ZaapIT Tools – Admin / User Guide

Smart-Tables, Smart-Mass-Update™, Smart-Activity-Manager™, Community-Grids™, Smart-Related-Grids™, DEDUP-Manager™

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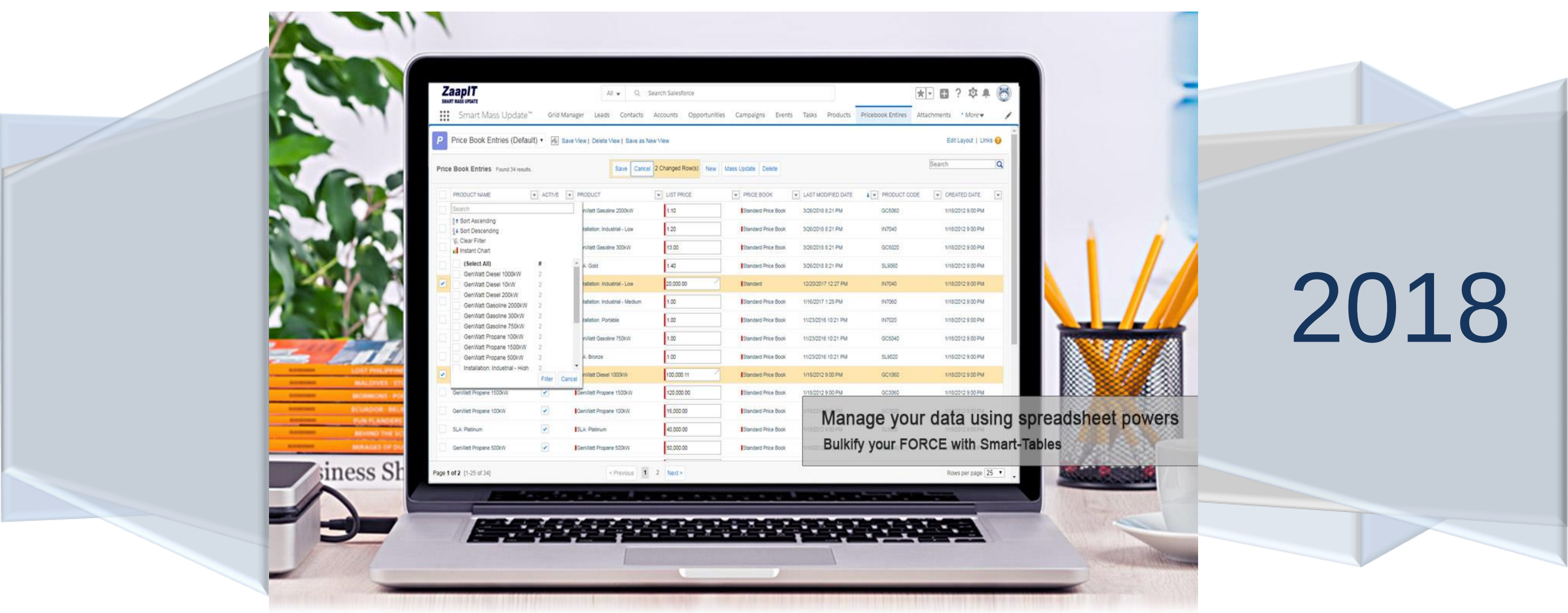

The ZaapIT Tools Apps for Salesforce is a collection of table-based solutions for Salesforce that offer advance features for any Salesforce Object (Custom / Native).

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Overview

ZaapIT's Tools suite is a collection of native Salesforce tools made by ZaapIT Software Technologies that provides a state-of-the-art tools for data management for both professional and novice users. Below is the list of our currently available tools followed by the list of common key features to all the Smart-Tables Tools. In the next sections we will learn how to use & configure the different Smart-Tables tools.

ZaapIT's Tools:

- **Smart-Mass-Update™** - A collection of predefined Smart tabs for common native/custom objects such as Lead, opportunities, Account etc. You can use it as a standalone Salesforce application or replace any "native tabs" with a ZaapIT's smart tabs.
- **DEDUP-Manager™ -** A collection of tabs & related list that helps you to de-duplicate your data.
- **Smart-Activity-Manager™ -** A collection of predefined Tasks & Events Smart-Tabs that's enables you to control yours and your team's tasks & events from one place & in mas.
- **Community-Grids** – A collection of Smart tabs for you community (smart tabs placed under Salesforce's communities).
- **Smart-Related-Grids** – Are smart grids user as related list, e.g. Place it inside the opportunity layout as opportunity-products or contacts.
- **Customer View –** a 360 view of Salesfforce's account hierarchy with all it's related data
- **Simple CPQ –** opportunity products & quote line items manager for Sales users, it enable users to quickly add products, set the pricing and be productive with many advanced features.

Common Key Features:

- **Smart Instant-Charts™** - Smart Data driven charts e.g. 1-click automatic charts.
- **Smart Mass Update** - Update multiple fields for multiple records in one click.
- **Mass Delete** – Delete multiple records in one click.
- **Mass Inline Edit** – Edit the grid's cells aka spreadsheet/excel style.
- **Smart Column filter** – filter the grid's record spreadsheet/excel style.
- **Export to file –** support formats xls, doc, pdf, csv & XML.
- **Easy to use interface** - Smart search, sorting, filters, grouping
- **Automatic Summary -** for the entire grid & for grouping**.**
- **Multi-Column Sorting & groupings –** via the layout editor
- **Smart layout editor –** admin & none-admin versions are available
- **100% Salesforce hosted**
- **Multi language support –** via Salesforce's translation workbench
- **Secured** – we do rigorous security checkups & tests on every version we release including Salesforce's ISV security review.

Smart Mass Update

The Smart mass update feature (Figure 1) enables you to update multiple fields for large number of records with few clicks of a button.

The Smart mass update feature offers you three working modes:

1. **Preview mode** – The data is changed only on the screen to enable the user to preview their changes before saving them to the Salesforce database (Figure 2).
2. **Mass Update All/Filtered rows –** This admin-only option will update all the rows based on the selected filters & search.
3. **Selective Update Mode** - Select the relevant rows on your screen and then click on the mass update button. This action will update only the selected rows e.g. you can update only 5 rows out of the 25 rows that you see on your screen.

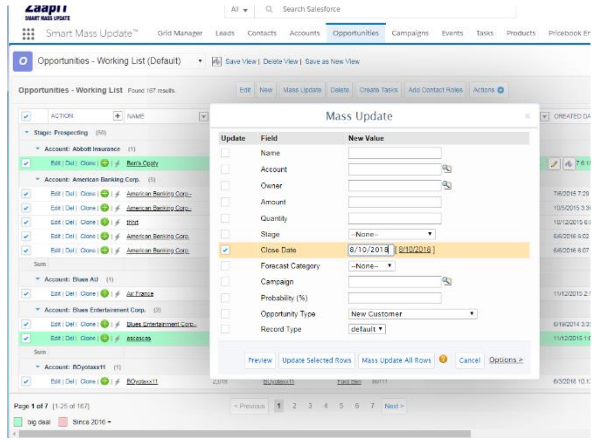
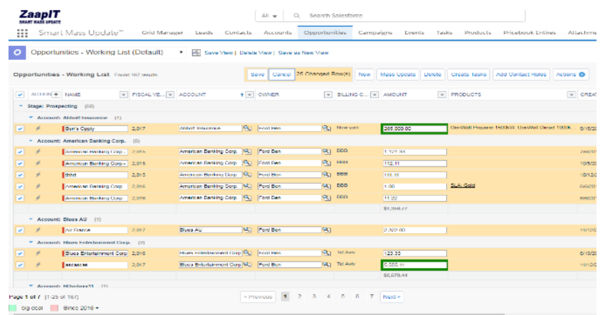


Figure 1 - Mass Update



To add/remove fields from mass update popup edit the layout and add/remove a column or make the row hidden by add a custom css statement. For more details please refer to the Layout Editor section.

Mass Create

The mass create feature enables you to create related-object for multiple objects. For example, you can create multiple tasks for all/selected contacts in the following example (Figure 3).

To create such a mass create button – open the table's layout editor and create a new button:

Button name: Create Tasks, Button link/JS: openMassCreate('tasksMC','whoid','Mass Create','1');

To create different mass-create buttons follow this JS API definition: openMassCreate(*Preview-table-configuration-name*,destination-API_FIELD_NAME-for-select-rows ,window-title, use-selected-values, skip-if-exists);

The *Preview-table-configuration-name* must be a real smart-table/grid, make sure the gird has the following advanced filter: id in ({ID})

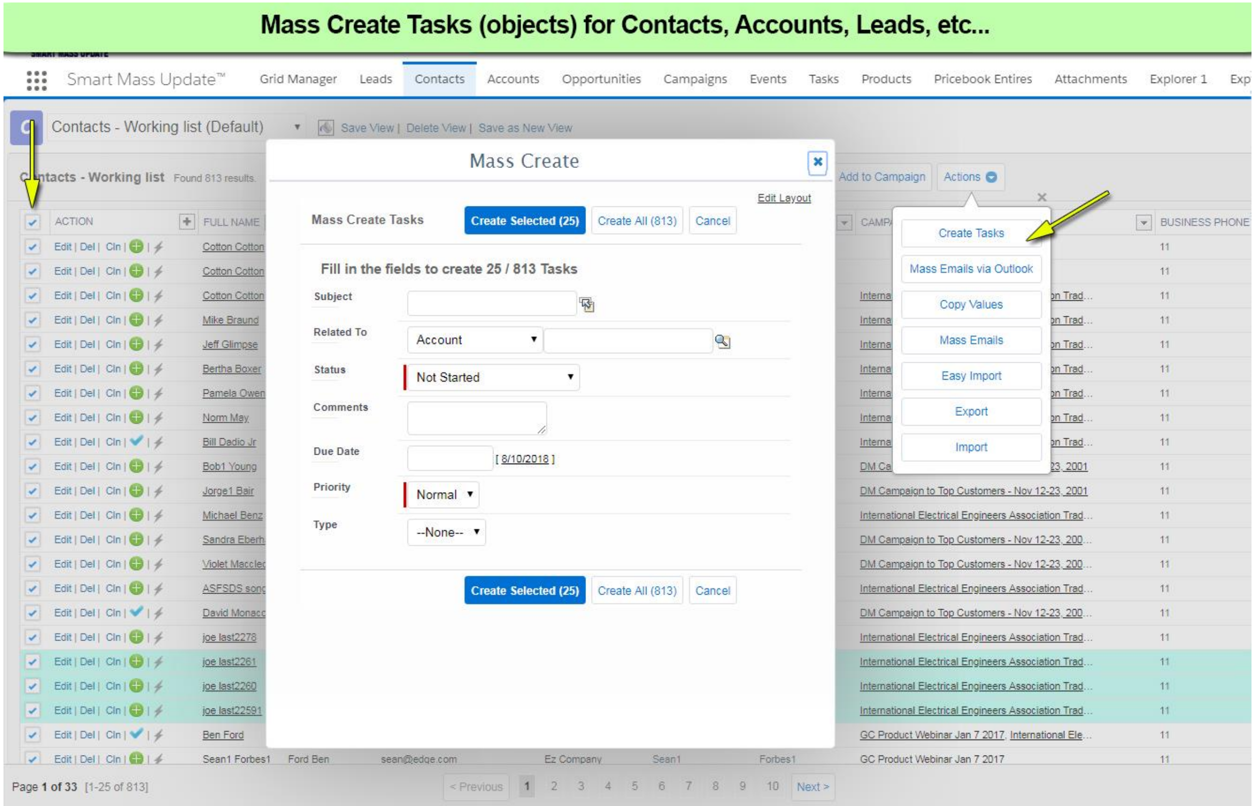


Figure 3 - Mass Create

Mass Delete

The mass delete feature (Figure 4) enables you to delete a large volume of rows with few clicks of a button. Just select the rows you wish to delete and then click on the top delete button (the delete all/filtered options is only available for admins).

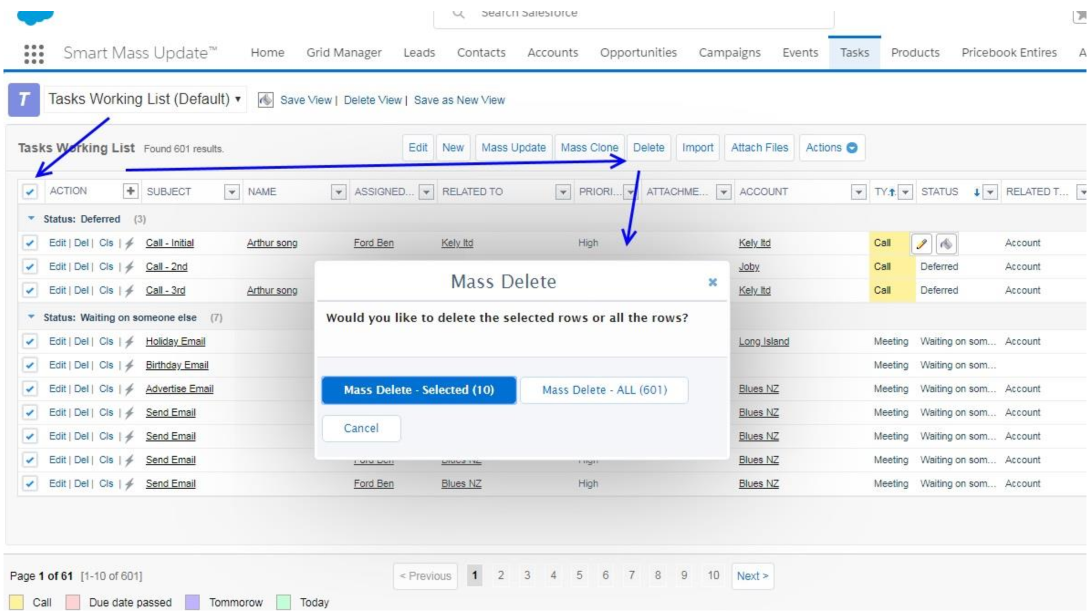


Figure 4 - Mass Delete

Mass Inline Edit

The mass inline feature (**Error! Reference source not found.**) enables you to inline edit a large amount o f data without double clicking each field/row. Just click the top edit bottom to enter this inline edit

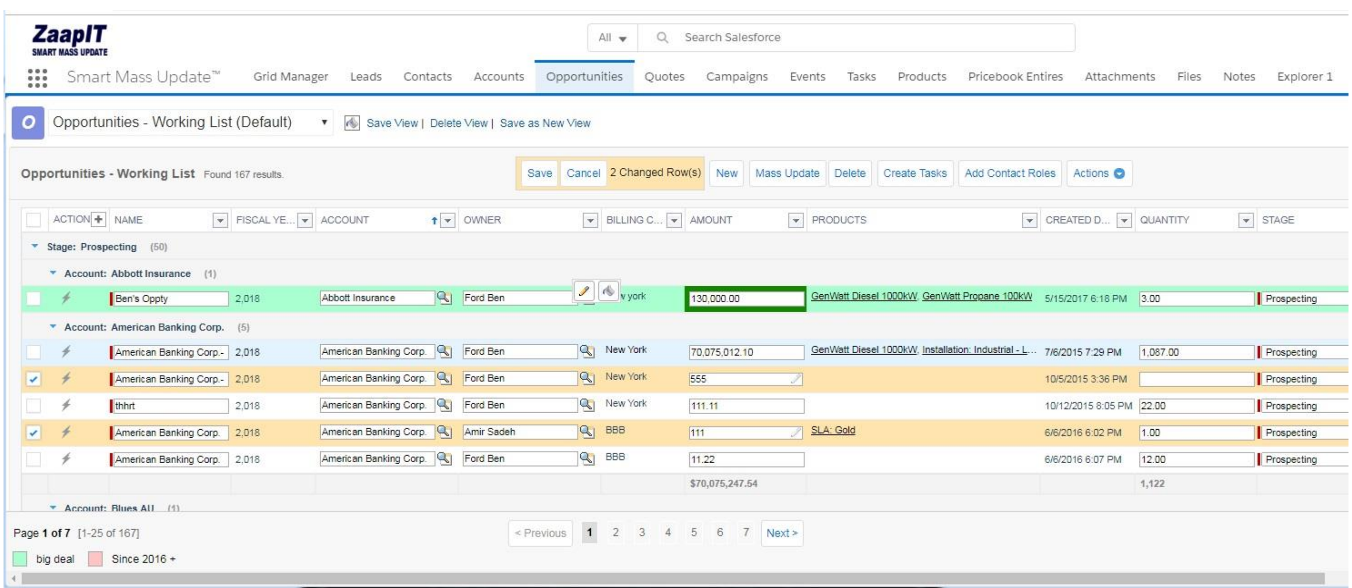


Figure 5 - Mass Inline edit

mode.

Smart Search

The Smart Search feature (Figure 6) enables you to search the entire table's text fields and find the relevant rows.

Technically speaking, the search finds every row in the database that has a text field that contains a word presented in the search field.

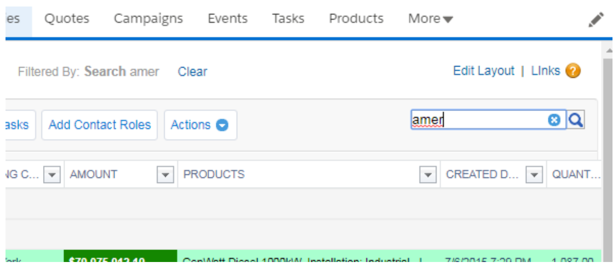


Figure 6 - Smart Search

A Smart Search Example:

When a user types "amer close", the search results knows to return the most relevant results in this case "amer" in the account-name column and "close" on the Stage column.

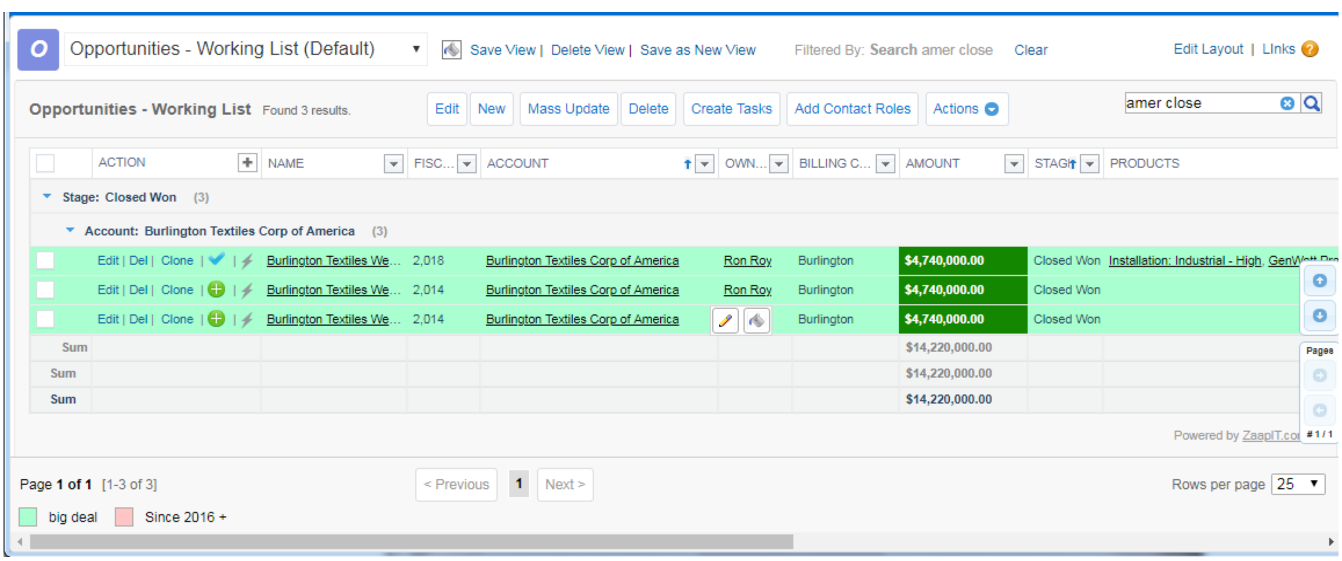


Figure 7 - A Smart Search Example

Smart Column Filters

The Smart Column Filters (Figure 8) enables you to filter a specific table column by choosing / typing the relevant data – “Spreadsheet Style”. For your convenience we also placed two sorting links on the Smart-Column-Filter menu, so you will be able to control the sorting direction easily, i.e. in addition to the regular click-a-column header sorting. The Smart Column filters also include the optional Instant Charts™ feature. For more information, please read the next Instant Charts™ section.

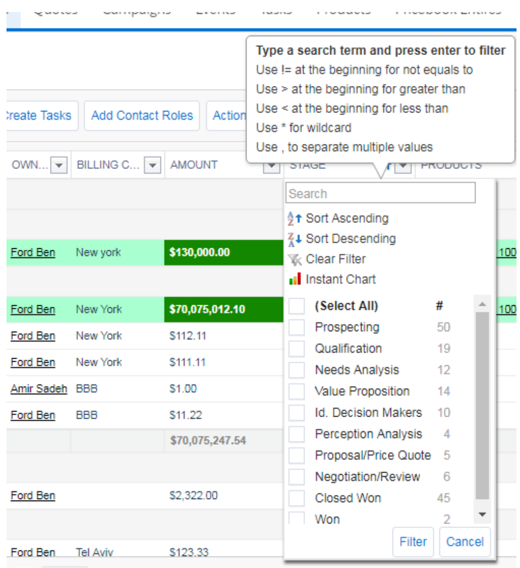


Figure 8 – Smart Column Filter (Text)

Figure 8 and Figure 9 illustrate the different types of Smart-Column-Filter: free text, integer, checkbox, currency / decimal and date filed type.

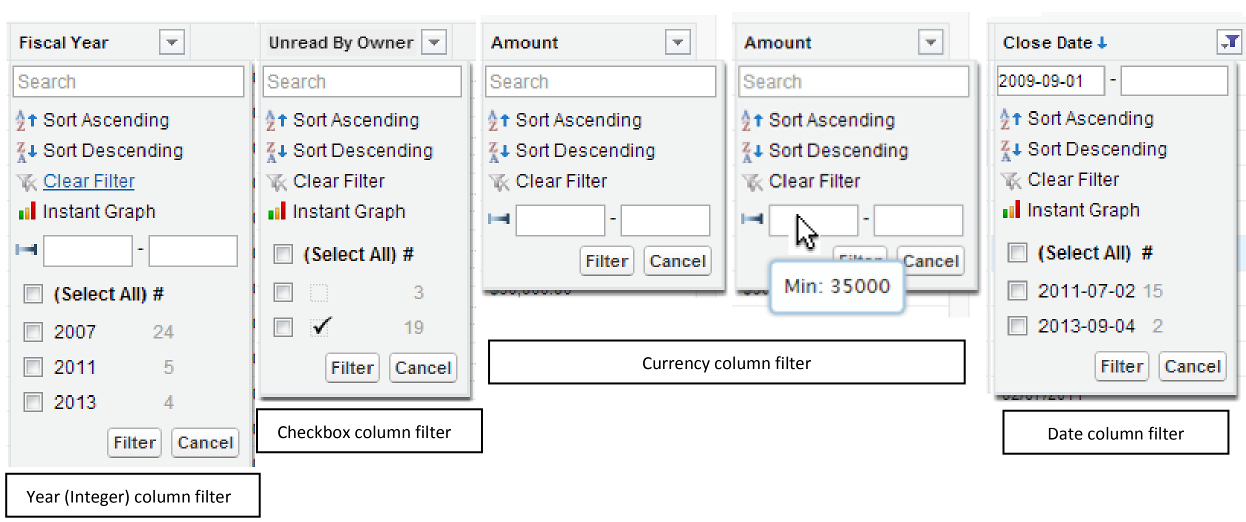


Figure 9 - Different types of Smart Column Filters

Instant Charts™

The Instant Chart™ feature (Figure 10) enables you to create a quick graphic illustration of your data in just 2 clicks, just open the column filter and click on the Instant- Charts™ link. Our entire collections of Instant Charts™ are touchable action charts, meaning you can click and filter any Smart-Table grid from the chart itself. You can even do it while editing, sorting and filtering by another field, the chart will stay on the page until you close it or leave the page. Pinning the chart to the grid's top will enable you to save that chart for the current view Figure 11 (you can pin several charts to the grid's top).

How does it work? Our product automatically detects the right chart based on the column type and the amount of data presented on the chosen column itself.

By default the Instant-Charts™ groups similar rows and show the count for each group using different charts / graphs. To add an additional dimension such as a currency-field to the totals of each group use the top edit-layout link, you can find more information for this option on the Layout Editor section. Figure 10 illustrates the usage of opportunity-amount field as the additional dimension; please note that the groups on chart (right & left side) are sorted by amount (and not by count).

