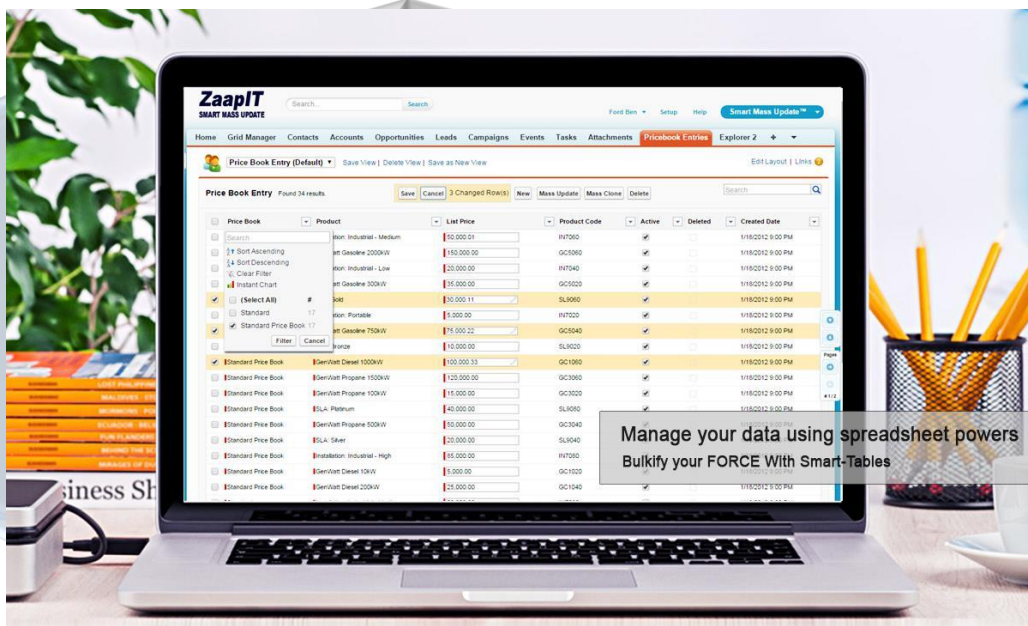


ZaapIT's - Smart-Tools

Getting Started / Training Guide

Created by Ben Ford

App Version: 1.693 (Jul-2018)



2018

INTRODUCTION

ZaapIT Apps can save up to 93.5% of your time in Salesforce.com by doing everything in Bulk / Mass in Salesforce in one smart list/screen.

With one click of a mouse you can see all the desired data taken from any desired objects. Instantly you can see what is missing and what needs to be updated by creating actionable reports.

Beyond visibility you can immediately use the Smart Mass Update functionality (inline editing & mass updating) to modify any or all records and never leave the current page/screen.

ZAAPIT CORE FUNCTIONALITY

ZaapIT has all the following core functionality:

1. Mass Inline editing from within Salesforce simply changes the view to inline editing by clicking the edit button.
2. Fast Inline editing from within Salesforce simply changes the selected grid-cell to inline editing by clicking the edit button on the cell.
3. Search functionality to find any record quickly in any object/list.
4. Action – Edit, Add and Delete from master screen.
5. Lighting button that opens related information (overview, contacts , task and etc) in a pop, click on any object and it opens another pop up.
6. Create task from master screen.
7. [+] Button which allows for bulk adding of leads, contacts, accounts, opportunities, campaigns (or any SF object).
8. Smart New to add a new record with smart record type selection.
9. Sort & filters are at any column-name & objects.
10. Smart Edit allows you to change and data in any object for multiple objects and never leave the screen.
11. Merge your own accounts/contacts/leads via a pop-up via smart-mass-update or in bulk via dedup-manager
12. Inter-object viewability.
13. Add to Campaign from contacts & leads grids.
14. Drag data to mass update/edit appropriate records aka fill series /drag & copy.
15. Create new or edit events from events screen.
16. Create new or update multiple tasks from task screen view.
17. Conditional Styling – mark rows/fields based on data
18. Mass create relate records based for any object e.g. mass create tasks for accounts...

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ACCESS THE TOOLS

To access ZaapIT's Smart-Mass-Update / Dedup-manager / Smart-Activity-Manager log into Salesforce. Notice in the upper right the following screen shot (in lightning use the app launcher on the top-left).



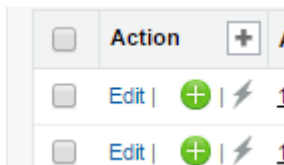
Click the Arrow and the you will see Smart-Mass-Update / Dedup-manager / Smart-Activity-Manager now you will see Salesforce in the ZaapIT app. To go back Salesforce Classic, click the same arrow and then click Sales. While in the view you have access to all the functionality described in Section 2 above

All objects in this view are the same as in Sales. All your personal data is here.

1. CORE FUNCTIONALITY ACTION SECTION

1.1. ACTION SECTION

Click on any object-tab and you will see the below on the left side:

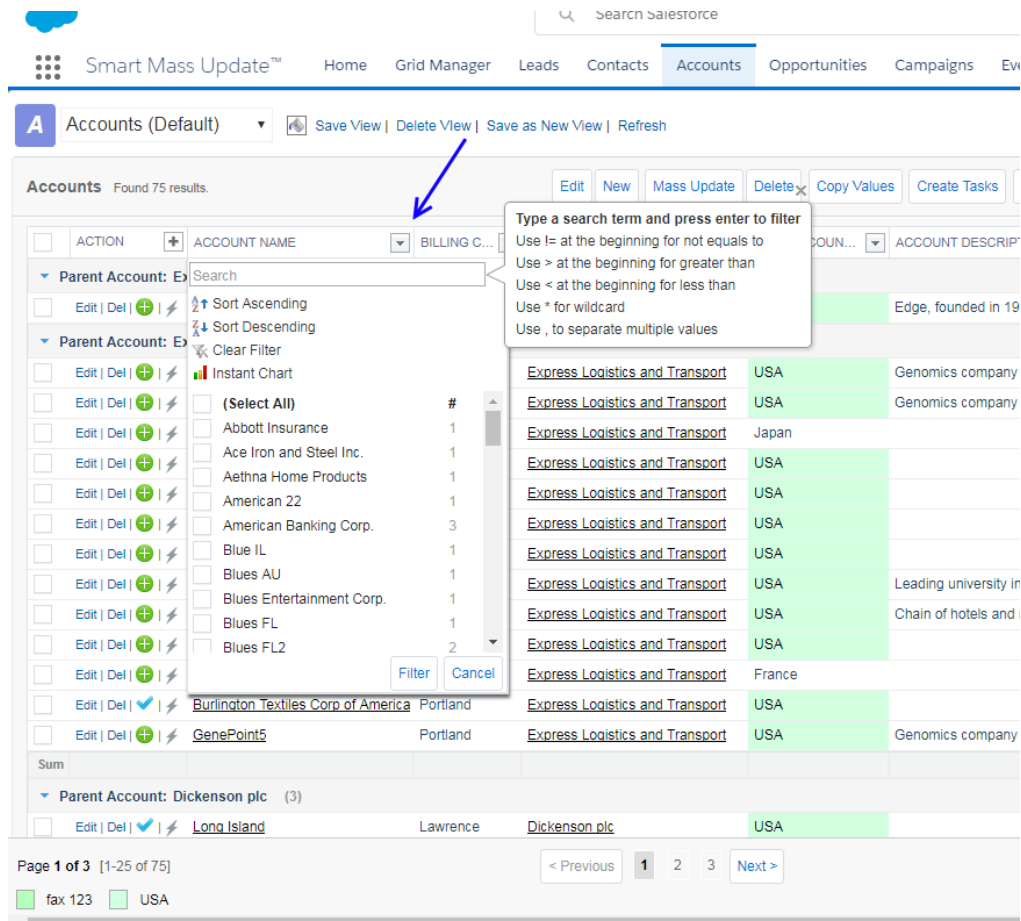


Explanations:

- Click the Check-Box next to each row to select individual rows / records
- Click the Check-Box on the top to select all the rows / records in the current page. You would use this to apply an action to all the rows / records
- The Edit link allows you to edit a single record from this view.

1.2. FILTER FUNCTIONALITY

The column headers have an arrow that allows you to search, sort & filter the current view. Please see below the Account Name filter screen shot.



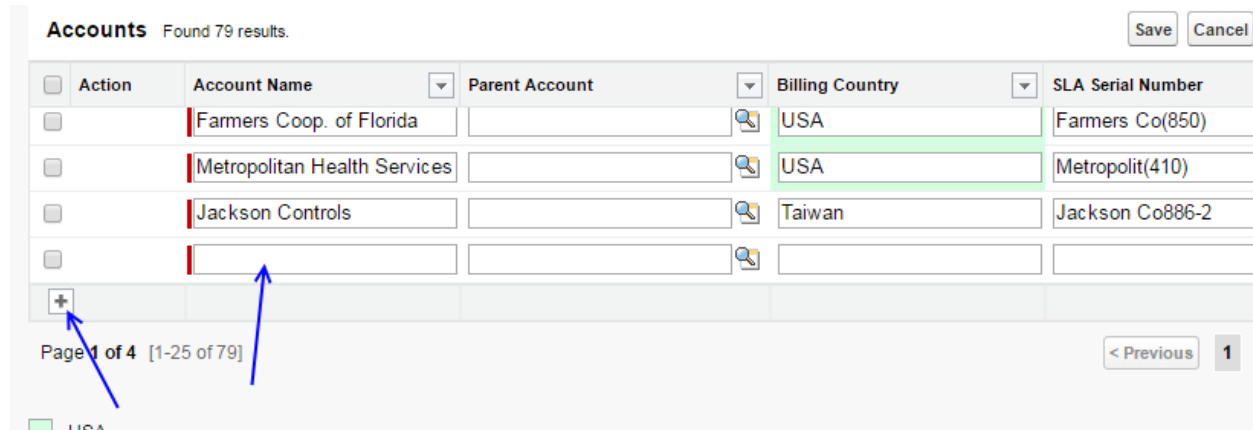
In an average Salesforce system there are thousands of accounts, work with this functionality to see the relevant records. Here are some examples to get you going.

