

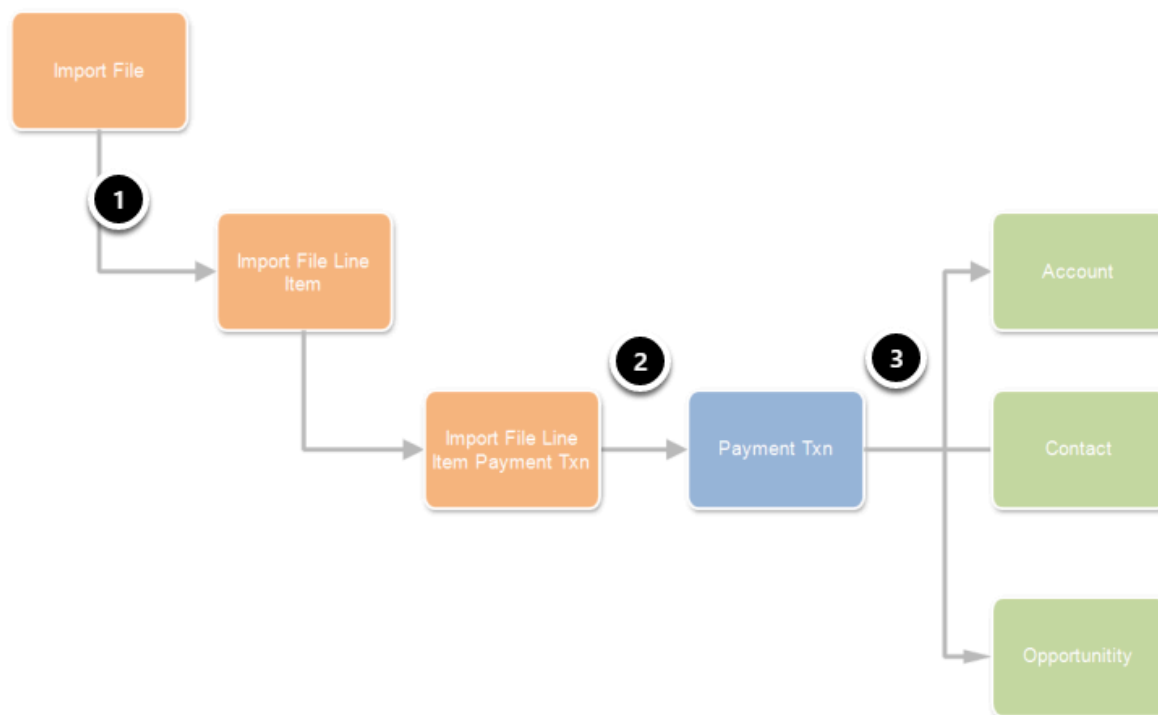
# How to add custom fields to Import Files

The import file process allows for extra fields to be added and processed.

Quick Steps:

1. Add a new Custom field to the "Import File Line Item" Custom Object
2. Add a new Custom field with the same API name to "Payment Txn" Custom Object
3. Optionally add a new Custom field with the same API name to Account, Contact or Opportunity

## 1. Data Model and the Processes



Before adding new fields, it is useful to understand which Objects are updated and when.

The above process shows the data model being used as part of the Import Files Process

1. When you add a new Import File, select the CSV to upload, match the columns to the field names in Salesforce and press the "Import" button. This creates the "Import File" and "Import File Line Item (s)". Each import line item represents a row in the CSV file imported.
2. On the Import File screen in Salesforce, when you press the "Process" button, followed by "Process Now", this process creates the "Import File Line Item Payment Txn" record and an "Payment Txn" record. The records are created for every "Import File Line Item" record.

The main reason why a "Import File Line Item" is not matched directly to a "Payment Txn" record, and the "Import File Line Item Payment Txn" record is created is because one "Import File Line Item" (row in a CSV file) could match to multiple "Payment Txns". Eg. when using BPAY and a person over pays a payment.

