

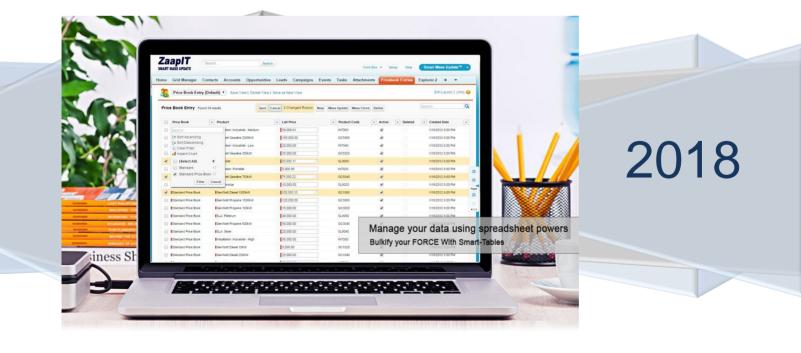


ZaapIT's - Smart-Tools

Getting Started / Training Guide

Created by Ben Ford

App Version: 1.693 (Jul-2018)





INTRODUCTION

ZappIT 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. Instantaly 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 functionalty (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 viewablility.
- 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).



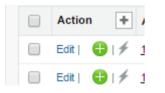
Click the Arrow and the you will see Smart-Mass-Update / Dedup-manager / Smart-Activity-Manager now you will see Salesforce in the ZaapIT app. To go back Salesforce Classic, click the same arrow and then click Sales. While in the view you have access to all the functionality described in Section 2 above

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.

	•			Q Search S	alestorce		
••••	Smart Mas	s Update™ Home	Grid Manager	Leads Contacts	Accounts	Opportunities	Campaigns E
4	Accounts (Def	ault) ▼ 🔊 Save View	Delete Vlew Sa	ve as New View ∣ Refres	h		
Acco	unts Found 75 res	ults.		Edit New M	Mass Update De	eletex Copy Value	Create Tasks
	ACTION +	ACCOUNT NAME	BILLING C	Type a search term an Use != at the beginning Use > at the beginning	for not equals to	filter	ACCOUNT DESCRI
▼ F	arent Account: Ex		K	Use < at the beginning	-		
	Edit Del 🕀 🗲	2 Sort Ascending		Use * for wildcard			Edge, founded in 1
• F	arent Account: Ex	X↓ Sort Descending Clear Filter		Use , to separate multi	ple values		
	Edit Del 🛟 🥖	Instant Chart		Express Logistics and	d Transport US	5A	Genomics compar
	Edit Del 🕀 🥖	(Select All)	#	Express Logistics and	d Transport US	BA	Genomics compar
	Edit Del 🕂 🥖	Abbott Insurance	1	Express Logistics and	d Transport Ja	pan	
	Edit Del 🕀 🗲	Ace Iron and Steel Inc.	1	Express Logistics and	d Transport US	5A	
	Edit Del 🕀 🗲	Aethna Home Products American 22	1	Express Logistics and	d Transport US	6A	
	Edit Del 🛟 🗲	American Banking Corp.	3	Express Logistics and	d Transport US	BA	
	Edit Del 🖶 🗲	Blue IL	1	Express Logistics and	d Transport US	BA	
	Edit Del 🖶 🗲	Blues AU	1	Express Logistics and	d Transport US	BA	Leading university
	Edit Del 🕂 🗲	Blues Entertainment Corp	. 1	Express Logistics and	d Transport US	5A	Chain of hotels and
	Edit Del 🛟 🗲	Blues FL2	2 -	Express Logistics and	d Transport US	5A	
	Edit Del 🖶 🗲		Filter Cancel	Express Logistics and	d Transport Fr	ance	
	Edit Del ✔ 🥖	Burlington Textiles Corp of Ame	erica Portland	Express Logistics and	d Transport US	BA	
	Edit Del 🛟 🥖	GenePoint5	Portland	Express Logistics and	d Transport US	SA	Genomics company
Sum							
▼ F	arent Account: Di	ckenson plc (3)					
	Edit Del ✔ 🥖	Long Island	Lawrence	Dickenson plc	US	BA	
ige 1	of 3 [1-25 of 75]			< Previous 1	2 3 Next	>	
fax	123 📃 USA						

In an avarage 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 LIGHTING 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.

Action	Account Name	Parent Account	Billing Country	SLA Serial Number
	Farmers Coop. of Florida	<u></u>	USA	Farmers Co(850)
	Metropolitan Health Services	<u></u>	USA	Metropolit(410)
	Jackson Controls	<u></u>	Taiwan	Jackson Co886-2
		<u></u>		
+				
age 1 of 4 [1	1-25 of 79]			< Previous

Same functionality in all objects.

1.4. LIGHTING 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.

SMADT	MASS UPDATE	Search	Search	
JIIAN	IIADD UPDATE		Related Information	
Home	Grid Manager	Contacts Accour		
			Overview Contacts 11 Tasks 1 Notes 0 test 3	
	Accounts (Defau	ult) 🔻 🚳 Save		
			Tasks Found 1 results. Edit New Mass Update E	хp
Acco	ounts Found 79 res	sults.	Action + Subject V Due Date V Call T V Status V Descript	
	Action +	Account Name		
	Edit Del 🕀 🖋	Blues AU	Sum	
	Edit Del 🖶 🖸	Joby		
	Edit Del 🖶 🖋		Page 1 of 1 [1-1 of 1] <pre> Previous 1 Next ></pre>	
	Edit Del 🕀 🖋	/		
	Edit Del 🕀 🗲			_
	Edit Del 🕀 🗲			
	Edit Del 🕀 🗲			
		Express Logistics		
	Edit I Dol I 🦳 I 🗸	Dickonson ble		



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 F	ound 79 results.		
Action	Account Name	▼ Parent Account	Billing Country
	Blues AU	Blues Entertainment Co	rp. 🕓 USA
	Joby	Blues Entertainment Cor	p. 🥂 🕙 USA
	kely	Blues Entertainment Cor	p. 🥂 🕙 🛛 USA
	Joby	Blues Entertainment Co	rp. 🖉 🔩 🔽 USA
	Bon		S 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.