- Click account type and select prospects
- Click Billing country and sort descending
- Click billing city and choose a city
- Use the filter's search for "start-with" search, use *, >, < and != for advanced searches.

Then go test out the other tabs/objects and their filters.

1.3. [+] BUTTON (NEXT TO ACTION HEADER ABOVE LIGHTNING BUTTON OR AT THE BOTTOM)

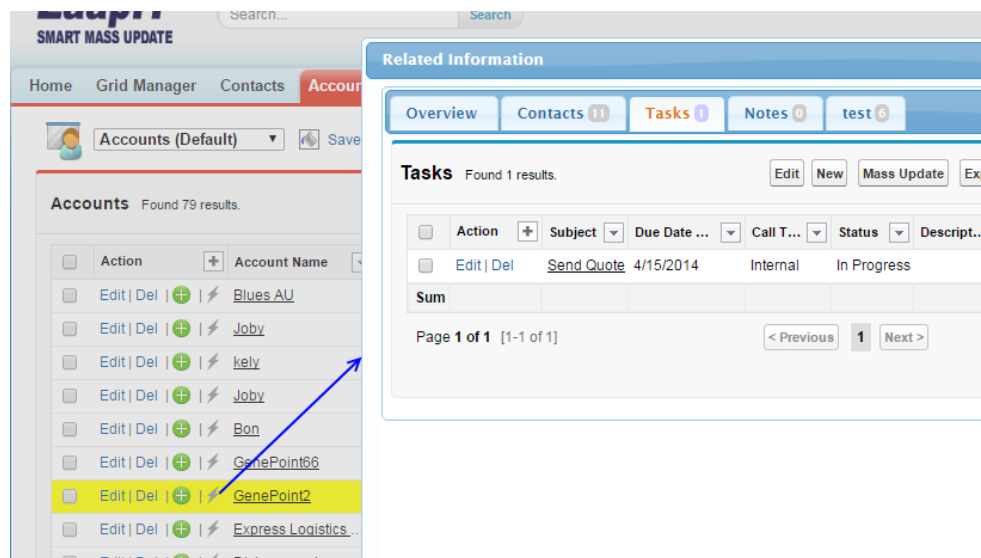
Click this button or move your mouse to the preset the number of new rows where you can then edit this number. Change it to 3 and hit enter or [+], you will see 3 blank lines at the bottom of the page. Here you can add the records from this page.



Same functionality in all objects.

1.4. LIGHTNING SYMBOL

The lightning button allows you update the selected record right from this screen, log a call, create or update a task, create an appoint etc. Screen shot below shows the pop up resulting from hitting the lightning button.



1.5. DRAG AND REPLACE AKA "FILL SERIES"

While in edit mode on the lower right of any data field is a black dot. Drag this dot and it will replace or add the content of the dragged location to the new locations (keep your mouse on top of the fields that you want to impact).

Accounts Found 79 results.

<input type="checkbox"/>	Action	Account Name	Parent Account	Billing Country
<input type="checkbox"/>		Blues AU	Blues Entertainment Corp.	USA
<input checked="" type="checkbox"/>		Joby	Blues Entertainment Corp.	USA
<input checked="" type="checkbox"/>		kely	Blues Entertainment Corp.	USA
<input checked="" type="checkbox"/>		Joby	Blues Entertainment Corp.	USA
<input type="checkbox"/>		Bon		USA

2. CORE BUTTON FUNCTIONALITY

The following buttons have the same functionality across all objects.

2.1. EDIT BUTTON

This is the most powerful of all buttons. Please go to Opportunities tab and click the Edit Button located on the top and you will see the following view.

Opportunities - Working List (Default) Save View | Delete View | Save as New View Edit Layout | Links

Opportunities - Working List Found 163 results. Save Cancel New Mass Update Delete Create Tasks Contact Role Actions

ACTION	NAME	ACCOUNT	BILLING C...	AMOUNT	CREATED D...	QUANTITY	STAGE	CLOSE DATE	PRODUCTS	FORECAST CA
Stage: Won (2)										
				\$1,544.18			22			
Stage: Closed Won (45)										
<input type="checkbox"/>	Air France	Blues US	New York	23.01	11/12/2015 2:19 PM		Closed Won	11/17/2015		Closed
<input type="checkbox"/>	Vimount 1	vimount		2.00	11/12/2015 1:02 PM		Closed Won	11/12/2015		Pipeline
<input type="checkbox"/>	Vimount 2	vimount		2.00	11/12/2015 1:02 PM		Closed Won	11/12/2015		Pipeline
<input type="checkbox"/>	Vimount 3	vimount			11/12/2015 1:02 PM		Closed Won	11/12/2015		Pipeline
<input type="checkbox"/>	University of AZ 2016	University of Arizona	Tucson	90,000.99	1/19/2015 12:01 AM	15.00	Closed Won	9/30/2016		Closed #1/7
<input checked="" type="checkbox"/>	Grand Hotel	Long Island	Tel Aviv	835,000.00	8/19/2014 3:35 PM	3.00	Closed Won	1/13/2015		Closed
<input checked="" type="checkbox"/>	Burlington Textiles Weevir	Burlington Textiles Corp of	Burlington	4,740,000.00	2/20/2014 1:38 AM	3.00	Closed Won	7/6/2014		Closed
<input checked="" type="checkbox"/>	Grand Hotels SLA	Grand Hotels & Resorts L	Chicago	2,230,000.00	2/19/2014 10:16 PM	123.00	Closed Won	5/5/2017		Closed

Page 1 of 7 [1-25 of 163] < Previous 1 2 3 4 5 6 7 Next > Rows per page 25

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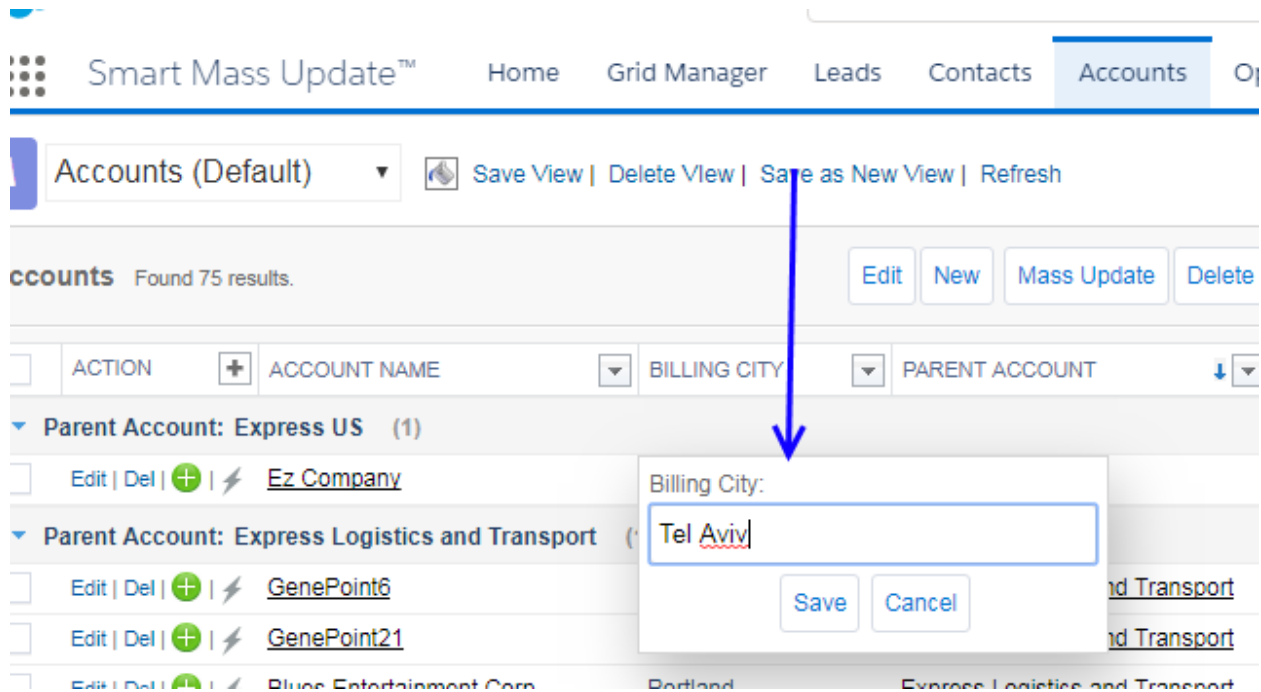
Please notice that you now have the ability to do inline editing off any or all of your records. Simply pick the records you wish to update and type in the info. If drop down box, click the arrow and change. When done making all changes hit save and all records are updated. See below for accounts, exact same functionality not only for accounts but all objects.