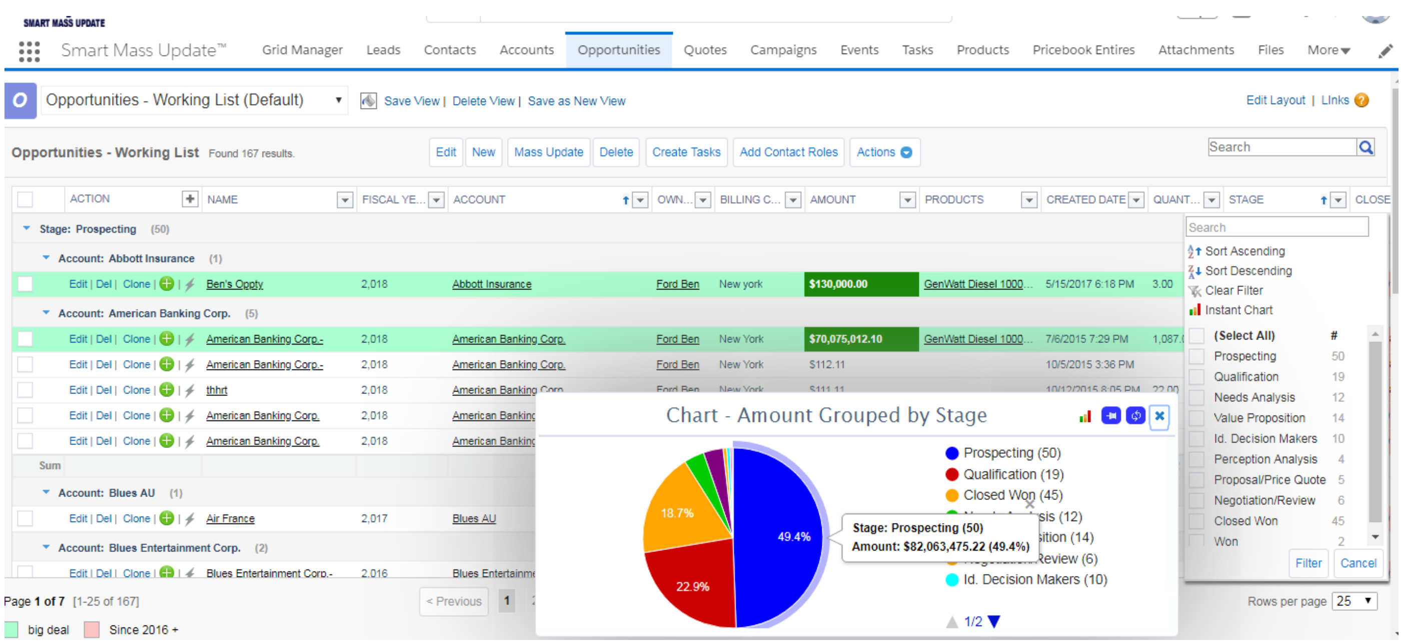


Figure 10 - Instant Charts®

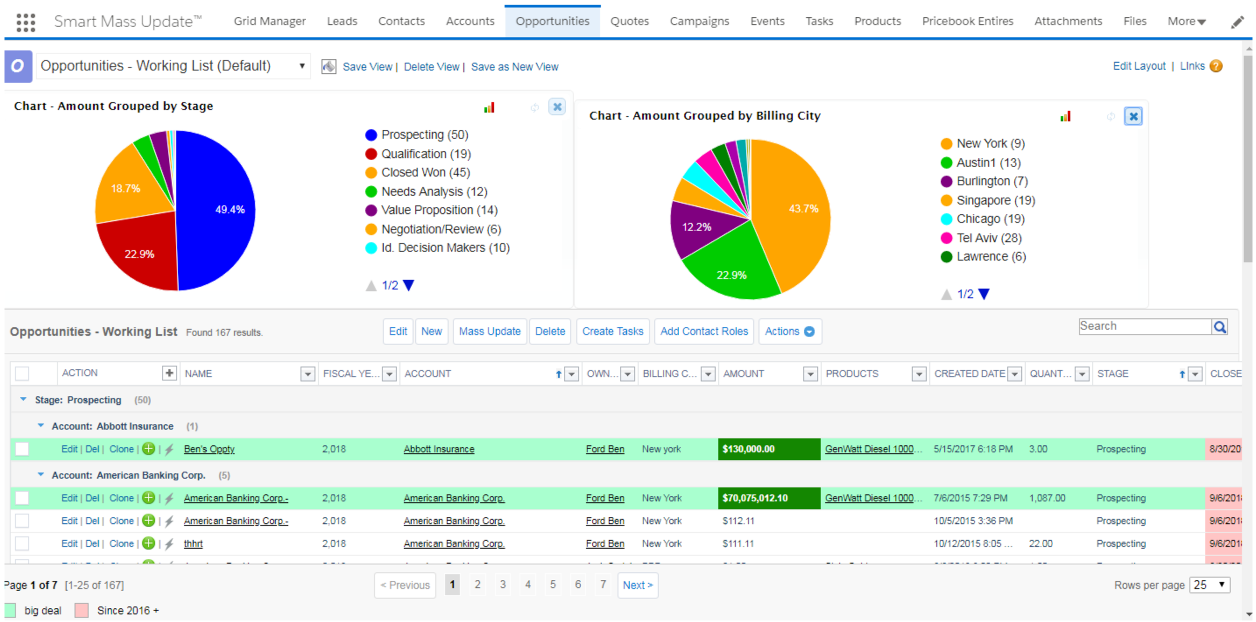


Figure 11 - Instant Charts pinned to the grid's top

The Instant-Charts™ collections include several types of charts: Line chart, Pie Chart, Bar Chart and Date Chart & Country Map chart.

Figure 12 illustrates the date chart in action. In the following example we filtered the Smart-Table grid by using the Date Chart itself and restrict the chosen date range to 16-Apr-2013 - 08-Aug-2016 (also reflected in the column filter date range).

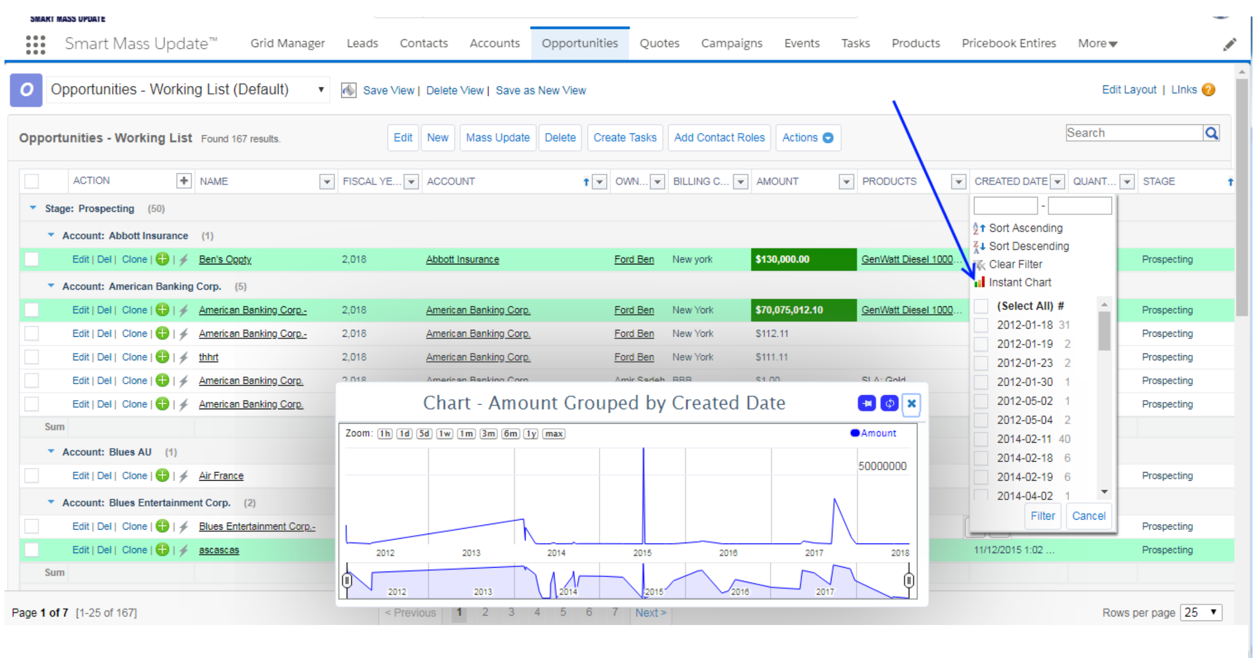


Figure 12 - Date Chart in action

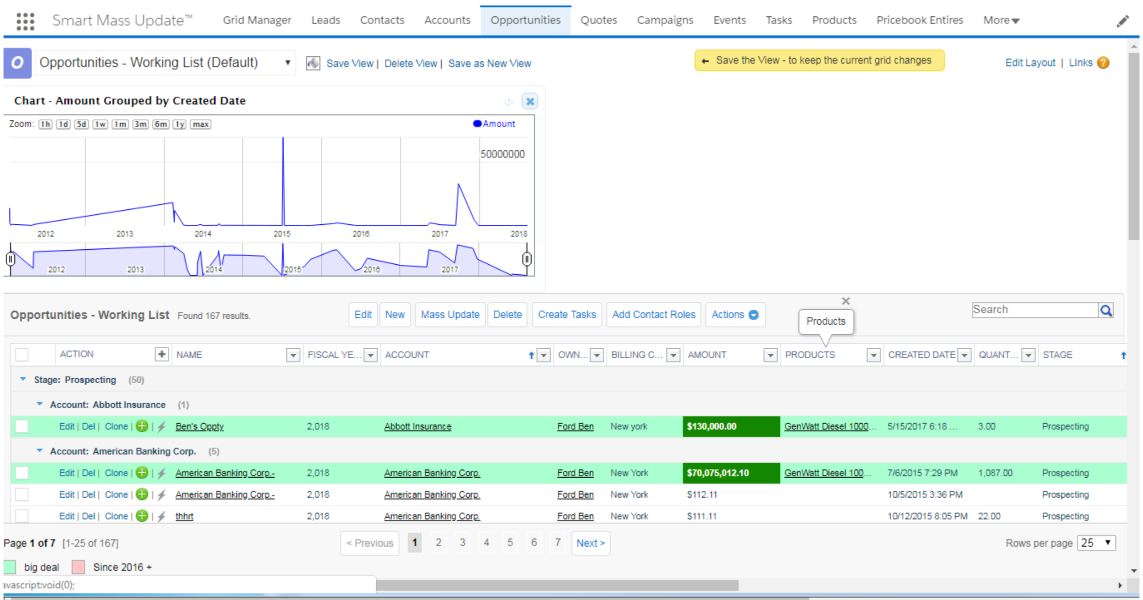


Figure 13 - Date chart pinned to the grid's top

Data export - Word, Excel ,PDF, CSV & XML

The data export feature (Figure 14) enables you to export any data to PDF, Word, Excel, CSV & XML. Just click on the export button on the grid's top to enter the export popup (Figure 14). For your convenience, when exporting to Excel a new filter row is generated for you (Figure 15).

Please note: The data export feature takes into account the search & filters i.e. you can choose and export only the relevant data for any business use case. As an example, on Figure 15 we exported all the opportunities that match our searching criteria: "uni".

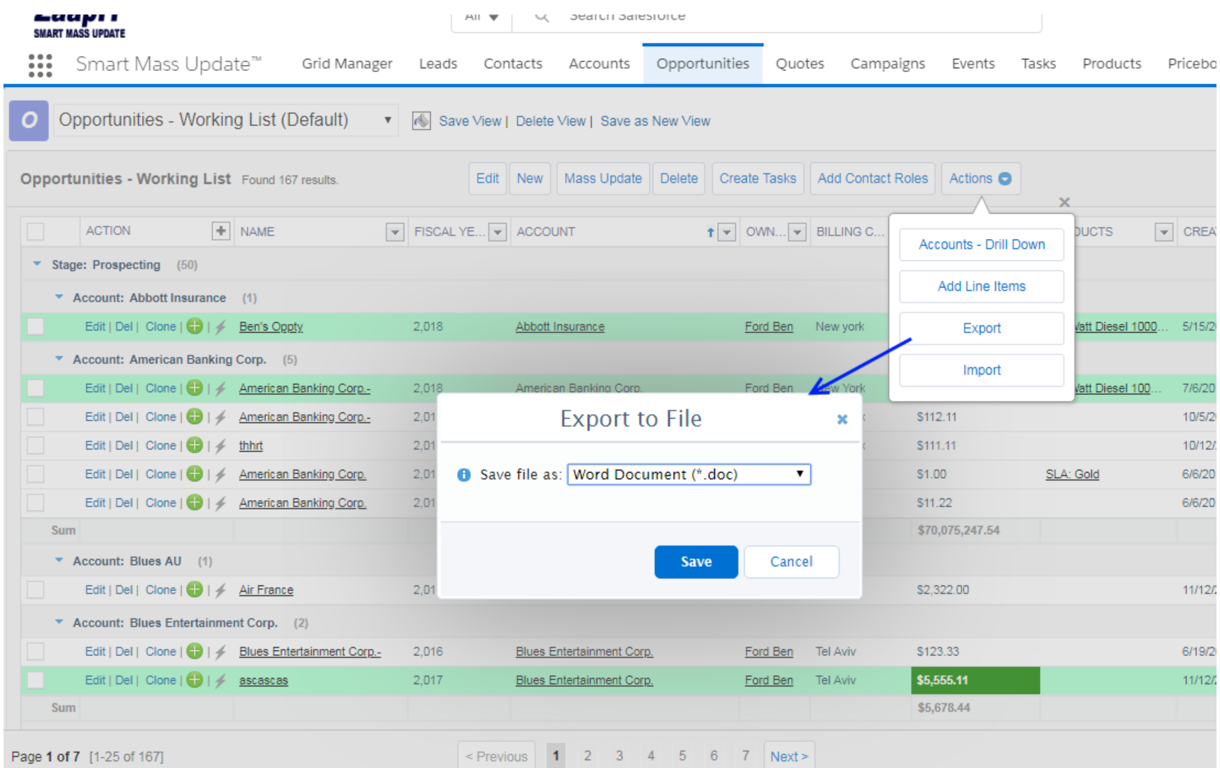


Figure 14 - Data export - PDF, Word, Excel, CSV

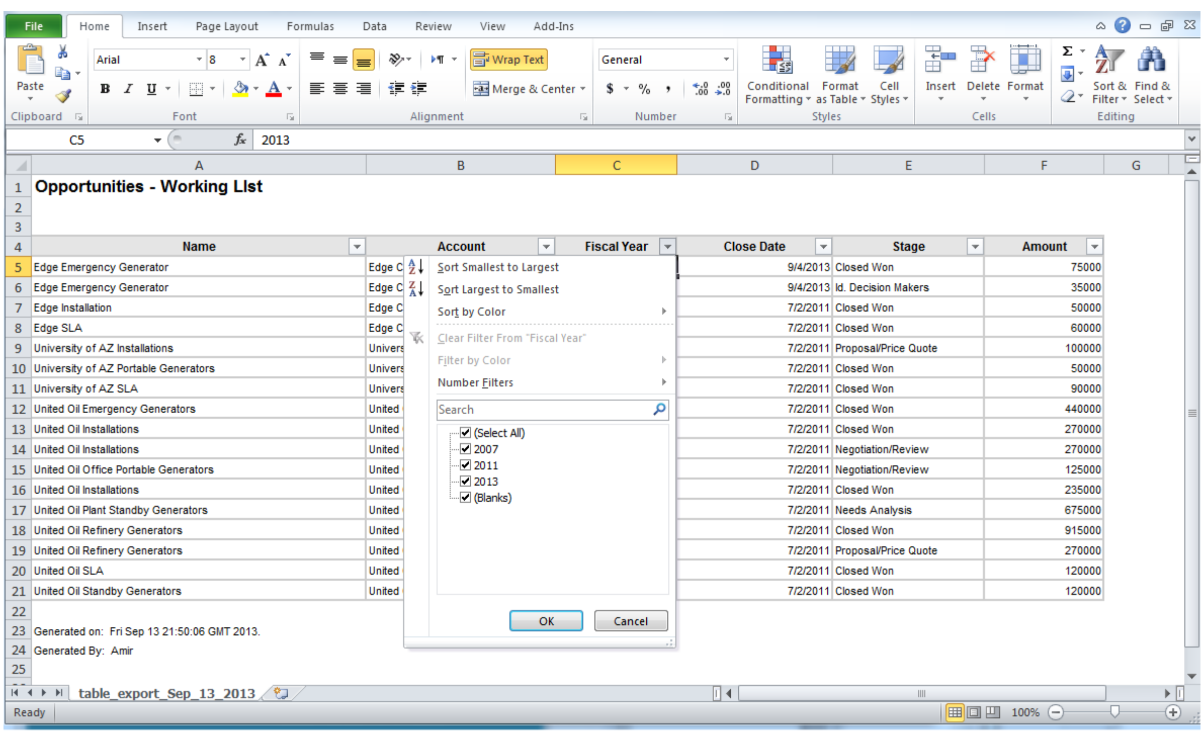


Figure 15 - Export to Excel

Multi Column Sorting & Multi Level Groupings

The multi column sorting (Figure 16) serves as the default sorting for a view/ grid. It is being controlled from the edit layout link. This feature compliments the regular point & click column sorting. The multi-level grouping and group similar values into groups and auto-calculate totals & sub-totals for those groups.

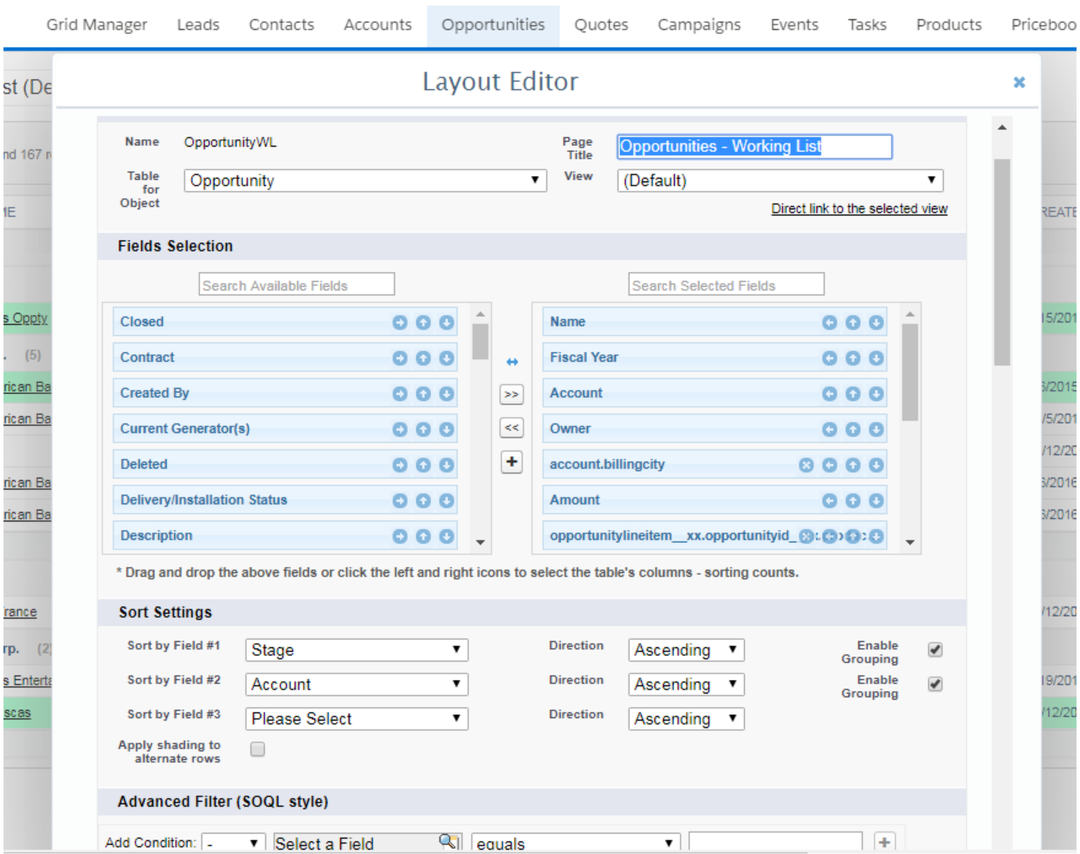


Figure 16 - Multi Column Sorting & Multi Level Groupings

Layout Editor

The Layout Editor (Figure 17) enables any users / administrator to control the gird layout, columns, content, buttons and general behavior. Each gird / view has its own Edit-layout settings; those settings are shared among all the users. To restrict a user / all users from changing those settings read the “Restricting Edit Layout Link Access” section or set the sharing settings for zaapit tables object (setup>>search > sharign settings>zaapit tables>…).

In the rest of this section we will review the different features available on the layout editor popup.

Basic Settings

Filling-in the basic settings section (Figure 17):

- Name – the grid’s API name aka custom setting page name

- Page Title - The title of the Smart-Table grid.
- Table for Object – the main gird object. Support objects: Native objects, Custom objects, settings, external objects and others.

Columns / Fields Selection

Set up the field selection section by dragging the fields from left side and dropping them on the right side in the desired order (Figure 17).

- Available Fields – The chosen Object fields (Table for Object).
- Selected Fields – the fields that were dragged from the Available-fields side.
- Advanced field selection ([+] button)
- Sort Setting – The grid's sorting & groupings (see Multi Column Sorting)

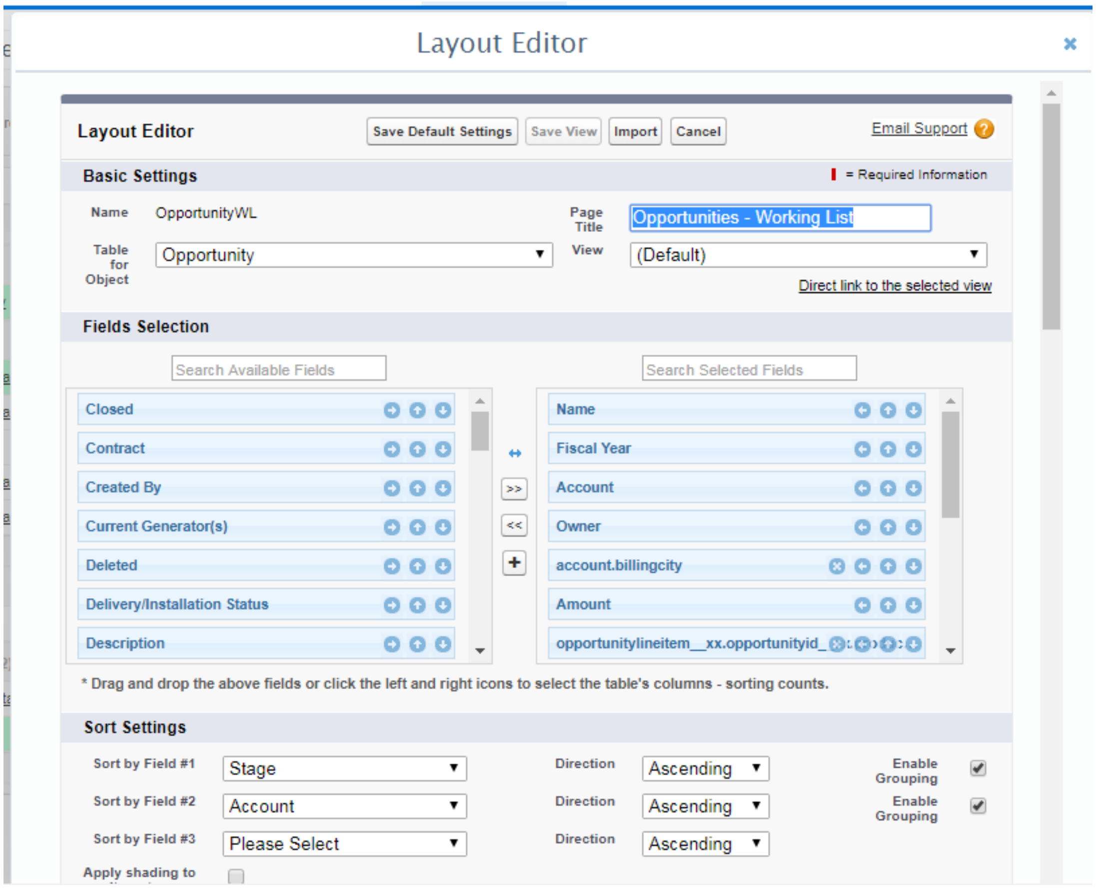


Figure 17 – Layout Editor

Advanced Columns / Field Selection

Add any regular / lookup / related child field with the Advance-Add-a-Column option. Click the [+] button located between the Available-Fields section and the Selected-Fields section (Figure 17). Choose the relevant fields then type your column title, filter column records, add a custom Ajax tooltip page or a custom link (Figure 18). Stand on the orange question mark in the small window for more details.