ppc	ortunities	- Working List Found	d 163 results.	Save	Cancel New Ma	ss Update Delete	Create Tasks	Contact Role Actions			Search	(
	ACTION +	NAME	ACCOUNT	• BILLING C •	AMOUNT	CREATED D 💌	QUANTITY	▼ STAGE ↓	CLOSE DATE	PRODUCTS	▼ FC	DRECAS
► S	Stage: Won	(2)										
					\$1,544.18		22					
• s		d Won (45) Air France	L	-				Closed Won	11/17/2015 [1	10/00/01		
	4	Airtiaice	Blues US	New Jork	23.01	11/12/2015 2:19 PM		Closed Wolf	11/1/2013	10/2010]	C	Closed
	*	Vimount 1	vimount	2	2.00	11/12/2015 1:02 PM		Closed Won	11/12/2015 [1	18/2018]	P	Pipeline
	*	Vimount 2	vimount	2	2.00	11/12/2015 1:02 PM		Closed Won	11/12/2015 [<u>1</u>	18/2018]	P	Pipeline
	4	Vimount 3	vimount	Ł		11/12/2015 1:02 PM		Closed Won	11/12/2015 [1	18/2018]	P	Pipeline
	4	University of AZ 2016	University of Arizona	Tucson	90,000.99] 1/19/2015 12:01 AM	15.00	Closed Won	9/30/2016 [1	18/2018]	C	Closed
	4	Grand Hotel	Long Island	Tel Aviv	835,000.00	6/19/2014 3:35 PM	3.00	Closed Won	1/13/2015 [1	18/2018]	c	Closed
	4	Burlington Textiles Weavir	Burlington Textiles Corp of	Burlington	4,740,000.00	2/20/2014 1:38 AM	3.00	Closed Won	7/9/2014 [1]	118/2018]	C	Closed
	4	Grand Hotels SLA	Grand Hotels & Resorts LI	Chicago	2,230,000.00	2/19/2014 10:16 PM	123.00	Closed Won	5/5/2017 [1]	18/2018] GenWatt Diesel 10kW	GenWatt Diesel 200kW G	Closed



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.

me	Grid Mana	iger Contacts	Accounts	Opportunities	Leads	Campai	jns Events	Tasks	Attachments	Explorer 1	Explorer 2	Explorer Sub Ta	bs 🕇
	Accounts (Default) V Kerresh												
Acco	ounts Foun	d 79 results.							Save	Cancel 1 Cha	nged Row(s)	New Mass Update	Delete Copy
	Action	Account Name	T	Parent Account			ling Country	Ŧ	SLA Serial Nu	mber	Annual Reve	nue 💌	Account Phone
		Blues AU		Blues Entertainm	ent Corp.	S U	3A		Blues AU43	467			434677788
		Joby				N	ŝA		Joby 111				13
		kely				<u>s</u> U	ŝA		XXX	6	2		15
		Joby				<u>s</u> U	ŝA		Joby				15
		Bon				S U	SA		Bon				
_				- · · · ·						250	0.000.000	1	

2.1. FAST INLINE EDIT

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

Smart Mass Update™ Home	Grid Manager	Leads	Contacts	Accounts	Opp
A Accounts (Default) • Save View	Delete Vlew Sav	ve as New	View Refres	h	
Accounts Found 75 results.	1	Edit	New	ss Update D	elete
	BILLING CIT	-	PARENT ACCO	UNT	1 -
 Parent Account: Express US (1) 	1				
Edit Del 🕂 🖌 Ez Company	Tel Aviv	/	Express US		
 Parent Account: Express Logistics and Transport 	(13)	Edit			
Edit Del 🕂 🖌 <u>GenePoint6</u>	Portland		Express Logist	ics and Transp	ort
Edit Del 🕂 🖌 GenePoint21	Portland		Express Logist	ics and Transp	ort



■*		
Smart Mass Update [™] Home Grid Manager	Leads Contacts	Accounts Ol
Accounts (Default)	e as New View Refresh	
ccounts Found 75 results.	Edit New Mass	Update Delete
ACTION + ACCOUNT NAME BILLING CITY	PARENT ACCOUNT	TI TI
Parent Account: Express US (1)	·	
Edit Del 🕂 🥖 Ez Company Billing City:		
Parent Account: Express Logistics and Transport (Tel Aviv		
Edit Del 🕂 🥖 <u>GenePoint6</u>	Save Cancel	nd Transport
Edit Del 🕂 🥖 <u>GenePoint21</u>		nd Transport
Edit Del I 🦰 🧭 Pluce Entertainment Core	Express Logistics	and Transport

2.2. NEW BUTTON

ī.

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.

New Account				Help for this Page 🤇
Account Edit	Save Save 8	& New Cancel		
Account Information				= Required Information
Account Owner	Ford Ben	Rating	None T	
Account Name		Phone]
Parent Account	<u></u>	Fax]
Account Number		Website]
Account Site		Ownership	None V	4
Туре	None	Employees]
Industry	None	SIC Code]



	Q Search Salesforce	×
Smart Mass Update [™] Home	New Account:	: Customer Level2
Accounts (Default)		•
ccounts Found 75 results.	Account Information	
	Account Owner	Rating
Parent Account: Express US (1)	Ford Ben	None
Edit Del 🖶 🖌 Ez Company	* Account Name	Phone
Parent Account: Express Logistics and Transpor		
Edit Del 🕂 🖌 <u>GenePoint6</u>	Parent Account	Fax
Edit Del 🖶 🥖 GenePoint21	Search Accounts Q	
Edit Del 😷 🖌 <u>Blues Entertainment Corp.</u>	Account Number	Website
Edit Del 🛟 🥖 Express UK		
Edit Del 🖶 🥖 Express US	* Account Site	Ownership
Edit Del 🕀 🥖 Express AU		None
Edit Del 🕂 🖌 Express NZ	Type	Employees
Edit Del 🔁 🥖 University of Arizona	-None	Linpidyees
Edit Del 🔁 🗲 Grand Hotels & Resorts Ltd		
	Industry	SIC Code
Edit Del 🖶 🥖 <u>Pyramid Construction Inc.</u>	None	
ae 1 of 3 [1-25 of 75]		Cancel Save & New Save
fax 123 USA		