Action	Account Name	Parent Account	Billing Country	SLA Serial Number	Annual Revenue	Account Phone
<input type="checkbox"/>	Blues AU	Blues Entertainment Corp.	USA	Blues AU43467		434677788
<input type="checkbox"/>	Joby		USA	Joby111		13
<input checked="" type="checkbox"/>	kely		USA	XXX		15
<input type="checkbox"/>	Joby		USA	Joby		15
<input type="checkbox"/>	Bon		USA	Bon		

2.1. FAST INLINE EDIT

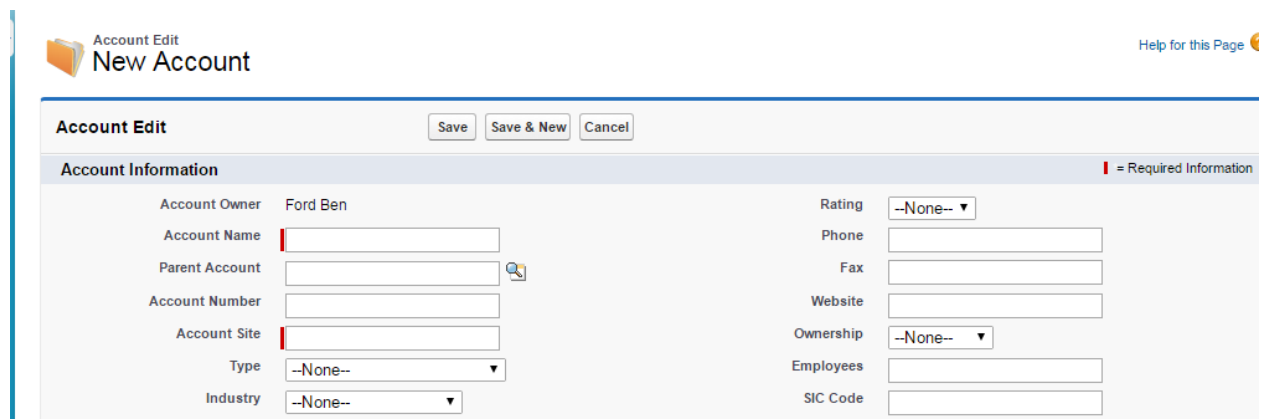
Click the pencil icon on a grid cell to open the fast-inline-edit option.

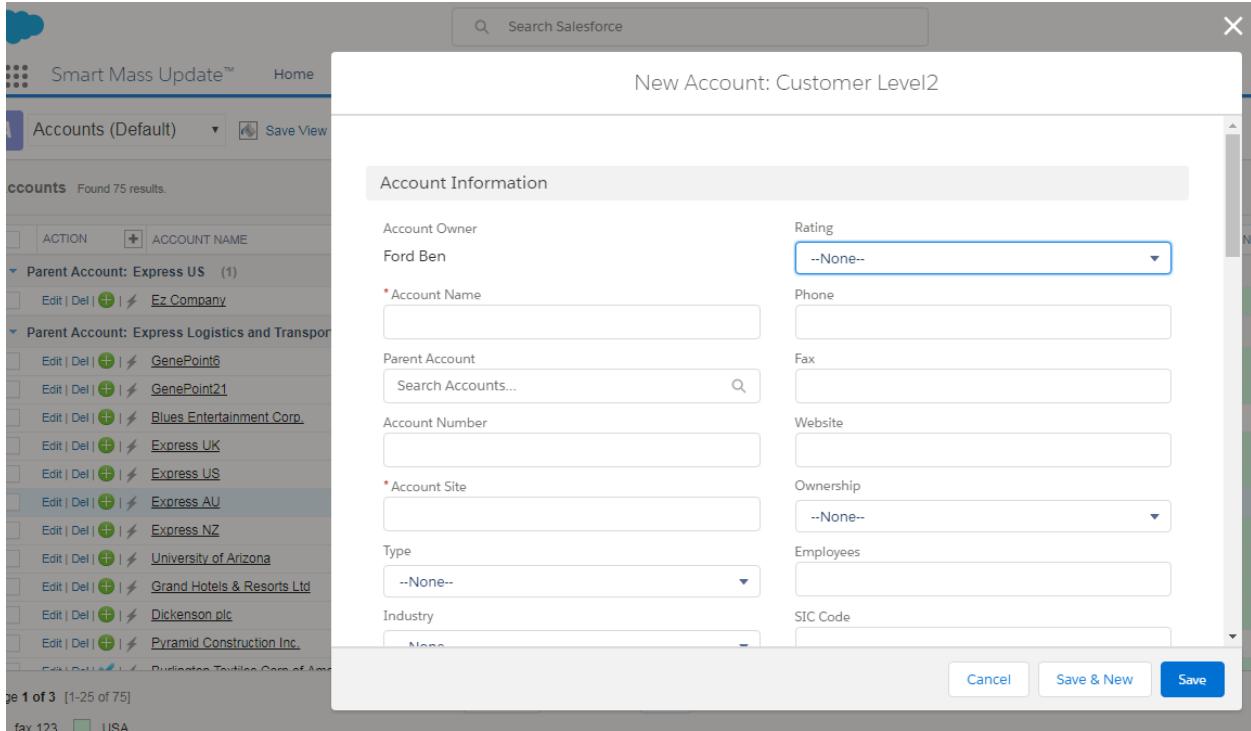
ACTION	ACCOUNT NAME	BILLING CITY	PARENT ACCOUNT
<input type="checkbox"/>	Ez Company	Tel Aviv	Express US
<input type="checkbox"/>	GenePoint6	Portland	Express Logistics and Transport
<input type="checkbox"/>	GenePoint21	Portland	Express Logistics and Transport



2.2. NEW BUTTON

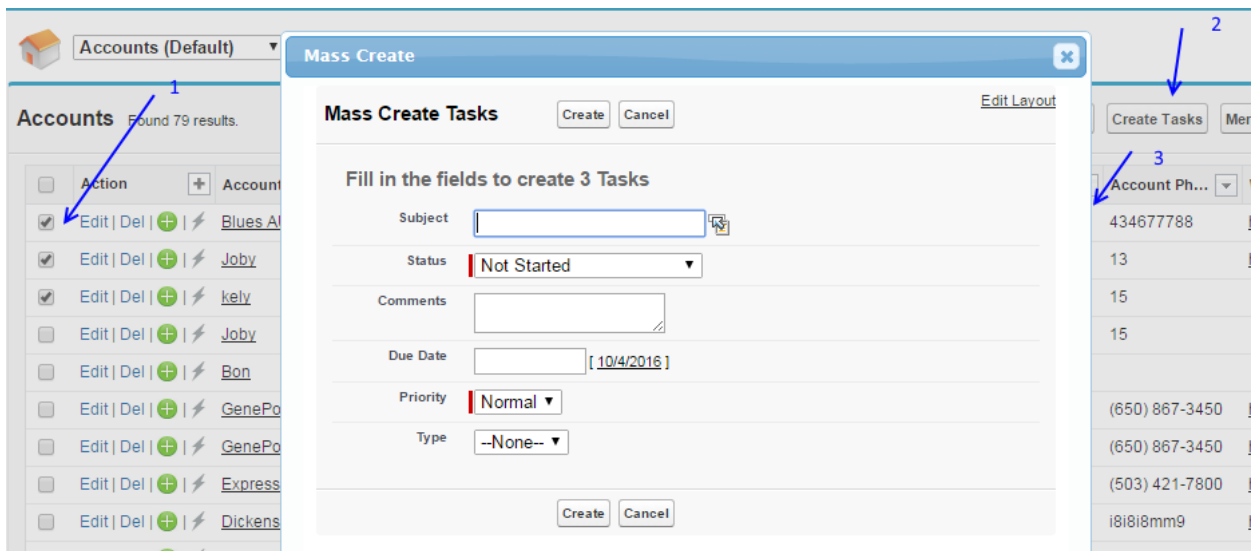
The new button allows you to add a new records by taking you to the new object page or by opening a new record popup in lightning. See below for Accounts, it is the same for all objects.





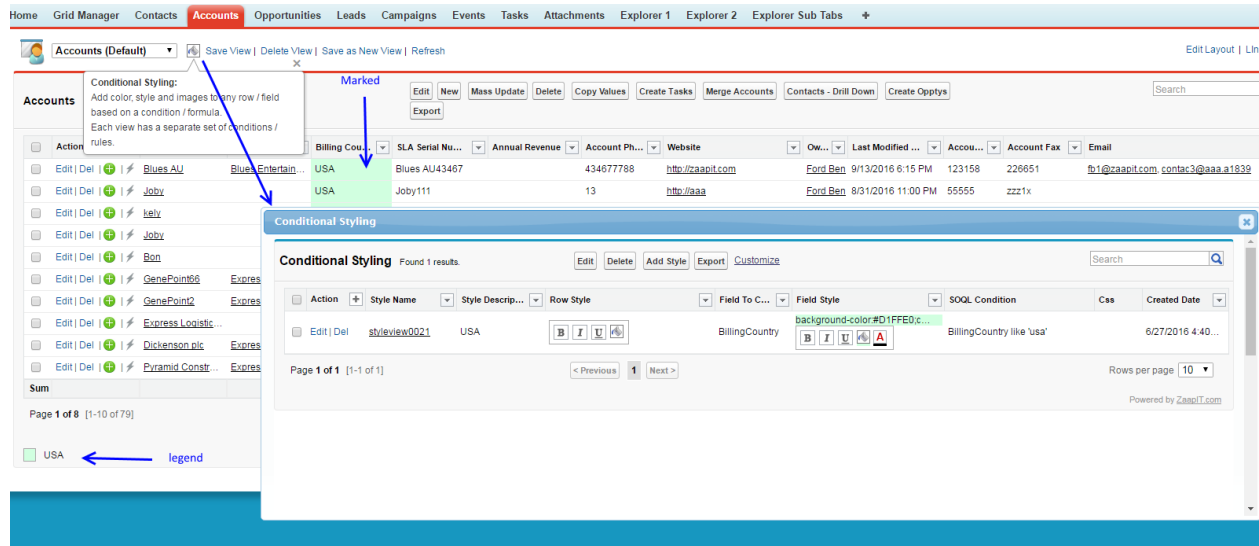
2.3. CREATE TASK

From any tab/object you can create tasks, select a record and then hit create task and fill in the relevant fields. This works for Accounts, Contacts, and Opportunities. In Events and Task tabs / Objects just hit the [+] or new button. The Screen shot below is from Accounts