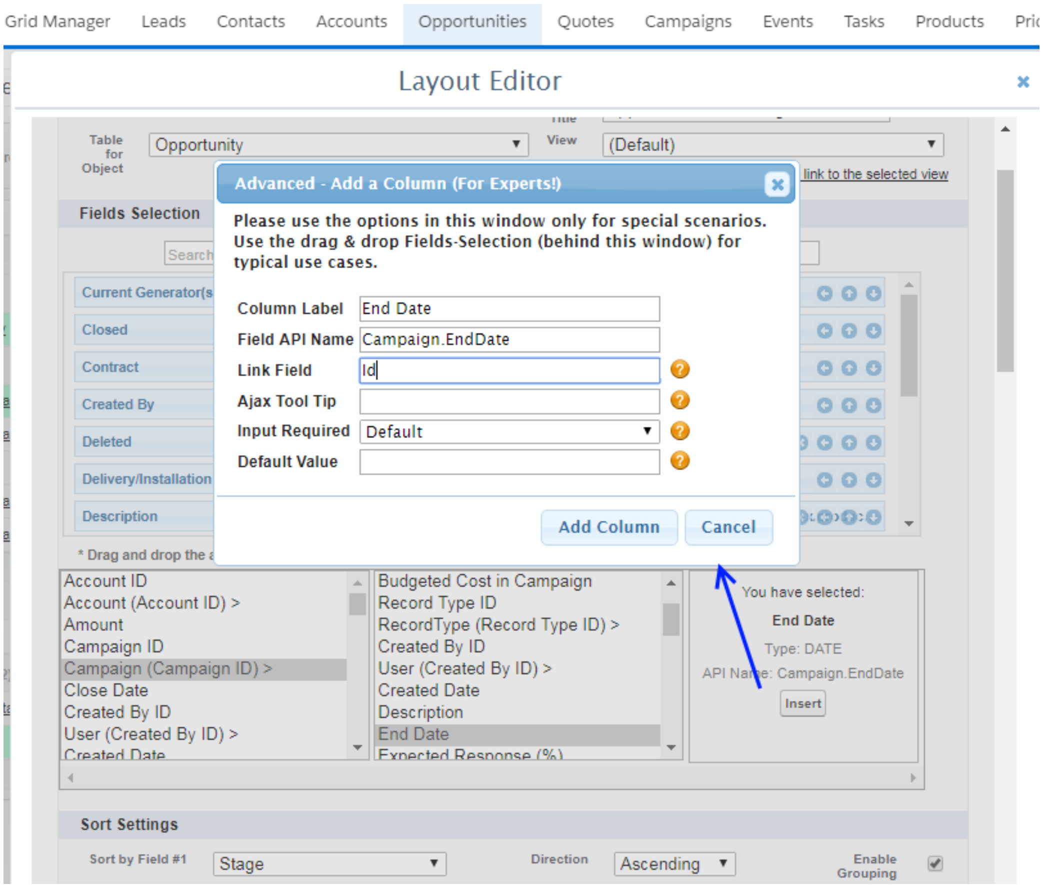


Figure 18 - Advanced field selection

Custom Buttons

Create as many custom buttons as you need – on each save the system will offer you 3 more buttons (Figure 19).

Button types:

- Link / JavaScript button – Enter the name of the button on the left input field and type a link/URL or add a small JavaScript on the right input field. You can use {ID} to reference the parent object (useful in related list mode – see related grids). “Demo Button 2” and “Demo Button 3” are a link & JS examples (Figure 19).
- Salesforce custom buttons – Create a regular Salesforce JavaScript button for the current grid’s object and put its API name in the left button name field e.g. see “button_demo1” on Figure 19 and its Salesforce definition on Figure 20.
  Developer Tip: currently only the related list parent field {ID} is available. Please use the

JavaScript AJAX API to fetch other fields or extend the page for more fields and custom controller.

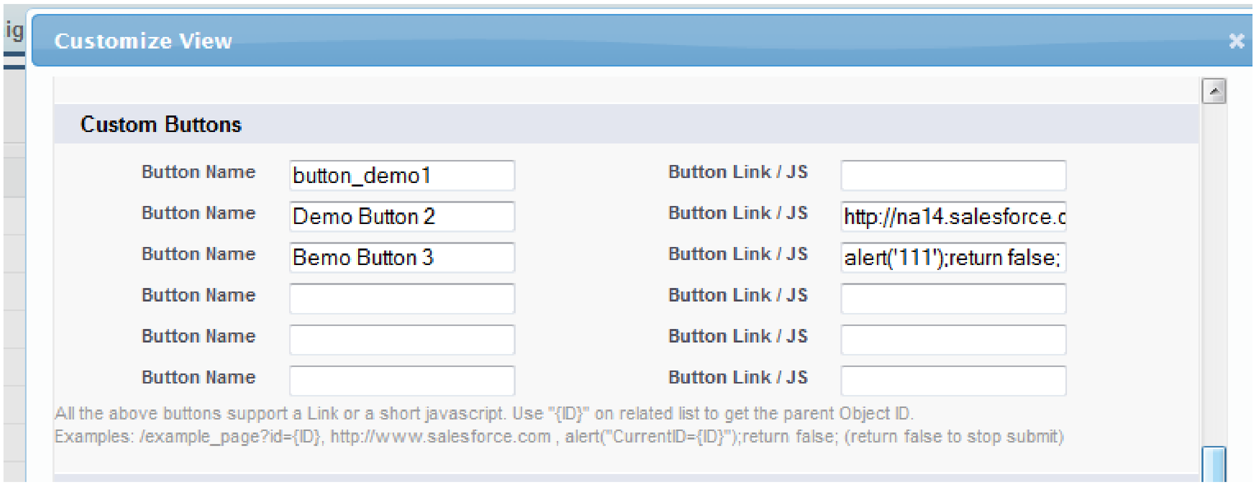


Figure 19 - Custom Buttons

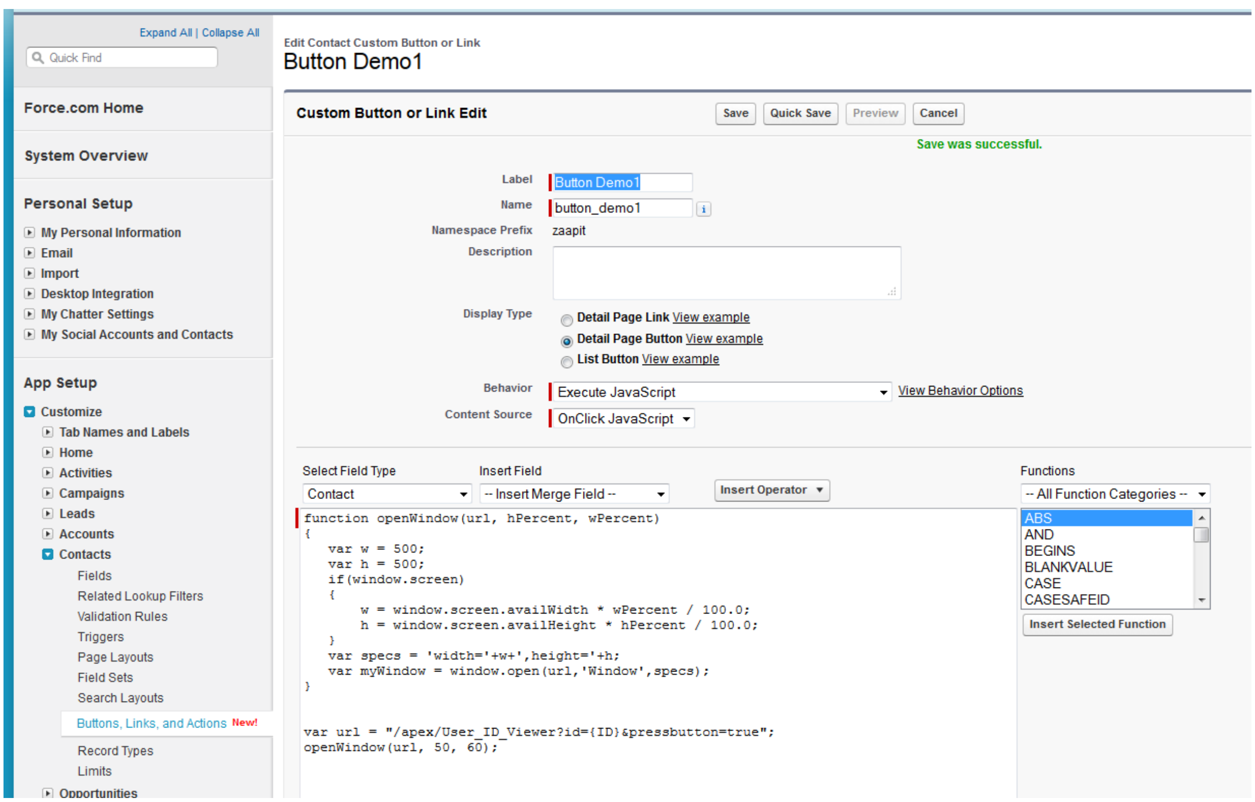


Figure 20 - Custom Demo Button

For developers / advanced users: You can forward the selected rows from a smart table to your standard controller that uses “recordSetVar” option by creating a custom button and using the following script:

```
var checkedIds="";
$(".lcbX input:checked").each(function(){
   checkedIds+="&ids="+$(this).parents(".lcbX:first").attr("rid");
});
if(checkedIds==""){
  alert("please select a row...");
}else{
top.location="https://cs15.salesforce.com/apex/putyour_visualforcepage_here?id={ID}&retURL={ID}&wrapMassAction=1&sco
ntrolCaching=1"+checkedIds;//{ID} is account id in this case
}
return false;
```

Example #2 enable multiselect for several pages (upload the script to static resources and use it under the layout editor):

```
var CollectedIDs="";
$(document).ready(function(){
fixMultiSelect();
$("body").bind("OnLoadDone",fixMultiSelect);
});
function fixMultiSelect(){
	$(".lcbXAll").attr("onclick","cbAll(this);$('.lcbXRow').trigger('checkboxChanged')").prop("checked",false);
	$(".lcbXRow").bind("click checkboxChanged",function(){
	var rid=$(this).parents(".lcbX:first").attr("rid");
	if($(this).prop("checked")){
		CollectedIDs=CollectedIDs+","+rid;
		CollectedIDs=CollectedIDs.substring(1);
	}else{
		CollectedIDs=CollectedIDs.replace(rid,"").replace(",,",",");
	}
	if(CollectedIDs.indexOf(",")==0){
		CollectedIDs=CollectedIDs.substring(1);
	}
	if(CollectedIDs.indexOf(",")==CollectedIDs.length){
		CollectedIDs=CollectedIDs.substring(0,CollectedIDs.length-1);
	}
	alert(CollectedIDs);
});
}
```

Advanced Settings:

Customize your Smart-Table grid to fit your company needs by using the following advance settings (Figure 21):

- Rows per page - set the number of displayed rows in one page, starting at 10 up to 500.
- Table in small font – when displaying a large amount of data in one page you might what to reduce the font size (to 8pt) to see more data on each page.
- Always show checkboxes – In read-only mode (read only objects) the checkboxes are hidden by default, when creating a custom JavaScript button you can use this option to force the row’s checkboxes become visible.
- Show mass update & inline edit button – Removes the top Mass-Update and Edit buttons.
- Show Export (xls,doc,pdf,csv,xml) – You can remove the top export & import buttons by unchecking this option.
- Related List Reference field – When using this table as a related list please choose the “Partner Object ID” as the lookup field. For Example: choose opportunity id for opportunity products related list (placed inside an opportunity).
- Show Column Filter – show the column filter on the header row (uncheck to hide it).
- Disable formula-field groupings – Formula field grouping can be slow in some cases, so you can disable it and offer the filter itself without showing all the options.
- Maximum rows for calculating formula-field groupings (textual formula filters) – the number of rows used for calculating a formula-field groupings for Smart-Filters (default: 3000).
- Hide Action column (Edit & Delete) – Hide the action column on read-mode (removes the edit & delete links from the left side of each row).
- Maximum item-per-page selector – end a number to restrict the maximum items per page on the bottom left side of the table (Item per page: 10 | 25 | 50 | 100 | 200 ….).
- Hide Table's Totals Row – Hide the Smart-Table total rows (summary line) + groups-sub-totals when there are no relevant summary fields that you want to expose.
- Exclude fields from total row (sub-total rows) – you can choose to exclude some of summary fields placed on the summary row. Use the Salesforce field API names and separate each field with ‘#’ i.e. in case you have more than one field to exclude
- Hide Scroll Buttons – when scrolling down on long pages you will see an on the right side of your screen an up & down floating buttons that can help the user to navigate up and down - useful in tablets. Uncheck this option to hide those floating buttons.
- Open Page on edit mode (default) – you can choose to open your Smart Table directly in inline-edit mode (instead of clicking the top edit button).
- Hide customize link from everyone (Mainly For developer) – once you are done configuring this Smart Table you can hide the customize link from everyone including yourself (revertible from setup>custom settings>Zaapit Smart Tables), read the following “Restricting Edit Layout Link Access” section for more options.
- Hide multi choice filter – you can choose to show the regular Smart-Column-Filter without the extra multi-choice section (the one with the checkboxes).

- Hide instant graph link – mark this checkbox to hide the Instant-Graph™ link placed on your Smart-Column-Filter.
- Apply shading to alternate rows - Apply shading to alternate rows based on Sort by Field #1. Use Sort_color1 & Sort_color2 custom labels to change the colors.
- Group different/alternate rows by sort - Group different/alternate rows based on "Sort by Field #1" / user sorting.
- Enable Advanced Text Search – supports textareas & long-text fields, does not support pick-lists (SOSL style)
- New record link - Replace the URL/Address for the top "New button" (use that to autofill data). Example: /a01/e?parent_id={ID}&parent__c={NAME}
  * {ID} and {NAME} are the parent's id and name, retUrl will be added automatically so please omit that from the url.
- Add X Empty Rows (default) – set the default number of new empty rows that you want to add upon clicking the add in place / add row / "+" button.
- Apex-Class Logic Extend – Write your own apex-class and trigger them on specific events.
  Your class must implement ZPTableHandler (it may also need to be global class).
  Format: EventName~classNameSpace~ClassName#EventName2~classNameSpace2~ClassName2
  Supported Events: BeforeSaveUpdate, AfterSaveUpdateOK, BeforeSaveInsert, AfterSaveInsertOK, AfterAllSaveOK,AfterAllSaveNOTOK, BeforeMassClone,AfterMassClone, BeforeMassUpdateAll,AfterMassUpdateAll, OnAddRow
- Amount field for Charts – Choose an amount/currency field for your Instant-Graph™, the selected field will be used to calculate the graph's group-value. Leave this field on the "please select" choice to use the default row-count group-value. For example: Choosing Opportunity amount for an opportunity Smart-Table will lead to an Instant-Graph™.
- Remove name-field from export (for no-name tables) – mark that option for objects/tables that doesn't have the standard name field otherwise you may see a warning/error message during export

Advanced Filter (SOQL style) - Useful for admin users or developers:

Add a SOQL condition and filter out unwanted data automatically from your Smart-Table.
In case of an unexpected or problematic result you can empty this field from setup>custom settings> table name> "ExtraConditionFilter" field.

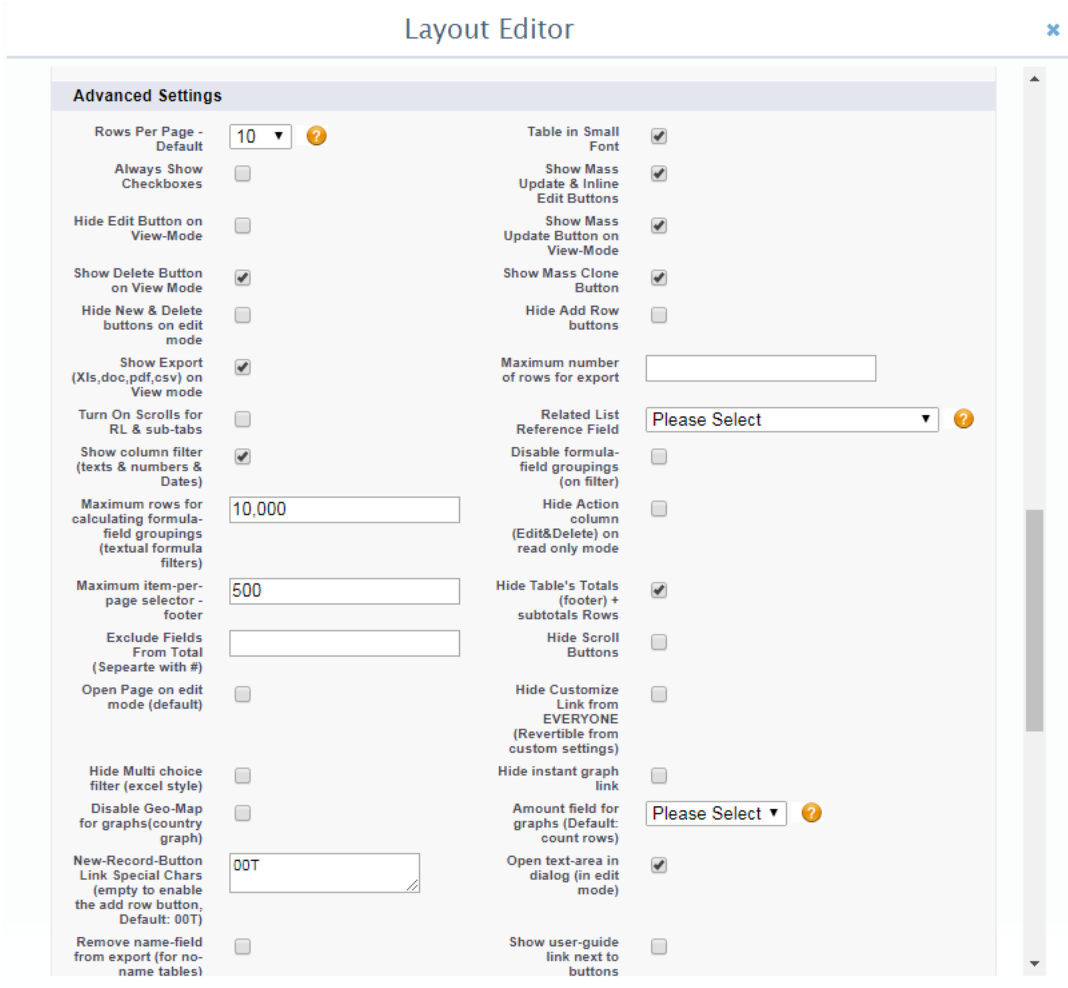


Figure 21 - Advanced Settings

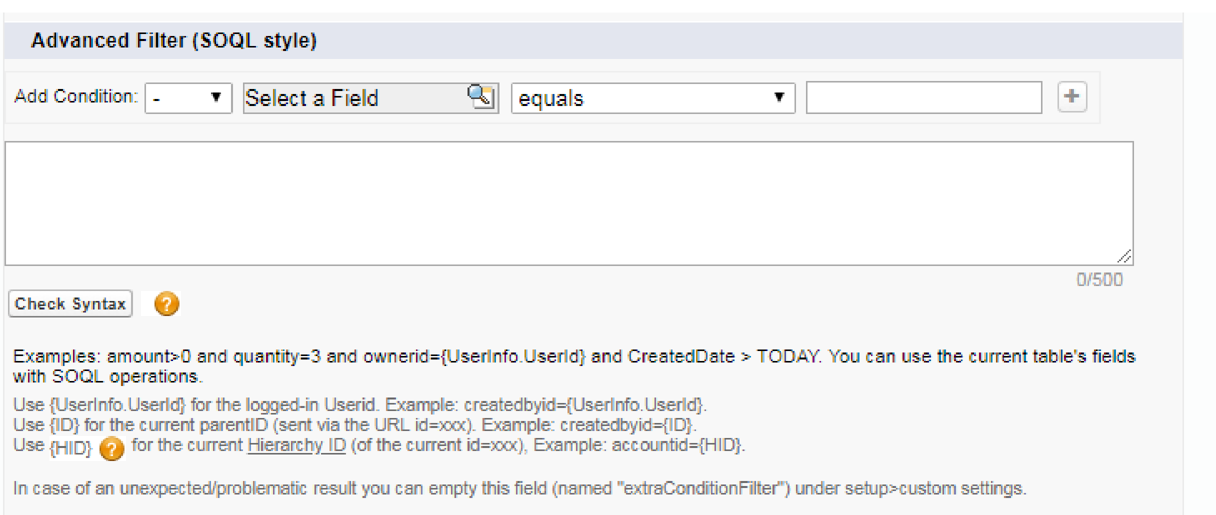


Figure 22 – Advanced Filter (SOQL Style)

Restricting Edit Layout Link Access

To grant access/ restrict a particular user from using the “Edit Layout” link please choose from one of the following options:

- To give access to the Edit-Layout link for a specific user with admin-rights to all the Smart-Tables/girds at once, just tick the “Enable ZaapIT's Layout Editor” checkbox under the user details: Go to setup>personal information>edit layout, add the “Enable ZaapIT's Layout Editor” field to your layout (Figure 23) and mark it for the checkbox (Figure 24). For none-admin users you tick the “Enable ZaapIT's **View** Editor” instead of “Enable ZaapIT's **Layout** Editor” which restricts the access to the advanced settings & custom buttons sections (afterwards the user won’t be able to change the table-for-object field i.e. to change the table-for-object drop down)

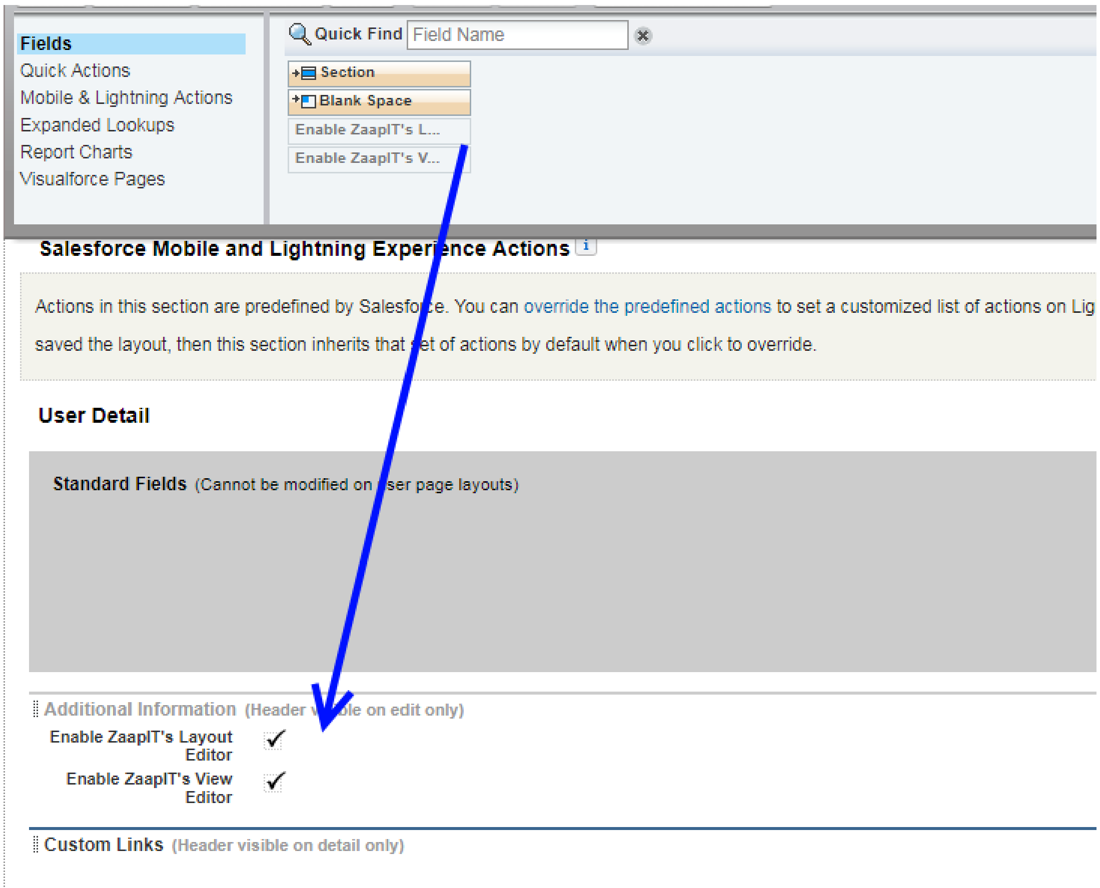


Figure 23 - Personal Information Layout

Please note: to edit the grid’s default-view none-admin users will need the customize application permission “setup>user-profile>Customize Application” checkbox

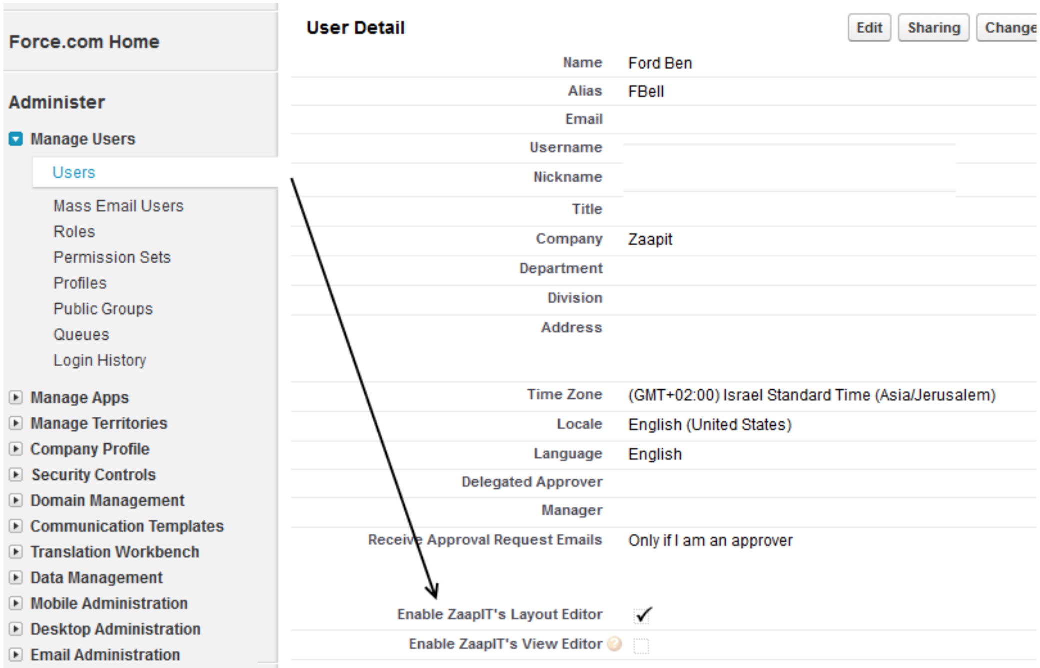


Figure 24 - Personal Information

- To hide the Edit Layout link from everyone – check the "hide Customize link checkbox" (Figure 25) to revert this option please go to setup>custom settings>Zaapit Smart Tables>"table name" and uncheck that checkbox (or do that from the grid manager tab…) .