3. The Batch Processor runs every 10 minutes and processes Payment Txn records. For more info about the Batch Processor, see: [How does the Batch Payments Processor work](#)

## 2. Field Mappings

COLUMN IN UPLOADED FILE	MAPS TO...	EXISTING PAYMENT TXN FIELD	RECEIVING FIELD EXISTS	MANDATORY TO PROCEED	COMMENTS
Account No.			✓		
gross	Amount		✓	✓	
Bank			✓		
date	Bank Deposit Date		✓	✓	use the standard date format dd/mm/yy
Biller Code			✓		
BSB No.			✓		
Campaign Name			✓		
Comments			✓		
Country			✓		
Credit Card CCV to Process			✓		
Credit Card Expiry MYYYY			⚠		This Import File Line Item field has no equivalent in the Payment Txn Object
Credit Card No to Process			✓		
Currency			✓		
Donation Amount			✓		Decimal values may be truncated during processing
Donation By			✓		
Donation By/Company Name			✓		
DpsBillingId			✓		
Email			✓		
First Name			✓		
Freight			✓		
Frequency			✓		
Fundraiser First Name			⚠		This Import File Line Item field has no equivalent in the Payment Txn Object

1. The first column has picklists that match the column headings in the CSV import file (selected in prior step of the wizard)
2. The second column has fields from the "Import File Line Item" Object
3. If the "Payment Txn" Object does NOT have a field with the same API Name as the "Import File Line Item" Object then a warning message is shown.

If your CSV file (1) contains a column that you wish to import and store in Salesforce, then you need to create a new custom field (2) on both "Import File Line Item" Object and the "Payment Txn" Object.

The next steps will take you through adding a new example field for "Fee"

## 3. Adding a new custom field to Import File Line Item

During this process, we will add an example field called "Fee" that is of type Currency.

## 3.1. Locate Custom Object Import File Line Item

The screenshot shows the 'Object Manager' page in the Payments2us system. The 'Object Manager' tab is selected in the top navigation bar. A search bar is visible at the top right. The main content area displays a list of objects. The 'Import File Line Item' object is highlighted with a red box and a callout '2'. The 'Import File' object is also highlighted with a red box and a callout '1'.

Object Name	Label	Description	Created Date	Status	Actions
Import File	AAkPay__Import_File__c	Used for file imports, such as BPAY Transactions	6/05/2019	✓	✓
Import File Line Item	AAkPay__Import_File_Line_Item__c	Imported file line items details as extracted from the Import File	6/05/2019	✓	✓
Import File Line Item Payment Txn	AAkPay__Import_File_Line_Item_Payment_T	Links the imported line item(s) with the associated Payment Txn(s)	6/05/2019	✓	✓
IP Address Access	AAkPay__IP_Whitelist__c	IP_Whitelist__c: Controls how certain IP addresses are managed - allowed/blocked	6/05/2019	✓	✓
Lead	Lead				
Letter	AAkPay__Letter__c		6/05/2019	✓	✓
Macro	Macro				
Merchant Facility	AAkPay__Payment_Setting__c	Payment settings (Merchant Accounts) for gateway	6/05/2019	✓	✓

1. Classic : Navigate to Setup > Create > Objects then Click into "Import File Line Item"
2. Lightning : Navigate to Setup > Object Manager then select the Import File Line Item"

## 3.2. Add a new field

The screenshot shows the 'Import File Line Item' object details page. The 'Fields & Relationships' section is active, showing a list of fields. A 'New' button is highlighted with a red box and a callout '2'. The 'Details' tab is selected in the left sidebar, and the 'Fields & Relationships' sub-tab is highlighted with a red box and a callout '1'.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Account No.	AAkPay__Account_No__c	Text(20)		
Amount	AAkPay__Amount__c	Currency(7, 2)		
Bank	AAkPay__Bank__c	Text(50)		
Bank Deposit Date	AAkPay__Bank_Deposit_Date__c	Date		
Billor Code	AAkPay__Billor_Code__c	Text(80)		
BSB No.	AAkPay__BSB_No__c	Text(7)		

1. Classic - Scroll down to the "Custom Fields & Relationships" section. Then press NEW button
2. Lightning - Select "Fields and Relationship" tab and press New button

### 3.3. Choose field data type

The screenshot shows the Salesforce 'New Custom Field' setup page for the 'Import File Line Item' object. The left sidebar contains a navigation menu with options like Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, Triggers, and Validation Rules. The main content area is titled 'New Custom Field' and shows 'Step 1. Choose the field type'. Below this, it says 'Specify the type of information that the custom field will contain.' and 'Data Type'. A list of data types is provided, including 'None Selected', 'Auto Number', 'Formula', 'Roll-Up Summary', 'Lookup Relationship', 'Master-Detail Relationship' (selected), 'External Lookup Relationship', 'Checkbox', 'Currency' (highlighted with a red box and callout '1'), and 'Date'. The 'Next' button is also highlighted with a red box and callout '2'.