2.4. CONDITIONAL STYLING

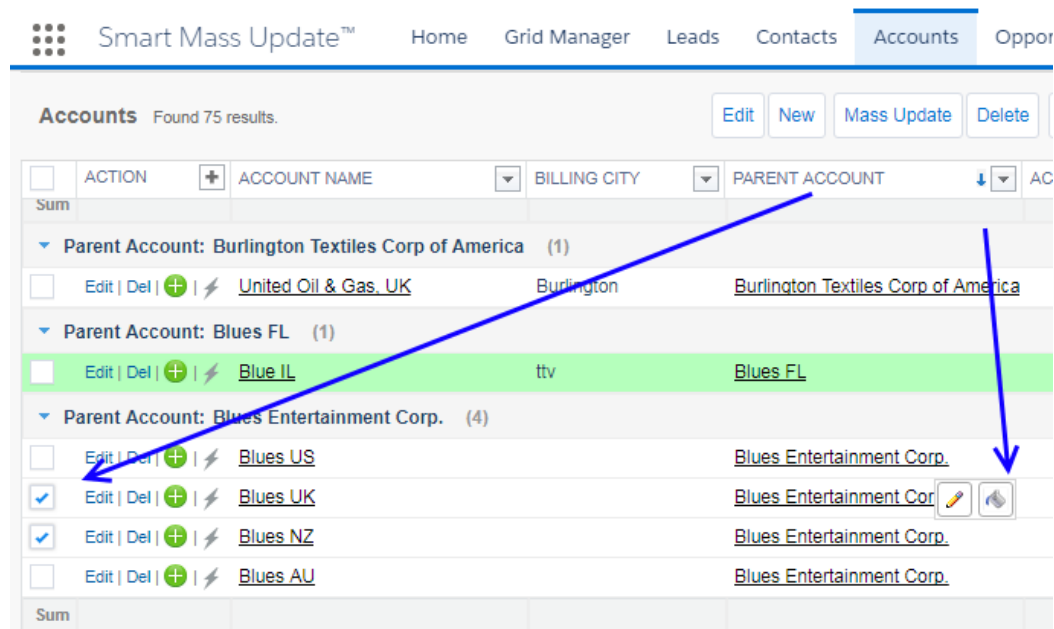
Mark the rows & fields based on a condition – each view has different styling.



2.1. MANUAL STYLING

Mark a few rows and click the bucket icon next to the relevant cell to style the rows/cells (if you don't mark any row then the current row/cell will be used).

You can click the bucket icon on existing styling to see/update/delete the styling.



The screenshot shows a web application interface with a table of accounts. A modal dialog titled "Conditional Styling" is open, allowing the user to define styles for selected rows. The dialog has the following fields and options:

- Set the styling for 2 selected row(s)**
- Style Description:** A text input field containing "VIP".
- Row Style:** A text input field containing the CSS rule `background-color:#CDFEFC;color:#000000;`. Below the input are icons for Bold (B), Italic (I), Underline (U), Text Color (A), and Background Color (a square with a color swatch).
- Field To Color:** A text input field containing "parentid".
- Field Style:** A text input field containing the CSS rule `background-color:#006B00;color:#FFFFFF;`. Below the input are icons for Bold (B), Italic (I), Underline (U), Text Color (A), and Background Color (a square with a color swatch).
- Buttons:** "Save" and "Cancel" buttons at the bottom.

The background table shows a list of accounts with columns for ACTION, ACCOUNT NAME, BILLING CITY, and PARENT ACCOUNT. The account "Blue_IL" is highlighted in green, and "Blues_UK" and "Blues_NZ" are checked. The page footer indicates "Page 1 of 3 [1-25 of 75]" and "fax 123 USA".

3. UNIQUE FUNCTIONALITY BY OBJECT

3.1. LEADS OBJECTS

Under the leads tab you have full access to all functions. Edit, New, Delete and Create have been addressed or require no explanation. The following are special functions.

3.1.1. MASS UPDATE BUTTON

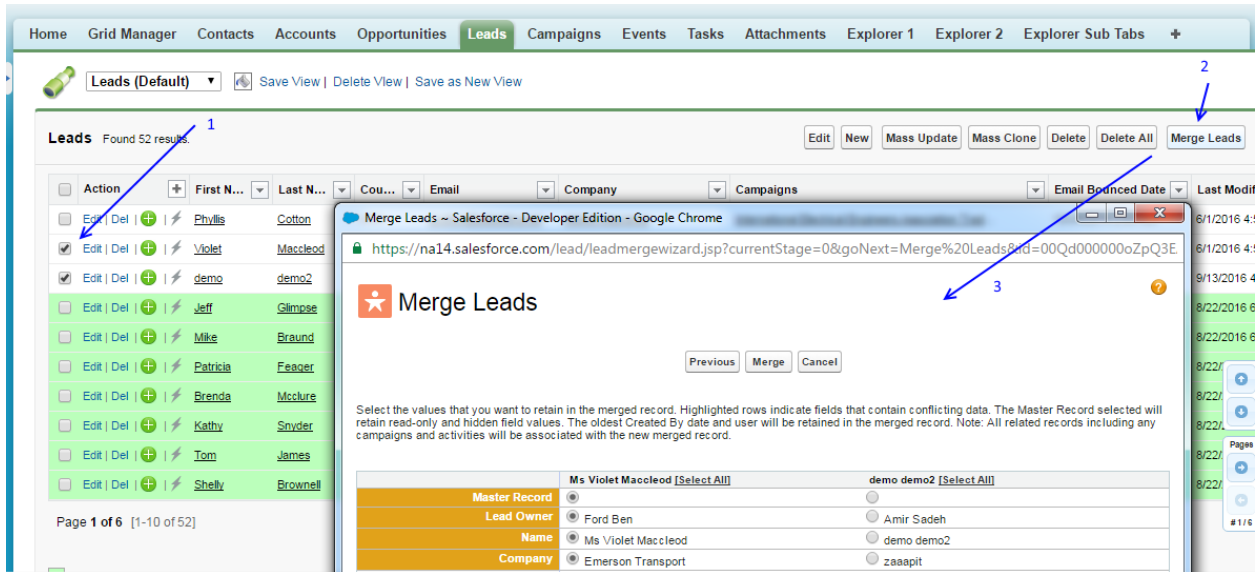
Mass Update allows you to change all the records at once to a specific Industry, Status or User (or any other allowed field). Once you select all the records that should be updated you use this function to make mass changes. See below.

The screenshot shows the CRM interface with the 'Leads' tab selected. A 'Mass Update' dialog box is open, allowing the user to select fields to update and their new values. The dialog box has a table with columns 'Update', 'Field', and 'New Value'. The 'Update' column contains checkboxes. The 'Field' column lists various lead attributes. The 'New Value' column contains input fields or dropdown menus. The 'Status' field is set to 'Open - Not Contacted'. The 'Owner' field is set to 'User'. The 'Lead Source' field is set to '--None--'. The dialog box has buttons for 'Preview', 'Update Selected Rows', 'Mass Update All Rows', and 'Cancel'. The 'Mass Update All Rows' button is highlighted in orange. A blue arrow labeled '1' points to the 'Action' column in the leads list. A blue arrow labeled '2' points to the 'Mass Update' button in the top right of the leads list. A blue arrow labeled '3' points to the 'Status' dropdown in the dialog box. A blue arrow labeled '4' points to the 'Mass Update All Rows' button in the dialog box.

Update	Field	New Value
<input type="checkbox"/>	First Name	<input type="text"/>
<input type="checkbox"/>	Last Name	<input type="text"/>
<input type="checkbox"/>	Country	<input type="text"/>
<input type="checkbox"/>	Email	<input type="text"/>
<input type="checkbox"/>	Company	<input type="text"/>
<input type="checkbox"/>	Email Bounced Date	<input type="text"/>
<input type="checkbox"/>	Status	Open - Not Contacted
<input type="checkbox"/>	Owner	User
<input type="checkbox"/>	Unread By Owner	<input type="checkbox"/>
<input type="checkbox"/>	Lead Source	--None--