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

1	Accounts (Defa	ult) 🔻	Mass Create		×	2
Acco	1 Dunts Found 79 re	esults.	Mass Create Ta	asks Create Cancel	Edit Layout	Create Tasks Merg
	Action 📑	Account	Fill in the fie	lds to create 3 Tasks		Account Ph 👻 V
1	📕 Edit Del 🕀 🗲	Blues Al	Subject	·		434677788 <u>h</u>
1	Edit Del 🕀 🗲	Joby	Status	Not Started		13 <u>h</u>
1	Edit Del 🕀 🗲	<u>kely</u>	Comments			15
	Edit Del 🕀 🗲	Joby				15
	Edit Del 🕀 🗲	Bon	Due Date	[10/4/2016]		
	Edit Del 🕀 🖋	GenePo	Priority	Normal T		(650) 867-3450 <u>h</u>
	Edit Del 🕀 🖋	GenePo	Туре	None 🔻		(650) 867-3450 <u>h</u>
	Edit Del 🕀 🖋	Express				(503) 421-7800 <u>h</u>
	Edit Del 🕀 🗲	Dickens		Create		i8i8i8mm9 <u>h</u>



2.4. CONDITIONAL STYLING

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

Home	Grid I	Manager	Contacts	Accounts	s Oppor	tunitie	s Leac	is Ca	impaigns	Events Tas	sks At	tachments	Explore	r1 Exp	lorer 2 Explor	er Sub Tabs	+							
	Acco	ounts (Defa	ult) 🔻	Save V	/iew Delet	e Vlew ×	Save as	New Vie	ew Refresh														Edit L	.ayout Lin
Acce	ounts	Add cold based or	a condition	mages to any n / formula. arate set of c			Ma	rked	Edit Ne Export	Mass Upda	Delet	Copy Value	Crea	te Tasks	Merge Accounts	Contacts - Dr	ill Down Cr	eate Opptys					Search	
	Action	n rules.				1	Billing Co	u 💌	SLA Serial No	u 👻 Annu	al Revenu	e 👻 Accoun	t Ph 🔻	Website		▼ Ow ▼	Last Modifi	ed 💌	Accou	Account	Fax 💌 B	Email		
	Edit	Del 🕀	Blues Al	<u>U</u> E	Blues Entert	ain I	USA	v	Blues AU434	467		434677	788	http://zaa	pit.com	Ford Be	9/13/2016	3:15 PM	123158	226651	f	b1@zaapit.	com. contac3@a	aa.a1839
	Edit	Del 🕕 🛙	✓ Joby		7		USA		Joby111			13		http://aaa		Ford Be	8/31/2016	11:00 PM	55555	zzz1x				
	Edit	Del 🕀	✓ kely			onditio	onal Styl	lina																×
	Edit	Del 🕀	✓ Joby																					
	Edit	Del 🕕 🗄	∮ <u>Bon</u>		C	Condi	tional S	tyling	Found 1 resu	its.		Edit De	lete Ad	d Style E	port Customize							Search		Q
	Edit	Del 🜐	GenePo	int66 E	xpres																			
	Edit	Del 🕀	GenePo	int2 E	xpres	A	ction +	Style	Name 👻	Style Descrip	💌 R	low Style		•	Field To C				SOQL Con	dition		Css	Created Date	-
	Edit	Del 🜐	Express	Logistic		. Б	dit Del	stylev	iew0021	USA		B I <u>U</u>			BillingCountry		d-color:#D1Fi		BillingCour	ntry like 'usa'			6/27/2016 4:40	J
		Del 🕀			xpres											D I								- 18
		Del 🜐	Pyramid	Constr E	xpres	Page 1	1 of 1 [1-	1 of 1]				< Previous	1 N	ext >								Rows p	er page 10 🔻	
Sun																						Po	wered by ZaapIT.c	om
Pag	e 1 of 8	[1-10 of 7	1																					
	194																							
		-	le	gend																				
																								*

2.1. MANUAL STYLING

Mark a few rows and click the butcket icon next to the relevat 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.

Smart Mass Update™ Home Grid Manager	Leads Contacts Accounts Oppor
Accounts Found 75 results.	Edit New Mass Update Delete
ACTION + ACCOUNT NAME BILLING CITY Sum	PARENT ACCOUNT
Parent Account: Burlington Textiles Corp of America (1)	
Edit Del 🛟 🥖 United Oil & Gas, UK Budington	Burlington Textiles Corp of America
 Parent Account: Blues FL (1) 	
Edit Del 🖶 🖌 <u>Blue IL</u> ttv	Blues FL
 Parent Account: Blues Entertainment Corp. (4) 	
Edit Perr 🖶 🖌 <u>Blues US</u>	Blues Entertainment Corp.
Edit Del 🖶 🖌 <u>Blues UK</u>	Blues Entertainment Cor 🥒 📣
Edit Del 🖶 🗲 <u>Blues NZ</u>	Blues Entertainment Corp.
Edit Del 🕂 🗲 <u>Blues AU</u>	Blues Entertainment Corp.
Sum	



Accounts Found 75 results.			Со	onditional Styling
ACTION + ACCOUNT NAME	BILLING CITY	▼ P/		
Edit Del 🕀 🗲 United Oil & Gas, Singapore	Lawrence	D	Set the styling for	2 selected row(s)
Sum				
Parent Account: Burlington Textiles Corp of America	(1)		Style Description	VIP
Edit Del 🕀 🥖 <u>United Oil & Gas. UK</u>	Burlington	B	Row Style	background-color:#CDFFCD;color:#000000;
Parent Account: Blues FL (1)				
Edit Del 🕀 🥖 <u>Blue IL</u>	ttv	B		BIUMA
Parent Account: Blues Entertainment Corp. (4)			Field To Color	parentid
Edit Del 🕀 🥖 Blues US		B	Field Style	background-color:#006B00;color:#FFFFF;
Edit Del 🖶 🥖 Blues UK		B		
Edit Del 🖶 🥖 <u>Blues NZ</u>		B		BIUMA
Edit Del 🖶 🥖 <u>Blues AU</u>		B		
Sum				
Parent Account: Blues AU (1)				Save Cancel
Edit Del 🜐 🥖 <u>Blues FL</u>		B		
Parent Account: American Banking Corp. (2)				
Edit Del 🕀 🥖 Blues FL3	BBB	A		



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.

ome	Grid Mana	ger	Contact	s Account	s Opportunities	Leads	Campaigns	Events	Tasks	Attachments	Expl	orer 1	Expl	orer 2
P	Leads (De	faul	t) ▼ 🤞	Save View	Delete Vlew∣ Save a	as New Vie∖	N							
Lead	ds Found 52	result	1 ts.							Edit	New M	ass Upd	ate Ma	ass Clo
	Action	+	First N	Mass Up	date						×	6	2	
	Edit Del 🕀	1	demo	Update	Field	N	lew Value							
	Edit Del 🕀	14	BOB2		First Name									
	Edit Del 🕀	14	<u>Betty</u>		Last Name							rs - Nov	/ 12-23, 2	<u>2001</u>
	Edit Del 🕀	1	<u>Jorge</u>		Country					3		<u>rs - Nov</u>	/ 12-23, 2	<u>2001</u>
	Edit Del 🕀	14	<u>Bob</u>		Email					5		rs - Nov	/ 12-23, 2	<u>2001</u>
	Edit Del 🕀	14	<u>Betty</u>		Company	Γ								
	Edit Del 🕀	1	<u>Betty</u>		Email Bounced Da	te								
	Edit Del 🕀	14	<u>Eugena</u>		Status	1	Open - Not Co	ontacted	•					
	Edit Del 🕀	14	<u>Bertha</u>		Owner		User ▼							
	Edit Del 🕀	14	<u>Eugena</u>		Unread By Owner	(
Pag	ge1of6 [1-1	0 of 5	52]		Lead Source	[None	¥				2	3 4	5
	Closed leads			4	Preview Upda	ate Select	ed Rows Ma	ass Update	e All Row	vs 🕜 Canc	el			

3.1.2. MERGE LEADS BUTTON



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

ome Grid Manager Co	Accounts Accounts Save View	Opportunities Leads Cam Delete View Save as New View	aigns Events Tasks	Attachments	Explorer 1 Explore	er 2 Explorer Sub Tabs	+ 2
Leads (Deladit)	• No Save View	Delete view Save as new view					
Leads Found 52 results.				Edit	New Mass Update Ma	ass Clone Delete All	Merge Lea
Action + Fir	st N 💌 Last N	▼ Cou ▼ Email ▼	Company	Campaigns		Email Bounced Da	te 👻 Last
🔲 Egy Del 🕀 🗲 Ph	<u>vilis</u> <u>Cotton</u>	Merge Leads ~ Salesforce - Develo	per Edition - Google Chrome	Incode section 1	Concern Security 74		6/1/2 0
🖉 Edit Del 🛟 🗲 <u>Vio</u>	let <u>Maccleod</u>	https://na14.salesforce.com/l	ead/leadmergewizard.jsp	currentStage=08	.goNext=Merge%20Le	ads&id=00Qd0000000Zp0	23E. 6/1/20
🕑 Edit Del 🔂 🗲 der	mo <u>demo2</u>				/	3	9/13/
📃 Edit Del 🕀 🗲 Jef	f <u>Glimpse</u>	📩 Merge Leads			k	5	8/22/
📃 Edit Del 🕀 🗲 Mił	e <u>Braund</u>						8/22/
🔲 Edit Del 🕀 🗲 <u>Pa</u>	tricia <u>Feager</u>		Previo	us Merge Cancel]		8/22/
📃 Edit Del 🕀 🗲 Bre	enda <u>Mcclure</u>						8/22/
📃 Edit Del 🕀 🗲 <u>Ka</u>	thy <u>Snyder</u>	Select the values that you want to retain retain read-only and hidden field values	The oldest Created By date an	d user will be retained	s that contain conflicting dat in the merged record. Note:	a. The Master Record selected wi All related records including any	8/22/
Edit Del 🕀 🗲 Tor	<u>n James</u>	campaigns and activities will be associ	ated with the new merged recon	3.			8/22/
Edit Del 🕂 🗲 Sh	elly Brownell		Ms Violet Maccleod [Select Al	0	demo demo2 [Select A	<u>III</u>	8/22/
		Master Record	•		0		
Page 1 of 6 [1-10 of 52]		Lead Owner	Ford Ben		Amir Sadeh		_
		Name	● Ms Violet Maccleod		demo demo2		_
		Company	Emerson Transport		zaaapit		

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.

ne	Grid Manager	Contacts	Accounts	Opportunities	Leads	Campaigns	Events	Tasks	Attachments	Explorer 1	Explorer 2	Explor	er Sub Tabs 🕂 🕂
2	Leads (Default)	▼ 🔞 S	ave View∣ De	lete ∨lew Save a	s New Viev	v							\backslash
_ea	ds Found 52 results.								Edit	Mass Update	Delete Mer	ge Leads	Add to Campaign
	Action +	First N 💌	Last N 💌	Cou 💌 Emai	I	▼ Compar	ıy	-	Campaigns	[✓ Email Bound	ced Date	 Last Modified
1	Édit Del 🕀 🗲	Phyllis	Cotton	USA pcotte	on@abbottin	s.net Abbott In	surance		International Electric	al Engineers Asso	ocia 12/24/2014 2	.03 AM	6/1/2016 4:56 PM
	Edit Del 🕀 🗲	Violet	Maccleod	USA <u>violet</u>	m@emerson	tra Emerson	Transport	I	GC Product Webina	r Jan 7 2002, Inte			6/1/2016 4:56 PM
	Edit Del 🖶 🗲	d 🗢 Campa	aign: Add Mem	bers ~ Salesforce -	Developer	Edition - Google	e Chrome			/		x	9/13/2016 4:04 PN
	Edit Del 🕀 🗲	🛓 🔒 https	s://na14.sales	sforce.com/ui/ca	mpaign/N	lassAddCMFro	omListingV	Vizard?er	nt=lead&retURL	=https%3A%2	2F%2Fzaapit.n	a14.v	8/22/2016 6:35 PN
	Edit Del 🕀 🗲	N (Campaign									0	8/22/2016 6:35 PN
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	Edit Del 🕀 🗲	K Step 1		impaign and me							Step 1 of 2	2	8/22/2016 6:35 PN
	Edit Del 🕀 🗲	I Select	t a campaign, a	and a desired mem	ber status.	To create a new	r campaign,	you must	exit this process.				8/22/2016 6:35 PN
	Edit Del 🕀 🗲	2	Campai	gn:									8/22/2016 6:35 PN
Pag	ge 1 of 6 [1-10 of 52	1	Member Stat	us:								>	-
_			Existing Membe		erride the me he member	ember status status							

3.1.4. CONVERT



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.

Home	Grid Manager	Contacts	Accounts	Opportunities	Leads	Campaigns	Events	Tasks	Attachmen	ts Explorer	1 Explore	r 2 Explor	er Sub Ta	bs +		
s?	Leads (Default)	▼ 🚳 :	Save View De	elete Vlew∣ Save	as New View	r									2	
Lea	ds Found 3 results.	/ ¹				E	Edit	Mass Upd	Delete	Merge Leads	Add to Campa	ign Mass En	Crea	ate Tasks	Convert Ma	ss Convert
	Action +	First N 💌	Last N 🔻	Cou 💌 Ema	il	Company	у	v (Campaigns		▼ Email Bo	unced Date	- Last Mo	dified 🛓 🗖	✓ Status	
	Edit Del 🕀 🗲 🦉	<u>demo</u>	demo2	USA sales	@zaapit.com	zaaapit					9/13/2016	3:51 PM	9/13/2010	6 4 0 4 PM	Open - Not C	ontacted
	Edit Del 🕀 🗲	<u>√iolet</u>	Convert Le	ead: demo demo2	~ Salesforce	- Developer Ed	lition - Googl	le Chrome	Chana Int				×	4:56 PM	Working - Co	ntacted
	Edit Del 🕀 🗲 !	Phyllis	https://	na14.salesforce	.com/lead/l	eadconvert.js	p?&retURL	=%2Fape	ex%2Fzaapit_	_Convert_Com	pleted&isdt	p=vw&id=0		4:56 PM	Open - Not C	ontacted
Pa	ge 1 of 1 [1-3 of 3]			mo demo2								k	0			
	Closed leads		You should o	e converted to acco only convert a lead ad has been convert	once you have	identified it as q	ualified.		an be viewed in	lead reports.						0
						Convert	Cancel						<u>ا</u> ا	<u>Go to Salesf</u>	force1	Pager
			Convert	t Lead							= Re	equired Informat	ion			0
				Record Owner	Amir Sadeh		<u>ج</u>									#1/1
			Send Ema	ail to the Owner												
				Account Name		v Account: zaa	aapit 🔻 🔍	View								1
			Ор	portunity Name	zaaapit-											

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 avilable for admins who are using the preimum plan).

4						Contact	s Accounts Opportunities Campaigns Events Tasks Attachments Explor	rer 1 E>
	Leads - W	orkir	ng List (Default) • 🔊 eave	View Delete View Sa	ave as Ne	w View	
ad	is - Working	List	ound 1,390 result	5.		Edit	t New Mass Update Mass Clone Delete Merge Leads Add to Campaign Convert Mass ate Tasks Mass Emails Excert	s Convert
•	ACTION	+	FIRST NAME	LAST NAME 👻	COMPANY	COUNT	Mass Convert *	AMPAIGNS
•	Edit Del 🜐	4	Ben	Ford	3C Systems	United S	Mass convert Options: 712/7	
•	Edit Del 🕀	4	Ben	Ford	Universal Technologies	United S	Find Contact 7/227	
	Edit Del 🕀	4	Ben	Ford	BigLife Inc.	United S	Try to find existing contact by using lead's email (before you create a	
	Edit Del 🕀	4	Ben	Ford	MedLife, Inc.	United S	new Contact & Account) 7 12:27	
]	Edit Del 🔀	4	Ben	Ford	Lee Enterprise, Inc	United S	Find Account Try to find existing account by using lead's company (before you creat)	
•	Edit Del 🕀	14	Ben	Ford	Green Dot Publishing	United S	a new account) 7 12:27	
•	Edit Del 🜐	4	Ben	Ford	BigLife Inc.	United S	Opportunities: Don't create any opportunities 7.12.27	
0	Edit Del 🜐	+	Ben	Ford	Green Dot Publishing	United S	Create an opportunity for each/first converted lead 7.12.27	
•	Edit Del 🜐	14	Ben	Ford	MedLife, Inc.	United S	Owner: Lead Owner T	
•	Edit Del 🜐	+	Ben	Ford	3C Systems	United S	An owner for the new contacts / Accounts / Opportunities 7 12:27	
•	Edit Del 🕀	4	Ben	Ford	BigLife Inc.	United S	Lead Status: Qualified V 7 12:27	
•	Edit Del 🔀	4	Ben	Ford	Green Dot Publishing	United S	7 12:27	
•	Edit Del 🔀	14	Ben	Ford	Green Dot Publishing	United S	7 12:27	
	Edit Del 🕀	4	Ben	Ford	Universal Technologies	United S	Mass Convert - Selected (25) Mass Convert - ALL (1,390) 7 12:27	
•	Edit Del 🕀	+	Ben	Ford	Lee Enterprise, Inc	United S	7 12:27	
•	Edit Del 🔀	4	Ben	Ford	Universal Technologies	United S	Cancel 7 12:27	
n'	Edit Del 🜐	4	Ben	Ford	Lee Enterprise, Inc	United S	7 12:27	



Ceads (Default)	Mass Convert 🛛 🗙	2
Leads Found 3 results. 1 ✓ Action + First N ▼ Last N ▼ Cou ▼ Email ✓ Action + First N ▼ Last N ▼ Cou ▼ Email ✓ Action + First N ▼ Last N ▼ Cou ▼ Email ✓ Edit Del ⊕ ≠ demo demo2 USA sales@zz ✓ Edit Del ⊕ ≠ Yolet Maccleod USA violetm@z ✓ Edit Del ⊕ ≠ Phylic Cotton USA acotton@ Page 1 of 1 [1-3 of 3] Action	 Find Contact Try to find existing contact by using lead's email (before you create a new Contact & Account) Find Account Try to find existing account by using lead's company (before you create a new account) 	Add to Campaign Mass Emails Create Taska Convert Mass Convert Email Bounced Date Last Modified J Status 9/13/2016 9/13/2016 4:56 PM Open - Not Contacte Status 12/24/2014 2:03 AM 6/1/2016 4:56 PM Open - Not Contacte Status Open - Not Contacte Contacted Contacted Status Contacted Contacted<
Closed leads	An owner for the new contacts / Accounts / Opportunities Lead Status: Closed - Converted ▼	nent Terms of Use 508 Compliance <u>Go to Salesforce1</u>

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

Tab Natiles and Labers				
Maps and Location	Edit Replace S	alutation	Picklist	
Home	F	ïrst Name	Text(40)	
Activities	L	ast Name	Text(80)	
Campaigns	Edit No.	of Employees	NumberOfEmployees	Number(8, 0)
Leads	Edit Pho		Phone	Phone
Fields				Picklist
Related Lookup Filters	Replace Edit Rati		Rating	
Validation Rules	Edit <u>Title</u>		Title	Text(128)
Triggers	Edit Wet	bsite	Website	URL(255)
Page Layouts				
Field Sets	Lead Custom Fie	lds & Relationships	New Map Lead Fi	elds Field Dependencies
Compact Layouts	Action	Field Label	API Name	Installed Package
Search Layouts				-
Lead Assignment Rules	Edit	Correlation Data	SFGA_Correlation_Data_c	Salesforce for Google AdWords
Lead Settings	Edit	CorrelationID	SFGA_CorrelationID_c	Salesforce for Google AdWords
Buttons, Links, and Actions	Edit Del Replace	Create Task	zaapitCreate_Task2c	ZaapIT Tools
Lead Processes	Edit Del Replace	Create Task (M)	zaapitCreate_Taskc	ZaapIT Tools
Record Types	Edit Del	dup	dupc	
Limits	Edit Del	Email Domain	Email_Domainc	
Web-to-Lead	Edit	Lange Subscriber Org Type	sfLmaSubscriber_Org_Typec	License Management App
Lead Auto-Response	Edit Del	version appexchange link	version_appexchange_linkc	
Rules				

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	(Defau	ilt) ▼ 🔞 Sa	ve View Delete VI	ew Save as New '	√iew Refresh				
Acco	ounts Foun	d 79 res	ults.			Edit New Export	Mass Update Delete	Copy Values	Create Tasks Merge Acc	counts Contacts - Drill Down Cr
	Action	+	Account Name 💌	Parent Acco	Billing Cou 👻	SLA Serial Nu	▼ Annual R ▼	Account Ph 🔻	Website	▼ Ow ▼ Last Modified
•	Edit Del	# 1\$	Blues AU	Blues Entertai	USA	Blues AU43467		434677788	http://zaapit.com	Ford Ben 9/13/2016 6:15
	Edit Del	🕀 I 🗲	Joby		USA	Joby111		13	http://aaa	Ford Ben 8/31/2016 11:00
	Edit Del	11	kely		USA	kely11		15		Ford Ben 8/31/2016 11:00
	Edit Del	11	Joby		USA	Joby		15		Ford Ben 8/31/2016 11:00

T	Contacts - Drill Do	wn (Defaul ▼	💰 Save View De	elete Vlew Save a	is New View					Edit Layout LI	Inks 🕜
Con	tacts - Drill Down	Found 2 results.		Edit New Create Tasks	Mass Update Mass Mass Emails Cop		e Contacts Add to Campaig	n	Sea	rch	Q
	Action +	Full Name 💌	Email	Owner 👻 Campa	ai 👻 Account	1 Mailing State/	Provi 💌 Mailing Country	✓ Acc.Billing 0	Coun 💌 First Name	✓ Last Name	-
	Edit Del Cln 🕀 🗲	joe last1817	contac3@aaa.a1839	Ford Ben	Blues AU		USA	USA	ioe	last1817	
	Edit Del Cln 🖶 🗲	zzz asfsf12	fb1@zaapit.com	Ford Ben	Blues AU	222	USA	USA	222	asfsf12	

3.3. CONTACTS

Page 1 of 1 [1-2 of 2]

All functionalities under contacts have been previously discussed.

< Previous 1 Next >

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.

Rows per page 10 🔻



Home	Grid Manager	Contacts	Accounts	Opportunities	Leads C	ampaigns	Events	Tasks	Attachments	Explorer 1	Explorer 2	Explorer Su	ıb Tabs	
S	Opportunities	- Working L	ist (Default)	▼ 🚯 Save	View Delete	Vlew Save	e as New Viev	(
Орр	ortunities - Wo	rking List	Found 150 resu	lts.			Edit	Mass U	Jpdate Delete	Create Tasks	Contact Role	Accounts - Dr	ill Down	с
	Action +	Name	-	Account	- Amount	v	Producte		- C	reated Date 👃 👻	Quan 🔻	Stage	▼ Fo	n
	Edit Del 🕀 🗲	<u>xxx11</u>		<u>xxx1</u>	\$11.00				8/	/2/2016 6:54 PM		Prospecting	Pip	e
1	Edit Del 🕀 🗲	<u>xxx2</u>		<u>xxx2</u>	\$11.00				8/	/2/2016 6:54 PM		Prospecting	Pip	e

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 defualt popup screen to sub-tabs with custom smart grids).

SMART	MASS UPDATE								Ford Ben 🔻	Setup	Hel	p Sr	nart Mass Upo
			Related Information								×		
Home	Grid Manager	Contacts	Task								-	b Tabs	+
3	Tasks Working	g List (Defa				Attachments [0]				•			
Tas	ks Working Lis	t Found 483	Task Detail		Edit Print Cre	eate Follow-Up Task	reate Follov	w-Up Event					
	Action	+ Subjec	Assigned To	Amir Sadeh			Status	Completed					Created
	Action	T Subjec	7 Subject	XXZXZ			Name	Shelly Brownell				ion	Created
-	Account: Western	Telecompun	Due Date	6/30/2016		Re	elated To						
9	Edit Del Popup	1 x0707	Phone	(408) 326-9000			Email	shellyb@westernte	lecom.com				3/13/2016
•			Priority	High 10/4/2016 1:33 AN									
1	Edit Del Popup	∮ 32155	test1	10/4/2016 1:33 AN									3/13/2016
	Edit Del Popup	i∳ xx	Created By	Ford Ben, 3/13/20	16.8:43 PM	Last Mo	dified By	Ford Ben, 9/10/201	6.6:59 PM				3/13/2016
Ø	Edit Del Popup	1 100	Comments	reerer1									3/13/2016
-	Account: Universit	y of Arizona	Reminder										
	Edit Del Popup	🔸 testZZZ	Reminder										2/14/2016
	Edit Del Popup	🔸 testZZZ											2/14/2016
	Edit Del Popup	🔸 testZZZ			Edit Print Cre	eate Follow-Up Task	reate Follov	w-Up Event					2/14/2016
	Edit Del Popup	🔸 testZZZ	Attachments										2/14/2016
	Edit Del Popup	🗲 call	No records to display									n updateXX	X 11/24/201
	Edit Del Popup	🗲 call	A Back To Top		Alwaya at	now ma fowar 🔺 ron orde	o nor rolato	of list			-		11/24/201
	Edit Del Popup	🗲 call		University	of AZ Portable	University of Arizona	Interr	nal <u>Ford Ben</u>	Completed				11/24/201
	Edit Del Popup	🗲 Email	ASE	SDS University	of AZ 2016	University of Arizona	Interr	nal <u>Ford Ben</u>	Completed	жж			7/29/2015



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.

Tasks Working List (Defaul 🔻 🔞 Save V	ïew∣ Delete Vlew	Save as New View		2			
Tasks Working List Found 483 results.			Edit New Mass	Update Mass Clone	e Delete Imp	port Export	
Action + Subject	Mass Clone	е			3	×	▼ De
 Account: Western Telecommunications Corp. (4) 	Overwrite	Field	New Value				
Edit Del Popup 🗲 xxzxz		Subject		1	¥		re
✓ Edit Del Popup		Name	Contact 🔻				re
✓ Edit Del Popup ✓ xx		Related To	Account 🔻				re
🕑 Edit Del Popup 🗲 oo		Call Type	None V				re
 Account: University of Arizona (9) 		Assigned To					
Edit Del Popup 🗲 testZZZ6		Status	Not Started	T			fre
Edit Del Popup 🗲 testZZZ5		Description					fre
Edit Del Popup 🗲 testZZZ6		Due Date Only	[10/	4/2016]			fre
Edit Del Popup 🗲 testZZZ5		Priority	Normal T				fre
Edit Del Popup 🗲 call		Туре	None V				De
Edit Del Popup 🗲 call							jhg
📃 Edit Del Popup 🗲 call				Clone Selected I	Rows 🕜	Cancel	

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.





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..)...
 - 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 smartmass-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: <u>https://www.youtube.com/watch?v=nR0vKnlca7k</u> 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: <u>https://www.youtube.com/watch?v=nR0vKnlca7k</u> Custom dedupe via grouping SOQL: <u>https://www.youtube.com/watch?v=bQ-ee2jO0w4</u>

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 specify 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

erview	Leads by Em	ail 🕖 🛛 Leads by N	lame 📴 🛛 Contacts by En	ail 🗿 🛛 Contacts	by Name 2	Accounts by Name 🔟	Lead w. Conta	ct (Email) 🔋	Lead w. C	Contact (Name) 🛛	Lead w. Account 🛛	
Sim	lar Leads by Em	ill (Defau ▼ 🔞 Sav	e View Delete View Save as №	lew View Refresh							Ed	t Layout Links (
imilar Le	ads by Email			Edit New Mass Upd Mark Non-Empty Fields		Delete Merge Leads Conve	Add to Campaig	n Mass Merge	Mass Conver	Group #	1 Search	
Actio		Full Name	▼ Email ↓	Company	t 👻 Owner	▼ Status	✓ Street	City 🖊	✓ State Pr ▼	Zip/Po v Phone	▼ Conver ▼	Industry
V		Violet Maccleod	violetm@emersontransport.com	Emerson Transport	Ford Ben	Working - Contacted		K	AL AL	90210 (770) 395-2	-2370	
🕑 🚝 dit I)ei 😈 🦻	Violet Maccieou	The second									
	Del 🕕 ≯	Violet Maccleod	violetm@emersontransport.com		Ford Ben	Closed - Converted COP	to master	_/	XXX	90210 (770) 395-2		
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4.5. DEDUPE-MANAGER > CREATING A CUSTOM DEDUPE TAB (FORMULA / SOQL)

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

Custom formula/fuzzy dedupe: <u>https://www.youtube.com/watch?v=nR0vKnlca7k</u> Custom dedupe via grouping SOQL: <u>https://www.youtube.com/watch?v=bQ-ee2jO0w4</u>

Inside the custom-dedupe tab there are a few popular custom formula fields exmaples 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)

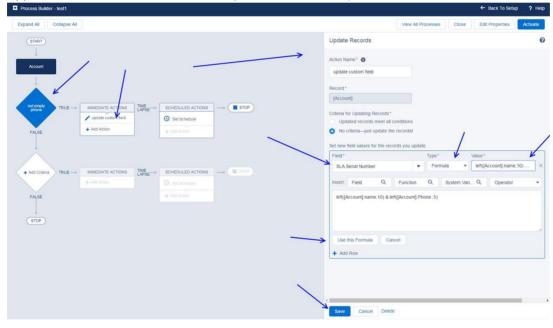
The following technique is only needed for formulas that you can't be created via slaesofrce custom formula fields.

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 deduplication report/process then just change the grouping statement (e.g. "group by name, phone" under <u>custom settings</u>).

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):



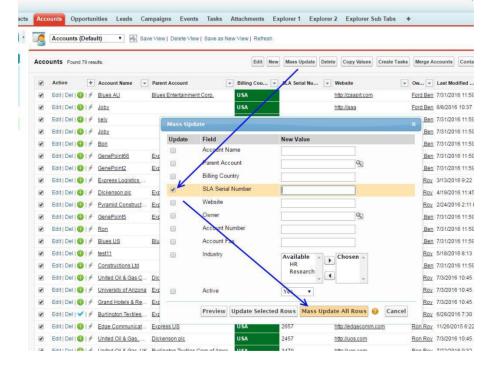
3. Go to smart-mass-update>accounts tab & mass update the "SLA Serial number" field:

Before the update:



	Accounts (De	fau	lt) 🔻 🔞 Sav	e View∣ Delete View∣ Save as Ne	w View I Refresh		
Acc	ounts Found 79	_				ew Mass Update Dele	ete Copy Values Creat
	Action	+	Account Name	Parent Account	Billing Cot	▼ SLA Serial Nu ▼	Website
	Edit Del 🜐	4	Blues AU	Blues Entertainment Corp.	USA		http://zaapit.com
	Edit Del 🜐	4	Joby		USA		http://aaa
	Edit Del 🜐	+	<u>kely</u>		USA		
	Edit Del 🜐	4	Joby		USA		
	Edit Del 🜐	+	Bon		USA		
	Edit Del 🜐	4	GenePoint66	Express Logistics and Transport	USA	7324	http://www.genepoint.ce
	Edit Del 😝	+	GenePoint2	Express Logistics and Transport	USA	7324	http://genepoint.com
	Edit Del 😗	4	Express Logistics		USA	4724	http://expressl&t.net
	Edit Del 🜐	4	Dickenson plc	Express Logistics and Transport	USA	3213255	http://dickenson-consul
	Edit Del 🜐	4	Pyramid Construct	Express Logistics and Transport	France	9840	http://pyramid.com
	Edit Del 🜐	+	GenePoint5	Express Logistics and Transport	USA	7324	http://www.genepoint.co
	Edit Del 🜐	4	Ron		USA		
	Edit Del 🜐	+	Blues US	Blues Entertainment Corp.	USA		http://zaapit.com
	Edit Del 🜐	4	test11				
	Edit Del 🜐	+	Constructions Ltd		USA		
	Edit Del 🕀	4	United Oil & Gas C	Dickenson plc	USA	6654	http://www.uos.com
	Edit Del 🖨	4		Express Logistics and Transport	USA	8350	http://universitvofarizon

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



The mass update result:



cts	Acco	unts Oppo	rtuni	ties Leads Cam	paigns Events Tasks At	tachments Exp	olorer 1 Explorer	2 Explorer Sul	b Tabs 🔸
• [0	Accounts (D	efaul	t) 🔻 🚳 Save	View Delete Vlew Save as New	iew Refresh			
	Acco	unts Found 75	resu	ts.		Edit	New Mass Update	Delete Copy Valu	Create Tasks Me
		Action	+	Account Name	Parent Account	Billing Cou	SLA Serial Nu 💌	Account Ph 👻	Website
		Edit Del 🜐	14	Blues AU	Blues Entertainment Corp.	USA	Blues AU43467	434677788	http://zaapit.com
		Edit Del 🔀	14	Joby		USA	Joby111	111	http://aaa
		Edit Del 🜐	14	<u>kely</u>		USA	kely11	11	
		Edit Del 🜐	14	Joby		USA	Joby		
		Edit Del 🕀	14	Bon		USA	Bon		
		Edit Del 🕕	14	GenePoint66	Express Logistics and Transport	USA	GenePoint6(650)	(650) 867-3450	http://www.genepoint.c
		Edit Del 😗	14	GenePoint2	Express Logistics and Transport	USA	GenePoint2(650)	(650) 867-3450	http://genepoint.com
		Edit Del 😗	14	Express Logistics		USA	Express Lo(503)	(503) 421-7800	http://expressi&t.net
		Edit Del 🜐	14	Dickenson plc	Express Logistics and Transport	USA	Dickenson i8i8i	i8i8i8mm9	http://dickenson-consul
		Edit Del 🜐	14	Pyramid Construct	Express Logistics and Transport	France	Pyramid Co(014) 🤌	(014) 427-4427	http://pyramid.com
		Edit Del 🜐	14	GenePoint5	Express Logistics and Transport	USA	GenePoint5(650)	(650) 867-3450	http://www.genepoint.co
		Edit Del 🜐	14	Ron		USA	Ron123	123	
		Edit Del 🕕	14	Blues US	Blues Entertainment Corp.	USA	Blues US45657	45657788888	http://zaapit.com
		Edit Del 😗	14	test11			test11		
		Edit Del	14	Constructions Ltd		USA	Constructi22	22	
		Edit Del 🜐	14	United Oil & Gas C	Dickenson plc	USA	United Oil(212)	(212) 842-55001	http://www.uos.com
		Edit Del 🕒	14	University of Arizona	Express Logistics and Transport	USA	University(520)	(520) 773-9050	http://universityofarizon
		Edit Del 🜐	14	Grand Hotels & Re	Express Logistics and Transport	USA	Grand Hote(312)	(312) 596-1000	http://grandhotels.com
		Edit Del 🗸	14	Burlington Textiles	Express Logistics and Transport	USA	Burlington(336)	(336) 222-7000	http://burlington.com
		Edit Del 🕕	14	Edge Communicat	Express US	USA	Edge Commu(512)	(512) 757-60001	http://edgecomm.com
		Edit Del	14	United Oil & Gas	Dickenson plc	USA	United Oil(650)	(650) 450-8810	http://uos.com
		Edit Del 😗	14	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 Advcaned filter to set the connection.

Adding a related list in lightning: <u>https://www.youtube.com/watch?v=-ly2C_aI7PA</u> Adding a related list in Classic: <u>https://www.youtube.com/watch?v=fxaLcHxePbI</u> Adding a csutomer view: <u>https://www.youtube.com/watch?v=9jJw9RRydW8</u>



Setiing the Related List Reference Field:

ustomer View					
Overview Account Hierarchy Related Accounts 🔤	Related Contacts 🥺	Related Opportunities 🚥	Related Tasks 💷	Related Events 🚺 Camp	ogins 🕘
Campigns (Default	Layout Editor			3	EditLayout Li
		Edit Butte	ons	*	
Campigns Found 0 results.	Hide Edit Button on View-Mode	Show M Update But on View-M	ton		Search
Action + Name + Active	Show Mass Delete All Button	Show De But (selected)	ton		d Leads
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Page 1 of 1	Hide Add Row Duttons	Maximum re for Mass de	2W8 6 000		Rows per page
	Show Export (Xls,doc,pdf,csv) on View mode	Maxim number of re for exp	ows 10,000		
	Turn On Scrolls for RL & sub- tabs	Related Reference F	List Please Select	▼ (
	Show column filter (texts & numbers & Dates)	Disa formula-f groupings fil	ield		
	Maximum rows for calculating formula-field	00 Hide Act colu (Edit∇	mn		

Using the Advcaned filter to set the connection:

Table without sub-tabs	
Customer View	
Overview Account Hierarchy Related Accounts 💿	Related Contacts 2020 Related Opportunities 2020 Related Tasks 2020 Related Events 1 Campgins 0
Campigns (Defaul 🔻 🍈 Save View Delete View Save as	
Campigns Found 0 results.	Sort by Field #3 Please Select Sort by Direction Ascending Search C
Action + Name † Active	Apply shading Group to attend to att
Sum	Advanced Filter (SOQL style)
Page 1 of 1	Add Condition: - 🔹 Select a Field 🕙 equals 🔹 👘 🕂 Kows per page 10 🔹
	Id in (select <u>CampaignId</u> from <u>CampaignIdember</u> where <u>ContactId=(ID)</u>
>	
	Check Syntax 📀
	Examples: amount>0 and quantity=3 and ownerid=(UserInfo UserInfo and CreatedDate > TODAY. You can use the current table's fields with SOOL operations.
	Use (UserInfo UserInf) for the logged-in UserInf. Example: created/ujdi=(UserInfo, UserInf), Use (()) for the current parently lotent with the UserNo; Example: created/ujdi=(10), Use (pit) Of the current (Hearry Hint) (Infe current Hearry). Example: accounted(HHD).
	In case of an unexpected/problematic result you can empty this field (named "extraConditionFilter") under setup>custom settings.