1. Select Field data type. In our example, we are adding a new Currency field.
2. Press the NEXT button

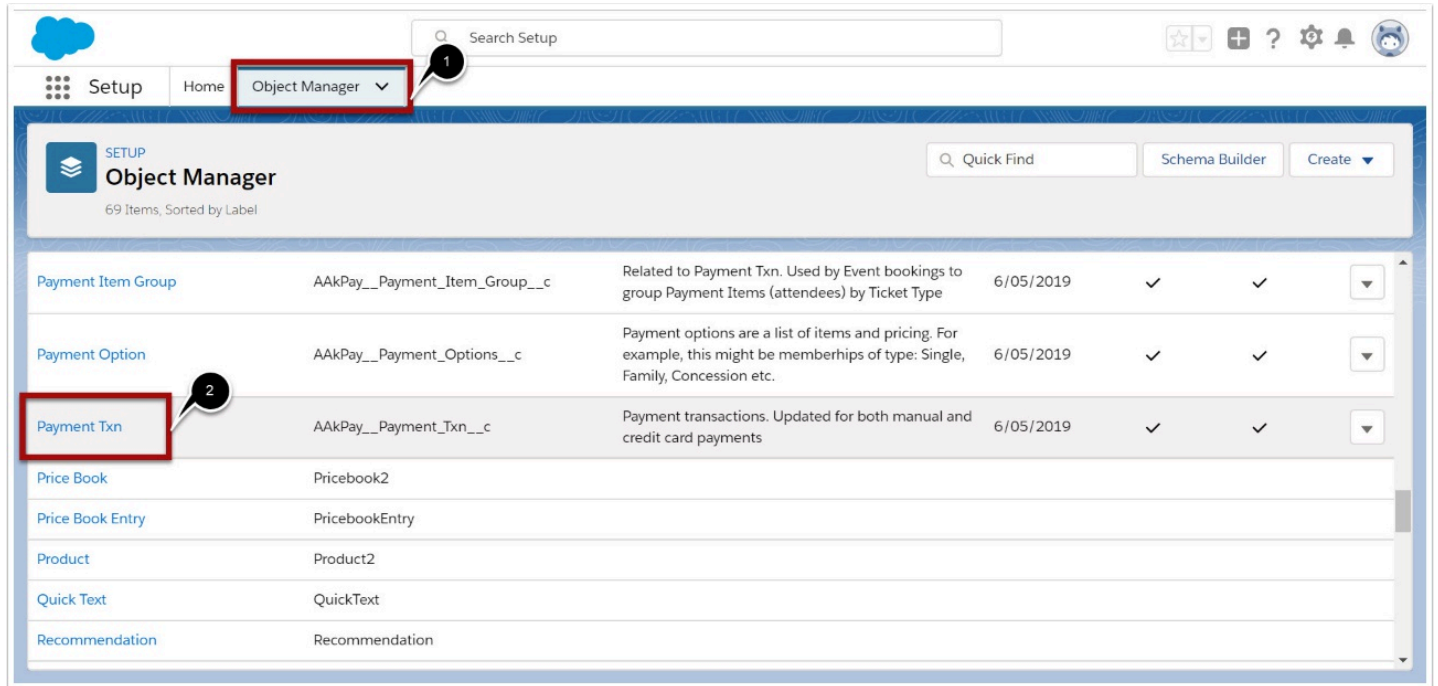
### 3.4. Enter field Label and Continue with Wizard

The screenshot shows the Salesforce Setup interface. The top navigation bar includes the Salesforce logo, a search bar labeled 'Search Setup', and several utility icons. Below the navigation bar, the 'Setup' menu is open, showing 'Home' and 'Object Manager'. The 'Object Manager' dropdown is selected, leading to the 'Import File Line Item' page. The page title is 'Import File Line Item' and the breadcrumb is 'SETUP > OBJECT MANAGER'. The left sidebar contains a list of setup options: Details, Fields & Relationships (highlighted), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main content area is titled 'New Custom Field' and shows 'Step 2. Enter the details' of a 4-step wizard. The 'Field Label' is 'Fee'. Below it, a note says 'Please enter the length of the number and the number of decimal places. For example, a number with a length of 8 and 2 decimal places can accept values up to "12345678.90"'. The 'Length' is '16' and 'Decimal Places' is '2'. The 'Field Name' is 'Fee', which is highlighted with a red box. Below the 'Field Name' is a 'Description' field and a 'Help Text' field. Navigation buttons 'Previous', 'Next', and 'Cancel' are at the top right of the wizard.

The key item in this step is the "Field Name" value. This field is also known as the API Name. For the matching process, this field name must be **exactly** the same for all objects. After entering the required information, press the NEXT button and continue with the wizard all the way through using the default values.