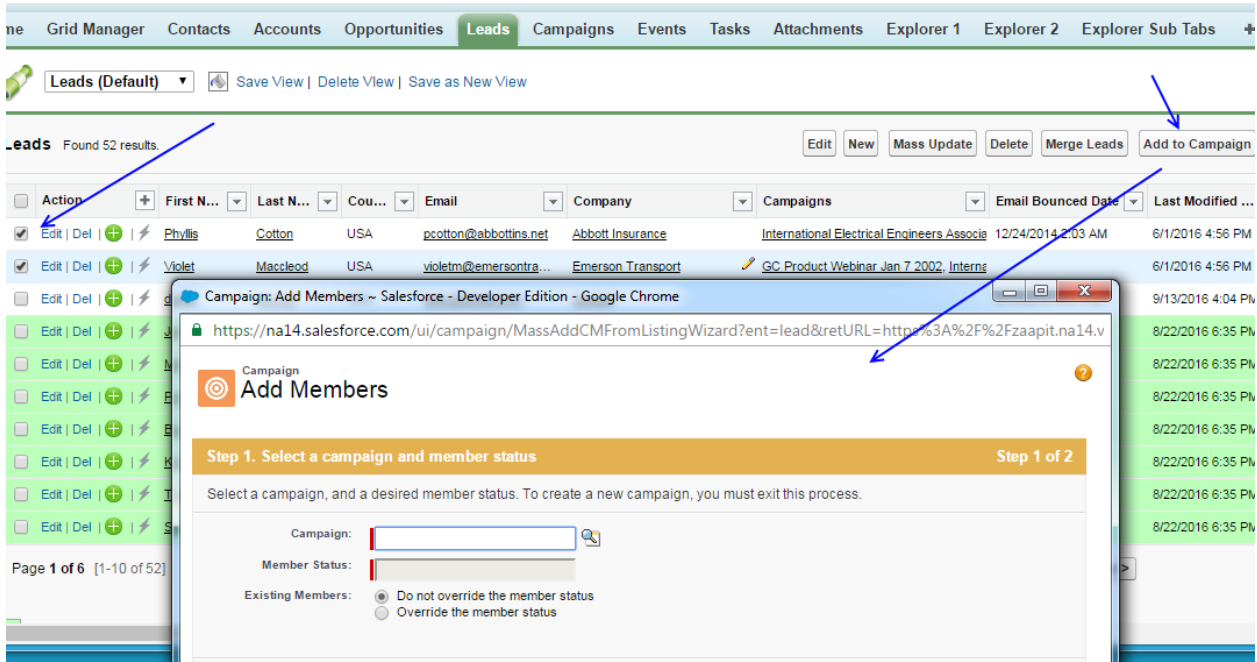
3.1.2. MERGE LEADS BUTTON

Identify duplicate leads then hit Merge Leads and the following screen pops up for merging.



3.1.3. ADD TO CAMPAIGN

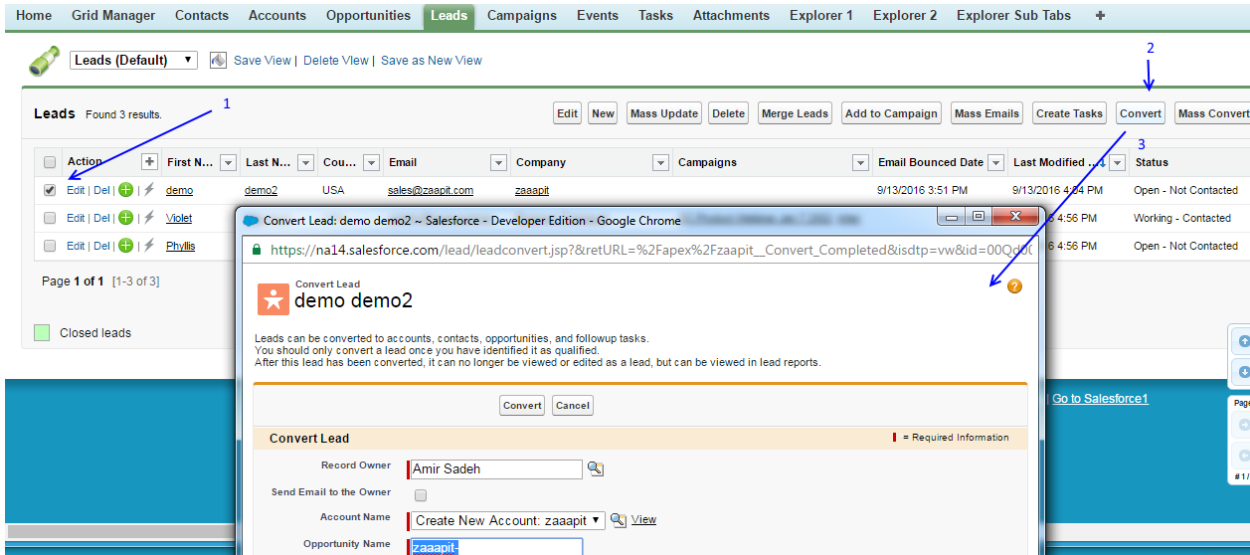
By looking through your leads you can sort and add them to a campaign easily and quickly. Select the records you want click Add to Campaign and then complete the screen to add the records.



3.1.4. CONVERT

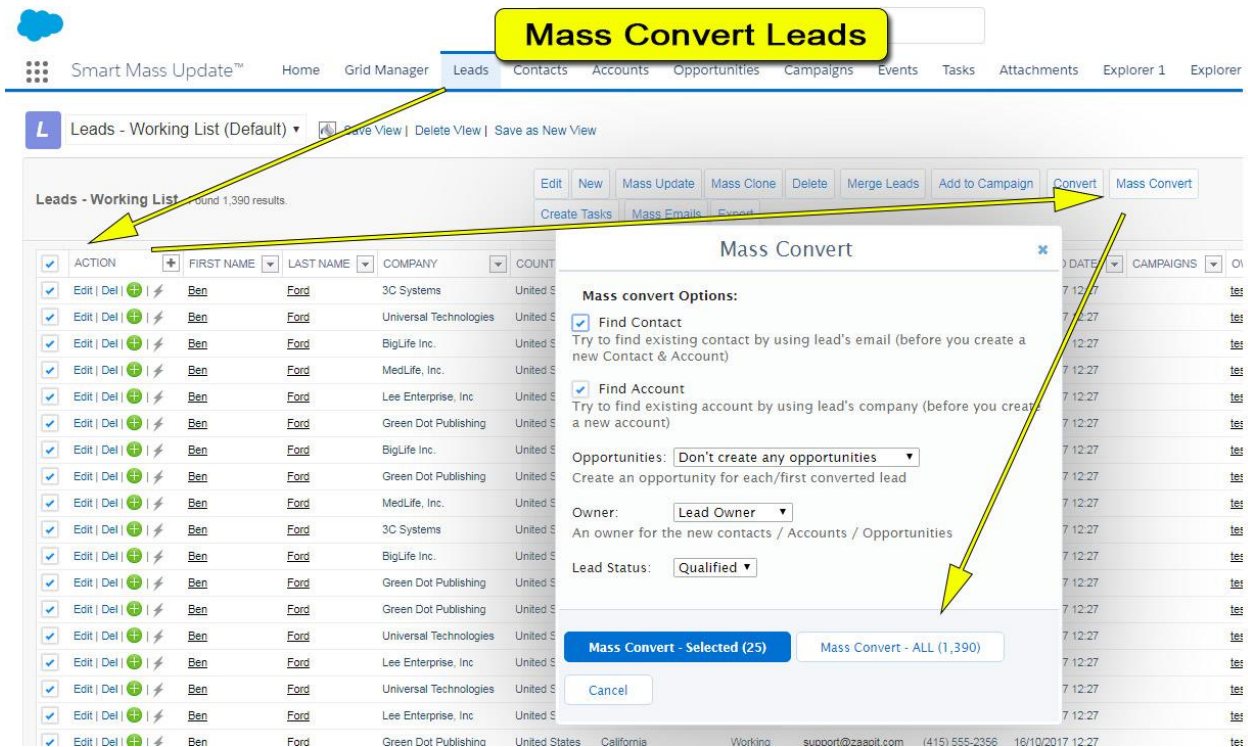
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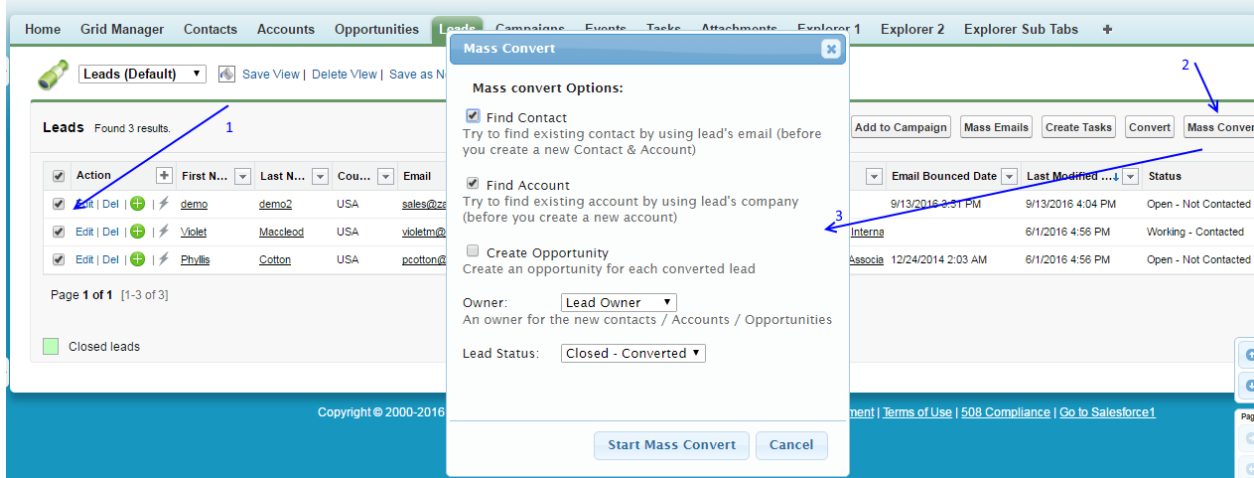
You can convert multiple leads to accounts simply by choosing the leads, hit the button and the following pop up screen walks you through it.