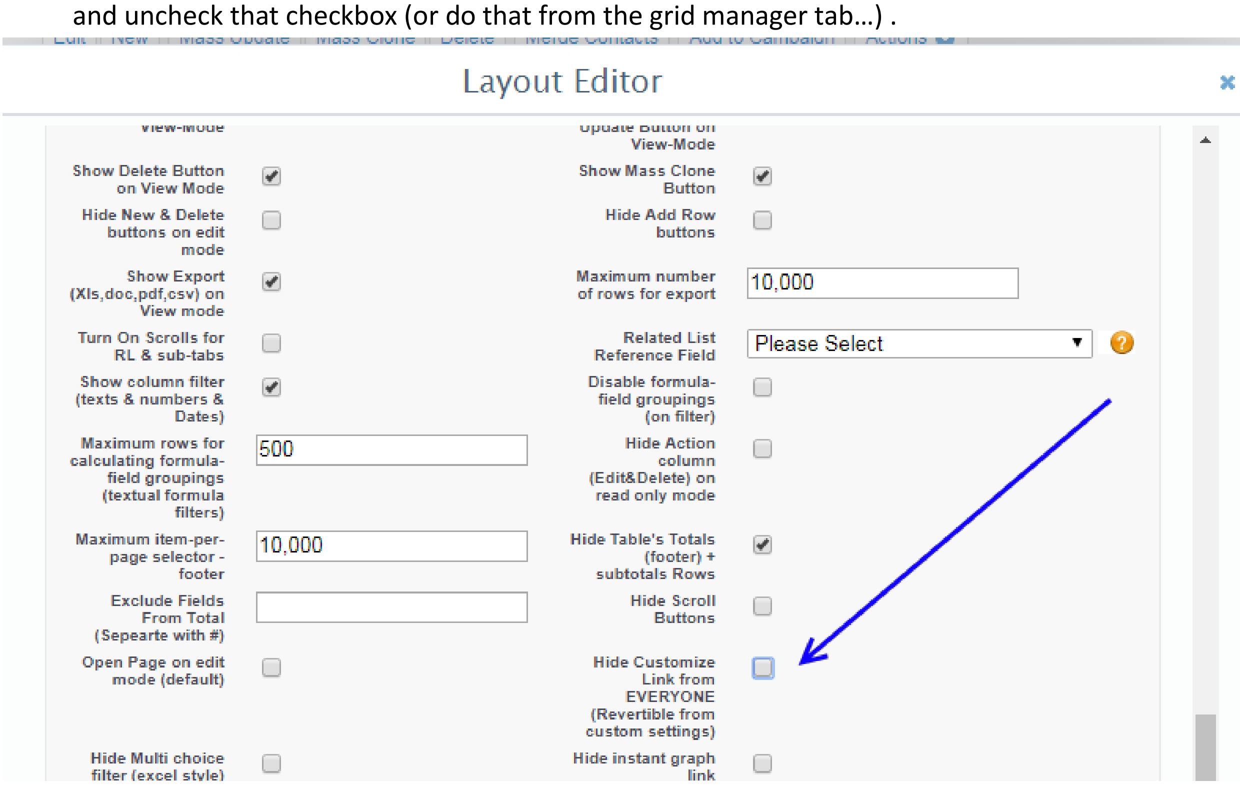


Figure 25 - Hide customize link from everyone

Placing a Smart-Table as a regular Tab

To place/create a Smart-Table as a regular tab do the following: go to smart-mass-update>grid manager> new smart tab> follow the wizard> (Figure 26)…. > enter the new tab > edit layout> set the object> choose a few field> save default settings (for the gird's default view).

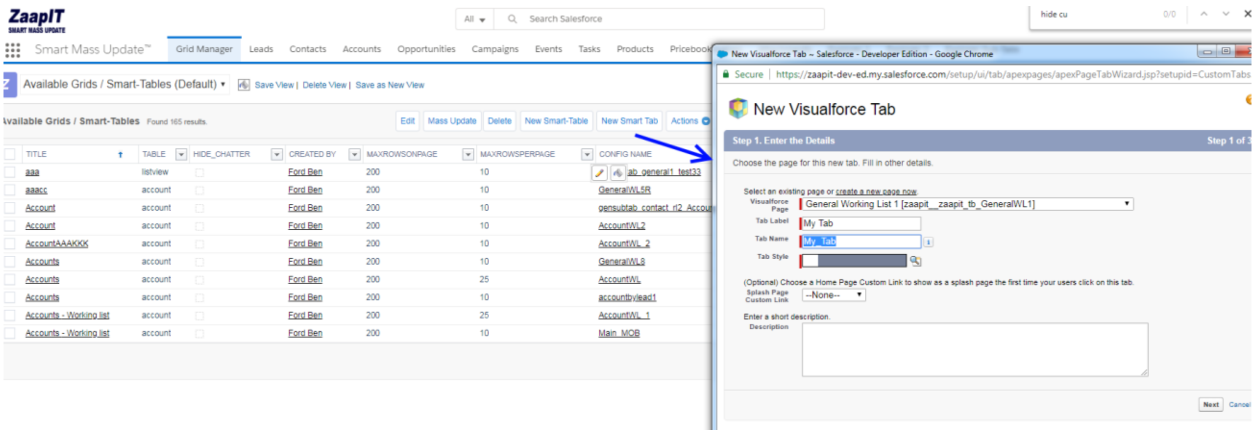


Figure 26 - Grid Manager new smart tab

The old way for creating a smart tab: go to setup>create>tab and press on the new button on the "Visualforce Tab" section (Figure 27,Figure 28). On the "New Visualforce Tab" page choose one of ZaapIT's "General Working list" for custom(or native) objects or choose a predefined working list for the Salesforce-Native objects (Figure 29). Tip: WL is the abbreviation for "Working list", RL is the abbreviation for "related list".

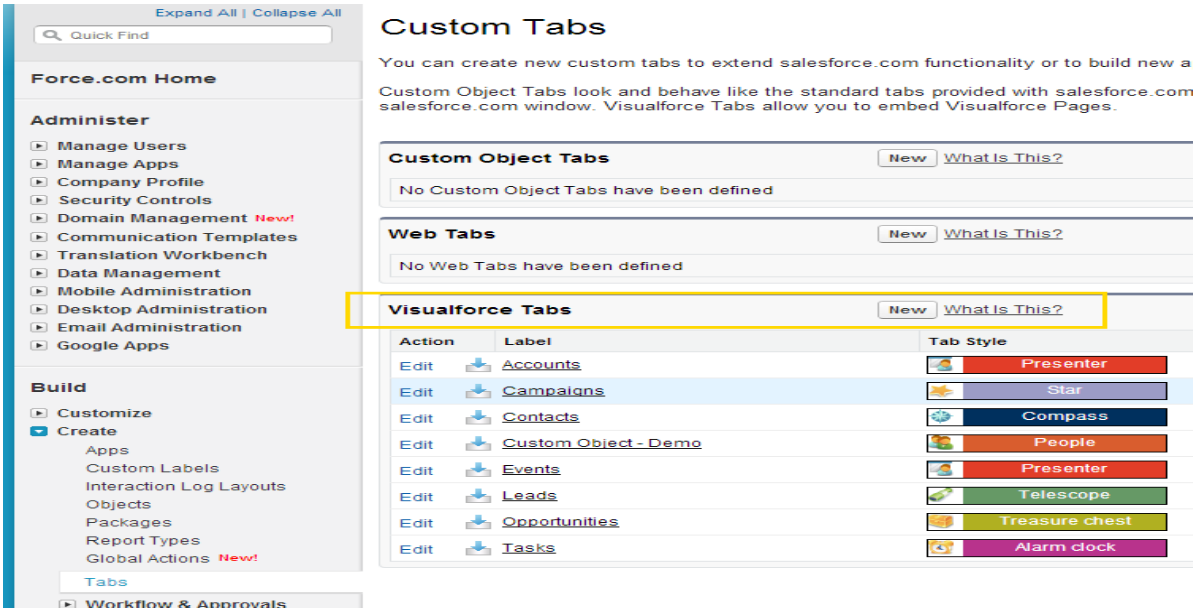


Figure 28 - Creating a new tab

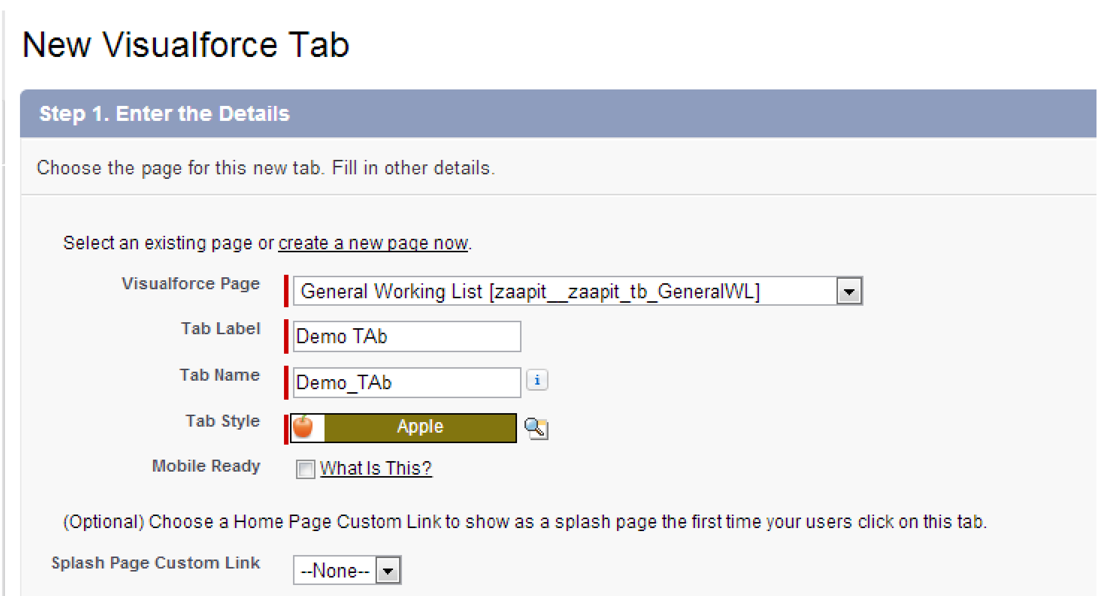


Figure 27 - Creating a new tab Step 2

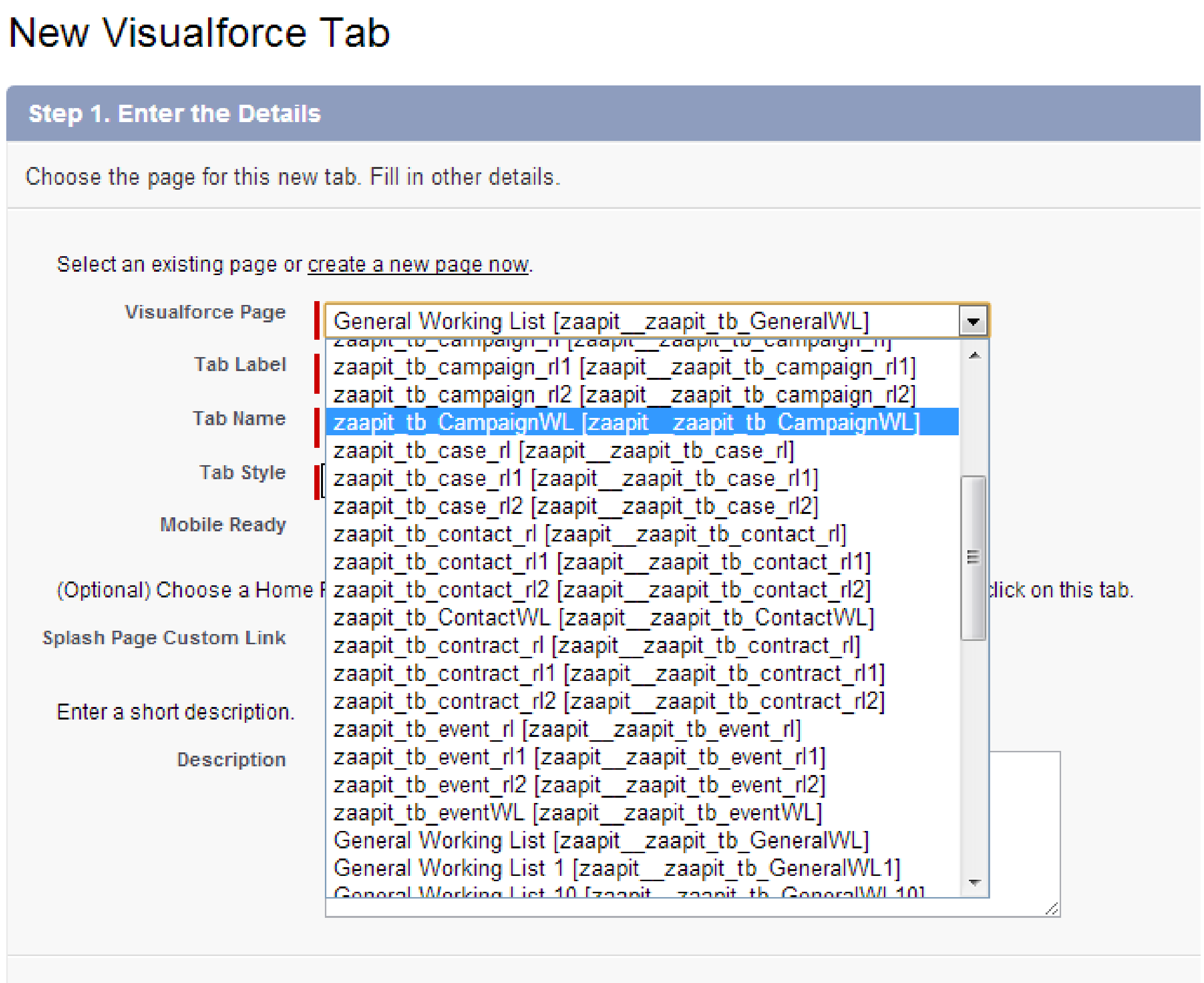


Figure 29 - Creating a new tab for Salesforce-native objects

Creating/Embedding a Smart-Table in your code

Before creating a new Smart-Table-visualforce-page, please note that we already created 3 visualforce-pages for every standard object for you to use (see Figure 29).

To create/Embed a Smart-Table in your own code just creates a new apex page that its API name start with zaapit_tb_XXXXX and include the “general working list” page in your code (see the below examples).

To activate the export for your custom page, please enter zaapit’s URL into the “export to URL” on the page’s layout editor. E.g. https://zaapit.xxx.visual.force.com

A general working list Example (change the yellow parts):

Label: free text
Api Name:zaapit_tb_XXX
Code:

```
<apex:page >
<apex:include pageName="zaapit__zaapit_tb_GeneralWL"/>
</apex:page>
```

A related-sub-tabs example (change the yellow parts):

Please create a new visual force page, the page API name must begin with “zaapit_**tab**_”:

Label: free text
Api Name:zaapit_tab_XXX
Code:

```
<apex:page standardController="opportunity">
<apex:include pageName="zaapit__zaapit_tab_general1"/>
</apex:page>
```

A related list Example (change the yellow parts):

Label: free text
Api Name:zaapit_tb_XXX
Code:

```
<apex:page standardController="opportunity">
<apex:include pageName="zaapit__zaapit_tb_GeneralWL"/>
</apex:page>
```

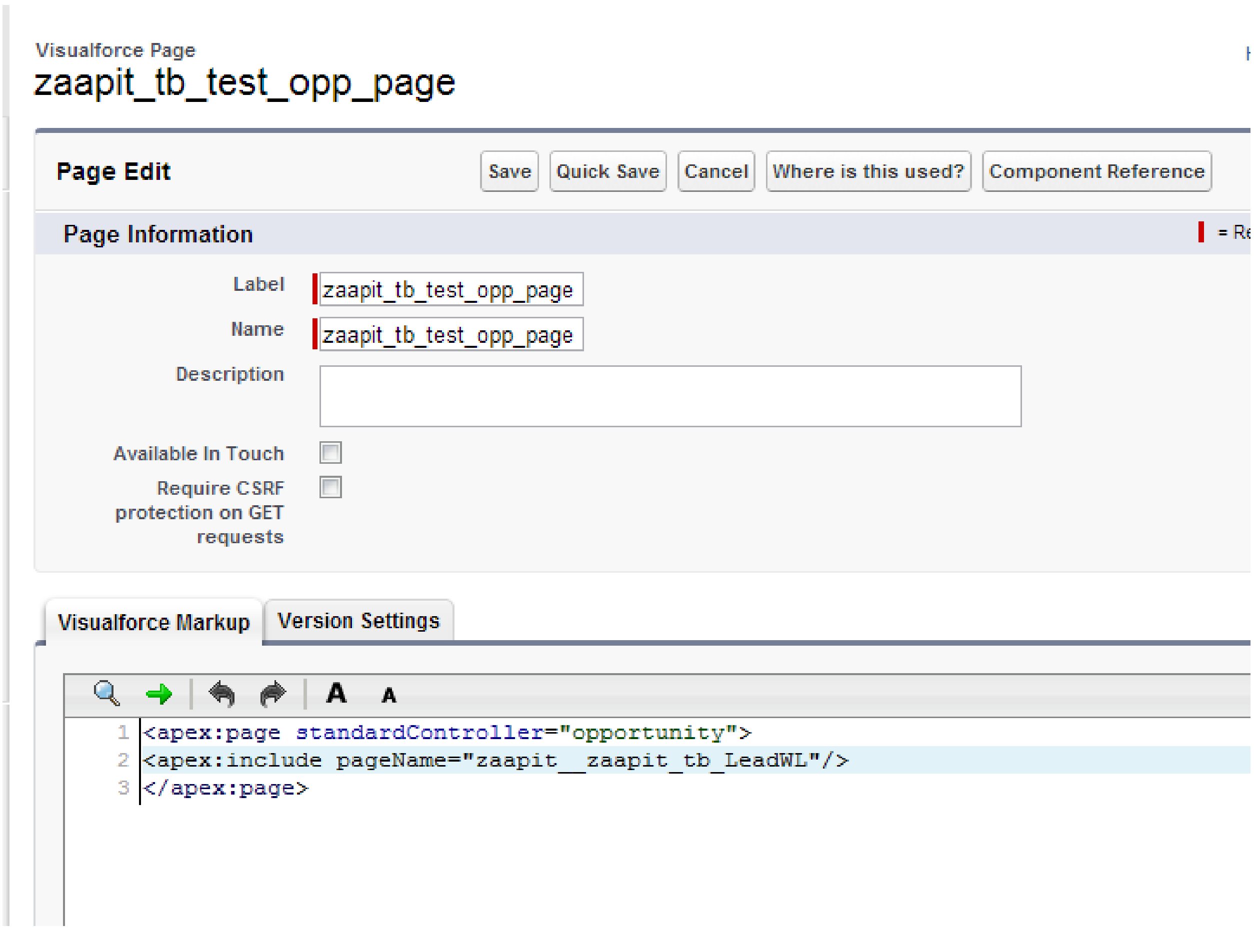


Figure 30 - Creating a new Visualforce Page

Multi Tables in one page Example (4 Smart Tables in 1 page):

```
<apex:page standardController="Account">
<table>
<tr><td>
<iframe src="/apex/zaapit__zaapit_tb_account_rl1?isdtp=vw"
title="zaapit_tb_account_rl1" border="0" width="500" height="500" frameborder="0"
scrolling="no"/>
</td><td>
<iframe src="/apex/zaapit__zaapit_tb_account_rl2?isdtp=vw"
title="zaapit_tb_account_rl2" border="0" width="450" height="500" frameborder="0"
scrolling="no"/>

</td><td>
<iframe src="/apex/zaapit__zaapit_tb_account_rl?isdtp=vw" title="zaapit_tb_account_rl"
border="0" width="550" height="500" frameborder="0" scrolling="no"/>
</td></tr>
<tr>
<td colspan="3">
<iframe src="/apex/zaapit__zaapit_tb_account?isdtp=vw" title="zaapit_tb_account"
border="0" width="100%" height="500" frameborder="0" scrolling="no"/>
</td>
</tr>
</table>

<zaapit:resize_include />

</apex:page>
```

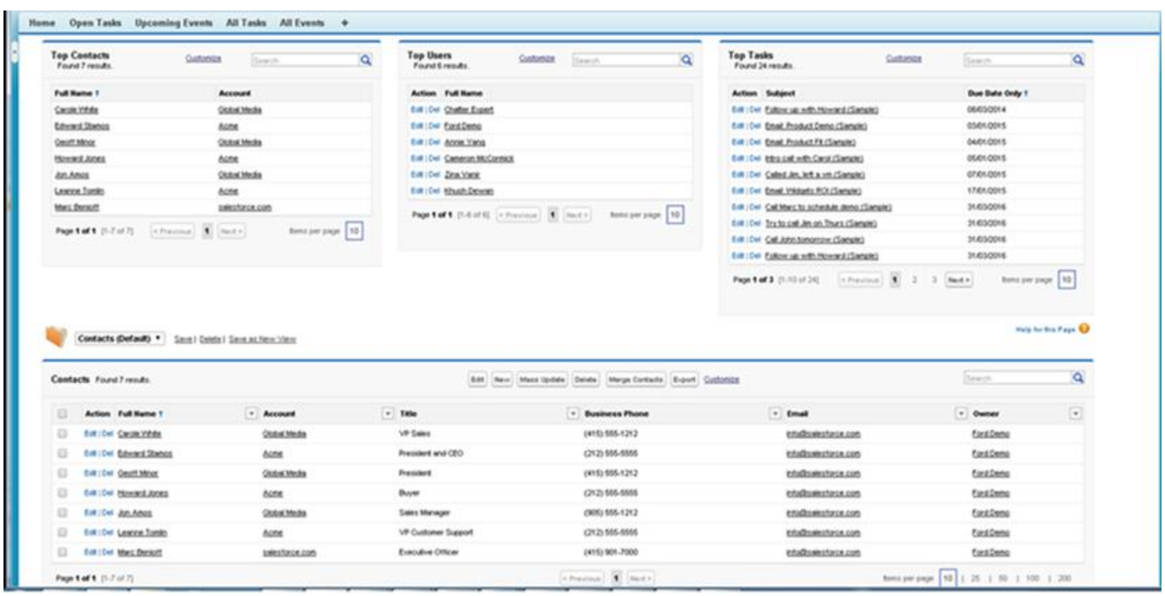


Figure 31 - Multi Tables in one page Example (4 Smart Tables in 1 page)

Smart Tables in apex:tab example:

```
<apex:page standardController="Account">
 <apex:tabPanel switchType="client" selectedTab="name1" id="theTabPanel" >
```

```
      <apex:tab label="Contacts" name="name1" id="tabOne">
      <iframe src="/apex/zaapit__zaapit_tb_account_rl1?id={!id}&isdtp=vw"
title="zaapit_tb_account_rl1" border="0" width="100%" height="200" frameborder="0"/>
      </apex:tab>
      <apex:tab label="Meetings" name="name2" id="tabTwo">
      <iframe src="/apex/zaapit__zaapit_tb_account_rl2?id={!id}&isdtp=vw"
title="zaapit_tb_account_rl2" border="0" width="100%" height="200" frameborder="0"/>
      </apex:tab>
      <apex:tab label="Tasks" name="name3" id="tabTwo2">
      <iframe src="/apex/zaapit__zaapit_tb_account_rl?id={!id}&isdtp=vw" title="zaapit_tb_account_rl"
border="0" width="100%" height="200" frameborder="0"/>
      </apex:tab>
    </apex:tabPanel>

<zaapit:resize_include />

</apex:page>
```

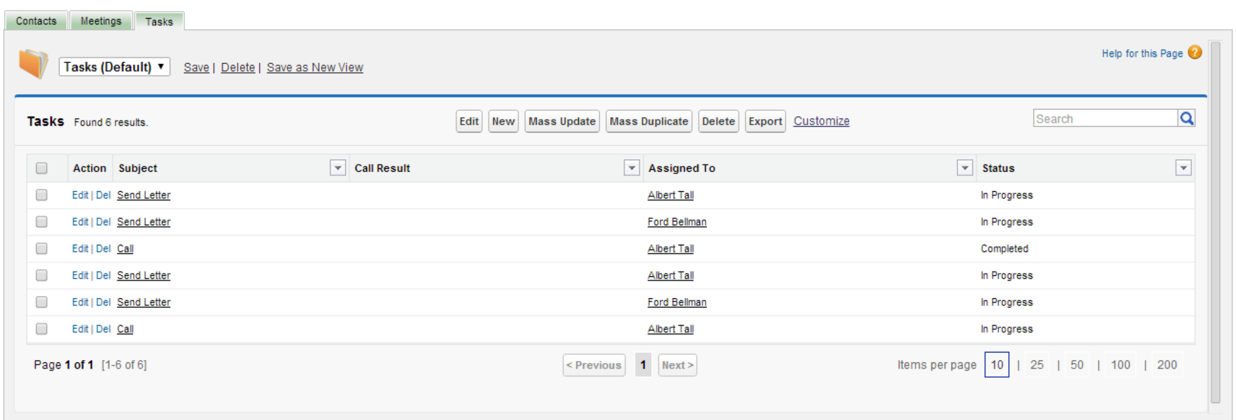


Figure 32 - Smart Tables in apex:tab example

Overwrite the view link – example:

```
<apex:page standardController="opportunity">
<apex:detail subject="{!opportunity.id}" relatedList="true" title="true" showChatter="true" inlineEdit="true"/>
<style>body table.detailList .data2Col[colspan="4"]{padding:3px 0px; margin:0px}
```

Multi Language support

Since version 1.120 (Sep-2013), each one of our Smart-Tables support multi-language translations and customizations. Every organization can enter its own translation or customize the Smart-Tables texts to meet its own needs. Just go to setup>create>custom label> and alter / add your own translations (Figure 33).