## 4. Adding a new custom field to Payment Txn

### 4.1. Locate Custom Object Payment Txn



The screenshot shows the Salesforce Object Manager interface. At the top, there is a navigation bar with 'Setup', 'Home', and 'Object Manager' (highlighted with a red box and a callout '1'). Below this, the 'Object Manager' section is displayed with a search bar and a 'Create' button. A table lists various objects, with 'Payment Txn' highlighted by a red box and a callout '2'. The table contains the following data:

Object Name	API Name	Description	Created Date	IsActive	IsVisible	Actions
Payment Item Group	AAkPay__Payment_Item_Group__c	Related to Payment Txn. Used by Event bookings to group Payment Items (attendees) by Ticket Type	6/05/2019	✓	✓	▼
Payment Option	AAkPay__Payment_Options__c	Payment options are a list of items and pricing. For example, this might be memberships of type: Single, Family, Concession etc.	6/05/2019	✓	✓	▼
<b>Payment Txn</b>	<b>AAkPay__Payment_Txn__c</b>	Payment transactions. Updated for both manual and credit card payments	6/05/2019	✓	✓	▼
Price Book	Pricebook2					
Price Book Entry	PricebookEntry					
Product	Product2					
Quick Text	QuickText					
Recommendation	Recommendation					

1. Classic : Navigate to Setup > Create > Objects then Click into "Payment Txn"
2. Lightning : Navigate to Setup > Object Manager then select the "Payment Txn"

## 4.2. Add a new field

SETUP > OBJECT MANAGER  
**Payment Txn**

Details  
**Fields & Relationships**  
Page Layouts  
Lightning Record Pages  
Buttons, Links, and Actions  
Compact Layouts  
Field Sets  
Object Limits  
Record Types  
Related Lookup Filters

**Fields & Relationships**  
49+ Items, Sorted by Field Label

Q Quick Find **New** Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Account	AAkPay__Account__c	Lookup(Account)	✓	▼
Account No.	AAkPay__Account_No__c	Text(20)		▼
Account Subscription	AAkPay__Account_Subscription__c	Lookup(Account Subscription)	✓	▼
Account Type	AAkPay__Account_Type__c	Picklist		▼
Address Id	AAkPay__Address_Id__c	Text(30)		▼
Amount	AAkPay__Amount__c	Currency(14, 2)		▼

1. Classic - Scroll down to the "Custom Fields & Relationships" section. Then press NEW button
2. Lightning - Select "Fields and Relationship" tab and press New button



## 4.3. Choose field data type

The screenshot shows the Salesforce 'New Custom Field' setup page for the 'Payment Txn' object. The page is titled 'New Custom Field' and is part of the 'Payment Txn' setup. The left sidebar shows the 'Fields & Relationships' section. The main content area is titled 'Step 1. Choose the field type' and contains a table of data types. The 'Currency' option is selected and highlighted with a red box and a callout '1'. The 'Next' button is highlighted with a red box and a callout '2'.

Data Type	
<input type="radio"/> None Selected	Select one of the data types below.
<input type="radio"/> Auto Number	A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
<input type="radio"/> Formula	A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
<input type="radio"/> Roll-Up Summary	A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.
<input type="radio"/> Lookup Relationship	Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.
<input type="radio"/> Master-Detail Relationship	Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where: <ul style="list-style-type: none"> <li>The relationship field is required on all detail records.</li> <li>The ownership and sharing of a detail record are determined by the master record.</li> <li>When a user deletes the master record, all detail records are deleted.</li> <li>You can create roll-up summary fields on the master record to summarize the detail records.</li> </ul> The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.
<input type="radio"/> External Lookup Relationship	Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.
<input type="radio"/> Checkbox	Allows users to select a True (checked) or False (unchecked) value.
<input checked="" type="radio"/> Currency	Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.

1. Select Field data type. In our example, we are adding a new Currency field.
2. Press the NEXT button



## 4.4. Enter field Label and Continue with Wizard

The screenshot shows the 'Object Manager' interface for 'Payment Txn'. The 'Fields & Relationships' tab is selected in the left sidebar. The main area displays the 'New Custom Field' wizard, specifically 'Step 2. Enter the details'. The 'Field Label' is 'Fee'. The 'Length' is '16' and 'Decimal Places' is '2'. The 'Field Name' is 'Fee', which is highlighted with a red box. Below the 'Field Name' is a 'Description' field. At the bottom, there is a 'Help Text' field. Navigation buttons 'Previous', 'Next', and 'Cancel' are visible in the top right of the wizard area.

The key item in this step is the "Field Name" value. This field is also known as the API Name. For the matching process, this field name must be **exactly** the same for all objects. After entering the required information, press the NEXT button and continue with the wizard all the way through using the default values.