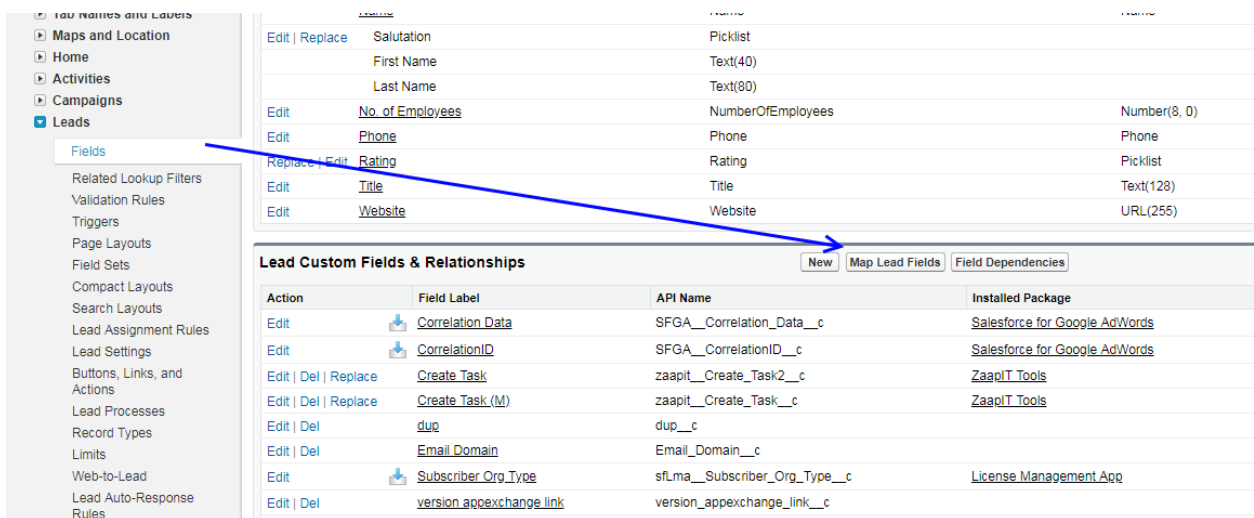
3.1.5. MASS CONVERT

Mass convert works the same simply choose the records and complete the pop up screen (the mass convert all option is available for admins who are using the premium plan).





To control the converted fields mapping go to setup>leads>field> map lead fields



3.2. ACCOUNTS OBJECT

Edit, New and Create Task have been discussed previously. The following buttons require a short description

3.2.1. MERGE ACCOUNTS

This functionality is the same as Leads merge, click the two or more records and then click Merge Accounts and the pop up allows you to do comparison and keep the selected information and then merge the record.

3.2.2. CONTACTS – DRILL DOWN

Simply pick one or more records and click the “contacts-drill down” to drills down to see the contacts.

Accounts (Default) Save View | Delete View | Save as New View | Refresh

Accounts Found 79 results. Edit New Mass Update Delete Copy Values Create Tasks Merge Accounts Contacts - Drill Down Export

Action	Account Name	Parent Acco...	Billing Cou...	SLA Serial Nu...	Annual R...	Account Ph...	Website	Ow...	Last Modified ...
<input checked="" type="checkbox"/> Edit Del + /	Blues AU	Blues Entertai...	USA	Blues AU43467		434677788	http://zaapit.com	Ford Ben	9/13/2016 6:15
<input checked="" type="checkbox"/> Edit Del + /	Joby		USA	Joby111		13	http://aaa	Ford Ben	8/31/2016 11:00
<input type="checkbox"/> Edit Del + /	kely		USA	kely11		15		Ford Ben	8/31/2016 11:00
<input type="checkbox"/> Edit Del + /	Joby		USA	Joby		15		Ford Ben	8/31/2016 11:00

Contacts - Drill Down (Default) Save View | Delete View | Save as New View Edit Layout | Links

Contacts - Drill Down Found 2 results. Edit New Mass Update Mass Clone Delete Merge Contacts Add to Campaign Search Create Tasks Mass Emails Copy Values Export

Action	Full Name	Email	Owner	Campai...	Account	Mailing State/Provi...	Mailing Country	Acc.Billing Coun...	First Name	Last Name
<input type="checkbox"/> Edit Del Cln + /	Joe last1817	contact3@aaa.a1839	Ford Ben		Blues AU		USA	USA	Joe	last1817
<input type="checkbox"/> Edit Del Cln + /	zzz asfsf12	fb1@zaapit.com	Ford Ben		Blues AU	zzz	USA	USA	zzz	asfsf12

Page 1 of 1 [1-2 of 2] < Previous 1 Next > Rows per page 10

3.3. CONTACTS

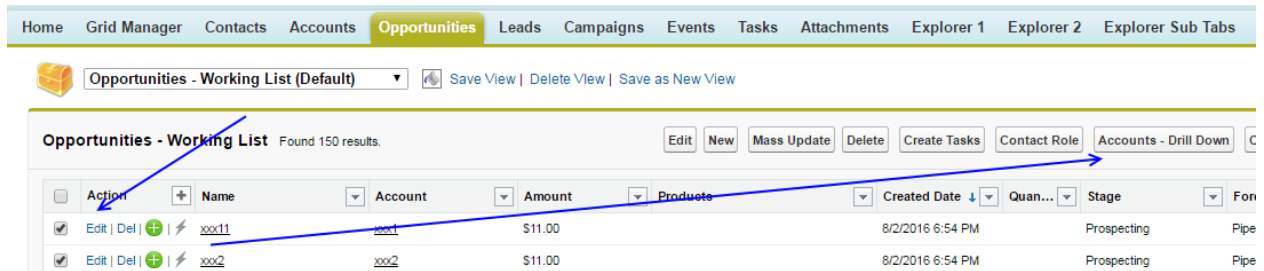
All functionalities under contacts have been previously discussed.

3.4. OPPORTUNITIES OBJECT

Edit, New, Created Tasks and Accounts have all been previously discussed same functionality as previously discussed.

3.4.1. ACCOUNTS - DRILL DOWN

Simply pick one or more records and click the “Accounts -drill down” to drills down to see the Accounts.



3.5. CAMPAIGNS OBJECT

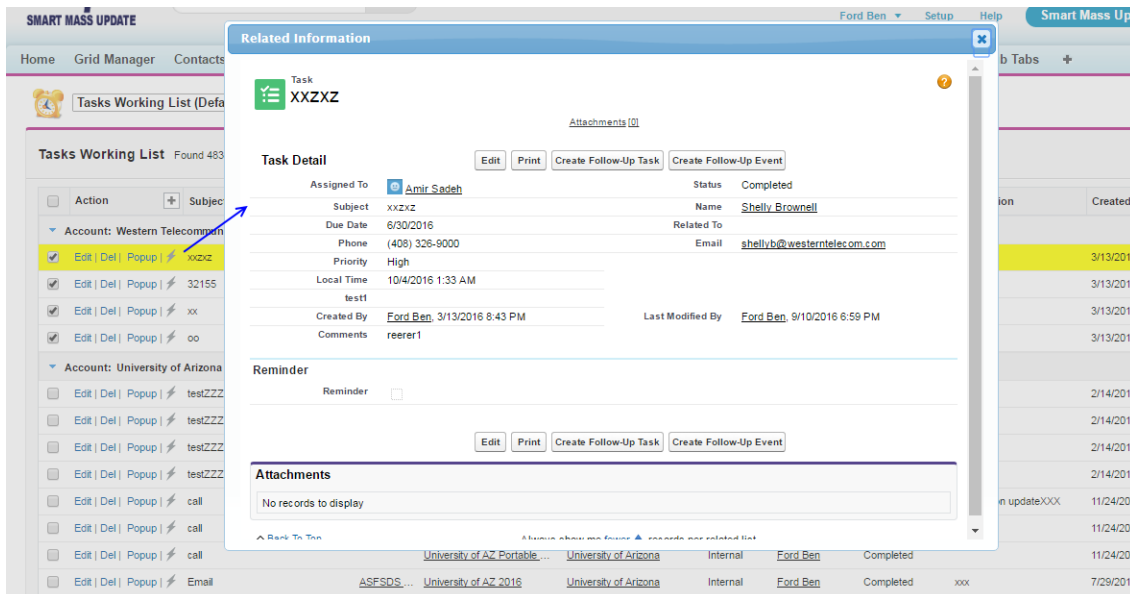
Edit and New are only functionality, previously discussed.

3.5.1. EVENTS & TASK OBJECT

Edit and New were previously discussed.

3.5.2. LIGHTNING ICON

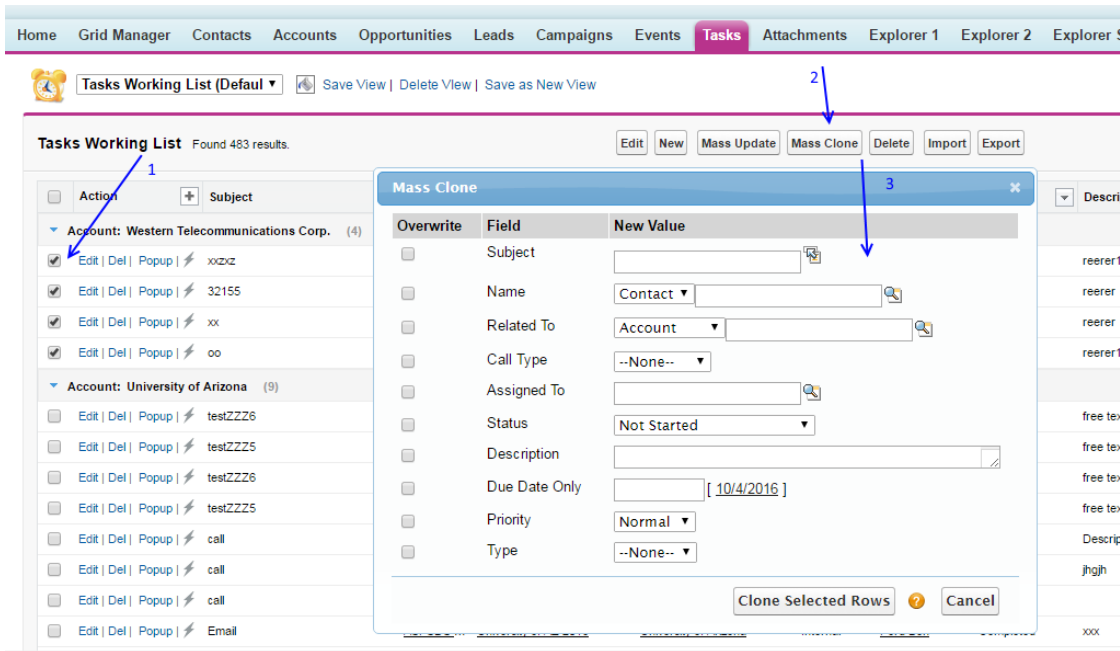
The lightning icon shows the entire tasks + attachments (you can change the default popup screen to sub-tabs with custom smart grids).



