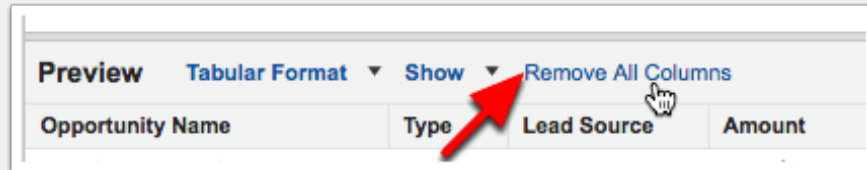
Opportunity (Pipeline) Report

Opportunity Name	Account	Stage	Profitability
GenePoint - GC5000 Generators (2)	\$125,000	Qualification	10%
Genwatt, Inc. - Standby Generators (5)	\$350,000	Needs Analysis	40%
Acme - Electrical Generators (4)	\$230,000	Negotiations	80%
Grand Total:	\$705,000		

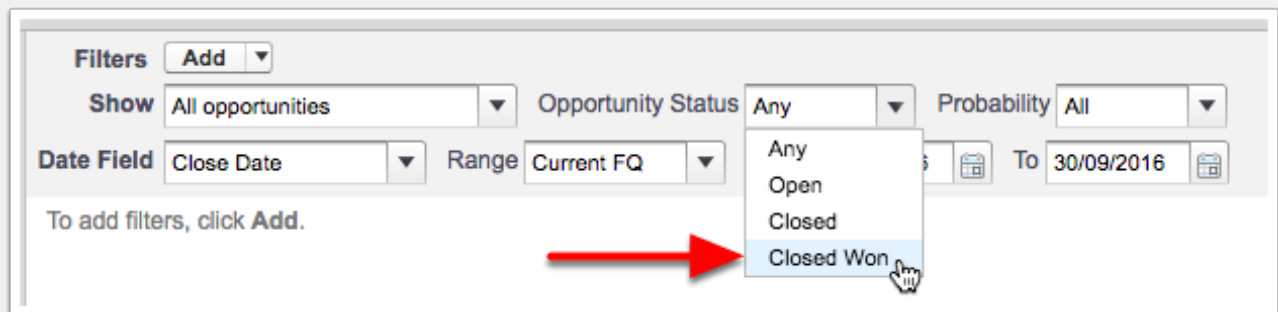
Cancel **Create**

Update the Amity Sync field in multiple accounts

5. Click the Remove All Columns link in the Preview panel



6. Change the Opportunity Status to Closed Won in the Filters panel

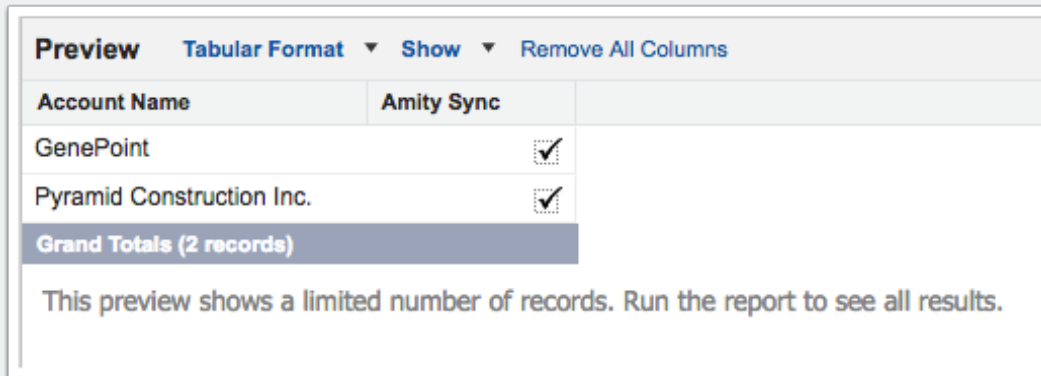


Update the Amity Sync field in multiple accounts

7. Select the necessary columns

Drag and drop the following columns from the Fields panel into the Preview panel:

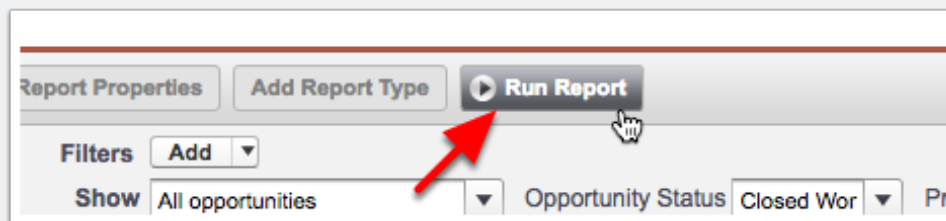
1. Account: General > Account Name
2. Account: Custom Info > Amity Sync



The screenshot shows a report preview interface. At the top, there are controls: 'Preview', 'Tabular Format' (with a dropdown arrow), 'Show' (with a dropdown arrow), and 'Remove All Columns'. Below this is a table with two columns: 'Account Name' and 'Amity Sync'. The table contains two rows of data: 'GenePoint' and 'Pyramid Construction Inc.', both with a checkmark in the 'Amity Sync' column. A 'Grand Totals (2 records)' row is highlighted in blue. Below the table, a message states: 'This preview shows a limited number of records. Run the report to see all results.'

Account Name	Amity Sync
GenePoint	<input checked="" type="checkbox"/>
Pyramid Construction Inc.	<input checked="" type="checkbox"/>
Grand Totals (2 records)	

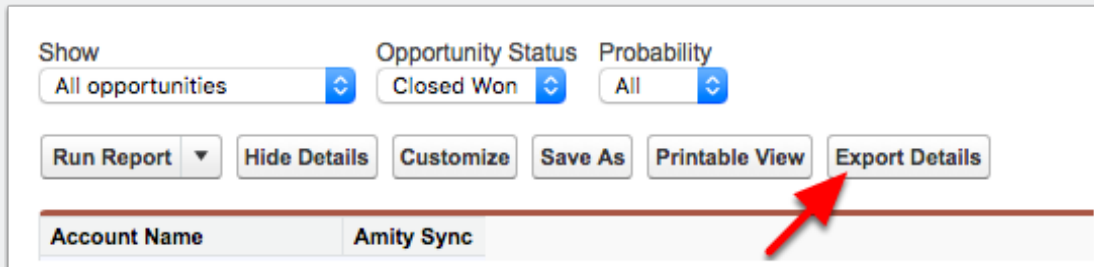
8. Click the Run Report button.



Update the Amity Sync field in multiple accounts

9. Click the Export Details button

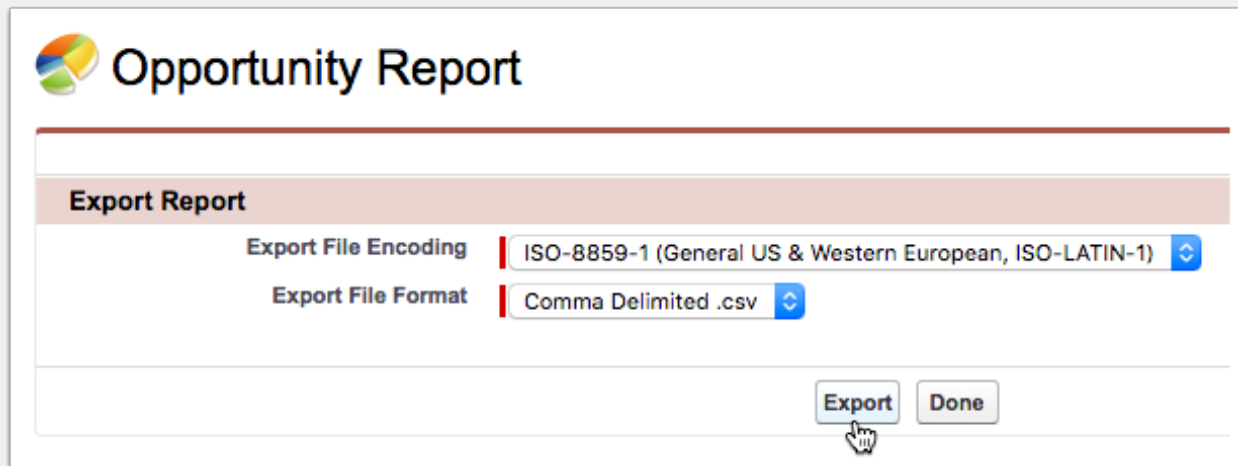
Click Export Details



The screenshot shows a web interface for an Opportunity Report. At the top, there are three dropdown menus: 'Show' set to 'All opportunities', 'Opportunity Status' set to 'Closed Won', and 'Probability' set to 'All'. Below these are several buttons: 'Run Report' (with a dropdown arrow), 'Hide Details', 'Customize', 'Save As', 'Printable View', and 'Export Details'. A red arrow points to the 'Export Details' button. Below the buttons is a table with one row: 'Account Name' | 'Amity Sync'.

10. Export a CSV file

1. Change the Export File Format to **Comma Delimited .csv**
2. Click the **Export** button
3. Save the CSV file



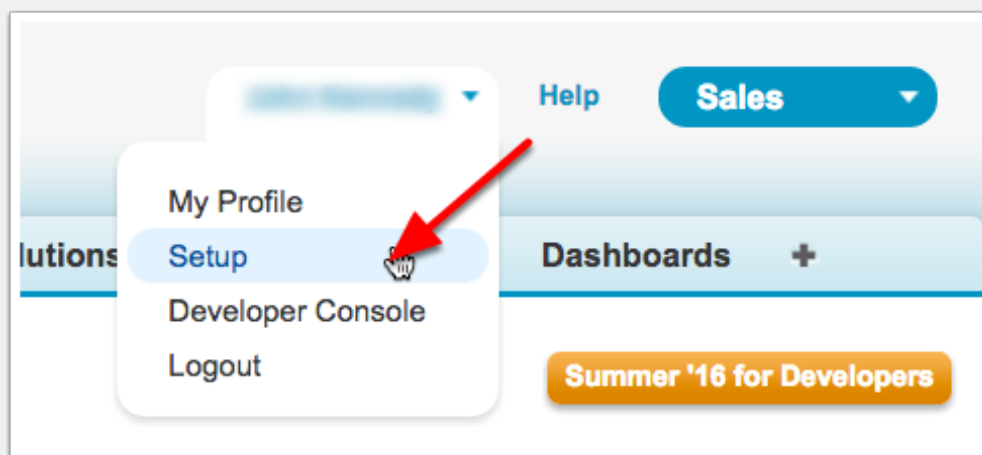
The screenshot shows the 'Opportunity Report' dialog box. The title is 'Opportunity Report'. Below the title is a section titled 'Export Report'. There are two dropdown menus: 'Export File Encoding' set to 'ISO-8859-1 (General US & Western European, ISO-LATIN-1)' and 'Export File Format' set to 'Comma Delimited .csv'. At the bottom right, there are two buttons: 'Export' and 'Done'. A mouse cursor is pointing at the 'Export' button.

Update the Amity Sync field in multiple accounts

11. Update the Amity Sync column

1. Open the CSV file in your favourite spreadsheet application
2. Update all of the cells in the Amity Sync column to **1**
3. The export process made add some additional rows to the file that contain report name, copyright information, etc. Delete all of these rows.
4. Save the changes to your CSV file
5. Return to Salesforce

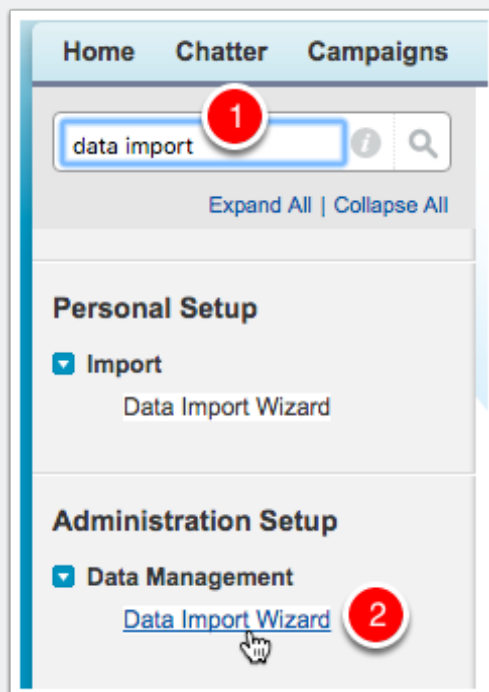
12. Click Setup from the user menu



Update the Amity Sync field in multiple accounts

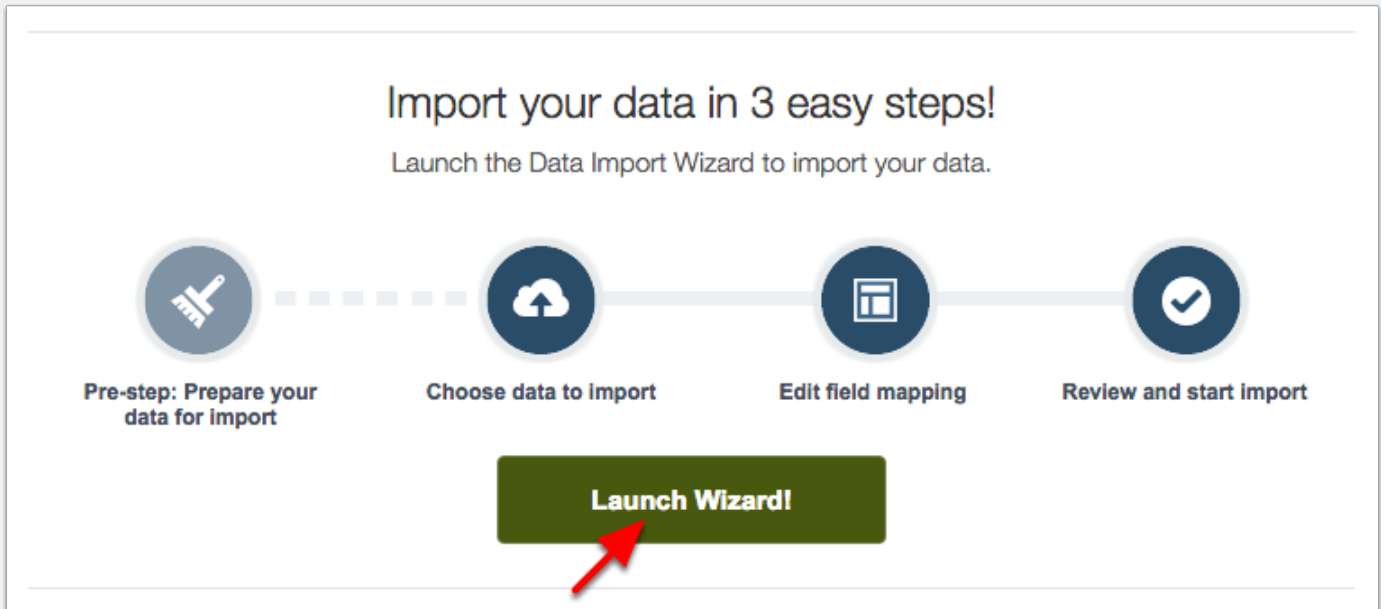
13. Open the Data Import Wizard

1. Type "data import" into the Quick Find search box
2. Click the Data Import Wizard



Update the Amity Sync field in multiple accounts

14. Click the Launch Wizard! button



Update the Amity Sync field in multiple accounts

15. Complete Step 1 of the Import Wizard

1. Click on **Accounts and Contacts**.
2. Click **Update existing records**.
3. Ensure the Match Account by picklist is set to **Account Name and Site**.
4. Check the **Update existing Account information** checkbox.
5. Click CSV and choose your file.
6. Click the **Next** button.

Import your Data into Salesforce Help for this page ?

You can import up to 50,000 records at a time.

What kind of data are you importing? ?

Standard objects	Custom objects
Accounts and Contacts ✓	
Leads >	
Solutions >	

What do you want to do? ?

Add new records >

Update existing records ✓

Match Contact by: ?

Name ▾

Match Account by: ?

Account Name and Site ▾

Update existing Account information? ?

Update existing Account information

Trigger workflow rules and processes? ?

Trigger workflow rules and processes for new and updated records

Add new and update existing records >

Where is your data located? ?

File

export.csv ✓

Character Code ?

ISO-8859-1 (General US & Western European, ISO-LATIN-1) ▾

5 CSV

Outlook CSV

ACT! CSV

GMail CSV

Cancel Previous **Next** 6

Update the Amity Sync field in multiple accounts

16. Click the Next button on Step 2

Step 2 will allow you to edit the field mapping. You should not need to make any changes here. Click the **Next** button.

Edit Field Mapping: Accounts and Contacts

Your file has been auto-mapped to existing Salesforce fields, but you can edit the mappings if you wish. Unmapped fields will not be imported.

Edit	Mapped Salesforce Object	CSV Header	Example	Example	Exa
Change	Account: Account Name	Account Name	GenePoint	Pyramid Cons	Opp
Change	Account: Amity Sync	Amity Sync	1	1	

17. Click the Start Import button on Step 3.

Review & Start Import [Help for this page](#)

Review your import information and click Start Import.

Your selections:

- Accounts and Contacts ✓
- Update existing records ✓
- ✓

Your import will include:

Mapped fields

2

Your import will not include:

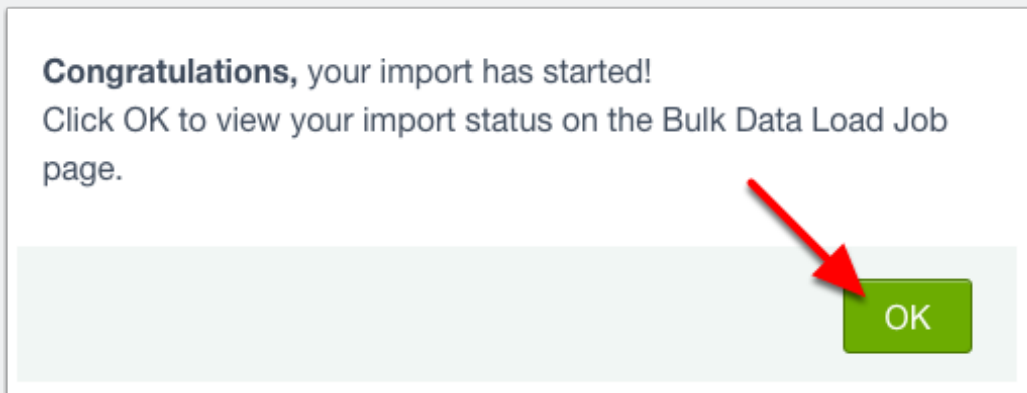
Unmapped fields

0

Cancel Previous **Start Import**

Update the Amity Sync field in multiple accounts

18. Click Ok to view the import status.



19. Wait for the Salesforce email

When Salesforce has finished processing the import, you will receive an email.

Once you get the email, the process is complete.