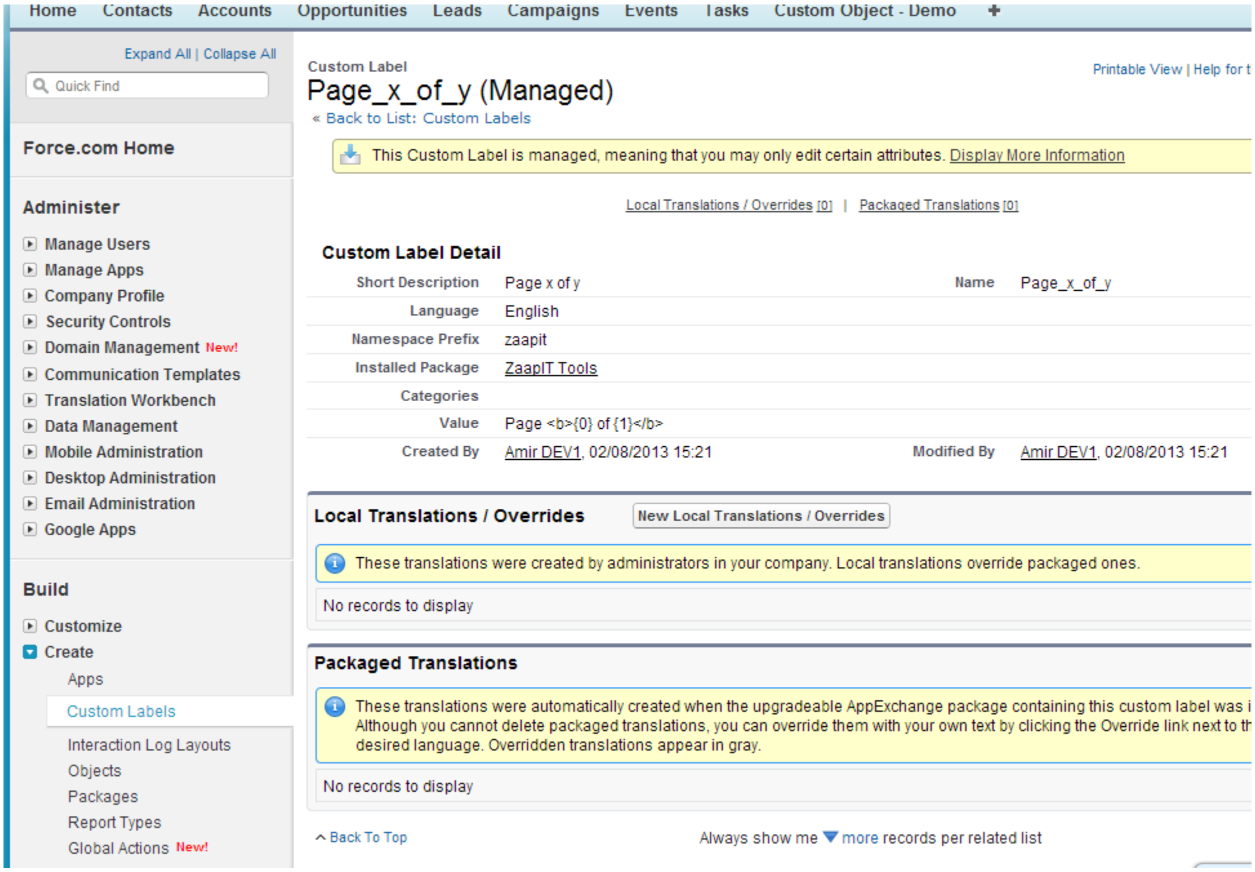


Figure 33 - Multi Language support

Override Existing Texts - labels / tab names / etc

To override existing text labels / tab names just go to setup>translation workbench>override, then choose the” ZaapIT Tools package” and choose the content that you want to override and in what language do you want to see it. Figure 34 illustrate how to override the Mass-Smart-Update tab names.

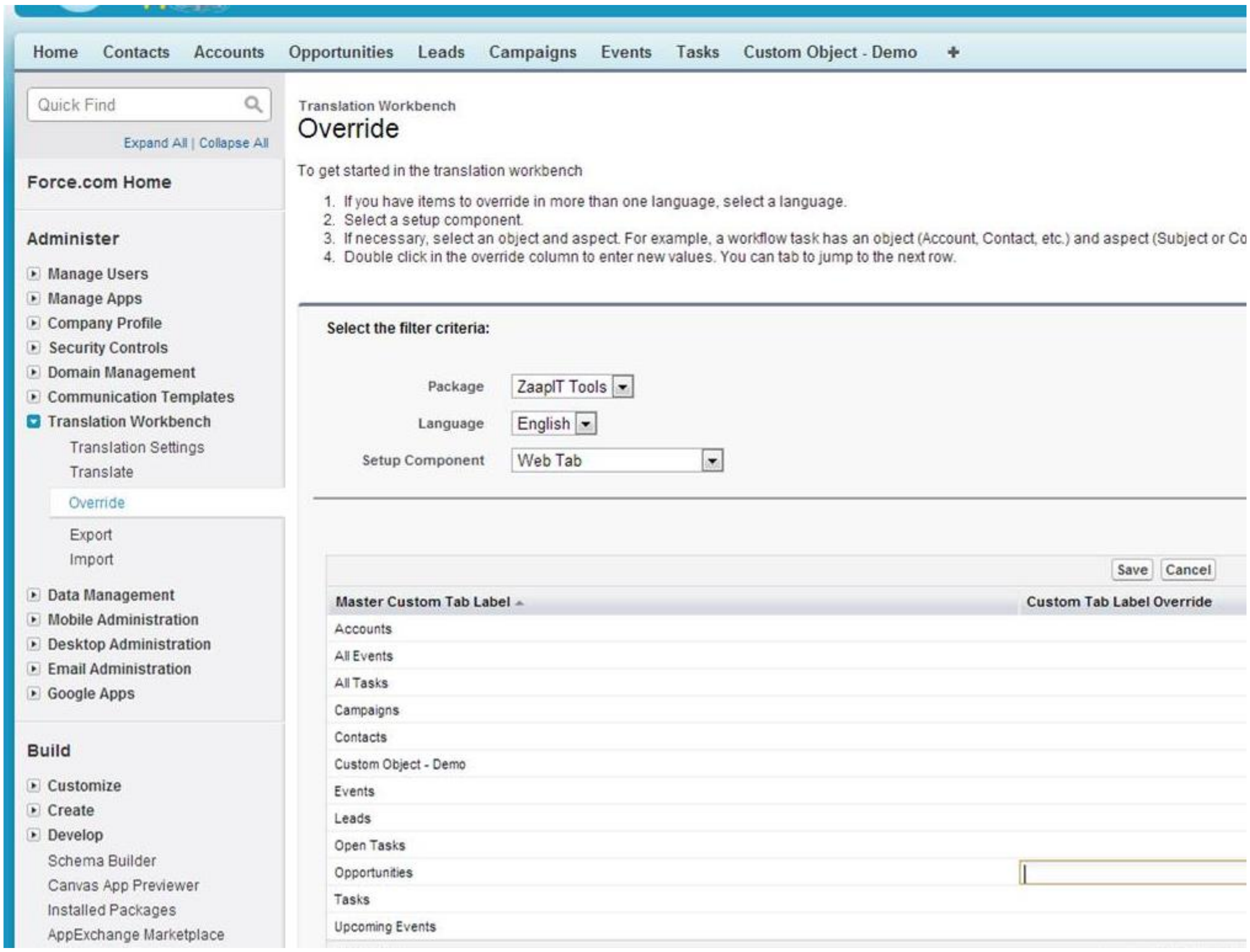


Figure 34 - Override Existing Texts

Smart-Mass-Update™

The Smart-Mass-Update application for Salesforce is a native Salesforce hosted application located on the Salesforce application dropdown (Figure 35). This application is a collection of predefined Smart-Tables (as tabs) for the most common built-in Salesforce objects plush one custom object tab.

To add more tabs please refer to the “Placing a Smart-Table as a regular Tab” section.

Application Tabs:

- Contacts
- Accounts
- Opportunities
- Lead
- Campaigns
- Events
- Tasks
- Explorer 1

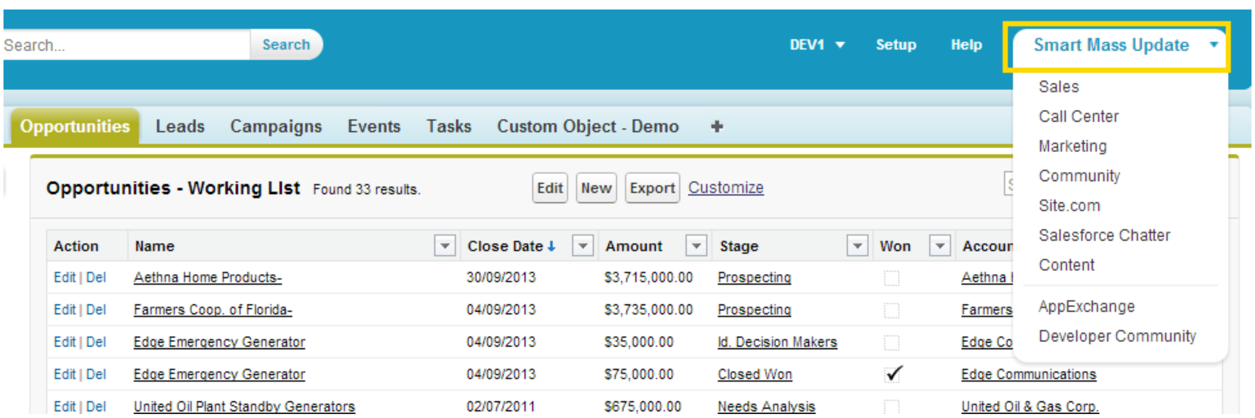


Figure 35 - Application Dropdown

Smart-Activity-Manager™

The Smart-Activity-Manager application for Salesforce is a native Salesforce hosted application located on the Salesforce application dropdown (Figure 36). This application is a collection of predefined Tasks & Events Smart-Tables (as tabs) that's enables you to control yours and your team's tasks & events in one place.

Main Features:

- Mass Assign tasks and event to other team members.
- Team View - view & edit your team's tasks / event (via Salesforce sharing rules)
- Progress monitoring with ZaapIT's Instant Charts™
- Mass close, Mass update & edit.

Application Tabs:

- Open Tasks (created in the last 90 days)
- Upcoming Events
- All Tasks (in the last 365 days)
- All Events (in the last 365 days)

To change the time period for the below tabs please click on the customize link and revise the condition inside the "Extra Condition Filter" editor.

For example: change the open task condition from "createddate = LAST_N_DAYS:90" to "createddate = LAST_N_DAYS:180" to view all the tasks created in the last 180 days.

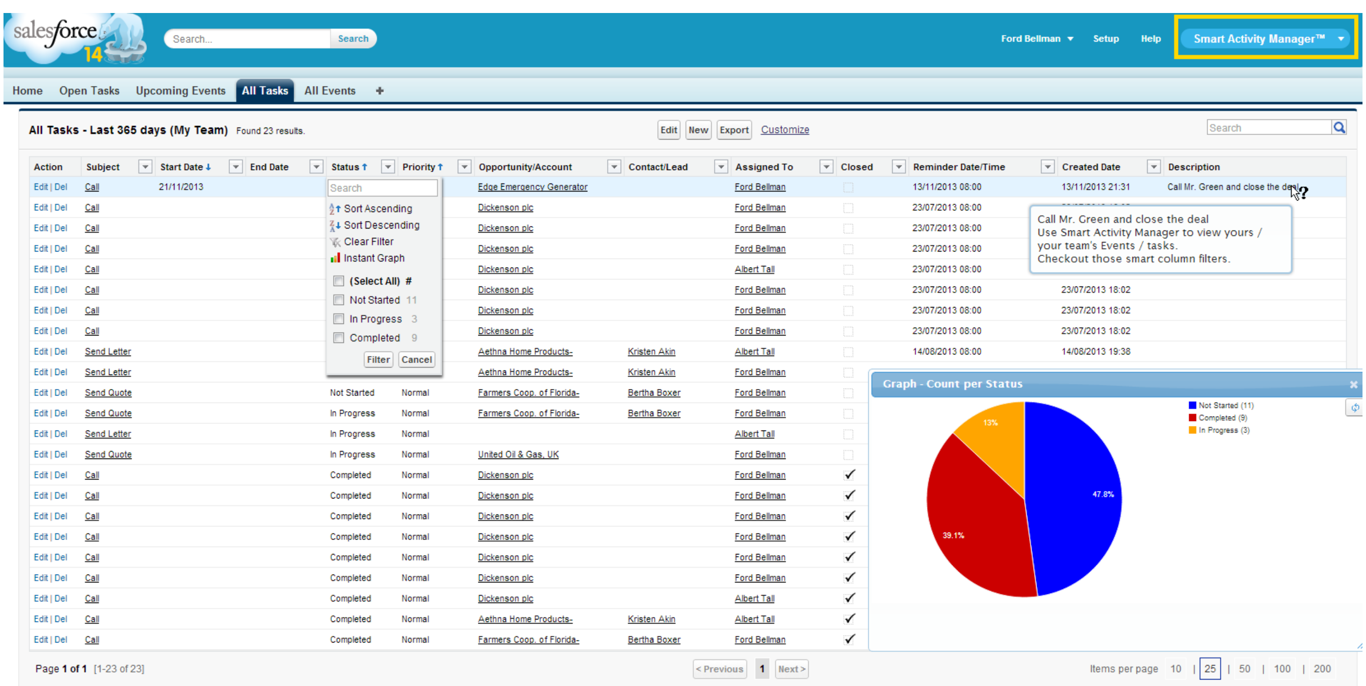


Figure 36 - Smart Activity Manager

DEDUP-Manager™

The DEDUP-Manager app for Salesforce is a native Salesforce app located on the Salesforce application dropdown (Figure 37). This application provides a collection of tabs & related list that helps you to de-duplicate your data.

Main Features:

- De-Duplication tabs/reports for leads, accounts, contacts, attachments & custom objects (any object)
- Mass Merge, convert, mass update, mass delete & other mass actions
- Cross objects duplicates detection e.g. leads & contact, leads & accounts + custom objects (any object) – click the lightning icon for cross-object-detection / more information.

Application Tabs:

- Leads by Email / Name – detects lead with similar email / name
- Contacts by Email /Name – detects contacts similar same email / name.
- Accounts by Name – detects accounts with the same name
- Lead w. Contact Email / name – detects lead & contacts with similar email /name
- Lead w. Account – detects leads that has an account with a similar company name
- Attachments – detects duplicate attachment with similar name

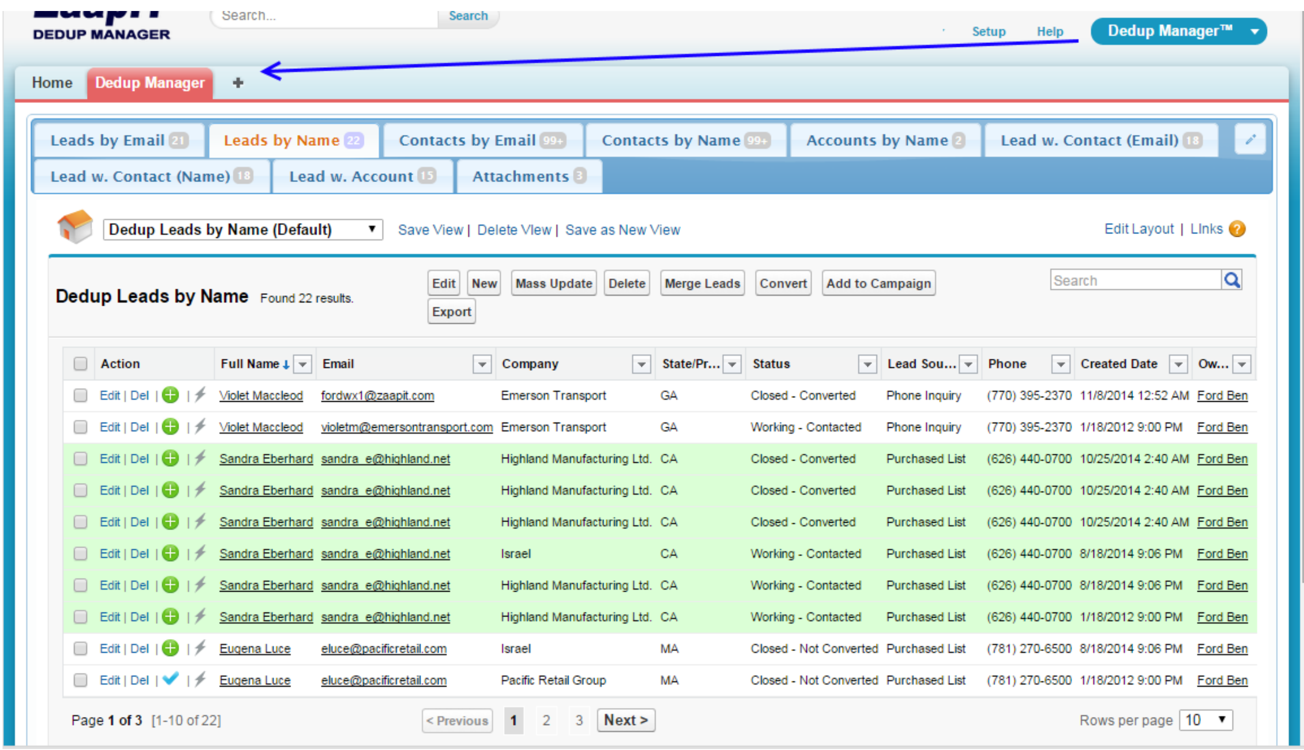


Figure 37 - DEDUP-Manager™

Community-Grids

The Community-Grids tool for Salesforce is a native Salesforce hosted tool built for Salesforce's communities. This tool will enable you to create Smart-Tables for your Salesforce communities. As an example you can create a Salesforce community for you Partners and give them a Smart-Table tab(s) to maintain their opportunities (contacts & accounts) - Figure 38. You can use the owner field to assign your partner new opportunities created by your – such as upsell, renewal & upgrade opportunities.

The Community-Grids tool can support multi-Salesforce-communities such as Partners community, Distributors community, customer community and employee's communities. Just use a different visualforce-tab for each community (Figure 39). To add a new visualforce-tab please read "Placing a Smart-Table as a regular Tab" section.

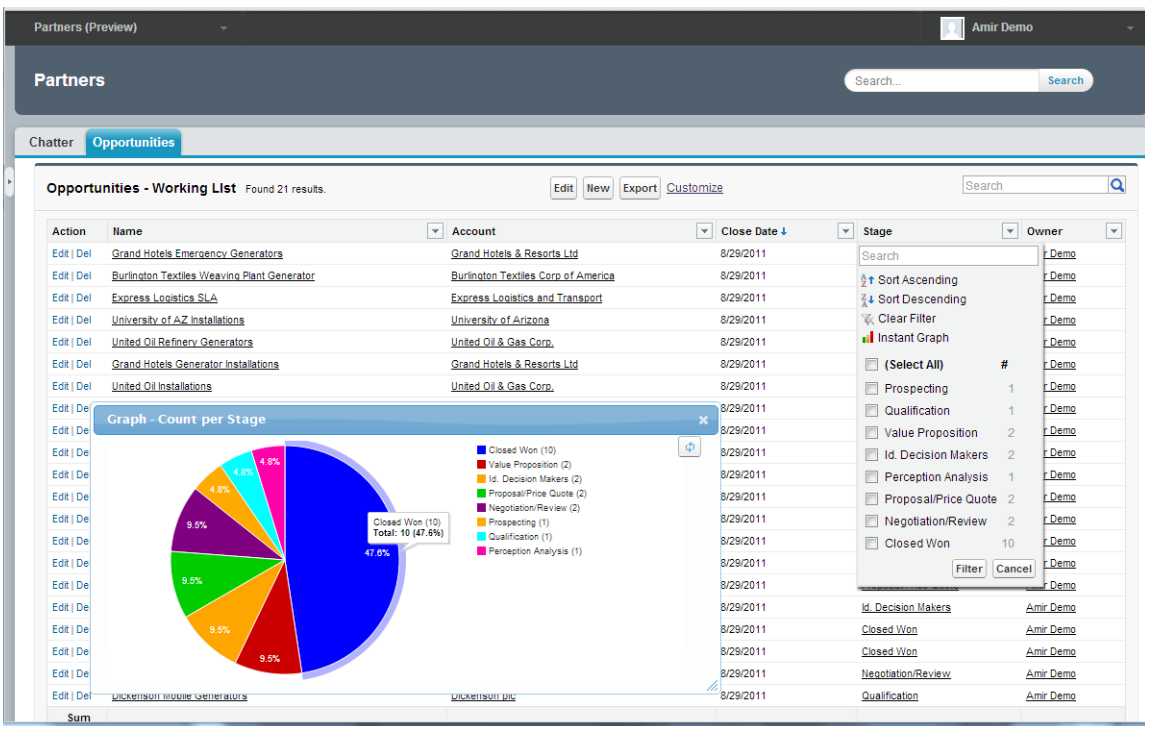


Figure 38 - Community Grids

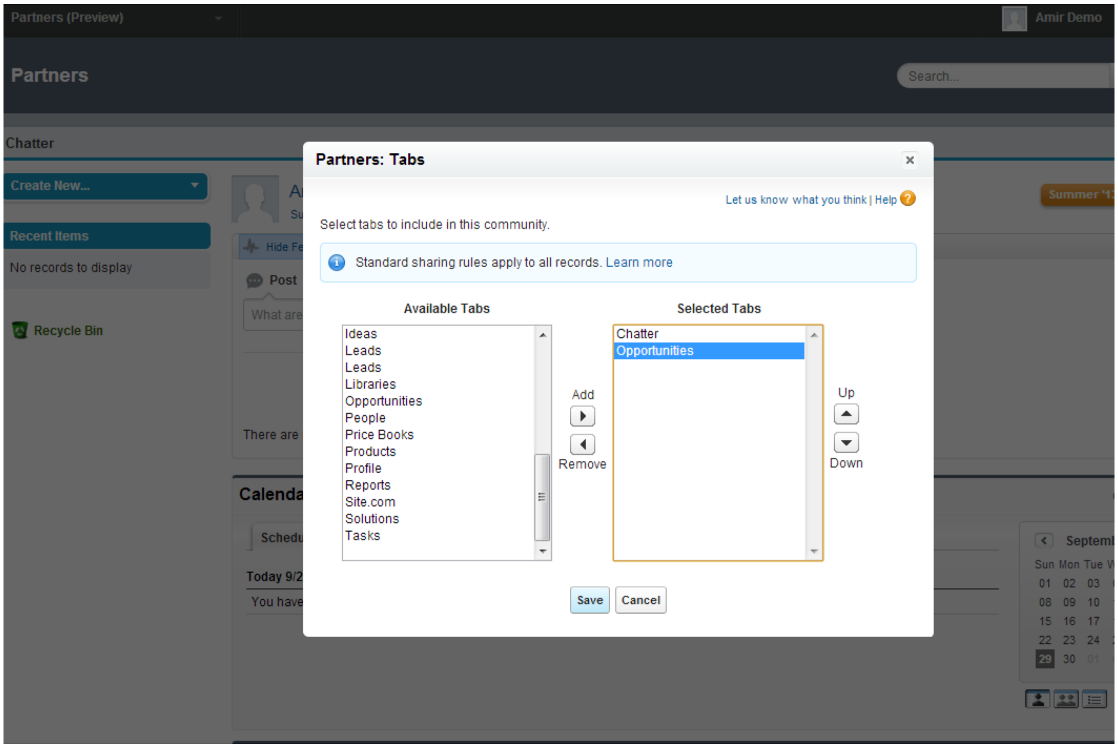


Figure 39 - Community Grids Tabs

Smart-Related-Grids

The smart Related Grid / related list are Smart grid that can function as a related list. They have the same enhanced functionality as the regular Smart-grid. Next is the explanation on how to setup a smart related grid.

Setting up your first Smart-Related-Grids / Sub Tabs in Salesforce Classic

In this example, we will add a new Smart-Related-Grid to an opportunity layout.

1. Go to one of setup>search>object (e.g. opportunities) >layouts> click the "edit layout" next to the page the chosen layout (Figure 40).
2. Create a new page section (Figure 41).
3. Uncheck the "edit page" & detail page checkboxes and choose 1 column layout (Figure 42).
4. Place the grid "`zaapit_tb_XXX`" inside the newly created section (Figure 43) – if you can't find the page please create one by following the steps on the bottom of page 27, create a "related list" page or a "related-sub-tabs" page (the examples are on page 24).
5. Save your layout.
6. The result - Figure 44.

How to video: https://www.youtube.com/watch?v=fxaLcHxePbI

What next? Click of the customize link and configure your new Smart-Related-Grid, for more information read the Layout Editor

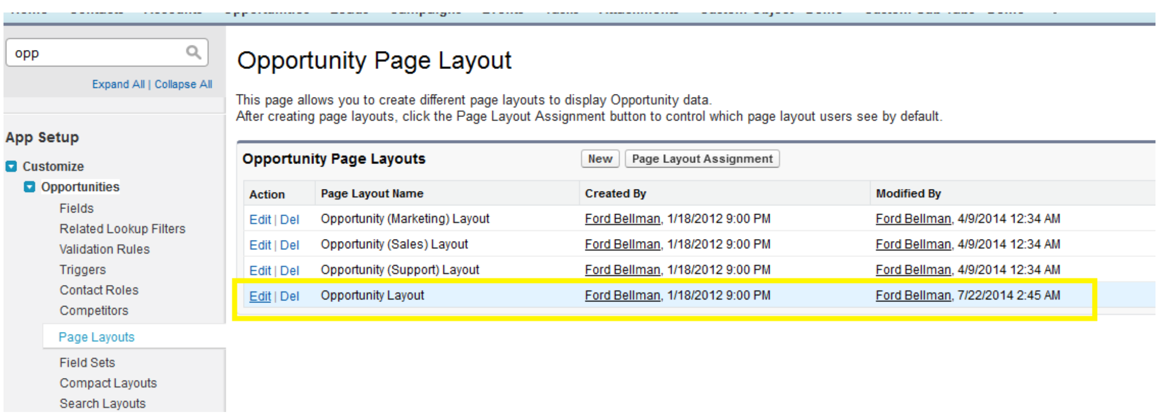


Figure 40 - Edit Layout

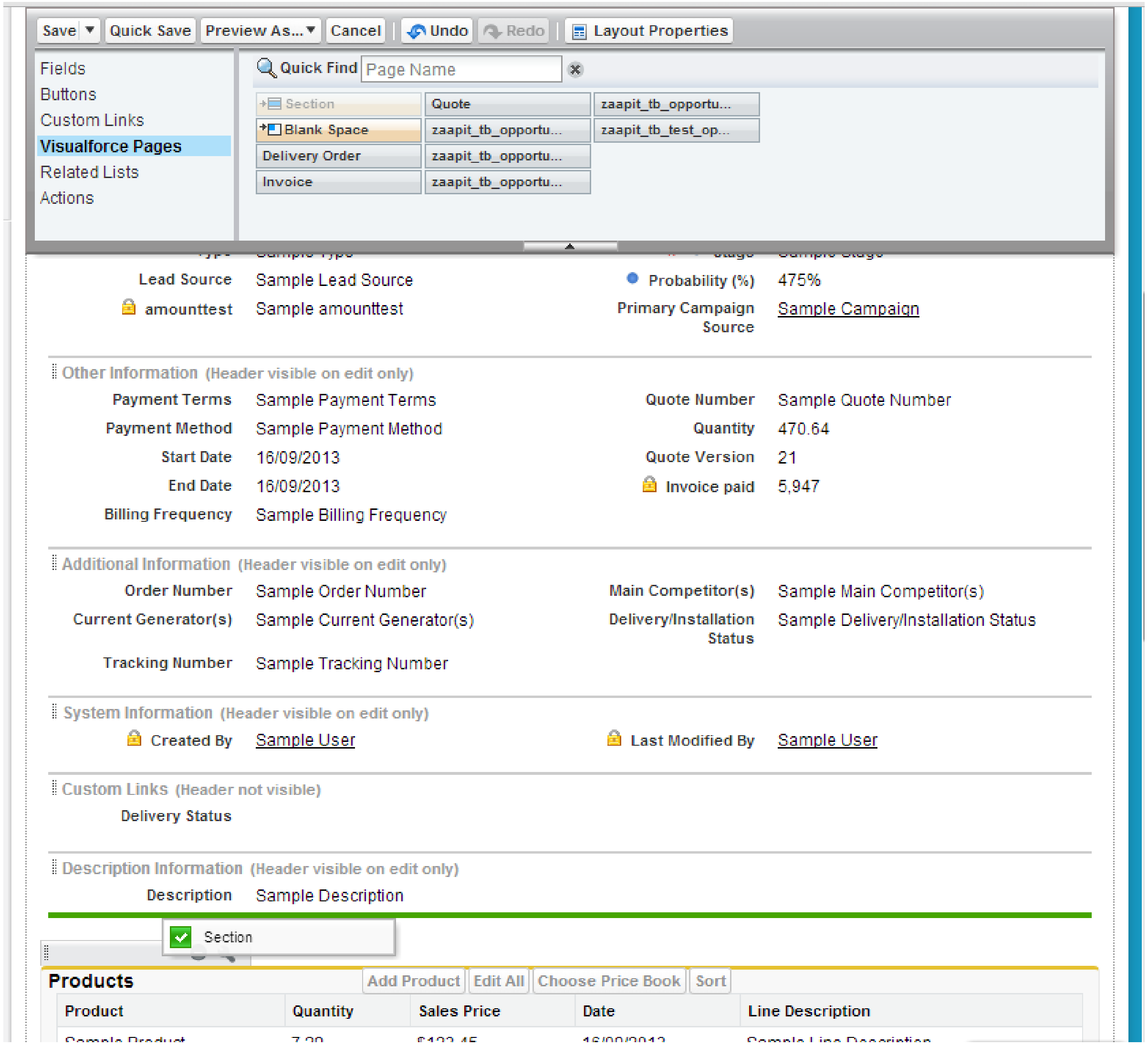


Figure 41 - Create a new Visualforce page section

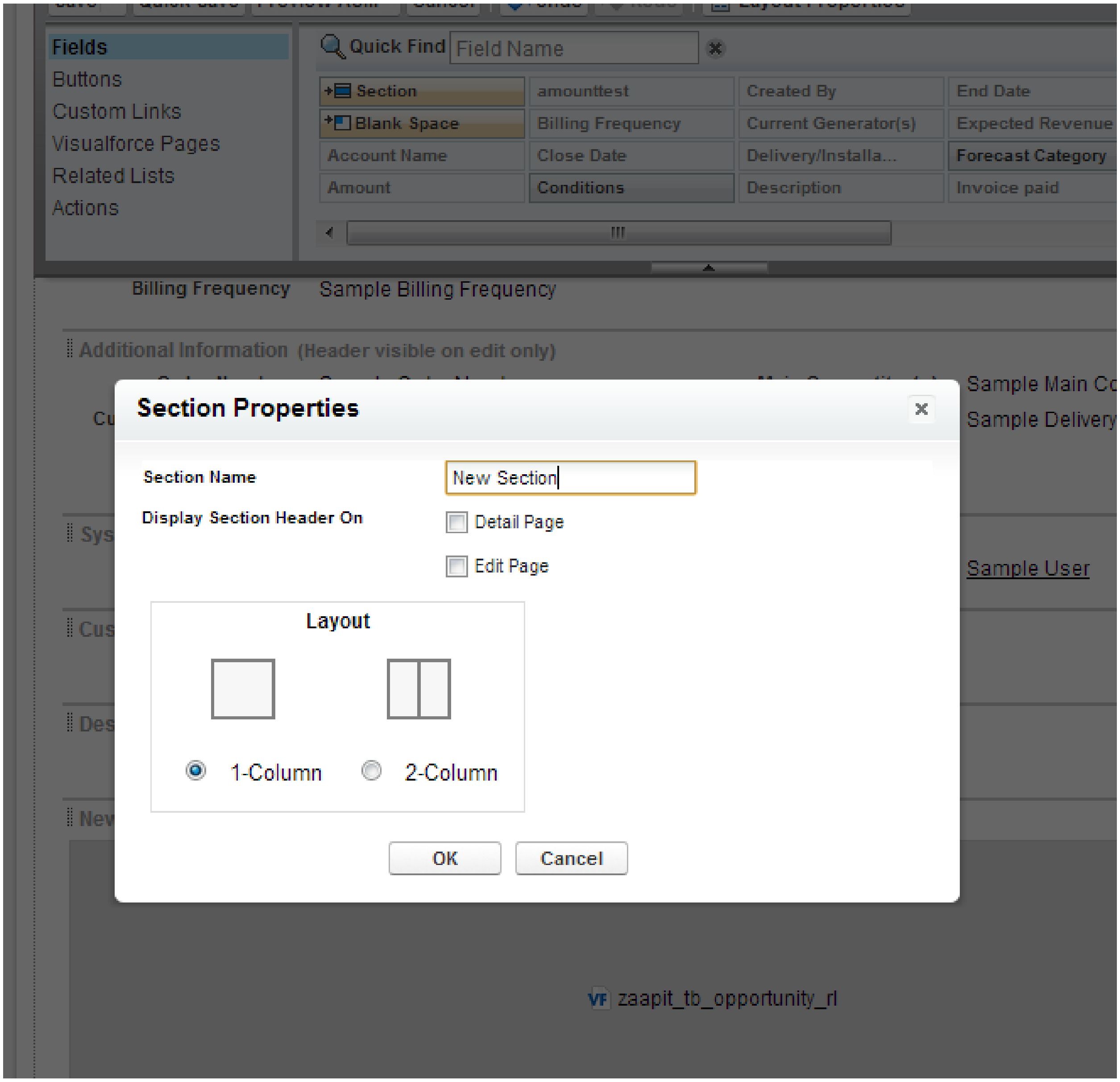


Figure 42 - Section Properties

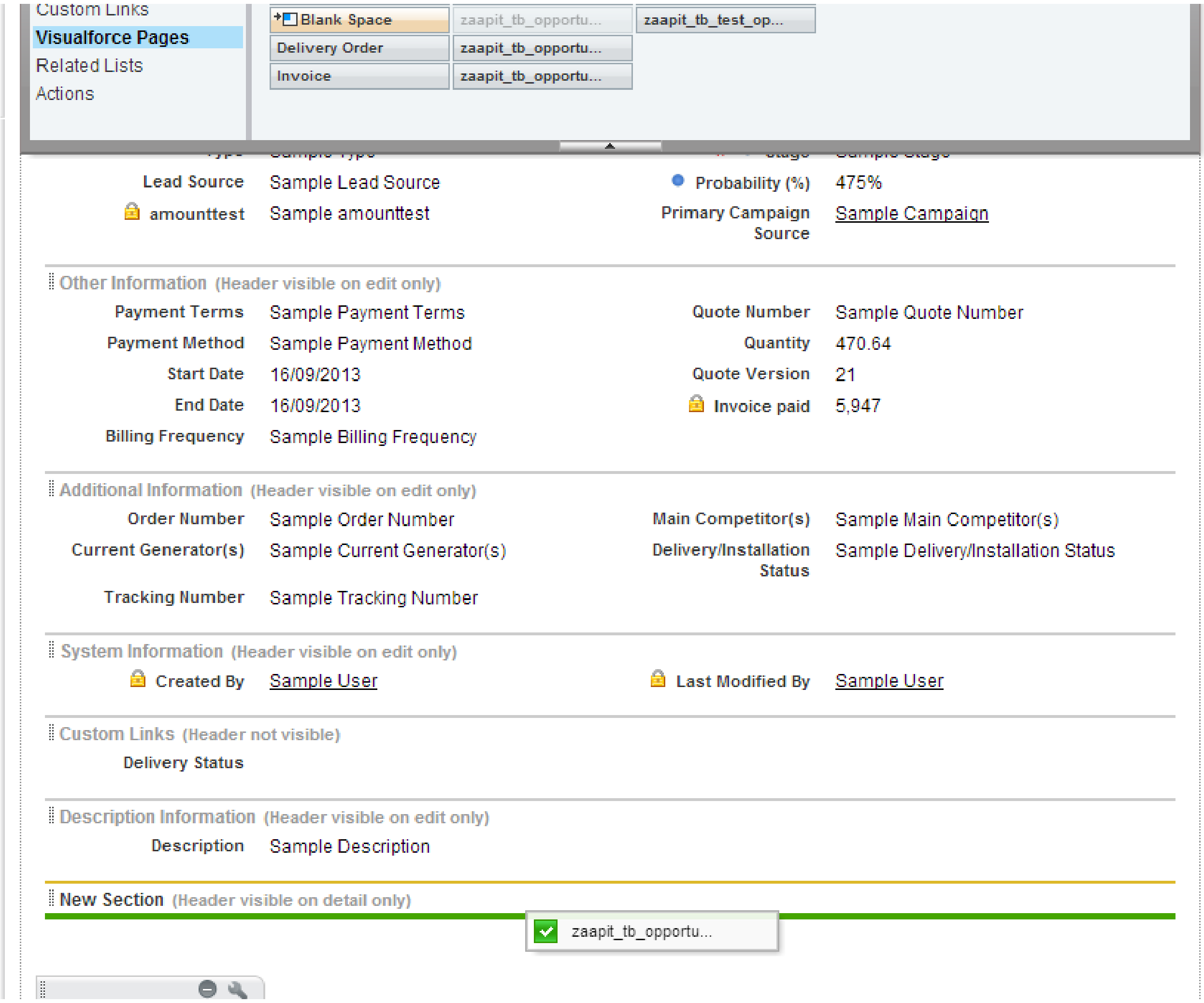


Figure 43 - Place the Related Grid

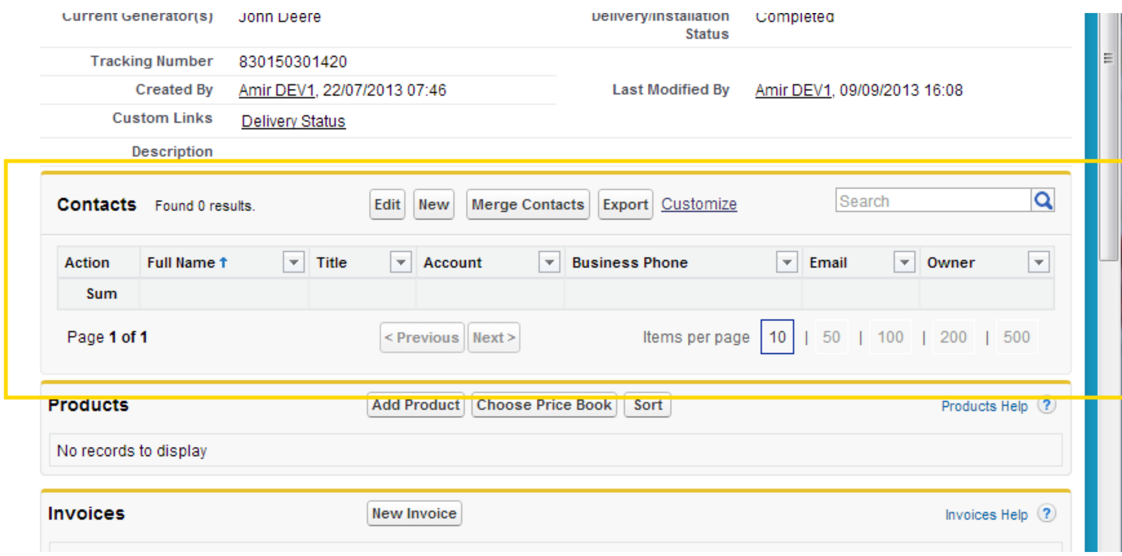


Figure 44 - The new Smart Related Grid

Adding a Sub-Tabs Related-Grid to your main object layout in salesforce classic

To add sub-tab just follow the steps presented in the previous section, but instead of sub-step #4 use the following sub-step.

Alternative step: Place the smart tabs "`ZaapIT opportunity Tabs (RL)`" inside the newly created section (Figure 45).

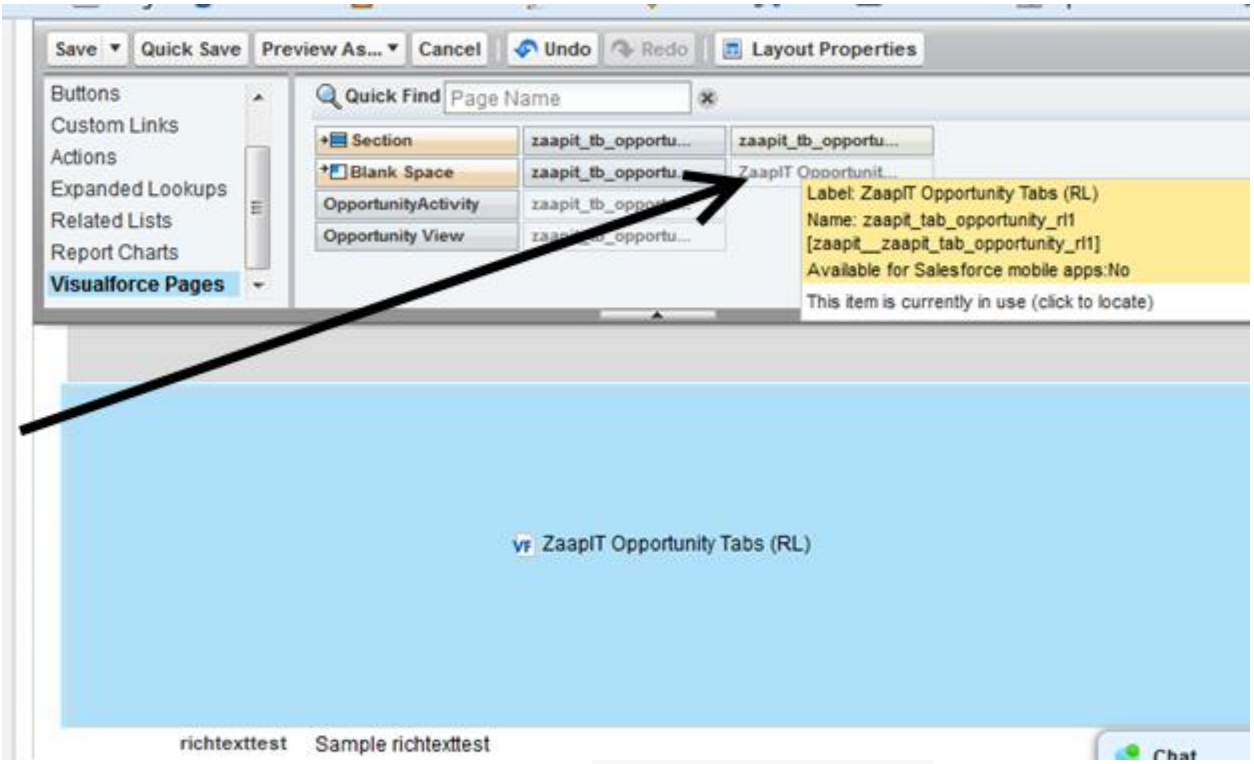


Figure 45 - Smart-Sub-Tabs with Related-Grid

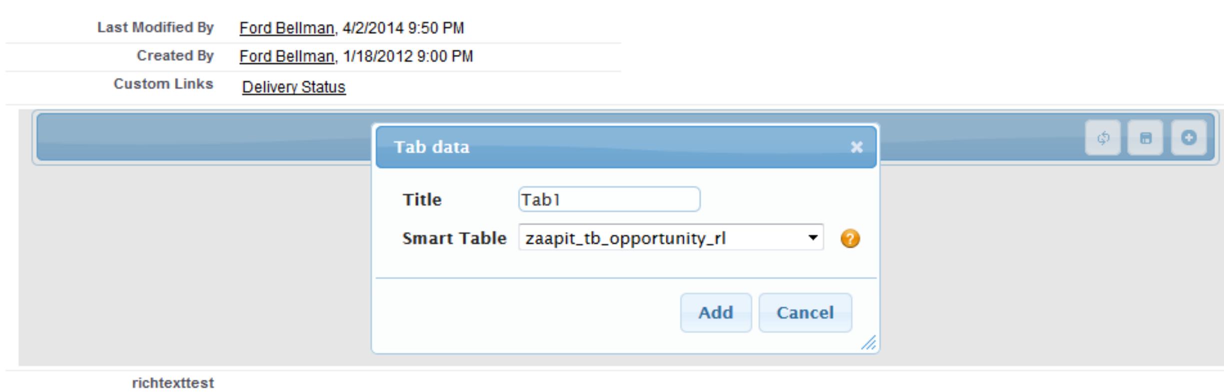


Figure 46 - New Smart Sub Tab

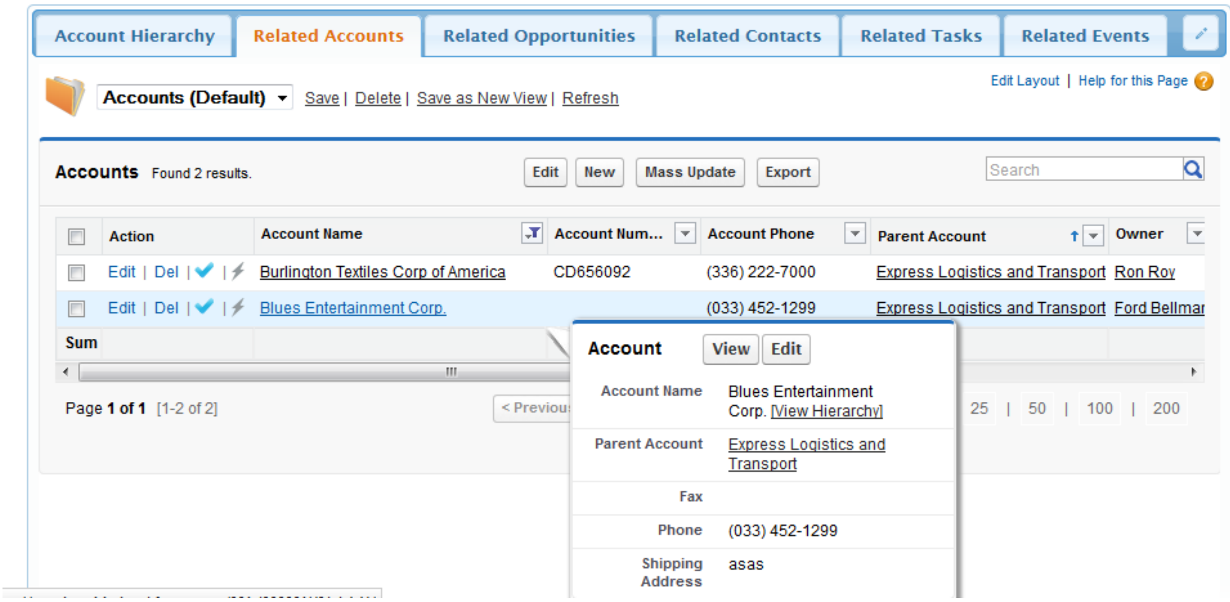


Figure 47 - Smart Sub Tabs in Action

Setting up your first Smart-Related-Grids / Sub Tabs in Salesforce lightning

In this example, we will add a new related list tab to an opportunity layout.

1) Edit the opportunity page - Figure 48
2) Create a new custom sub-tab - Figure 50
3) If you have a custom salesforce domain (Figure 49) then continue with step 3.a otherwise and if you don't have a custom salesforce domain or you want to add a pre-configured grid then go to step 4
    a. Drag the lightning component " `Smart Related List - Choose a name first`" in to it's place
    b. Type a new grid api-name (text & numbers only) or use an existing name to loader the settings (Figure 52 - lightning grid component)
    c. Save the page
4) If you don't have a custom salesforce domain (Figure 49) then do the following instead of step#3
    a. Drag a visual force component to the page Figure 51
    b. Choose the right page (e.g. opportunity products / quote products / or gen-mobX..)
    c. Set the height to 690
    d. Save the page
5) Enter the page (to one of the records)
6) If you chose a "blank gird" a grid that is not pre-configured do the following:
    a. Edit the grid's layout (click the grid's layout on it's top-right)
    b. Set the fields / objects/ sorting /buttons
    c. Set the "related list reference field" to point to the parent object (located under the advanced setting section)
    d. Save this grid default settings
7) Try the grid - Figure 53, How to video guide: https://www.youtube.com/watch?v=-ly2C_aI7PA

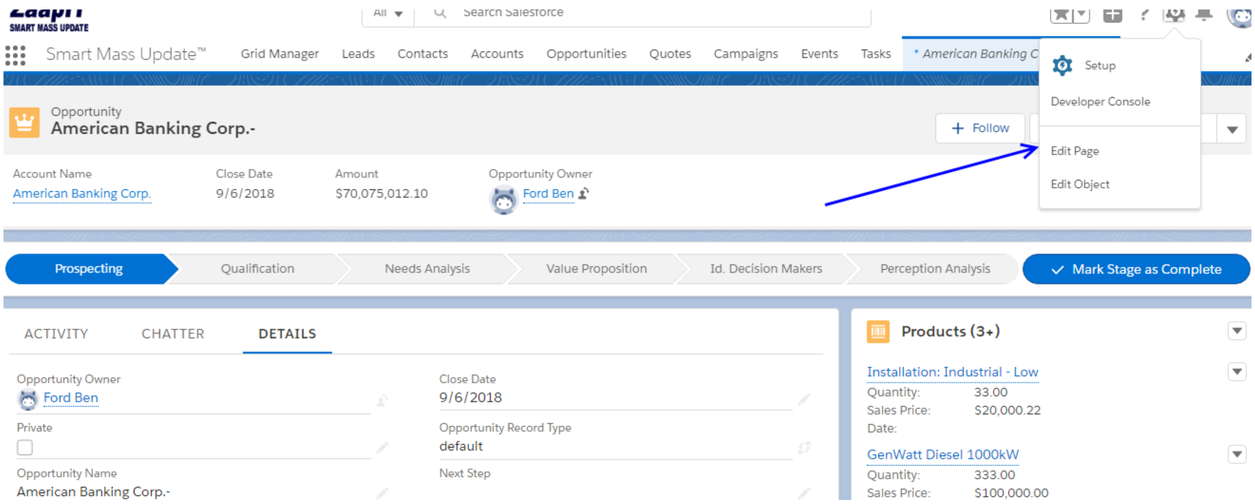


Figure 48 - Adding a related gird in lightning

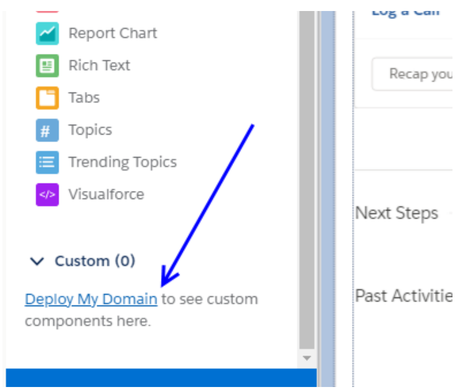


Figure 49 - custom domain indicator

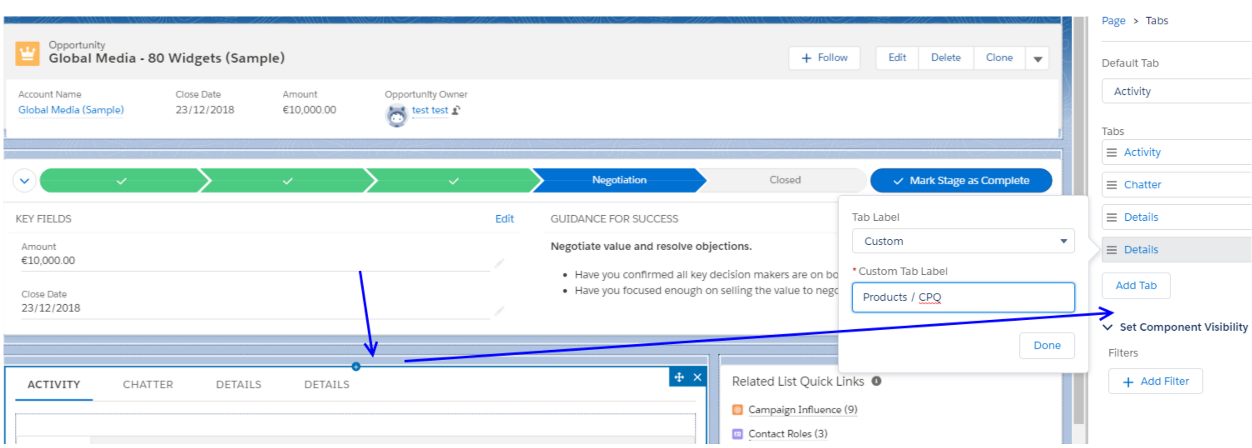


Figure 50 - adding a new sub-tab for a related list in lightning

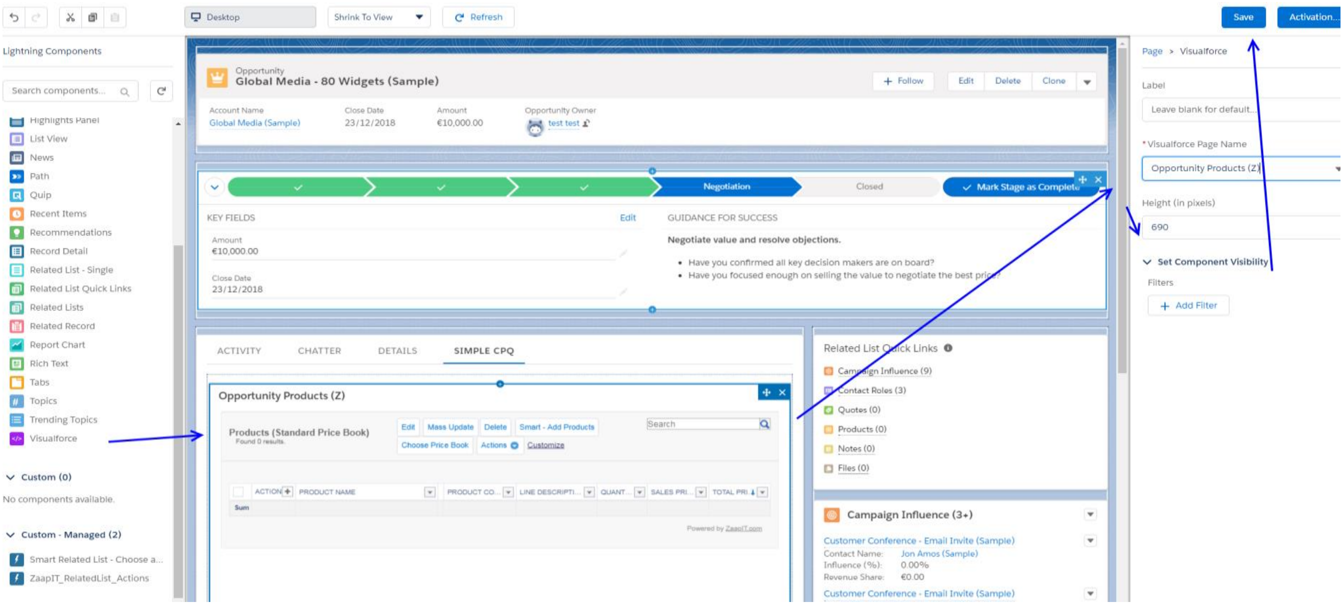


Figure 51 - adding simple CPQ

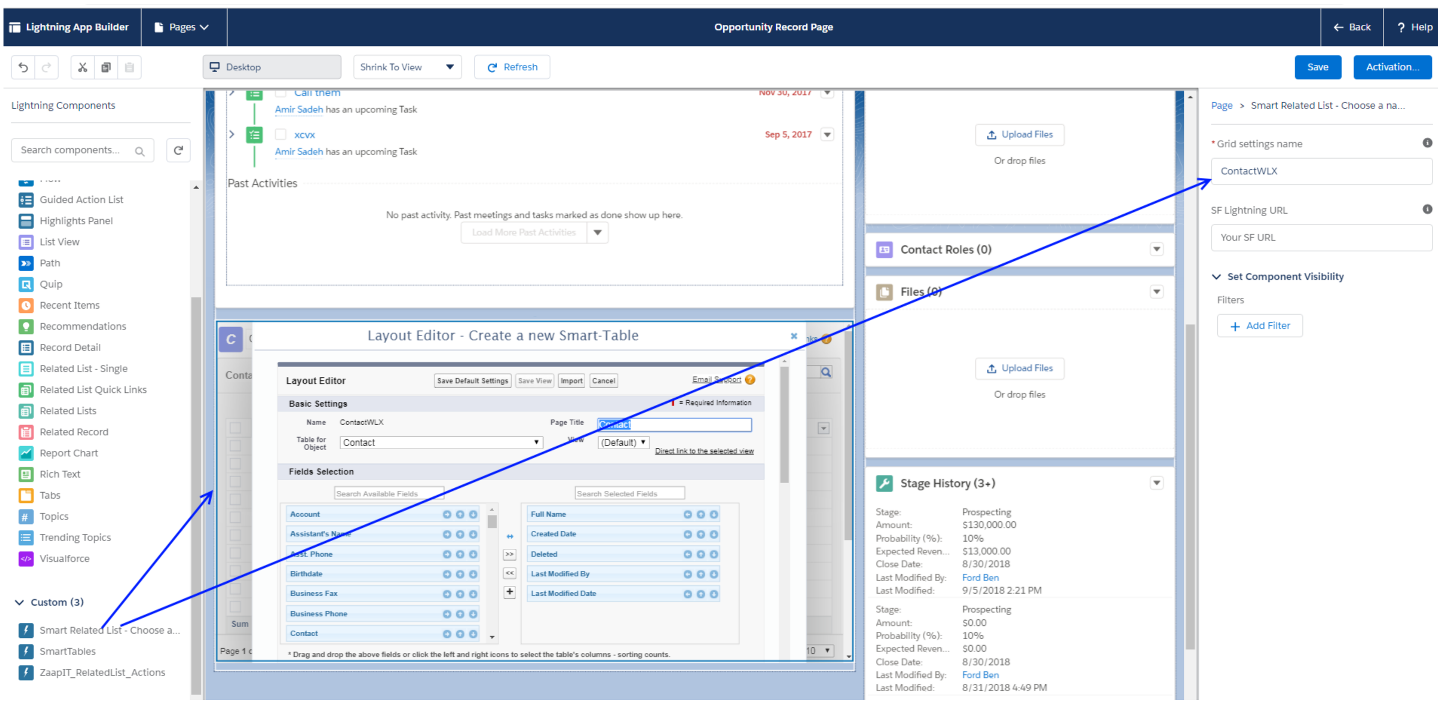


Figure 52 - lightning grid component

Simple CPQ for opportunity products / quote line items

The simple CPQ for opportunity products & quote line items let's Sales users to quickly add products, set the pricing and be productive with many advanced features such as: adding multiple products in one click, "package item" / "bundle" support, on the fly calculations, editing multiple line products inline, price calculations (via our find and replace/calculate options), multi-currency & native price book support .

On Figure 53 the opportunity products grid is present as a sub-tab under the opportunity page in Salesforce lightning (you can place the gird anywhere and in any SF version).

On Figure 54 you can see the Smart-Add-Product button in action, we searched for products that contains 100 and added all of them in 1 click. To support product bundles/packages just add a custom bundle/package column and use the bundle column-filter to fetch the bundle…

Figure 55 the quote line items grid is present as a sub-tab under the quote page in Salesforce lightning (you can place the gird anywhere and in any SF version). In this example we add 1 new row and edit an edit the price next to installation portable row (the small pencils indicate the changed cells), after the changes were made the user can save the changes or click cancel button to revert.

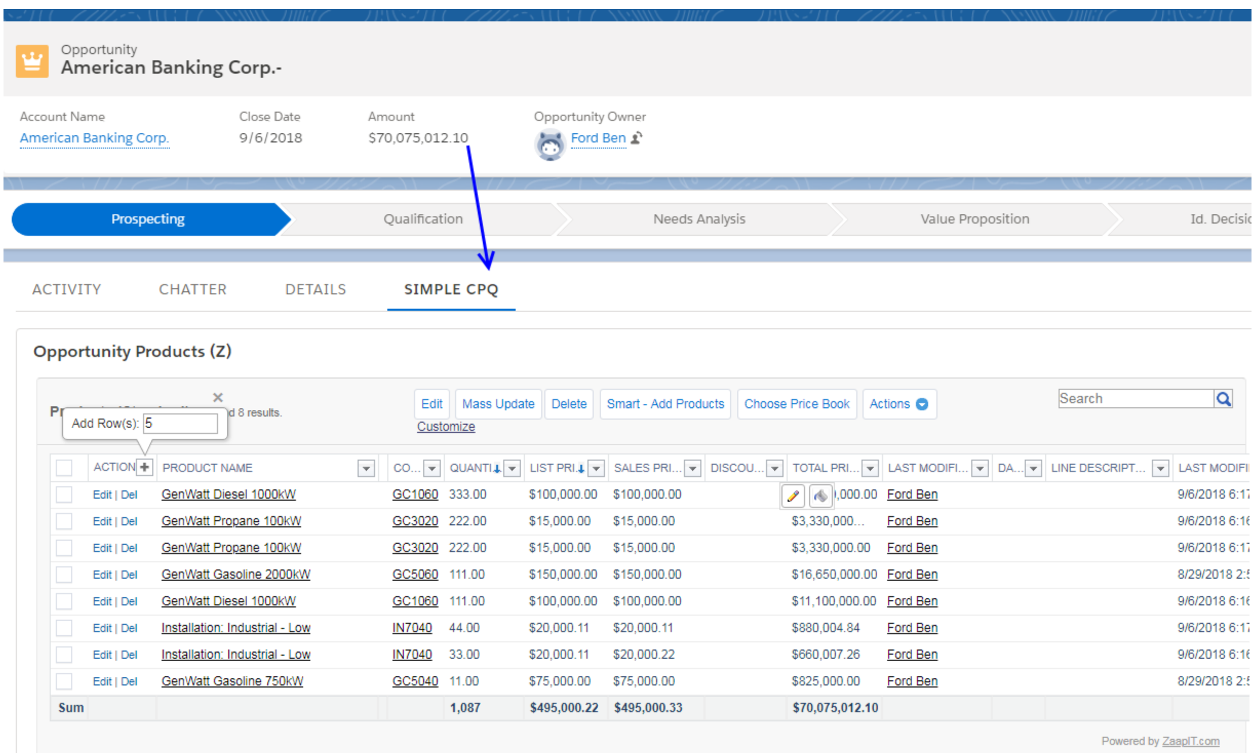


Figure 53 - simple CPQ / opportunity line items

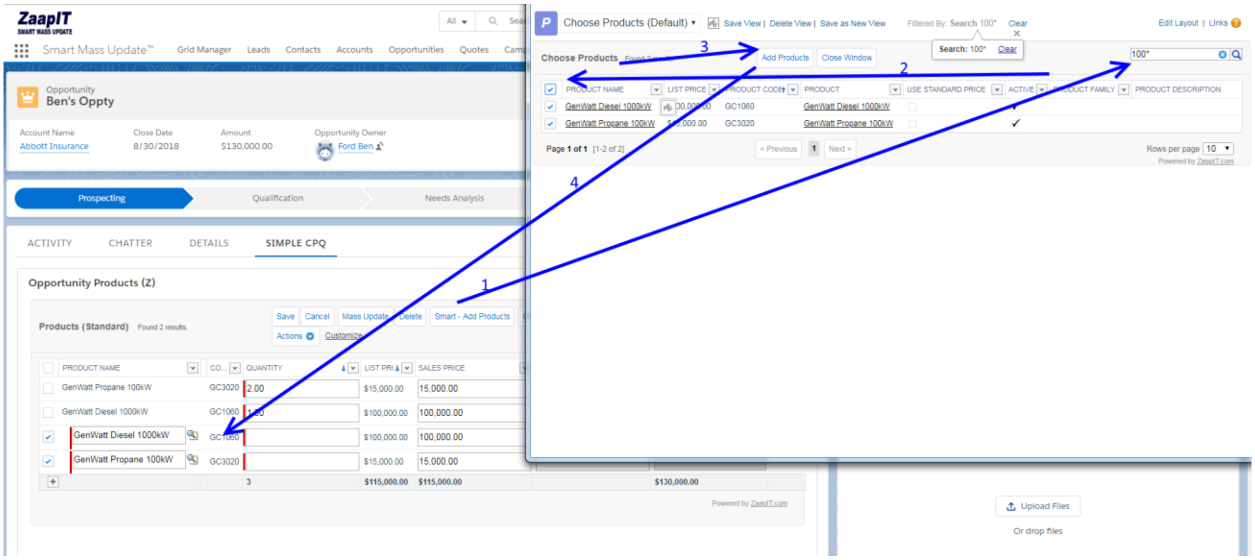


Figure 54 - simple CPQ Add Products

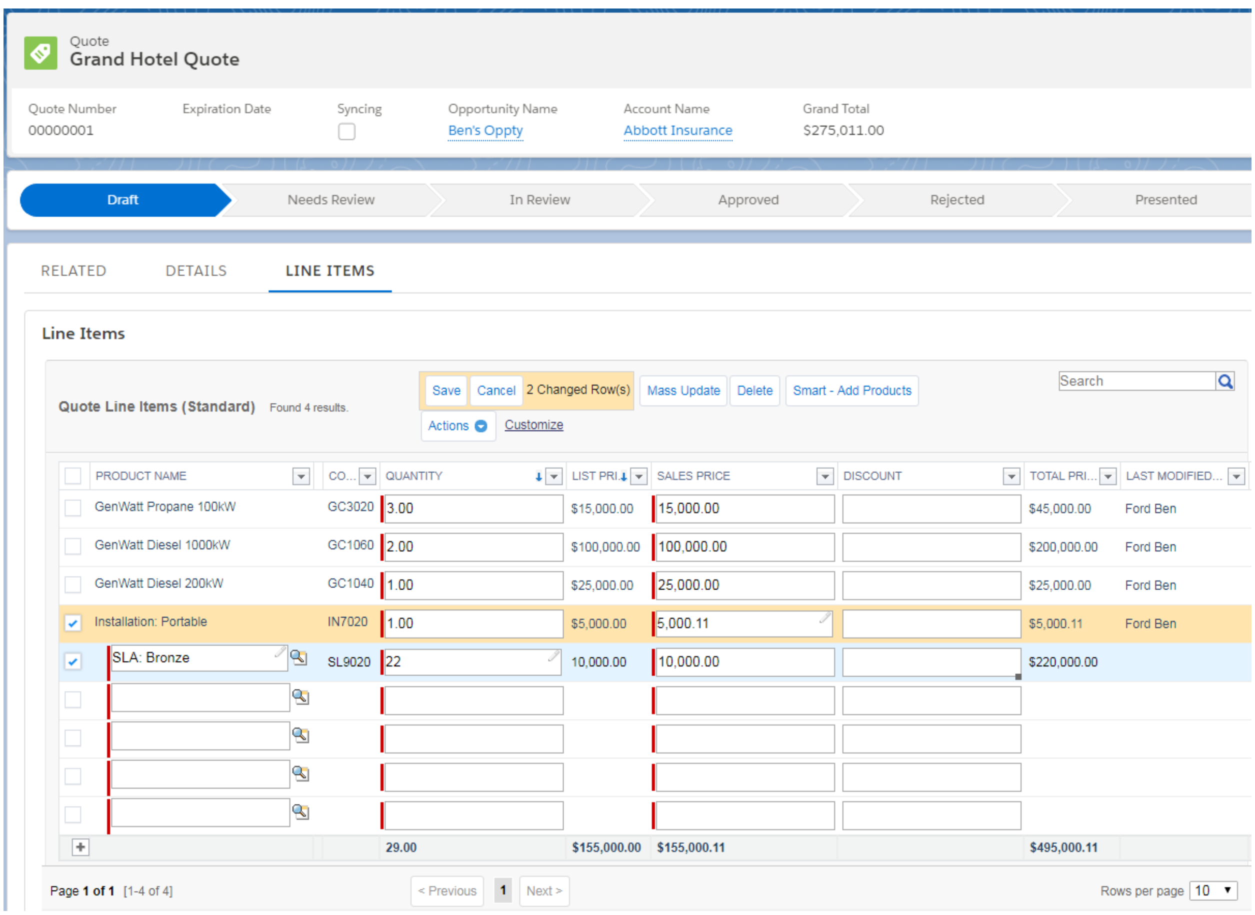


Figure 55 - simple CPQ / quote line items

360 Customer View

The 360 customer view is a collection of hierarchy sensitive sub-tabs that know how to aggregate and display related-data from an entire hierarchy with no coding. The out of the box customer view component works with the Salesforce's account hierarchy i.e. account-parent account hierarchy (this can be changed to work with different hierarchies as well).

The out of the box customer view is usually placed on the account page/layout (Figure 56). On Figure 57 the hierarchy charts are presented with all the relevant data points (customizable), this enables account managers to the understand the exact state of a customer, presented by the account-hierarchy, instantly. On Figure 58 all the opportunities from the entire hierarchy are present grouped by account (sales reps can utilize this information to find new upgrade/cross-sale opportunities and see the real value of a customer via the totals/sub-totals filters & sorting). All the sub-tabs are customizable, and an admin can add more tabs or enrich the grid's data by pulling more fields/related information such as product line items (Figure 59), quotes/ cases/notes or custom objects.

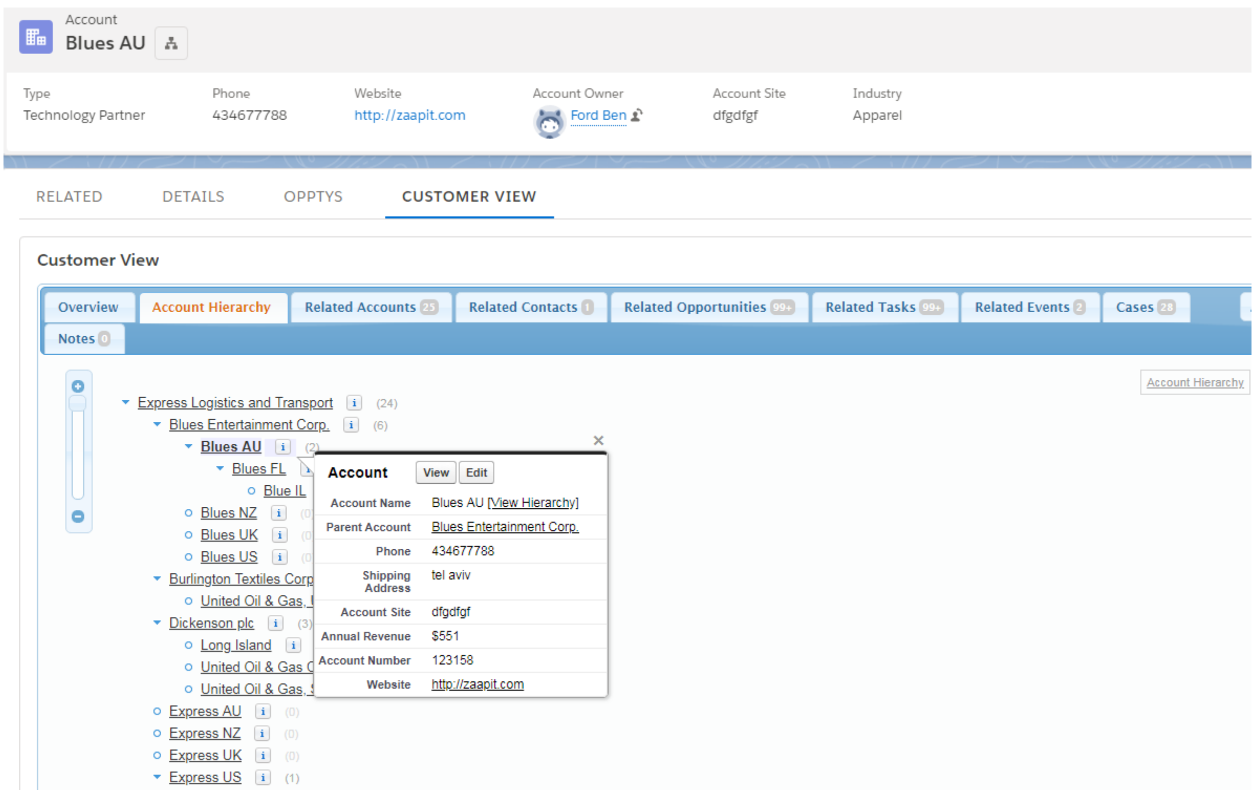


Figure 56 - Customer view tree

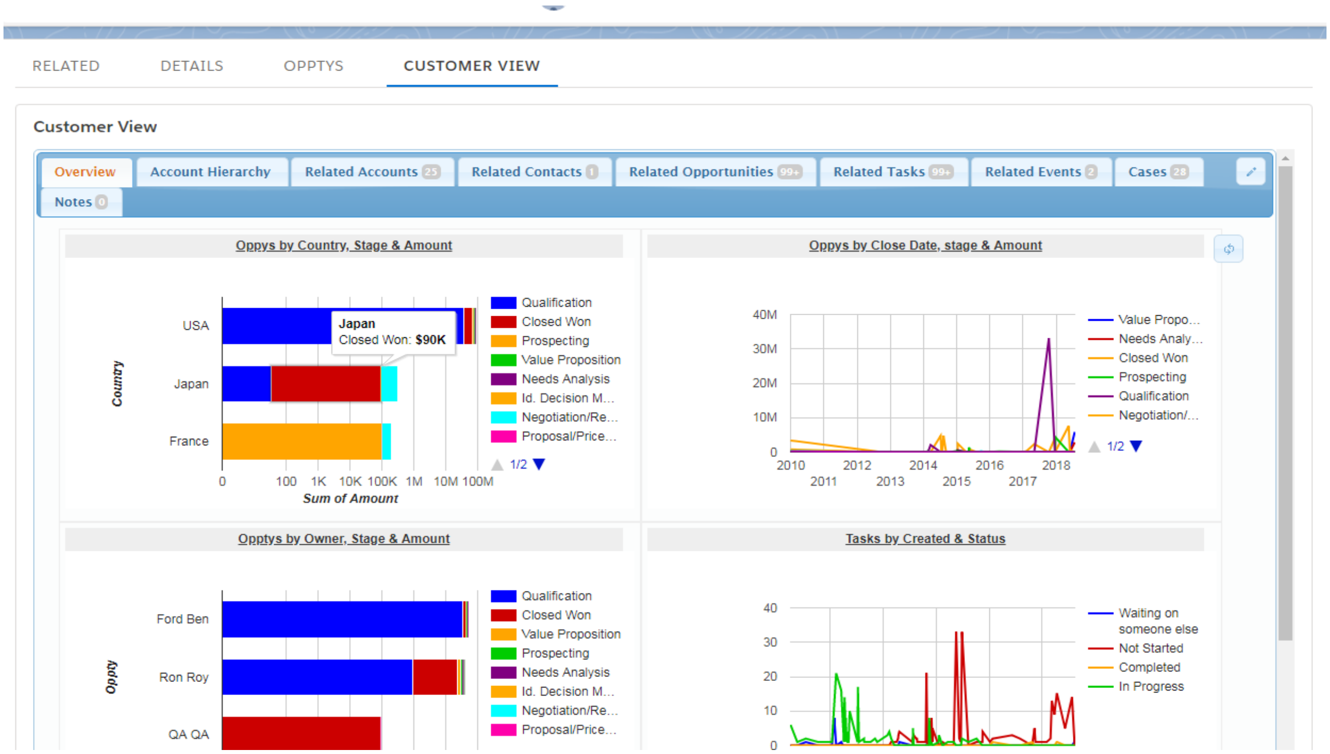


Figure 57 - Customer view overview

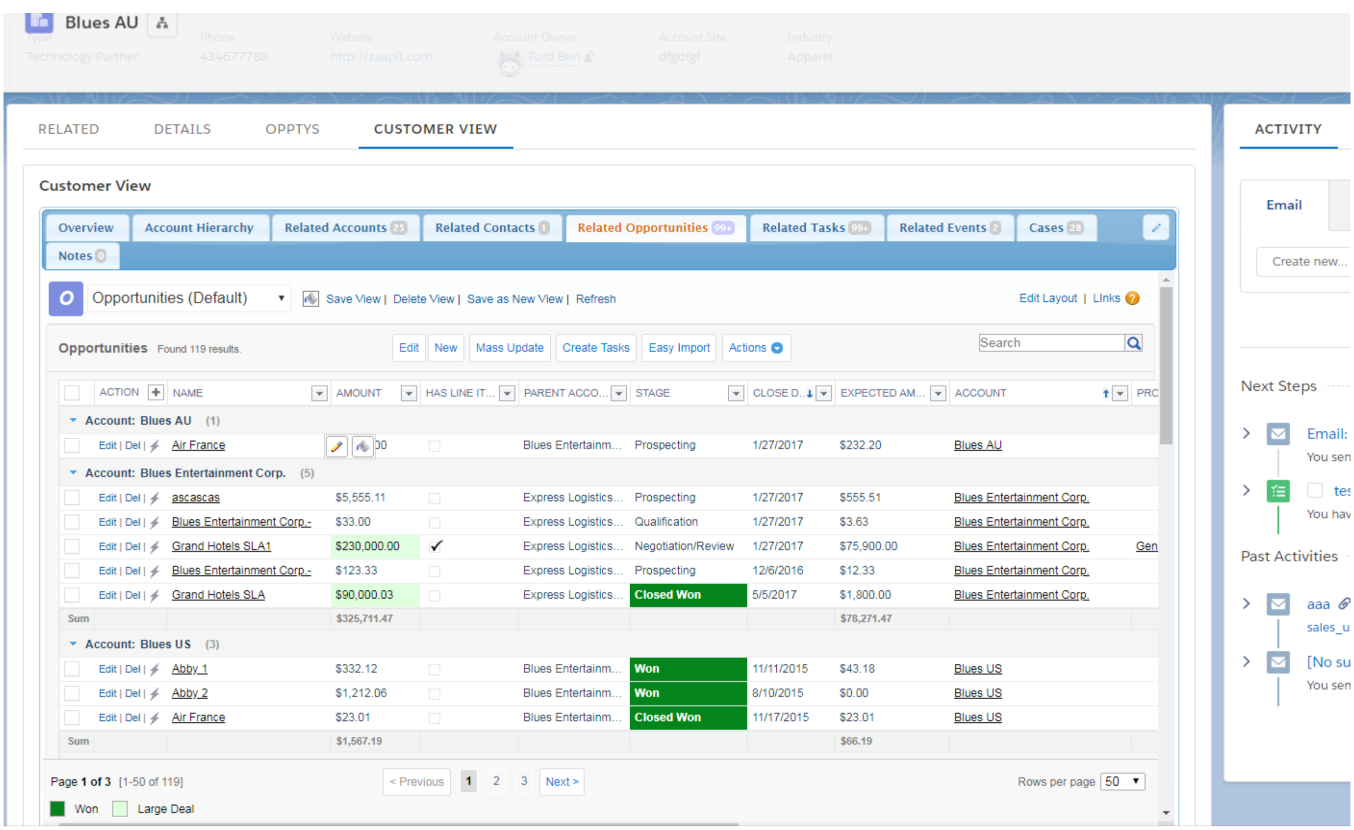


Figure 58- Customer view opportunities grouped by account

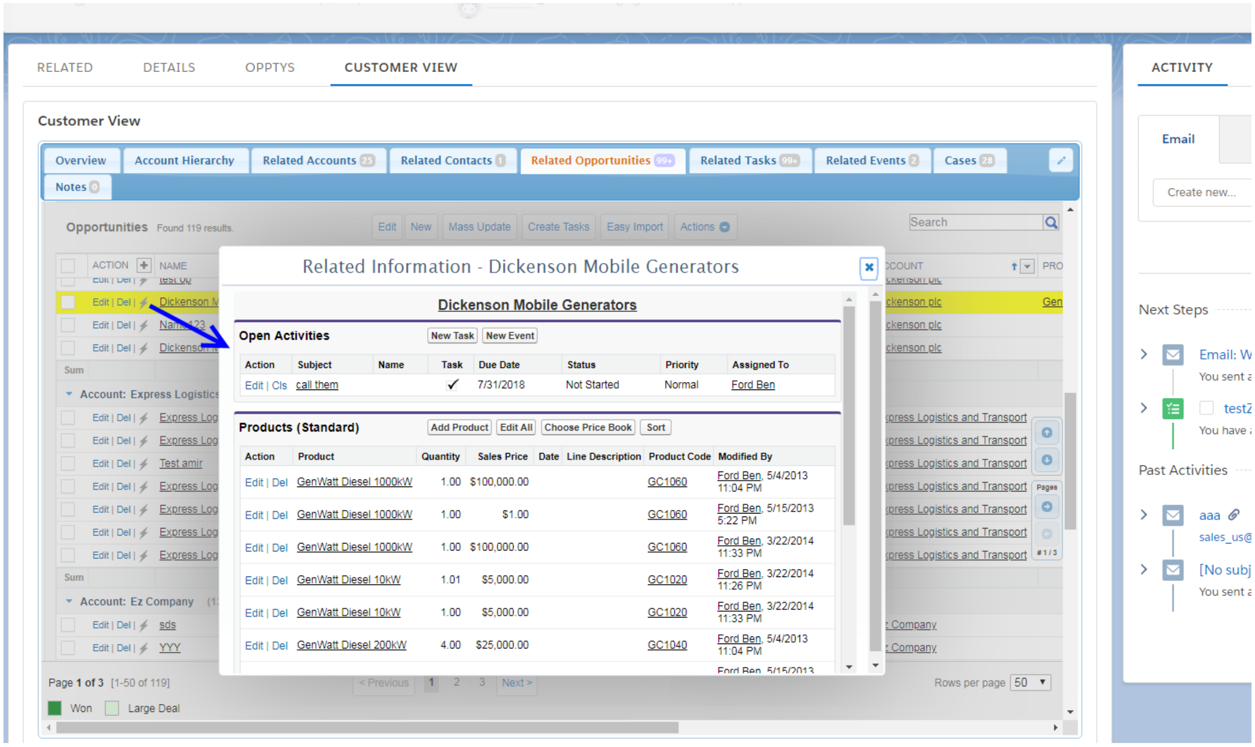


Figure 59 - Customer view related opportunity info

Custom Buttons

The below table contains custom/special buttons definitions provided by ZaapIT, some of the buttons only work with dedicated objects while others works with every object.

To install / use a button just open the table's layout editor and put the button definitions under the custom buttons section i.e. put "button name" under "button name" and the "Button link/JS" under "Button link/JS" (some of the Button link/JS are empty on purpose and works without the link/JS) - Figure 60.

Button Description	Button Name	Button link/JS	Works on Object's Grid
Mass Merge Contacts	Mass_Merge		Contact Shading must be enabled
Mass Merge Leads	Mass_Merge		Lead Shading must be enabled
Mass Merge Accounts	Mass_Merge		Account Shading must be enabled
Merge 3 Contacts	Merge_Contacts1		Contact
Merge 3 Leads	Merge_Accounts		Lead
Merge 3 Accounts	Merge_Leads1		Account
Mass add to Campaign	Add_to_Campaign		Contact / Lead
Create Tasks	Create Tasks	openMassCreate('tasksMC','whoid','Mass Create','1');	Contact / lead
Create Tasks	Create Tasks	openMassCreate('tasksMC','whatid','Mass Create','1');	All objects except Contact / Lead
Create Opportunities	Create Opptys	openMassCreate('MassCreatedOpptys','accountid','Mass Create','1');	Account
Create Opportunities Line Items	Add Line Items	openMassCreate('MassCreateOpptyPRDS','opportunityid','MassCreate','1');	Opportunity
Add Contact Roles	Add Contact Roles	openMassCreate('MassCreateOpptyContactRoles','opportunityid','Mass Create','1');	Opportunity
Copy column Values	Copy Values	copyValuesX1();return false;	All
Multi User Calendar	Multi User Calendar	/00U/c?cType=2	Tasks/events
My Calendar	My Calendar	/00U/c	Tasks/events
Mass Emails (SF)	Mass Emails	Mass_Emails	Contact / lead**
Mass Emails (outlook)	Mass Emails	Mass_Emails2	Contact / lead

Drill Down / Up
Contacts Drill Down
Accounts Drill Down
	OBJECT Drill Down
	Contacts Drill Down
	Account Drill Down
		drillDown('zpAPI_NAME_OBJECT1');
		drillDown('zpContacts1');
		drillDown('zpAccounts1');
		Make you add the relation in the advanced filter- for example: accountid in ({ID})
			All (table setup needed)
			Account
			Opportunity

Mass Convert	Mass_Convert		Lead
Single Convert	Convert_leads		Lead
Import	Button_api_name	Button script: var w1=window.open('/apex/zaapit__importDataFromCSV?obj=OBJECT_API_NAME','x', 'width=800,height=690');var t1 = setInterval(function() {if(w1.closed) {clearInterval(t1);jumpToClk(currPageCls,600);}}, 1000);	Any Object (create a button and use the api name)

** Mass-emails-to-all-rows uses Salesforce's mass-emails API, the blast confirms to salesforce limits.

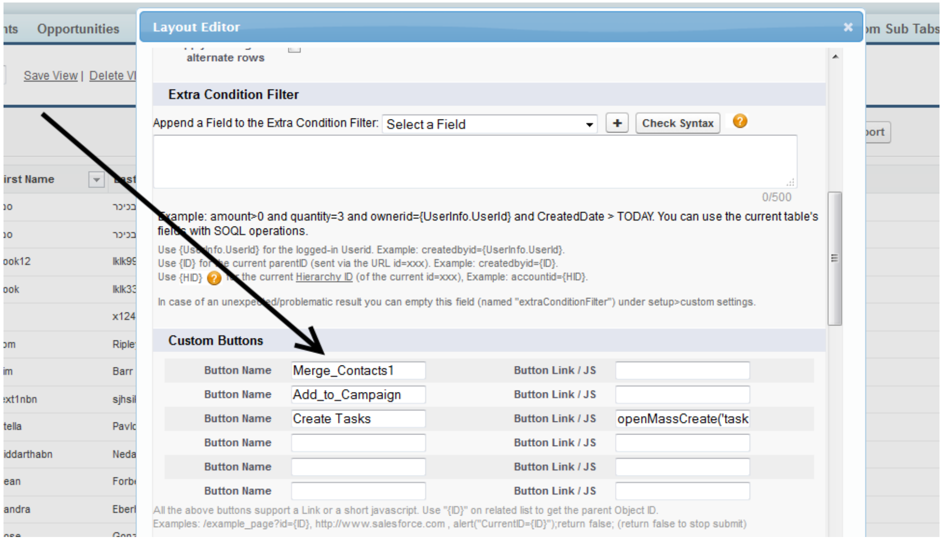


Figure 60 - Custom Buttons

Custom – Related Information / Lightning Icon / More Actions

The below table contains custom/special Lightning Actions provided by ZaapIT, some of the Lightning Actions only work with dedicated objects while others works with every object.

To use the below just open the table's layout editor and put the link definition under the "Related Information vf Link" - Figure 61, you can also use the built-in page available under the "Related Information type" options.

More Action Description	Link	For Objects
More Action for contacts	../apex/zaapit__ContactActivity?id={0}&isdtp=vw	Contact
More Action for accounts	../apex/zaapit__AccountActivity?id={0}&isdtp=vw	account
More Action for Opportunities	/apex/zaapit__OpportunityActivity?id={0}&isdtp=vw	Opportunity
More Action for Leads	../apex/zaapit__LeadActivity?id={0}&isdtp=vw	lead
More Action for Events	../apex/zaapit__EventView?id={0}&isdtp=vw	Event
More Action for Tasks	../apex/zaapit__TaskView?id={0}&isdtp=vw	Task
Customer View	../apex/zaapit__zaapit_tab_customerview?id={0}&isdtp=vw	accounts
Sub-tabs	../apex/zaapit__zaapit_tab_general1?id={0}&isdtp=vw	all
Sub-tabs2	../apex/zaapit__zaapit_tab_general2?id={0}&isdtp=vw	all
Sub-tabs3	../apex/zaapit__zaapit_tab_general3?id={0}&isdtp=vw	All
Custom Smart Table	../apex/zaapit__zaapit_tb_TABLE_NAME?id={0}&isdtp=vw	all
Custom VF Page	../apex/c__YOUR_VF_PAGE?id={0}&isdtp=vw	all

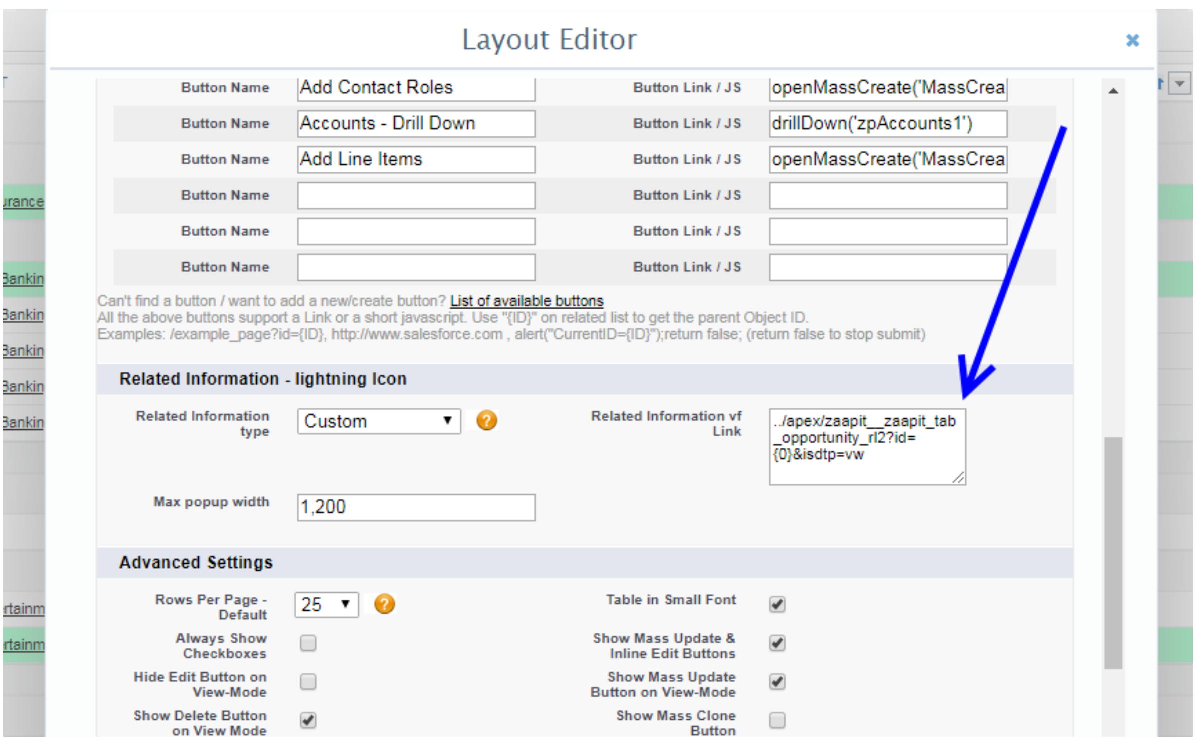


Figure 61 - More Custom Actions

Manage licenses

To give your users the ability to use the above tools please assign a valid ZaapIT-Tools license to them.

- Go to setup>”installed packages” and click the “manage licenses” link (Figure 62)
- Click on the Add Users button and choose the relevant users (Figure 63).

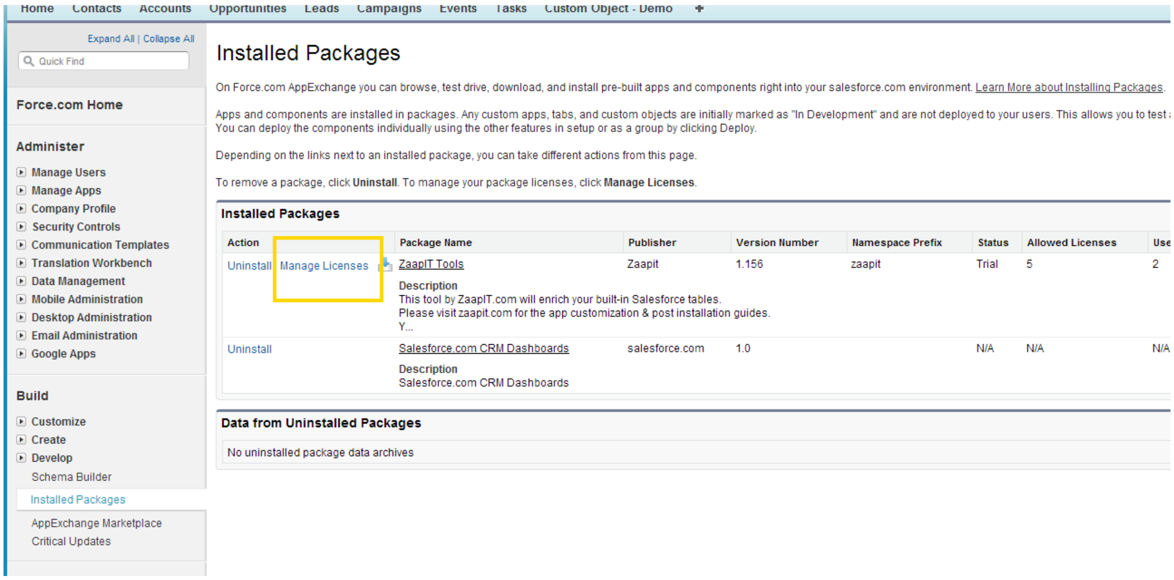


Figure 62 - Manage Licenses

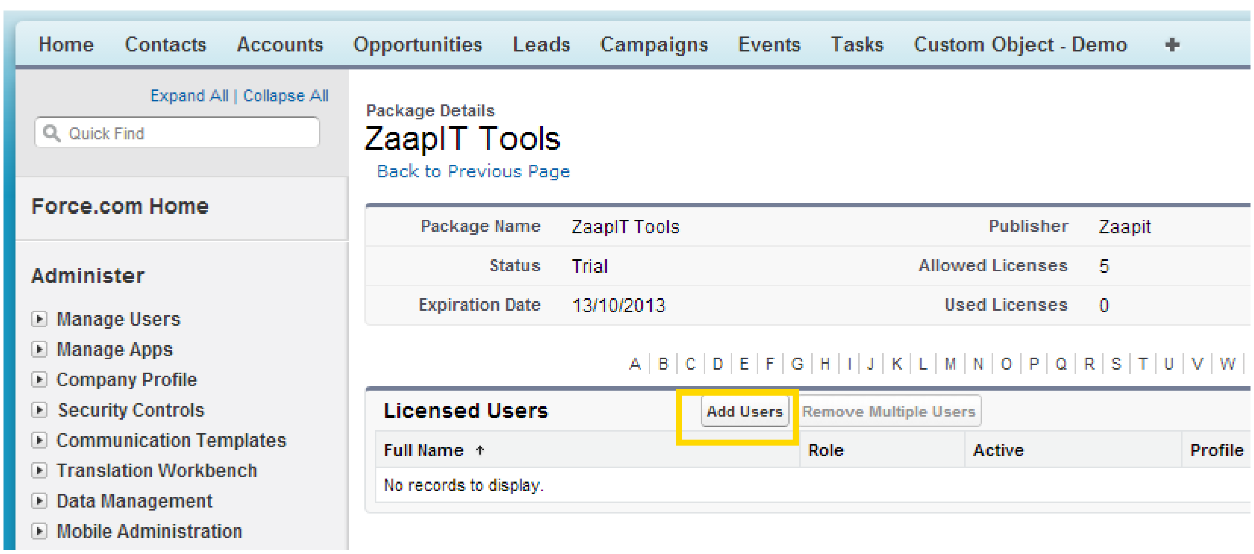


Figure 63 - Add Users

Sharing a view / restricting access to a view

By default all the app's views are publically shared with all the app's licensed users.

To share a view or to restrict access to certain views go to Salesforce setup> Security Controls > Sharing Settings > Manage sharing settings for: "zaapit table"> make the views private (set "default internal access" to private i.e. only visible to the view owner) > and then set a sharing rule by view title or other view parameter/field .e.g. view title contains "- All" .

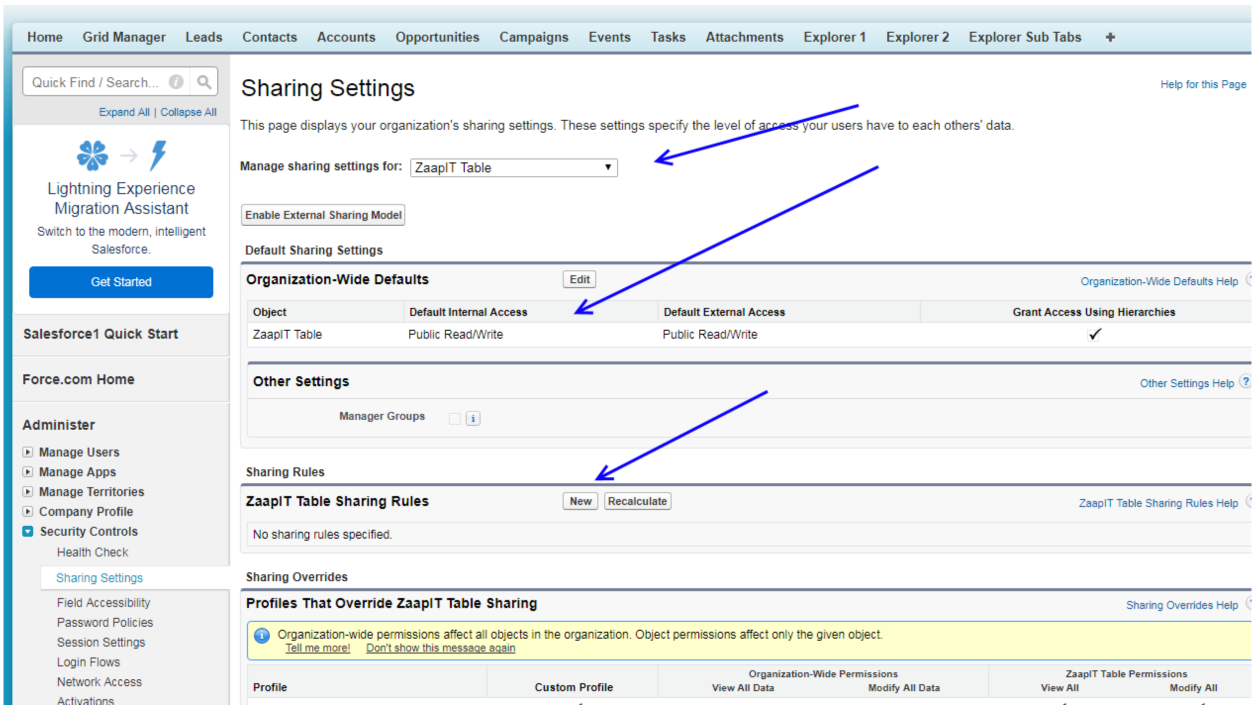


Figure 64 - Sharing a view / restricting access to a view