3.5.3. MASS CLONE

If you have multiple events / task that need to be re-created select the records and then hit mass clone and then complete the pop up.

The mass clone option can be activate for any object via the edit-layout link.

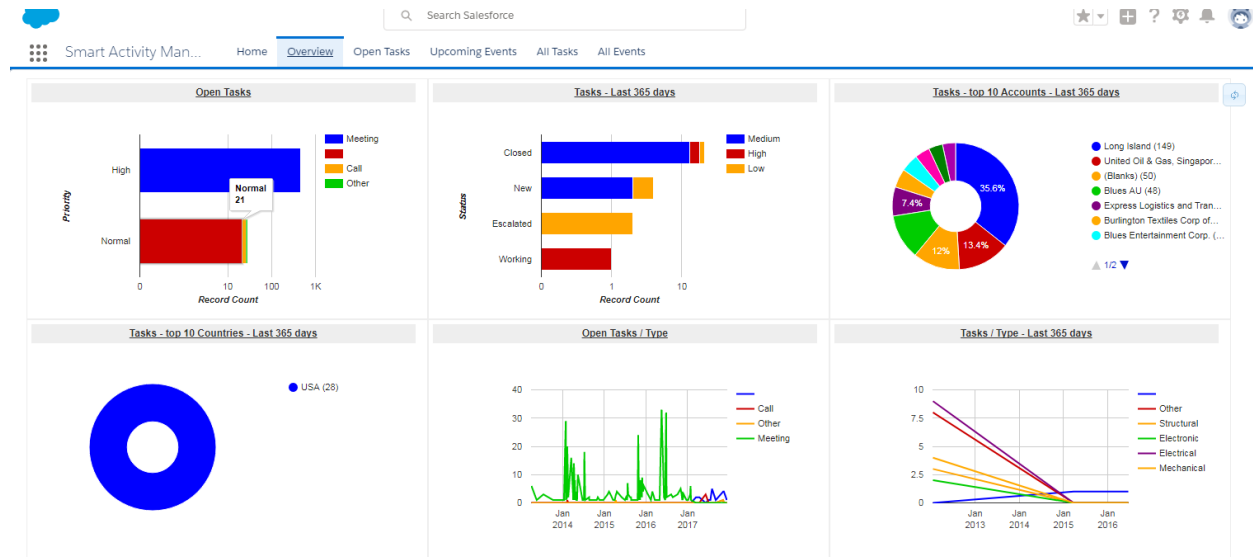


4. APPS & FEATURES

4.1. SMART-ACTIVITY-MANAGER>OVERVIEW TAB

This tab is a summary graphic of: Open Tasks, Open and Completed Task last 365 days, Top 10 accounts, Open Tasks by Type, Task Type by last 365 days.

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4.2. DEDUPE-MANAGER > OVERVIEW TAB

The Dedup-manager>overview tab is a summary graphic of: Similar leads by email, Similar leads by name, Similar contacts & similar accounts.



4.3. GETTING STARTED WITH DEDUP-MANAGER (BEST PRACTICE):

1. Start by backing up your data - you can do a full backup via setup>data management> data export... (it will be very handy in case you will need to compare / restore something later).

2. Decide which object you want to dedupe first (contacts or lead) and then our recommendation is to use email (because it is usually a unique identifier and there are no “spelling related issues” in compare to exact name detection...)
 - a. You can use the sort-field#2 & sort-field#3 to tell the mass-merge process which row to auto-pick as the master (the first row in each cluster is auto-picked as the master unless you overwrite that manually by marking the checkbox in pink..)...
 - b. Before you start the mass-merging process make sure you pick the fields (by clicking the fields on the grid) that you want to transfer to the master from the clones records (if needed) – a video is attached:
<https://www.youtube.com/watch?v=Cl13Owu9SiY&t=24>
 - c. Start with a small number of clusters to experience the mass-merge result (before you do that on everything)
3. Once you complete #2 you can use the “leads with contact (email)” sub-tab and decide if you need to mass convert your leads that already got a matching contact (in order to save the lead’s activities and pass that to the existing contact) or just to mass-delete those leads (if you don’t need the lead’s related records).
4. You can even mass convert other leads via smart-mass-update>leads tab... (this mass convert also tries to find duplicates before it create new records).
5. If you need to search “free style” for a specific duplicate lead/contact/account then use smart-mass-update> tabs> search / filter, those tabs also got a merge button on the top...
6. You can create a custom formula dedupe (that combine several fields into one formula field) by following this video guide: <https://www.youtube.com/watch?v=nR0vKnlca7k>
inside the custom-dedupe tab there are a few popular formula exmaples for such a custom dedupe (first word dedupe, dedupe by name and phone, name and zip code etc...)

Useful videos:

Custom formula/fuzzy dedupe: <https://www.youtube.com/watch?v=nR0vKnlca7k>

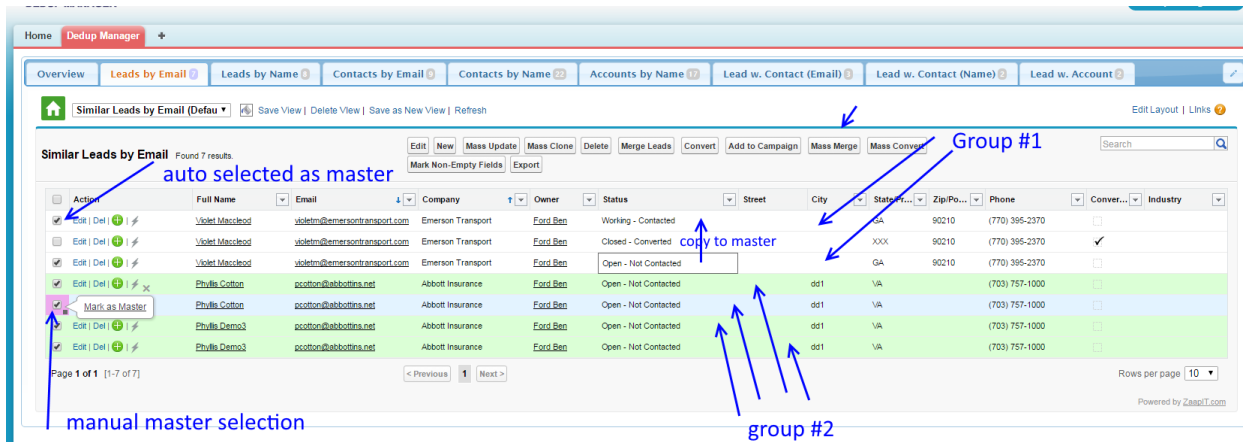
Custom dedupe via grouping SOQL: <https://www.youtube.com/watch?v=bQ-ee2jO0w4>

4.4. DEDUPE-MANAGER > SMILIAR OBJECT BY CRITIRIA TABS

The “similar object by critia tabs” show you the first 1200 duplicates based on your critiria, once you will start the merging process more rows will be fetched.

Use the following demo video to learn how to use mass marging process. The mass merge will merge all the related records but you need to specifiy the fields (for the top-object) that you want to copy to the master record. Before you click the mass-merge button you need to select the rows that you want to merge then the fields that you want to keep, and then (optinally) you need to select the master record for each colored-based-group of rows.

https://www.youtube.com/watch?time_continue=14&v=GZ0AGNQGoxM



4.5. DEDUPE-MANAGER > CREATING A CUSTOM DEDUPE TAB (FORMULA / SOQL)

The following videos explain how to create a custom dedupe for custom formula fields / any salesforce field:

Custom formula/fuzzy dedupe: <https://www.youtube.com/watch?v=nR0vKnIca7k>

Custom dedupe via grouping SOQL: <https://www.youtube.com/watch?v=bQ-ee2jO0w4>

Inside the custom-dedupe tab there are a few popular custom formula fields examples for such a custom dedupe (first word dedupe, dedupe by name and phone, name and zip code etc...)

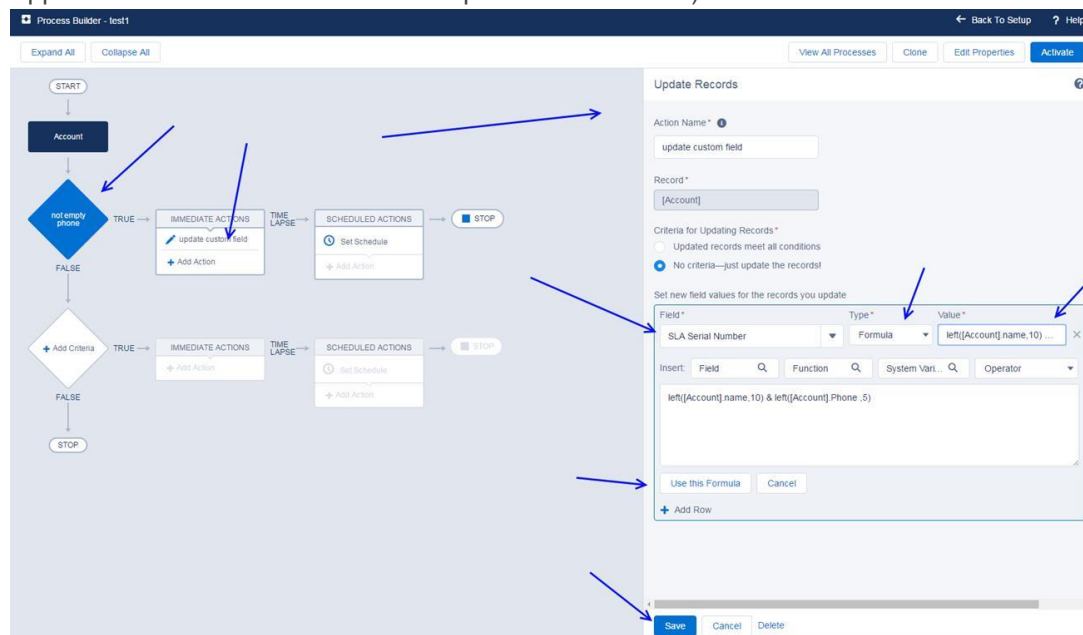
4.6. DEDUP-MANAGER > DEDUPE BY FORMULA (VIA PROCESS BUILDER)

The following technique is only needed for formulas that you can't be created via slaesofrce custom formula fields.

The following example will show how to dedupe your data by using a custom formula (10 chars from the name + 5 chars from the phone number). In case you only need to you add a second field to the de-duplication report/process then just change the grouping statement (e.g. "group by name, phone" under [custom settings](#)).

Creating a custom formula to de-duplicate your data:

1. Create a custom text field (250 chars) for the relevant object via via setup>"object name">fields>create custom field in the following example I will use the account object and I will create a custom field named "SLA Serial number".
2. Build the formula to populate your field via process builder (setup>create>Workflow & Approvals>Process Builder> use the update record action):



3. Go to [smart-mass-update](#)>accounts tab & mass update the "SLA Serial number" field:

Before the update:

Getting Started Guide

Search... Search

Contacts Accounts Opportunities Leads Campaigns Events Tasks Attachments Explorer 1 Explorer 2 Explorer Sub Tab

Accounts (Default) Save View Delete View Save as New View Refresh

Accounts Found 79 results. Edit New Mass Update Delete Copy Values Create

Action	Account Name	Parent Account	Billing Country	SLA Serial Number	Website
Edit Del + -	Blues AU	Blues Entertainment Corp.	USA		http://zaapit.com
Edit Del + -	Joby		USA		http://aaa
Edit Del + -	kely		USA		
Edit Del + -	Joby		USA		
Edit Del + -	Ron		USA		
Edit Del + -	GenePoint66	Express Logistics and Transport	USA	7324	http://www.genepoint.com
Edit Del + -	GenePoint2	Express Logistics and Transport	USA	7324	http://genepoint.com
Edit Del + -	Express Logistics...		USA	4724	http://expressl.net
Edit Del + -	Dickenson plc	Express Logistics and Transport	USA	3213255	http://dickenson-consultir
Edit Del + -	Pyramid Construct...	Express Logistics and Transport	France	9840	http://pyramid.com
Edit Del + -	GenePoint5	Express Logistics and Transport	USA	7324	http://www.genepoint.com
Edit Del + -	Ron		USA		
Edit Del + -	Blues US	Blues Entertainment Corp.	USA		http://zaapit.com
Edit Del + -	test11				
Edit Del + -	Constructions Ltd		USA		
Edit Del + -	United Oil & Gas C...	Dickenson plc	USA	6654	http://www.uos.com
Edit Del + -	University of Arizona	Express Logistics and Transport	USA	8350	http://universityofarizona.

Choose the field & mass updating all the rows (filters will be respected):

Accounts Found 79 results. Edit New Mass Update Delete Copy Values Create Tasks Merge Accounts Contact

Accounts (Default) Save View Delete View Save as New View Refresh

Mass Update

Update	Field	New Value
<input type="checkbox"/>	Account Name	
<input type="checkbox"/>	Parent Account	
<input type="checkbox"/>	Billing Country	
<input checked="" type="checkbox"/>	SLA Serial Number	
<input type="checkbox"/>	Website	
<input type="checkbox"/>	Owner	
<input type="checkbox"/>	Account Number	
<input type="checkbox"/>	Account Fax	
<input type="checkbox"/>	Industry	Available: HR Research Chosen: Research
<input type="checkbox"/>	Active	Yes

Preview Update Selected Rows Mass Update All Rows Cancel

The mass update result:

Action	Account Name	Parent Account	Billing Cou...	SLA Serial Nu...	Account Ph...	Website
Edit Del	Blues AU	Blues Entertainment Corp.	USA	Blues AU43467	434677788	http://zaapit.com
Edit Del	Joby		USA	Joby111	111	http://aaa
Edit Del	kely		USA	kely11	11	
Edit Del	Joby		USA	Joby		
Edit Del	Bon		USA	Bon		
Edit Del	GenePoint66	Express Logistics and Transport	USA	GenePoint6(650)	(650) 867-3450	http://www.genepoint.co
Edit Del	GenePoint2	Express Logistics and Transport	USA	GenePoint2(650)	(650) 867-3450	http://genepoint.com
Edit Del	Express Logistics...	Express Logistics and Transport	USA	Express Lo(503)	(503) 421-7600	http://expressl8t.net
Edit Del	Dickenson plc	Express Logistics and Transport	USA	Dickenson i(8i)	i8i8imm9	http://dickenson-consult
Edit Del	Pyramid Construct.	Express Logistics and Transport	France	Pyramid Co(014)	(014) 427-4427	http://pyramid.com
Edit Del	GenePoint6	Express Logistics and Transport	USA	GenePoint6(650)	(650) 867-3450	http://www.genepoint.co
Edit Del	Ron		USA	Ron123	123	
Edit Del	Blues US	Blues Entertainment Corp.	USA	Blues US45657	45657788888	http://zaapit.com
Edit Del	test11			test11		
Edit Del	Constructions Ltd		USA	Construct22	22	
Edit Del	United Oil & Gas C...	Dickenson plc	USA	United Oil(212)	(212) 842-55001	http://www.uos.com
Edit Del	University of Arizona	Express Logistics and Transport	USA	University(520)	(520) 773-9050	http://universityofarizona
Edit Del	Grand Hotels & Re...	Express Logistics and Transport	USA	Grand Hotel(312)	(312) 596-1000	http://grandhotels.com
Edit Del	Burlington Textiles...	Express Logistics and Transport	USA	Burlington(336)	(336) 222-7000	http://burlington.com
Edit Del	Edge Communicat...	Express US	USA	Edge Commu(512)	(512) 757-60001	http://edgecomm.com
Edit Del	United Oil & Gas...	Dickenson plc	USA	United Oil(650)	(650) 450-8810	http://uos.com
Edit Del	United Oil & Gas UK	Burlington Textiles Corp of Amer	USA	United Oil+44 1	+44 191 4956...	http://uos.com
Edit Del	Farmers Coop. of ...		USA	Farmers Co(850)	(850) 644-4200	

4. Create a custom dedup tab - follow the below video and use your new custom field (instead of website):

<https://www.youtube.com/watch?v=bQ-ee2jO0w4>

5. Once you verified that the formula separates your data to "right" duplicates row-sets then you can start to mass-merge those duplicates groups (mass merging starts at 00:23):

<https://www.youtube.com/watch?v=Cl13Owu9SiY&t=33>

4.7. ADDING A SMART RELATED LIST / CUSTOMER VIEW

Edit the object's layout and add one of the visualforce pages named: "Object" RL1 / "Object" RL2 / "Object" tabs / Customer view (hierarchy tabs) > afterwards save the layout and edit the new related list grid to > change the object, add fields and use the Related List Reference Field or Advanced filter to set the connection.

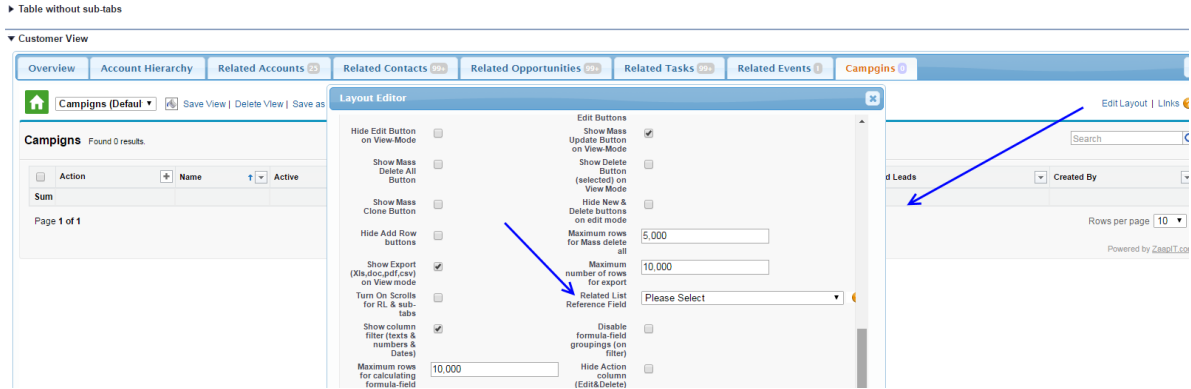
Adding a related list in lightning: https://www.youtube.com/watch?v=-ly2C_al7PA

Adding a related list in Classic: <https://www.youtube.com/watch?v=fxaLcHxePbI>

Adding a customer view: <https://www.youtube.com/watch?v=9jJw9RRydW8>

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Setting the Related List Reference Field:



Using the Advanced filter to set the connection:

