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Smart-Mass-Update™

The ultimate app to Salesforce's Mass Actions & Bulk Updates

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OPPORTUNITIES - WON!

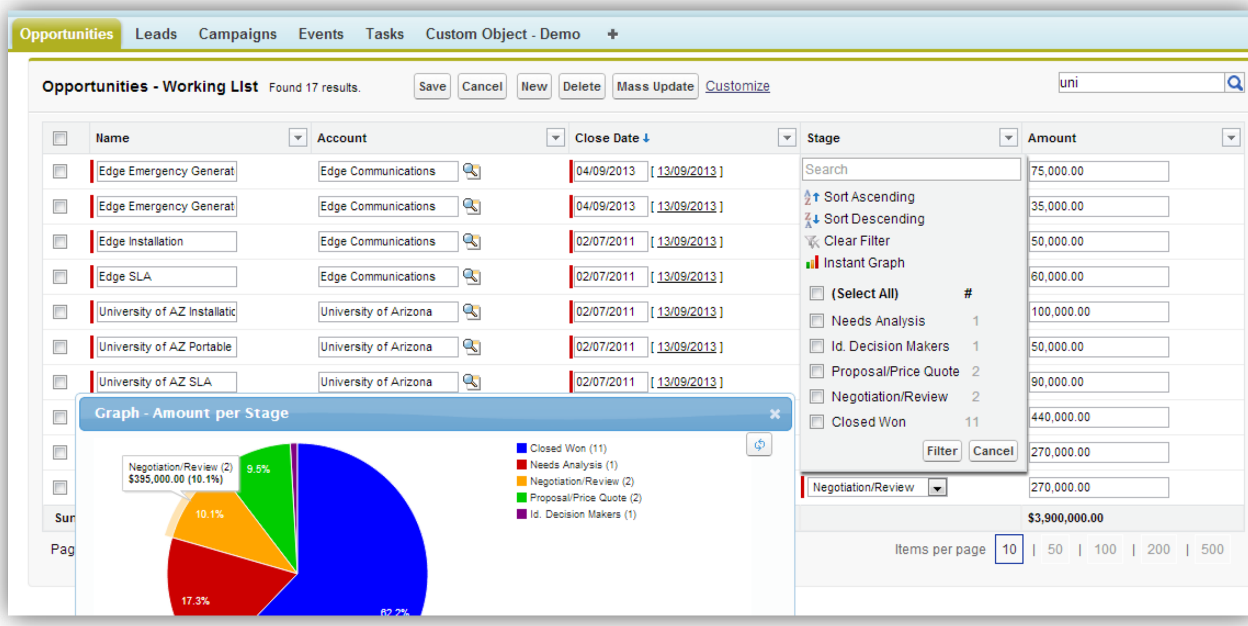
TASKS - DONE!

LEADS - CONVERTED!

Smart-Tables – Guide

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

Version: 1.473 (Jan-2016)



The Smart-Tables 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

The Smart-Tables product is a collection of native Salesforce tools made by ZaapIT Software Technologies that provides a state of the art tools for data visibility and maintainability 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.

Smart-Tables Tools:

- **Smart-Mass-Update™** - A collection of predefined Smart Tables for common native objects such as Lead, opportunities, Account etc. You can use it as a standalone Salesforce application or replace any "regular tabs" with a predefined / custom Smart-Table.
- **Smart-Activity-Manager™ -** A collection of predefined Tasks & Events Smart-Tables (as tabs) that's enables you to control yours and your team's tasks & events from one place.
- **DEDUP-Manager™ -** A collection of tabs & related list that helps you to de-duplicate your data.
- **Community-Grids** – Smart Tables for you community.
- **Smart-Related-Grids** – Smart Tables as a related list, e.g. Place it inside the opportunity layout as opportunity-products or contacts.
- **Lightweight Tables** (Deprecated).

Common Key Features:

- **Smart Instant-Graphs™** - Data analytics tool e.g. 1-click automatic charts.
- **Mass Update** - Update multiple records in one click.
- **Mass Delete** – Delete multiple records in one click.
- **Mass Inline Edit** – excel style.
- **Smart Column filter** – excel style.
- **Export to xls, doc, pdf, csv & XML.**
- **Easy to use interface** - Smart search, sorts, filters & pages
- **Auto Summary line.**
- **Multi-Column Sorting**
- **Smart layout editor**
- **100% Salesforce hosted**
- **Multi language support**
- **Secured** – our product passes software security regulations & tests on every version we release.

ZaapIT Software Technologies

Smart-Tables

The Smart-Tables product is a collection of native Salesforce tools made by ZaapIT Software Technologies that provides a state of the art tools for data visibility and maintainability for both professional and novice users. This section reviews the common main features available to all the Smart-Tables tools.

Main Features:

- Mass Update
- Mass Delete
- Mass Inline Edit
- Smart Search
- Smart Column Filters
- Data Export - PDF, Word, Excel, CSV, XML
- Optional – Instant Graphs™
- Optional – Auto Summary line.
- Multi-Column Sorting

Mass Update

The mass update feature (Figure 1) enables you to control a large amount of data with few clicks of a button.

The 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. **Direct Update mode** – Upon clicking the "Update Selected Items" button the requested changes in the mass update window will take place immediately – i.e. the changes will be saved into the Salesforce database.
3. **Selective Update Mode** - Select the relevant rows on your Smart-Table 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.

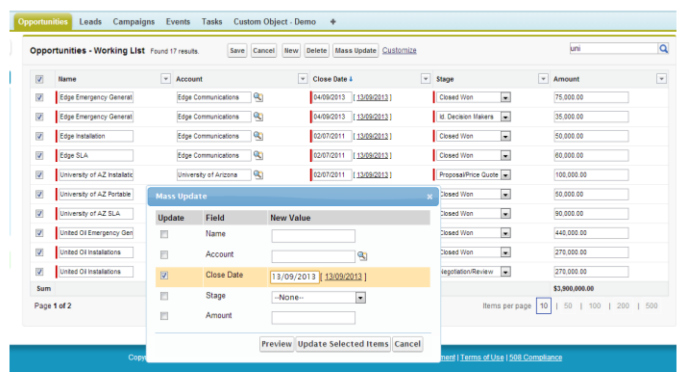


Figure 1 - Mass Update

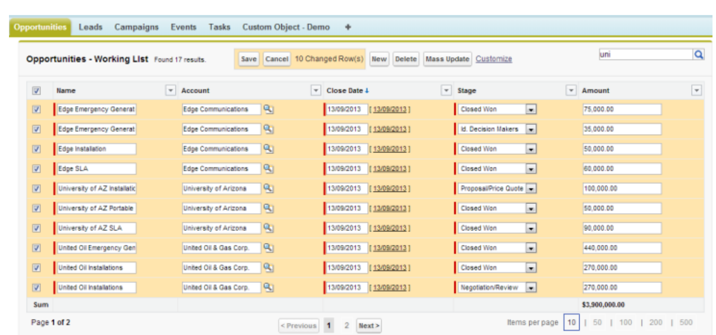


Figure 2 - Mass Update preview mode

To customize the mass Update fields, use the customize link on the top of the table. For more details please refer to the Layout Editor section.

ZaapIT
Software Technologies

Mass Create

The mass create feature enables you to create related-object for multiple objects. For example you can create a task for the selected contacts in the below 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);

The Preview-table-configuration-name must be a real smart-table with this extra condition filter: id in ({ID})

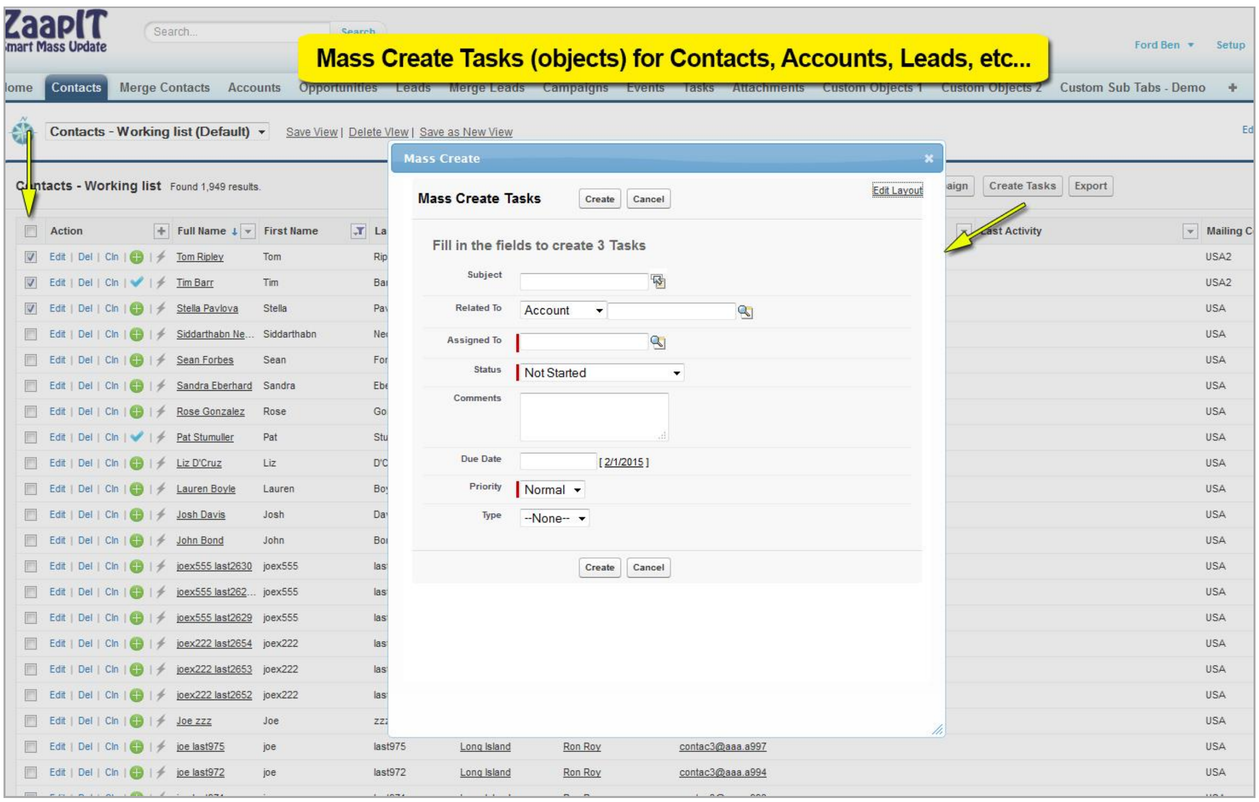


Figure 3 - Mass Create

Mass Delete

The mass delete feature (Figure 4) enables you to delete a large amount of rows with few clicks of a button. Just select the rows you wish to delete and then click on the top delete button.

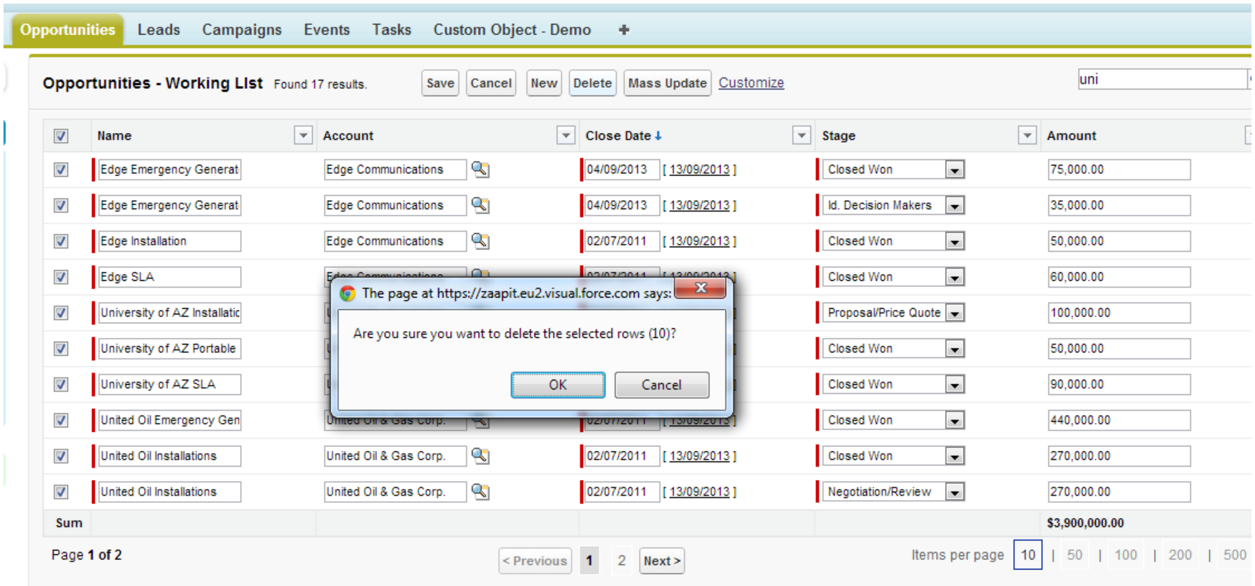


Figure 4 - Mass Delete

Mass Inline Edit

The mass inline feature (Figure 5) enables you to inline edit a large amount of data without double clicking each field/row. Just click on top edit bottom to enter this inline edit mode.

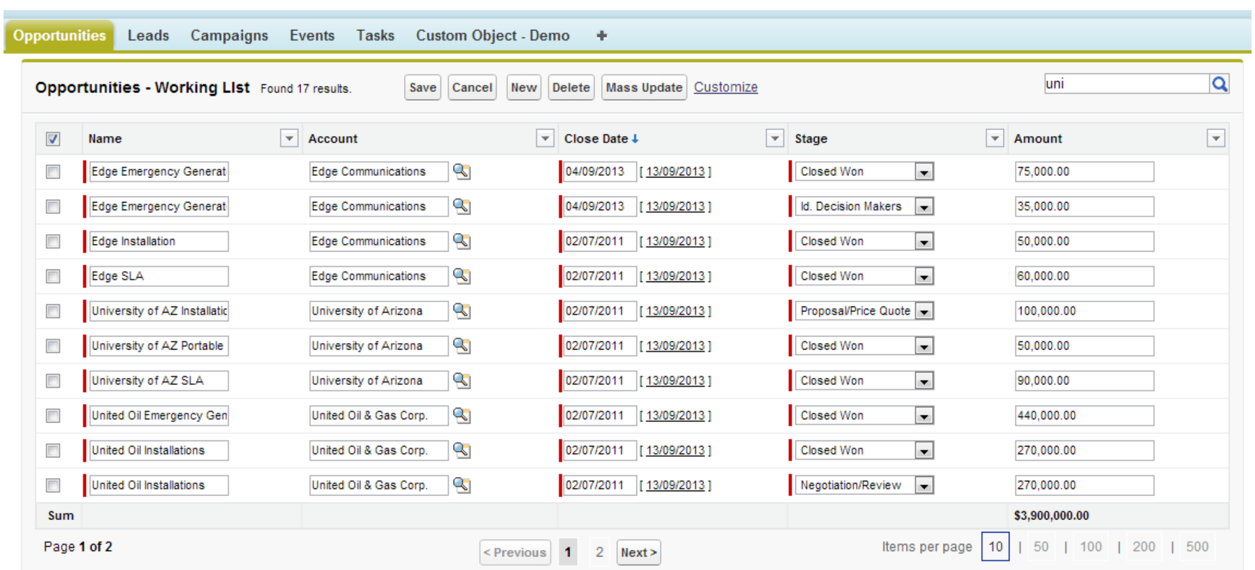


Figure 5 - Mass Inline edit

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.

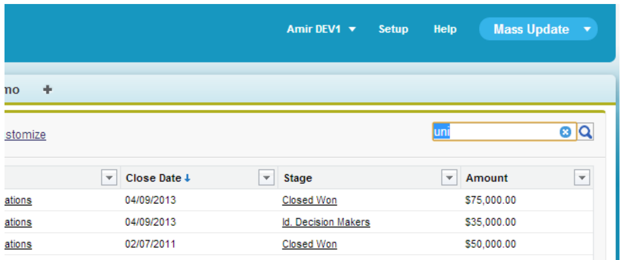


Figure 6 - Smart Search

A Smart Search Example:

The user types "edge close", the search results have "edge" on their name column and "close" on their Stage column.

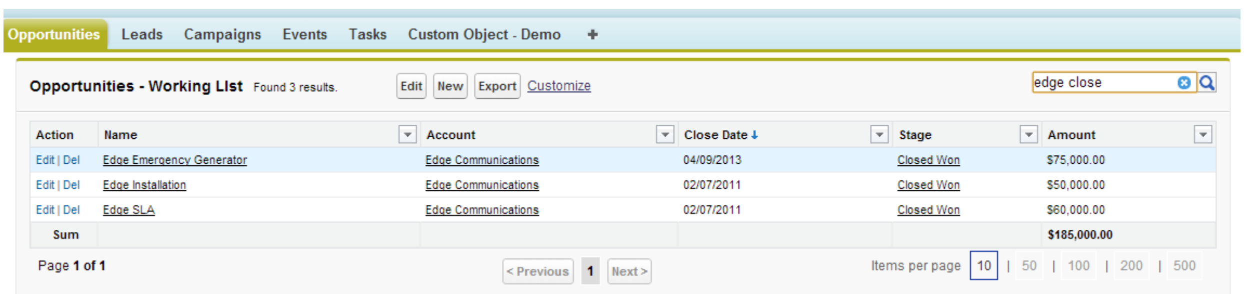


Figure 7 - A Smart Search Example

Smart Column Filters

The Smart Column Filters (Figure 8) enables you to filter a specific table column by choosing / typing the relevant data – "Microsoft Excel 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 Graphs™ feature. For more information, please read the next Instant Graphs™ section.

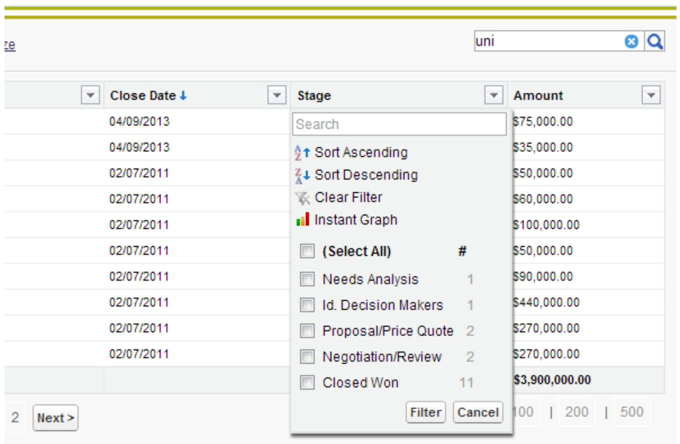


Figure 8 – Smart Column Filter (Text)

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

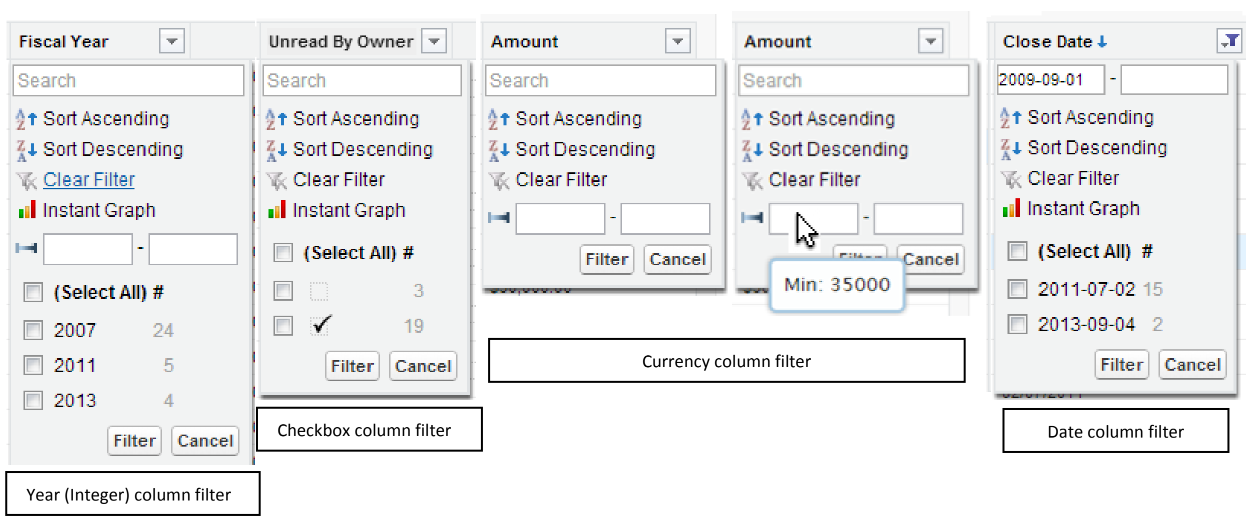


Figure 9 - Different types of Smart Column Filters

Instant Graphs™

The Instant Graph™ 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-Graphs™ link. Our entire collections of Instant Graphs™ are touchable action charts, meaning you can click and filter any Smart-Table 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.

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-Graphs™ 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).

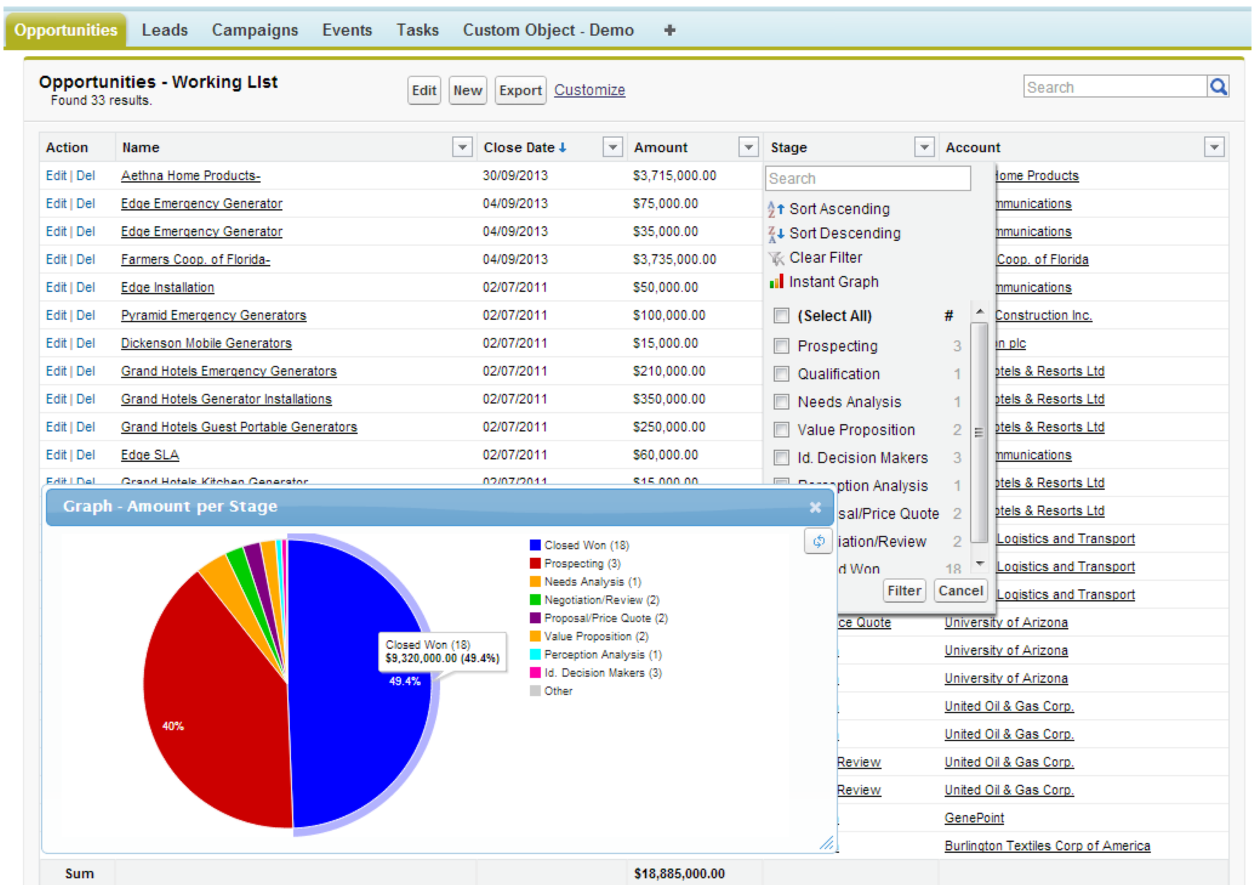
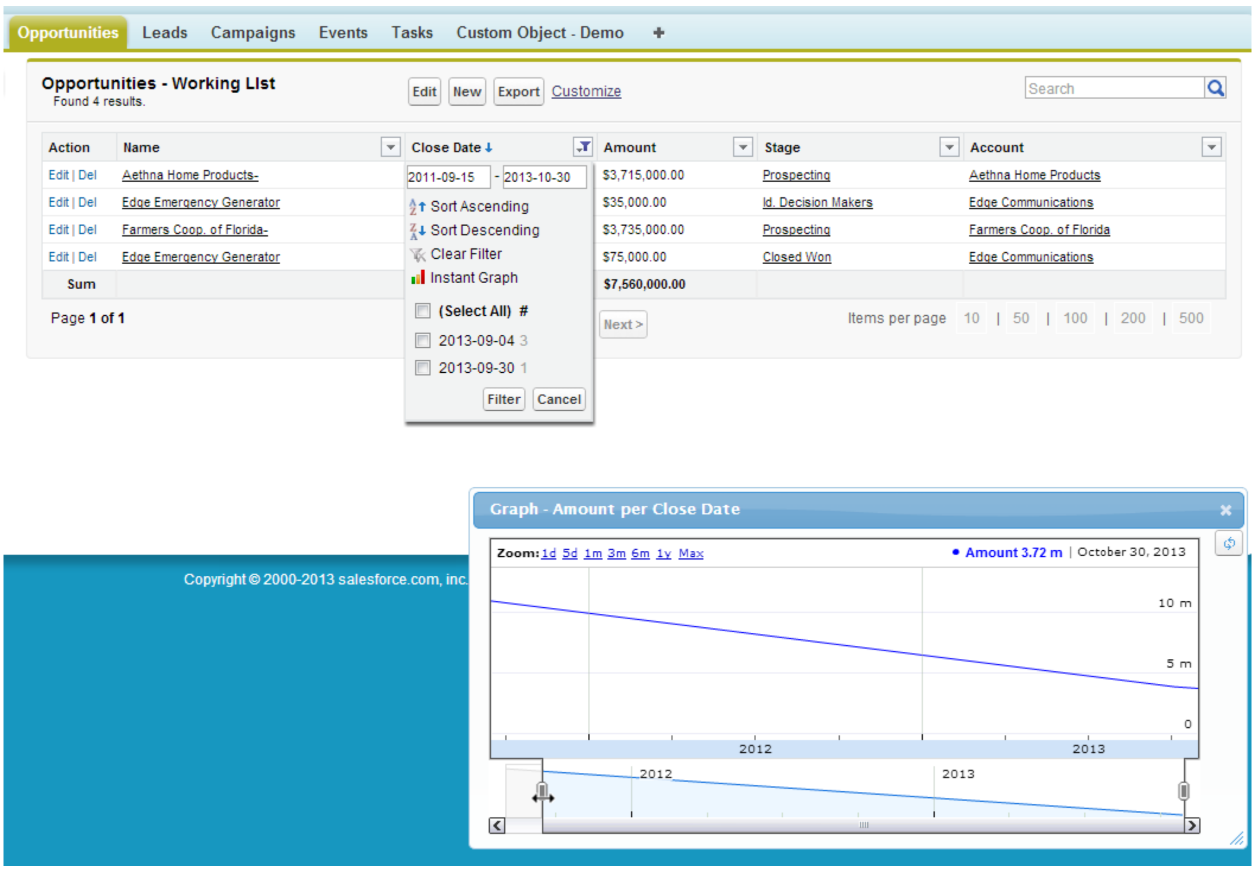


Figure 10 - Instant Graphs®

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

Figure 11 illustrates the date chart in action. In the example below we filtered the Smart-Table using the Date Chart itself and restrict the chosen date range to 15-Sep-2011 - 30-Oct-2013 (also reflected in the



column filter date range).

Figure 11 – Date Chart in action

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

The data export feature (Figure 12) enables you to export any Smart-Table data to PDF, Word, Excel, CSV & XML. Just click on the top export button to enter the export view mode (Figure 13). For your convenience, when exporting to Excel a new automatic filter row is generated for you (Figure 14).

Please note: The data export feature takes into consideration the search & column filters fields i.e. you can choose and export the relevant data for your current business task. As an example on Figure 12, Figure 13 and Figure 14 we exported all the opportunities that match our searching criteria: “uni”.

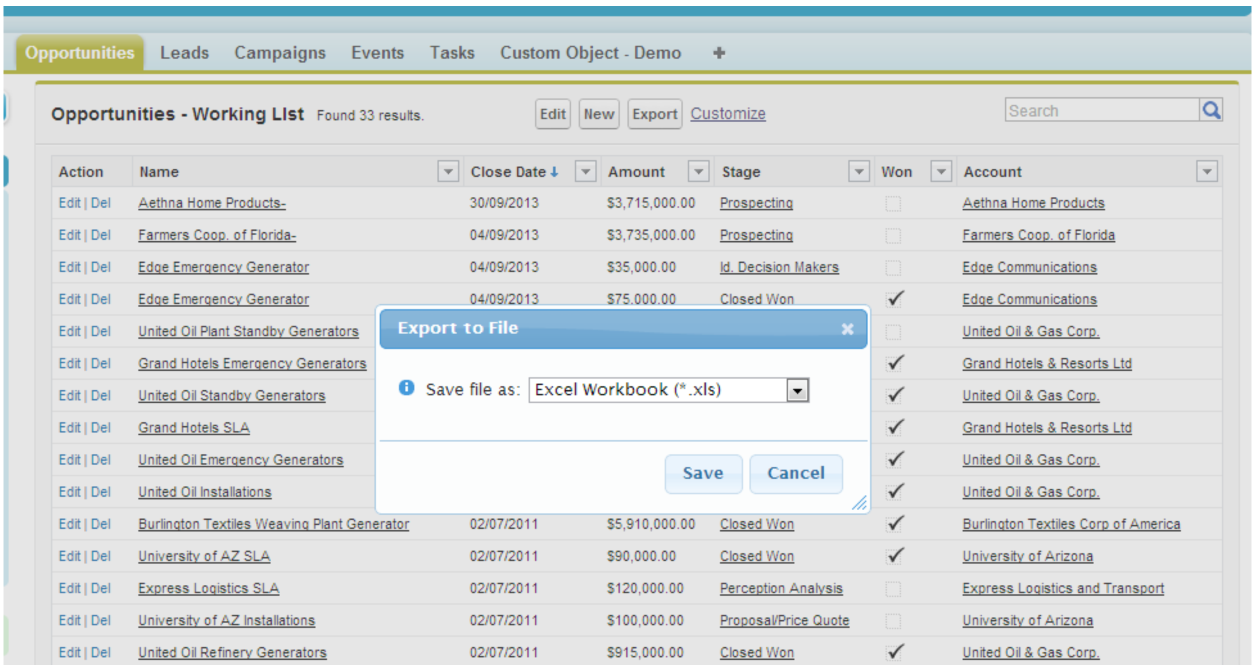


Figure 12 - Data export - PDF, Word, Excel, CSV

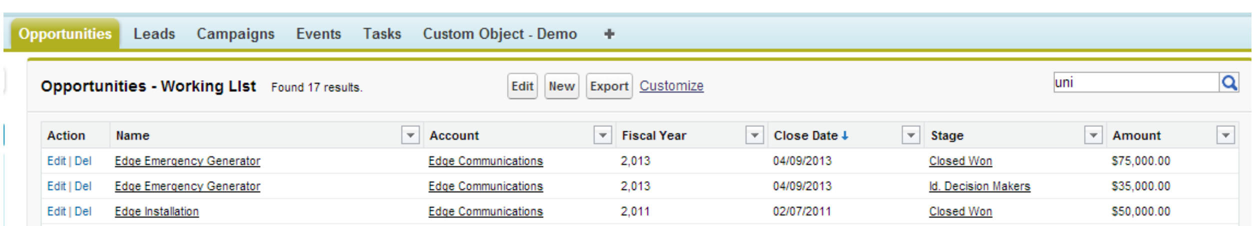


Figure 13 - Data export top button

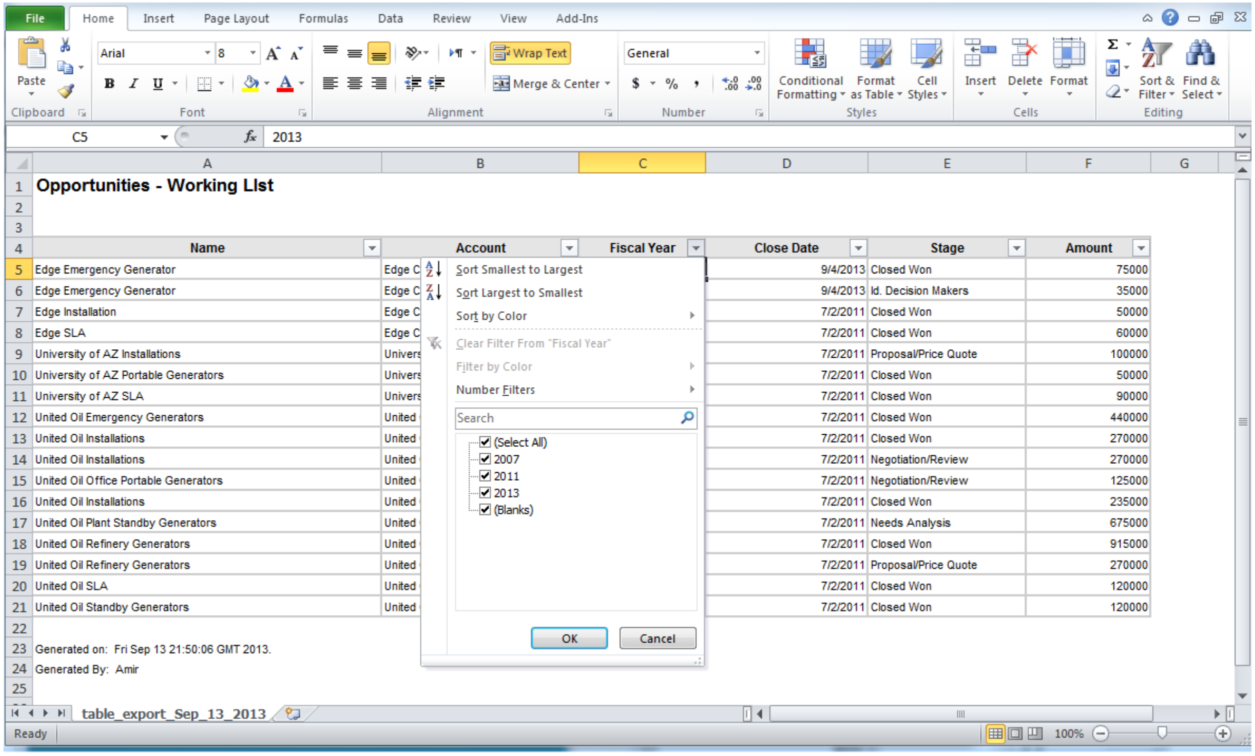


Figure 14 - Export to Excel

Multi Column Sorting

The multi column sorting (Figure 15) is an optional feature that serves as the default sorting for a particular Smart-Table. It is being controlled from the top Smart-Table customized link. This feature compliments the regular point & click column sorting.

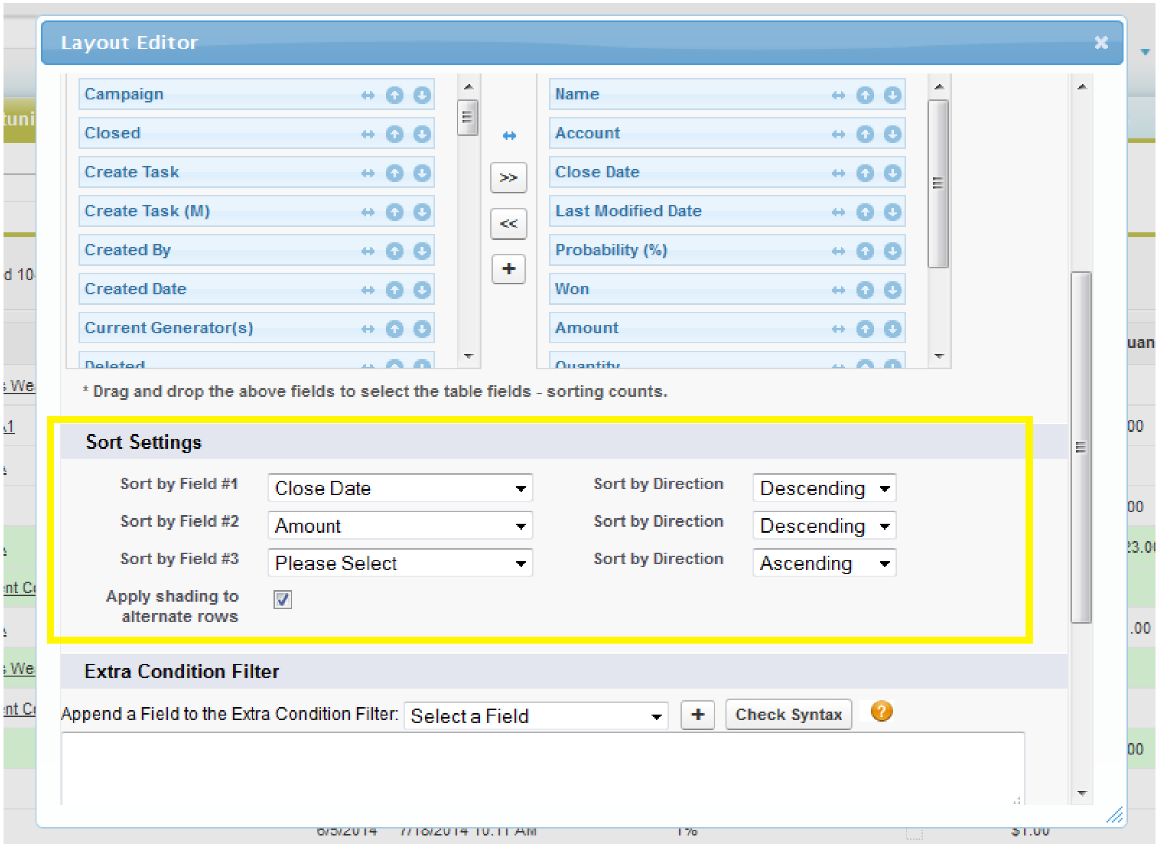


Figure 15 - Multi Column Sorting

Layout Editor

The Layout Editor (Figure 16) enables any users / administrator to control the Smart-Table object, columns, content, buttons and general behavior. Each Smart-Table has its own Customize-View settings; those settings are shared among all the users. To restrict a particular user / all the users from changing those settings read the “Restricting Edit Layout Link Access” section.

In the rest of this section we will review the different features available on the Customize-View page.

Basic Settings

Filling-in the basic settings section (Figure 16):

- Name – the custom setting page name
- Page Title - The title of the Smart-Table.
- Table for Object – the smart-Table will show the lines of the selected object (Native / Custom object).

Columns / Fields Selection

Set up the field selection section by dragging the left side fields and dropping them on the right side in the desired order (Figure 16).

- Available Fields – The chosen Object fields (Table for Object).
- Selected Fields – the fields that were dragged from the left Available-fields component.
- Advanced field selection ([+] button)
- Sort Setting – The default table sorting (see Multi Column Sorting)

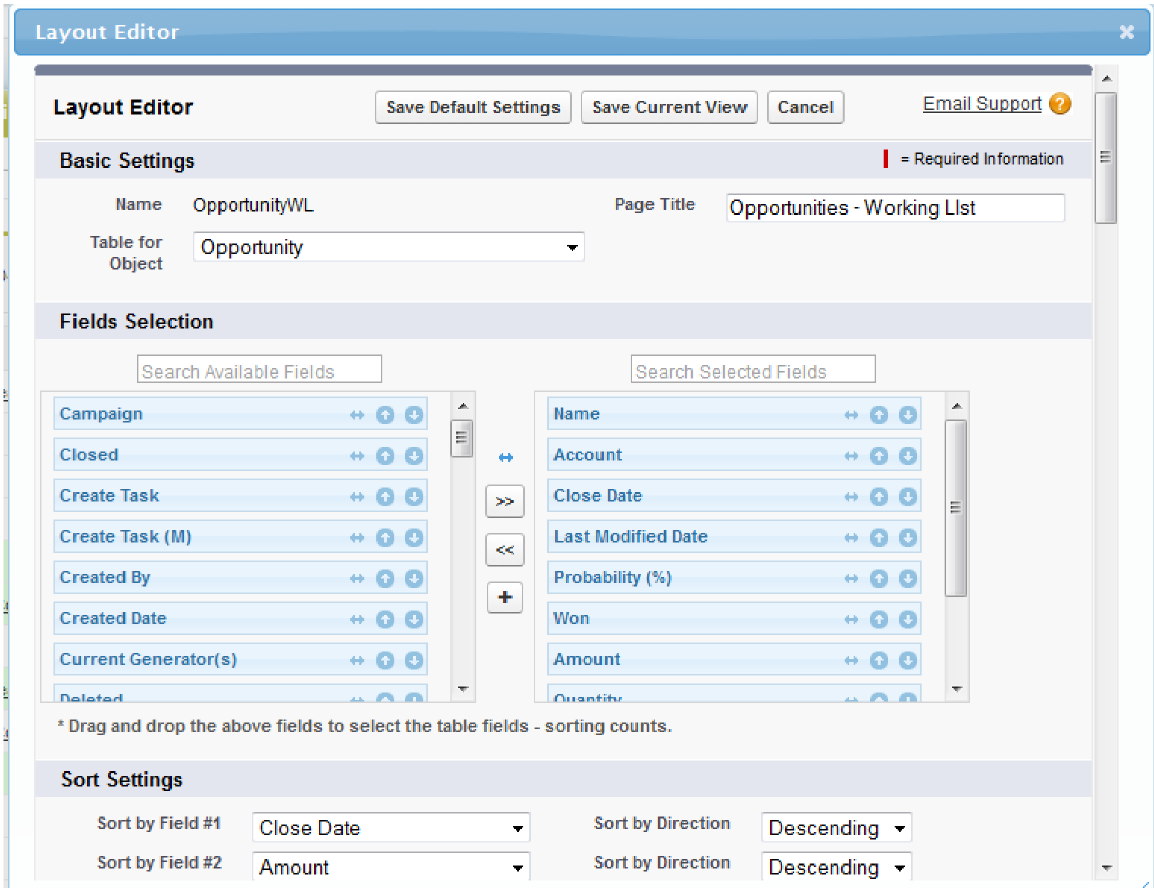


Figure 16 – Layout Editor

Advanced Columns/Fields Selection

Add a regular / lookup-related field with the Advance-Add-a-Column option by clicking the [+] button located between the Available-Fields section and the Selected-Fields section (Figure 16). After clicking the [+] button you will be able to add any filed / far-connected field with a custom column title, custom Ajax tooltip page and a custom link (Figure 17). Stand on the orange question mark in the small window for more details.

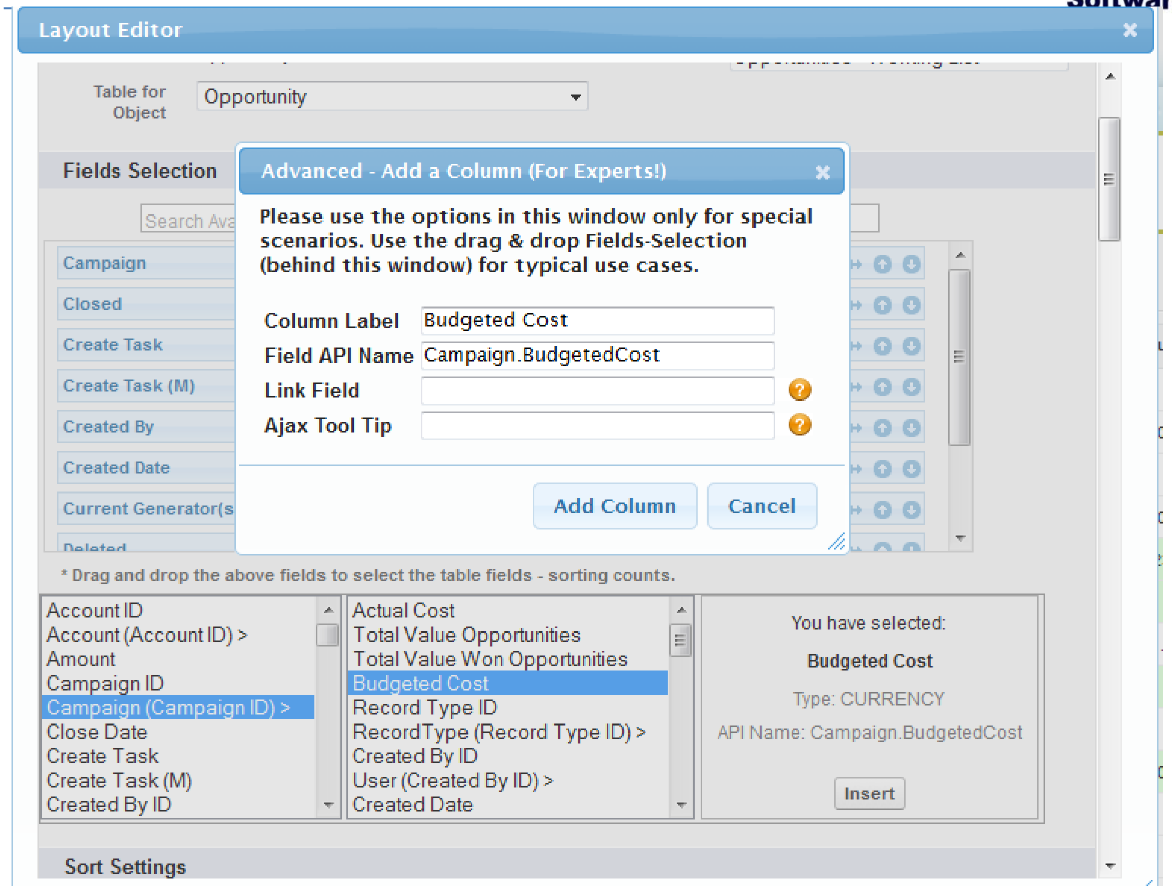


Figure 17 - Advanced field selection

Custom Buttons

Create as many custom buttons as you need – on each save the system will offer you 3 more buttons (Figure 18).

Button types:

- Link / JavaScript button – Enter the name of the button on the left input field and the link or 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) see “Demo Button 2” and “Demo Button 3” on (Figure 18).
- Salesforce custom buttons – Create a regular Salesforce JavaScript button for the current object and put its API name in the left button name field see for example the “button_demo1” button on Figure 18 and its Salesforce definition on Figure 19.
  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.

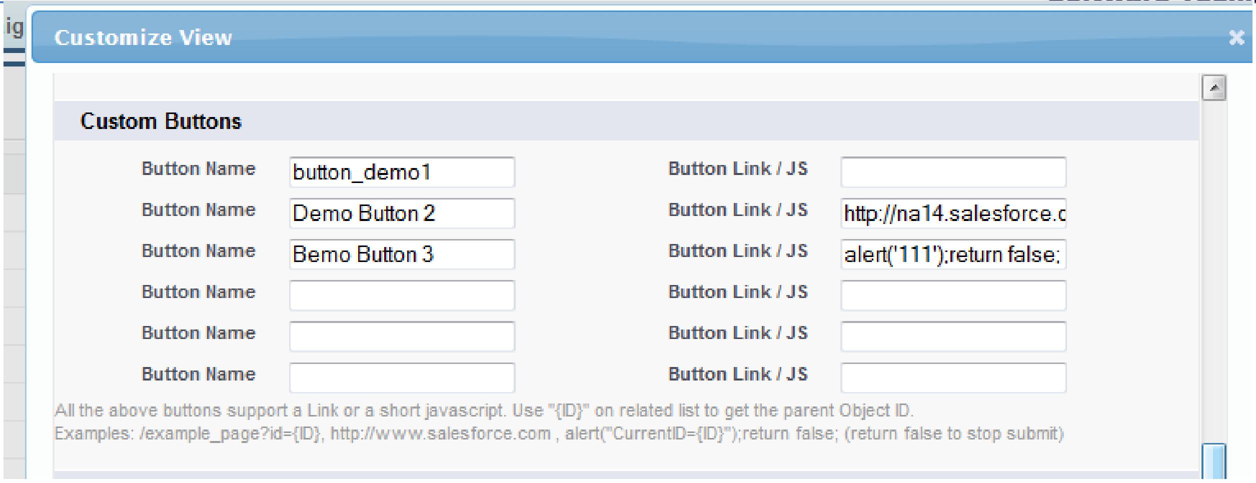


Figure 18 - Custom Buttons

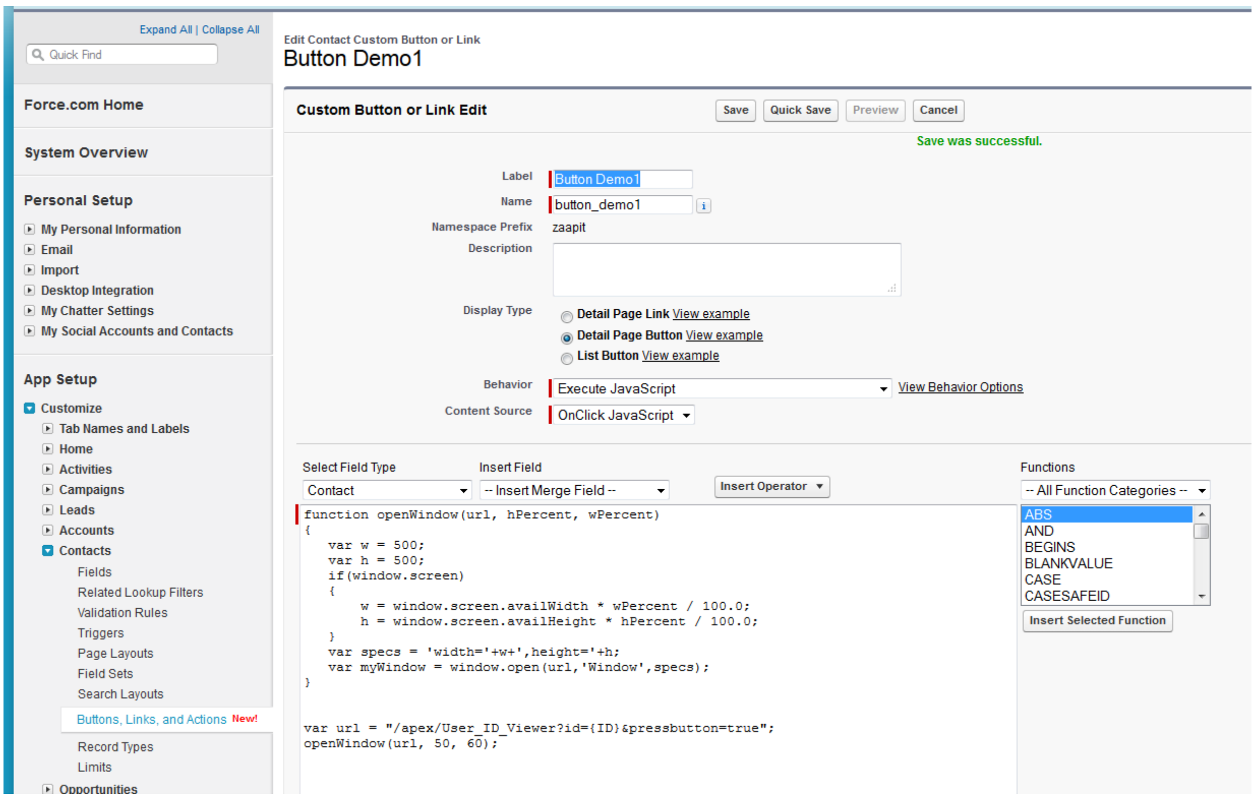


Figure 19 - Custom Demo Button

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 buttons and using the below 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&scontrolCaching=1"+checkedIds;//{ID} is account id in this case
}
return false;
```

```
//enable multiselect for several pages
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 to fit your company needs by using the below advance settings (Figure 20):

- Rows per page - control the number of displayed rows in one page, starting at 10 up to 5000.
- Table in small font – when displaying a large amount of data in one page you might what to reduce the font size (to 8pt).
- Always show checkboxes – In read-mode the checkboxes are hidden by default, when creating a custom JavaScript button you can use the selected rows in your code.
- Show mass update & inline edit button – Removes the top Mass-Update and Edit buttons.
- Show Export (xls,doc,pdf,csv) – You can remove the top export button 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) when there are no relevant summary fields that you want to expose.
- Exclude fields from total row – 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.

- Amount field for Graphs – 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™ presented in Figure 10.

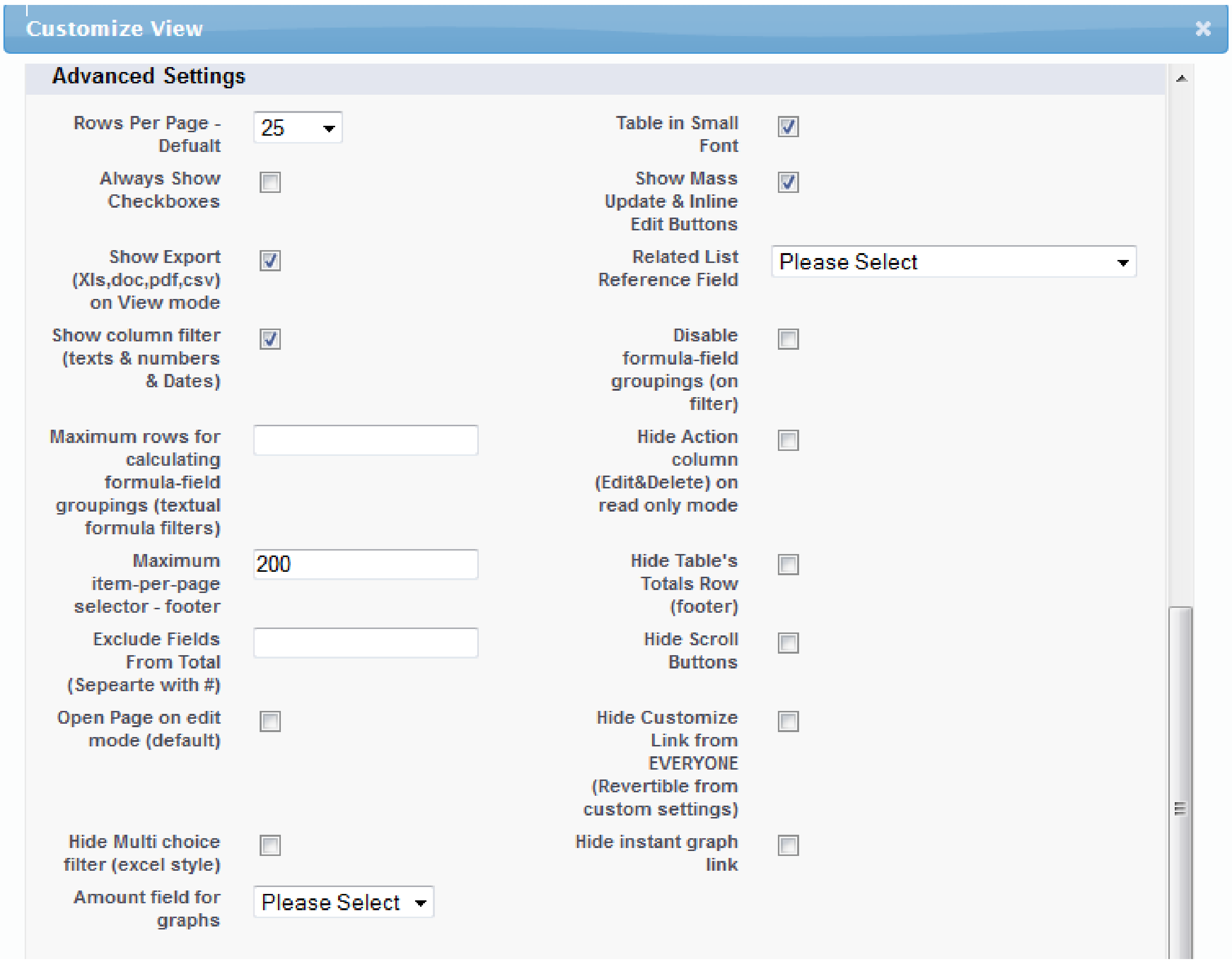


Figure 20 - Advanced Settings

Extra Condition Filter (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.

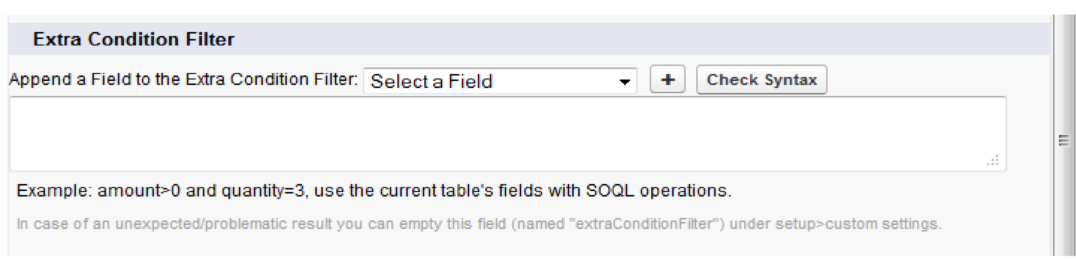


Figure 21 - Extra Condition Filter

Restricting Edit Layout Link Access

To restrict / grant access a particular user / all the users from changing the “Edit Layout” settings please choose from one of the below options. (To enable the edit for none admin users please show the “Edit Layout” link for the user by using the below options and enable the “setup>user-profile>Customize Application” option/checkbox):

- To hide / give access the Edit-Layout link for a specific user for all the Smart-Tables at once, just uncheck the “Enable ZaapIT's Layout Editor” for each user: Go to setup>personal information>edit layout, add the “Enable ZaapIT's Layout Editor” field to your layout (Figure 22) and uncheck it for the relevant users (Figure 23). For none-admin users you may want to tick the “Enable ZaapIT's View Editor” instead of “Enable ZaapIT's Layout Editor” which restricts the to the advanced settings section and the user won’t be able to change the table-for-object field (change the basic table-object)

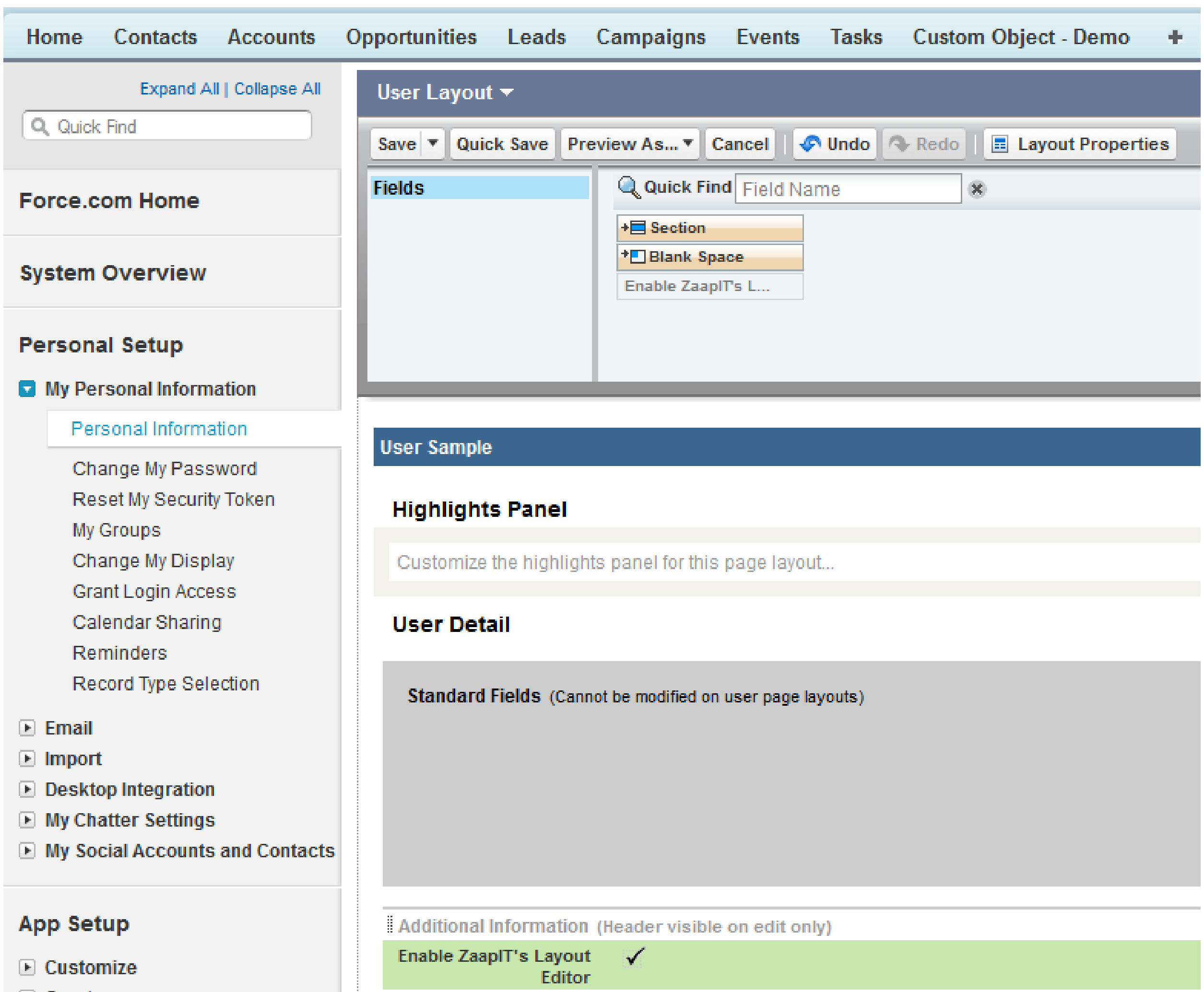


Figure 22 - Personal Information Layout

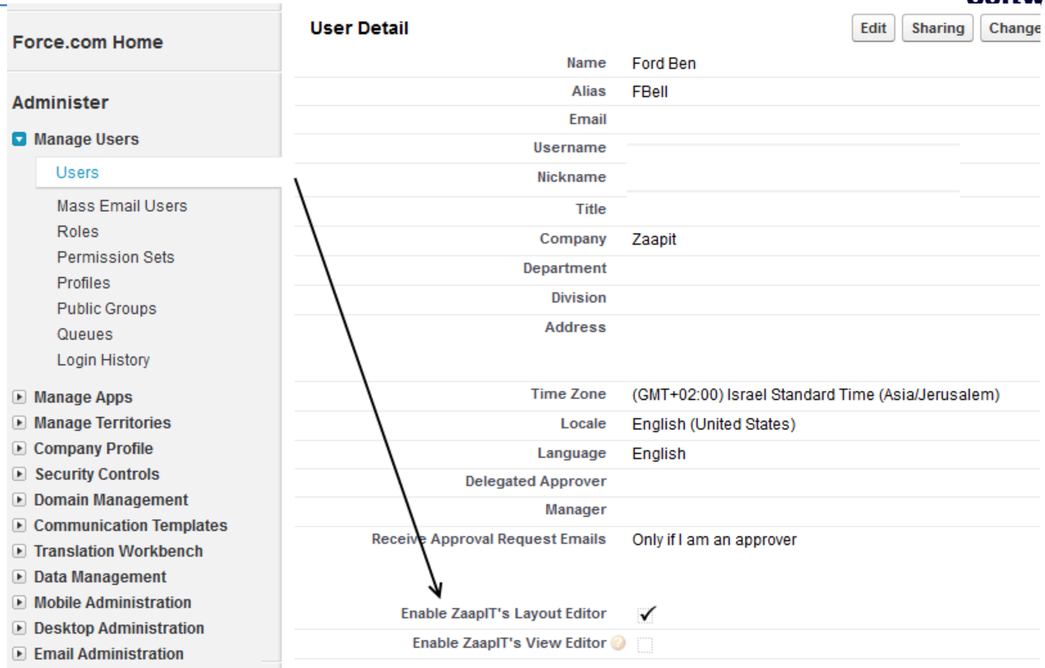


Figure 23 - Personal Information

- To hide the Edit Layout link from everyone – check the "hide Customize link checkbox" (Figure 24) to revert this option please go to setup>custom settings>Zaapit Smart Tables>"table name" and uncheck that checkbox .

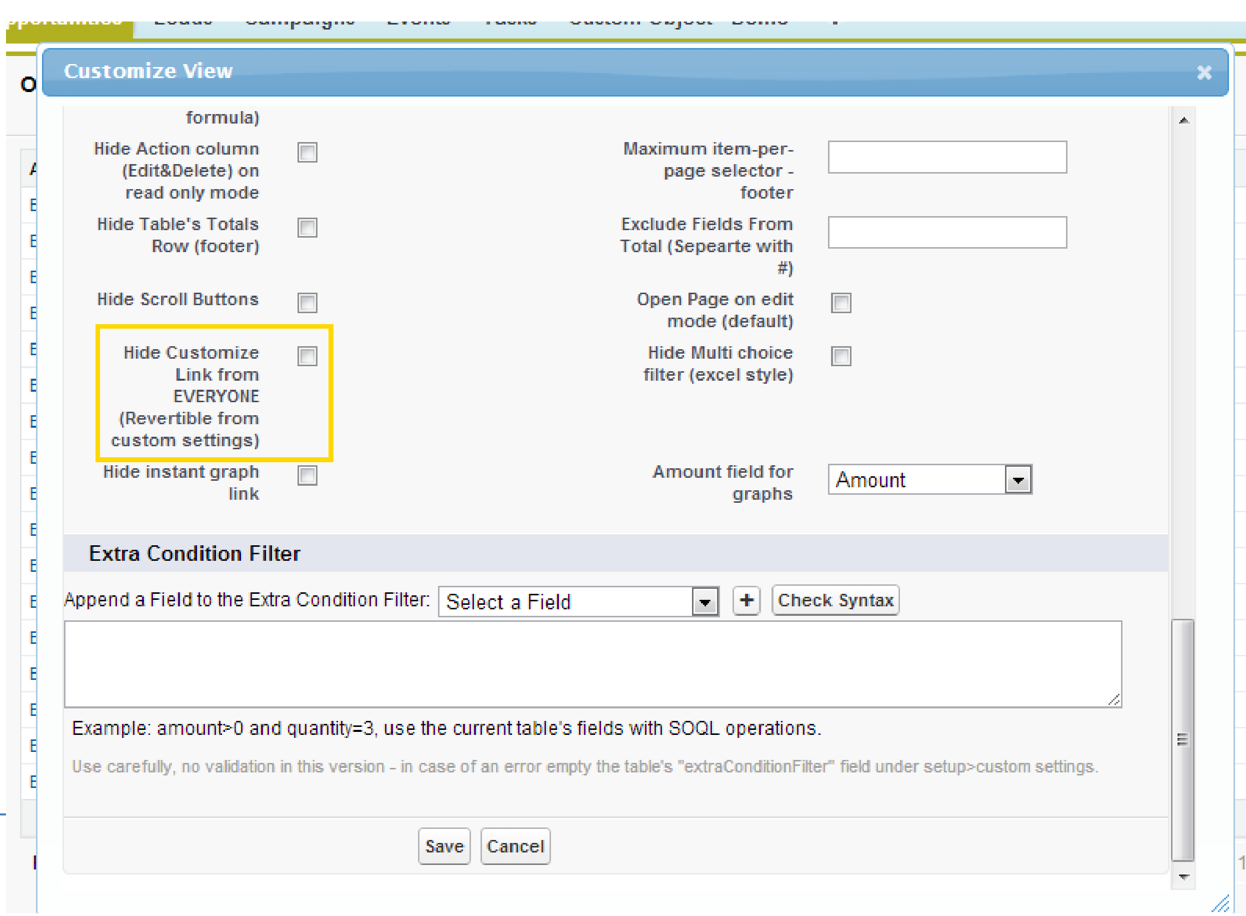


Figure 24 - Hide customize link from everyone

Placing a Smart-Table as a regular Tab

To place a Smart-Table as a regular tab please go to setup>create>tab and press on the new button on the “Visualforce Tab” section (Figure 25,Figure 26). 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 27). Tip: WL is the abbreviation for “Working list”, RL is the abbreviation for “related list”.

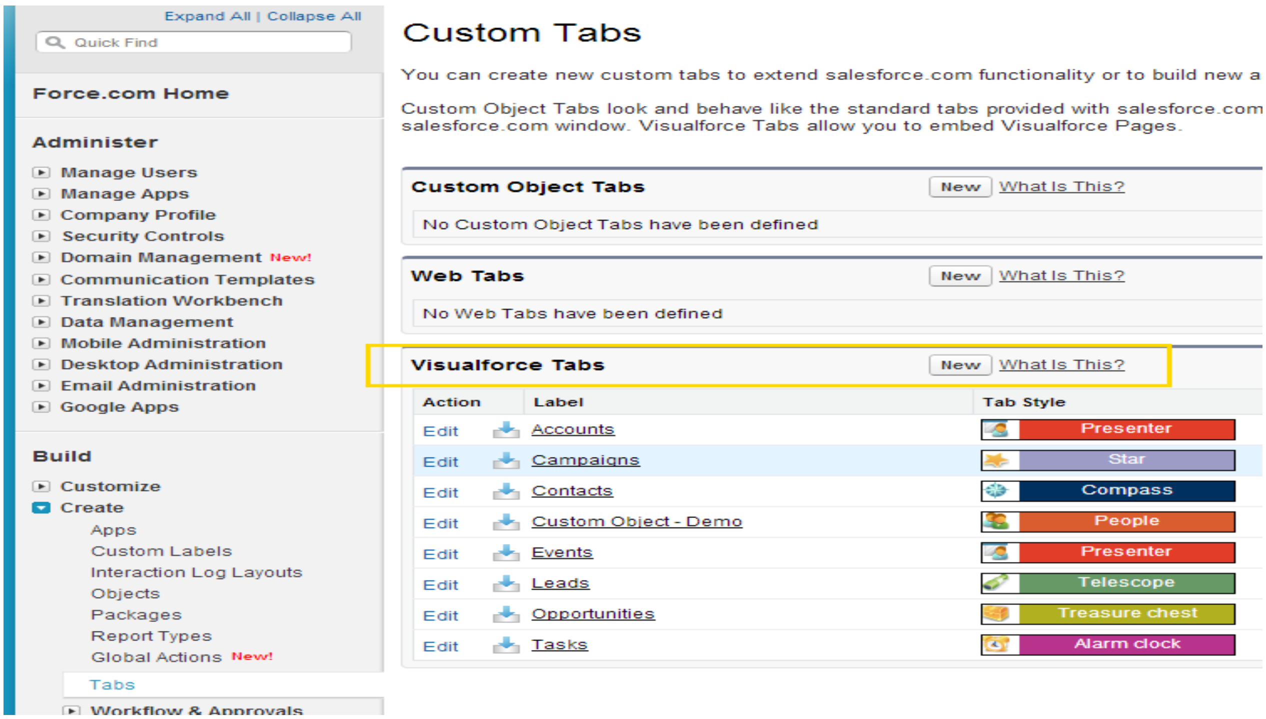


Figure 26 - Creating a new tab

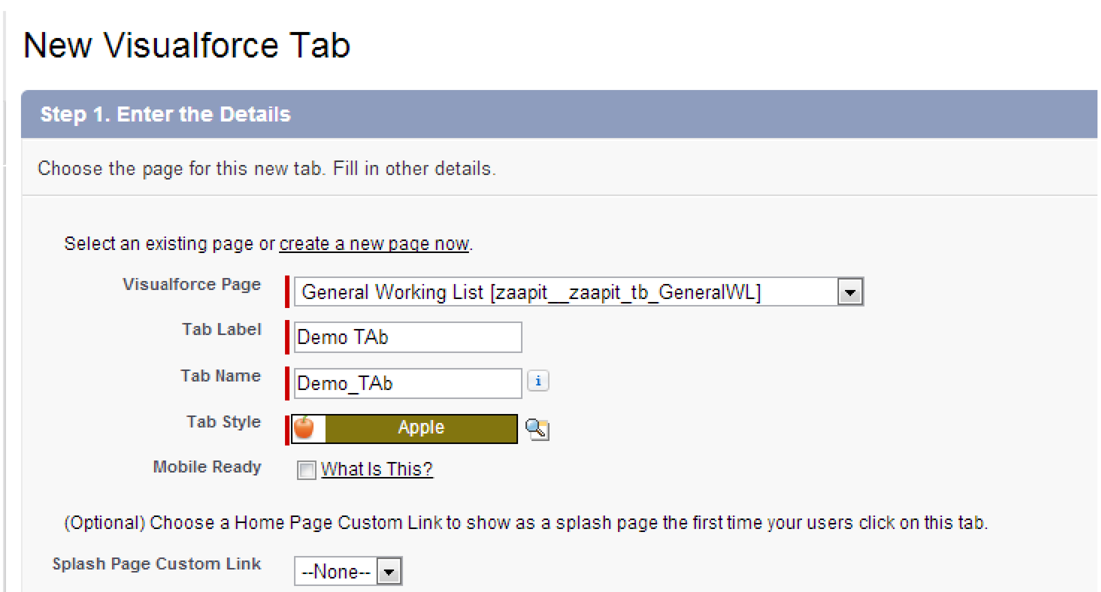


Figure 25 - Creating a new tab Step 2

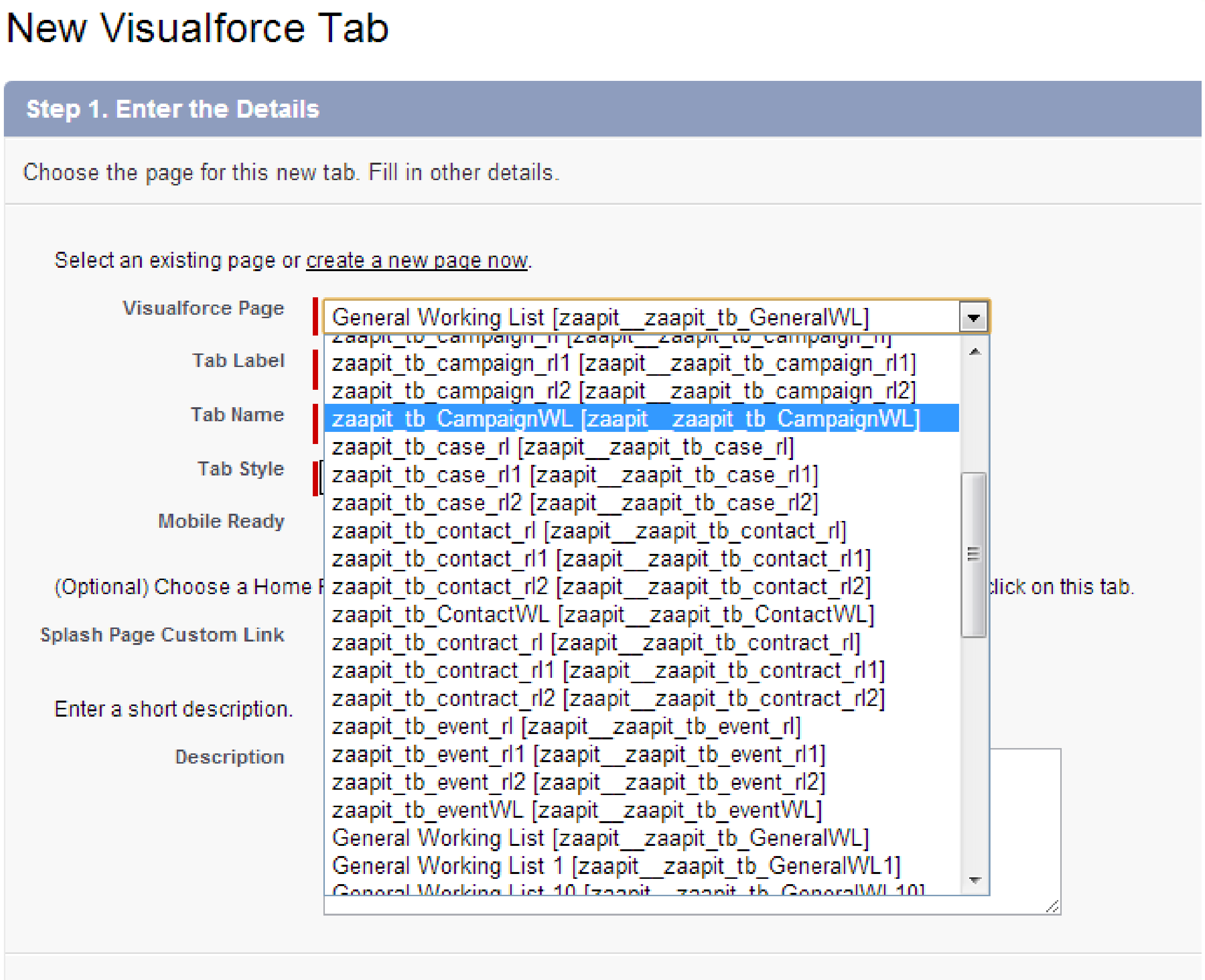


Figure 27 - Creating a new tab for Salesforce-native objects

Creating/Embedding a Smart-Table in your code (beta)

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 27).

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:

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

A related-sub-tabs example:

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

<apex:page **standardController="opportunity"**>

<apex:include pageName="zaapit__zaapit_**tab**_general1"/>

</apex:page>

A related list Example:

<apex:page **standardController="opportunity"**>

<apex:include pageName="zaapit__zaapit_tb_GeneralWL"/>

</apex:page>

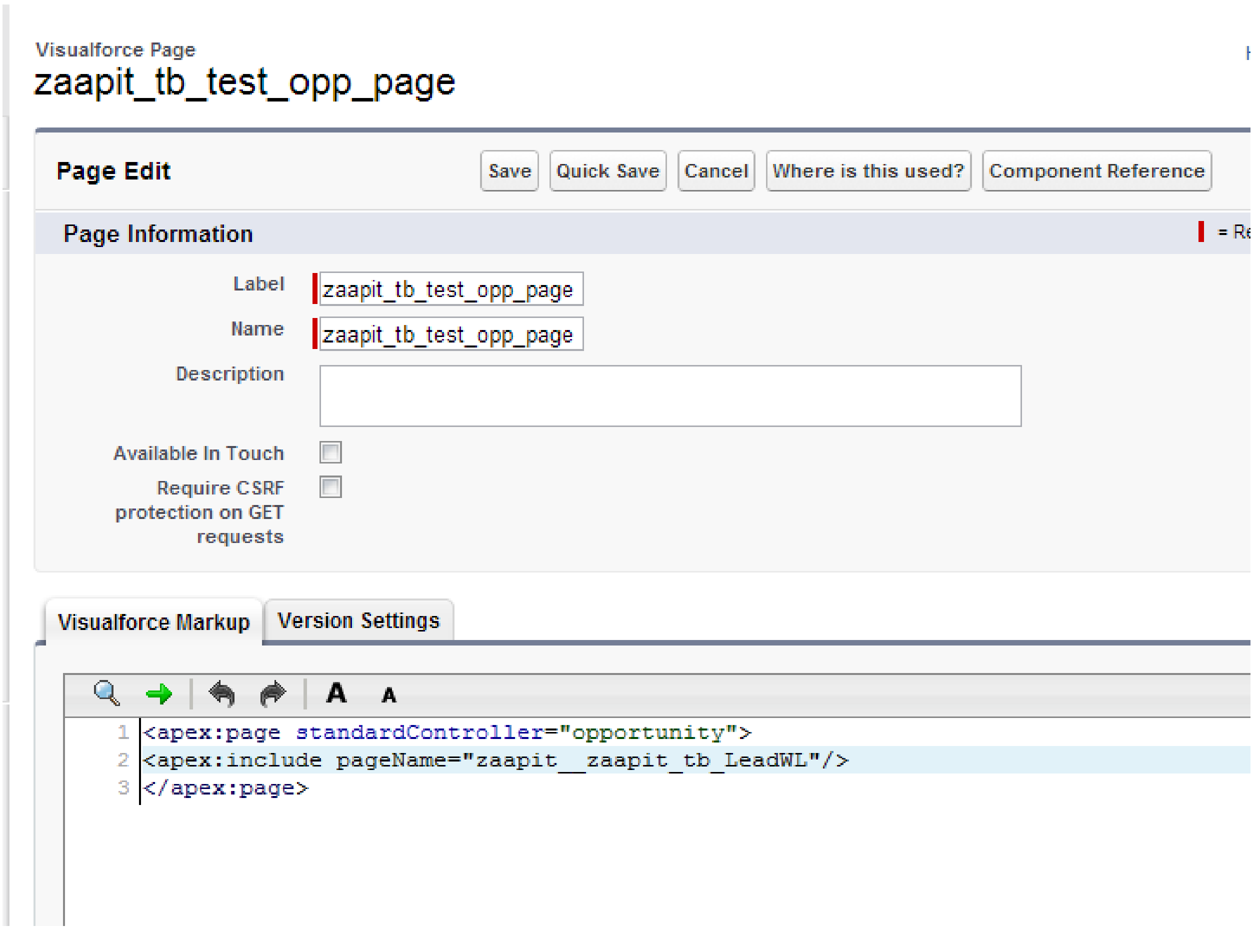


Figure 28 - Creating a new Visualforce Page

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>
```

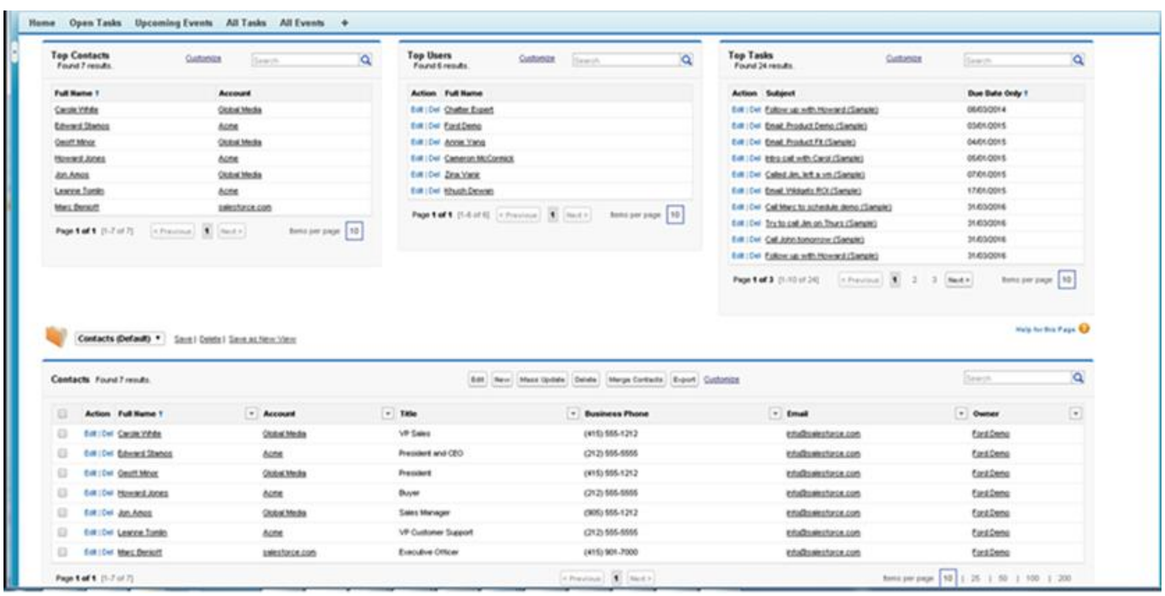


Figure 29 - Multi Tables in one page Example (4 Smart Tables in 1 page)

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>
```

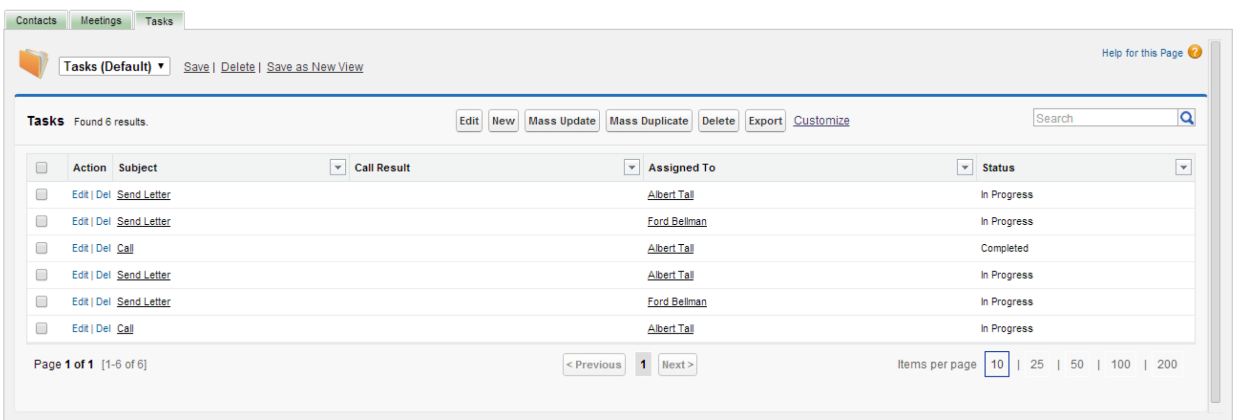


Figure 30 - Smart Tables in apex:tab example

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 31).

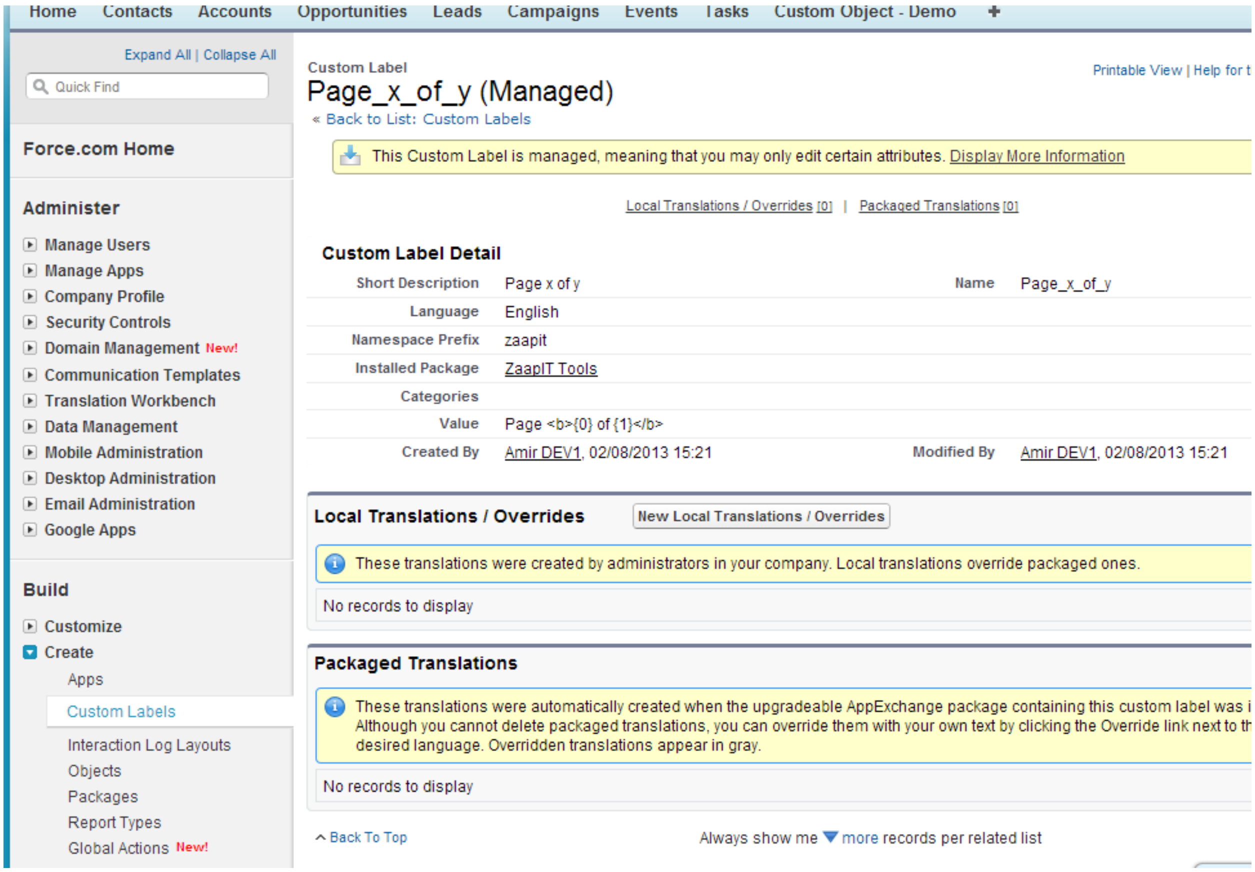


Figure 31 - Multi Language support

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 32 illustrate how to override the Mass-Smart-Update tab names.

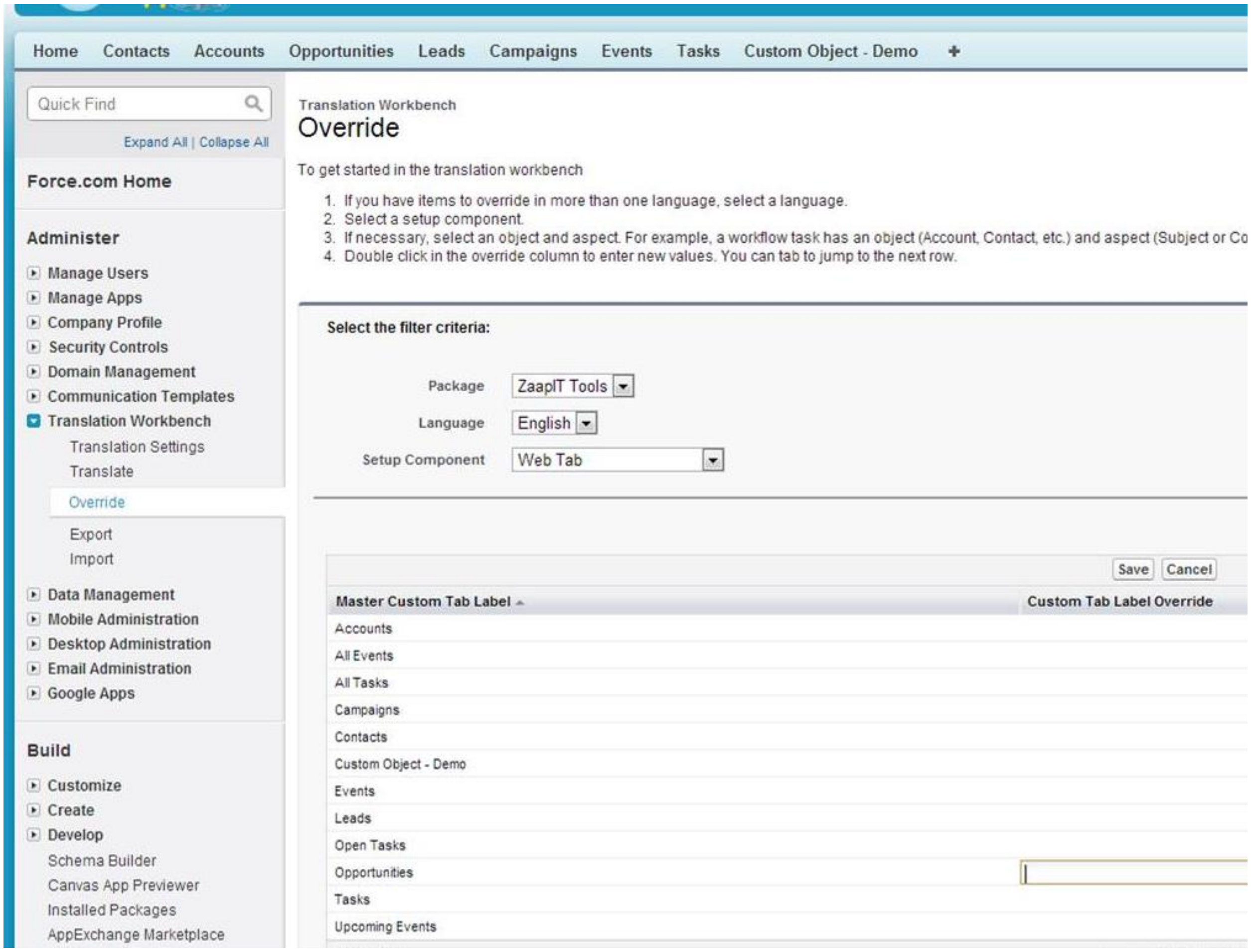


Figure 32 - Override Existing Texts

Smart-Mass-Update™

The Smart-Mass-Update application for Salesforce is a native Salesforce hosted application located on the Salesforce application dropdown (Figure 33). 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
- Custom Object - Demo

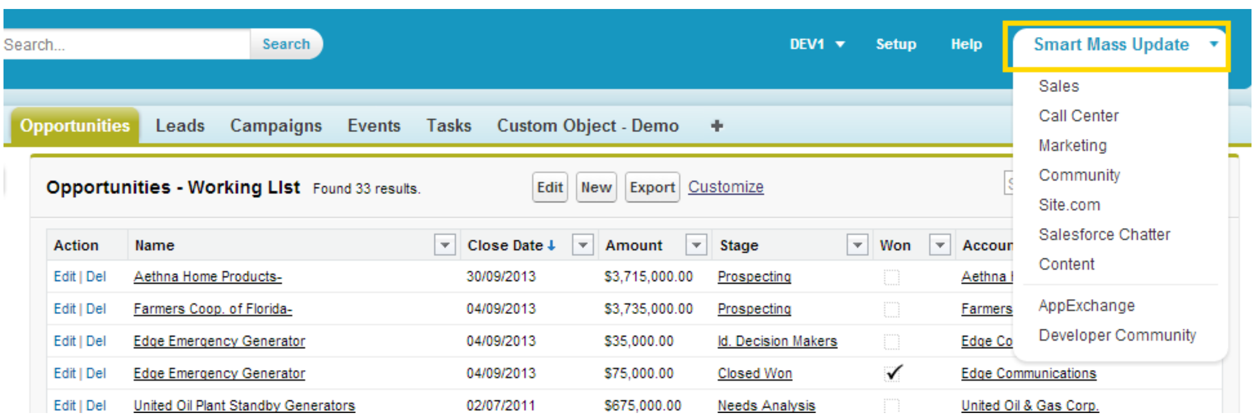


Figure 33 - Application Dropdown

Smart-Activity-Manager™

The Smart-Activity-Manager application for Salesforce is a native Salesforce hosted application located on the Salesforce application dropdown (Figure 34). 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 Graphs™
- 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.

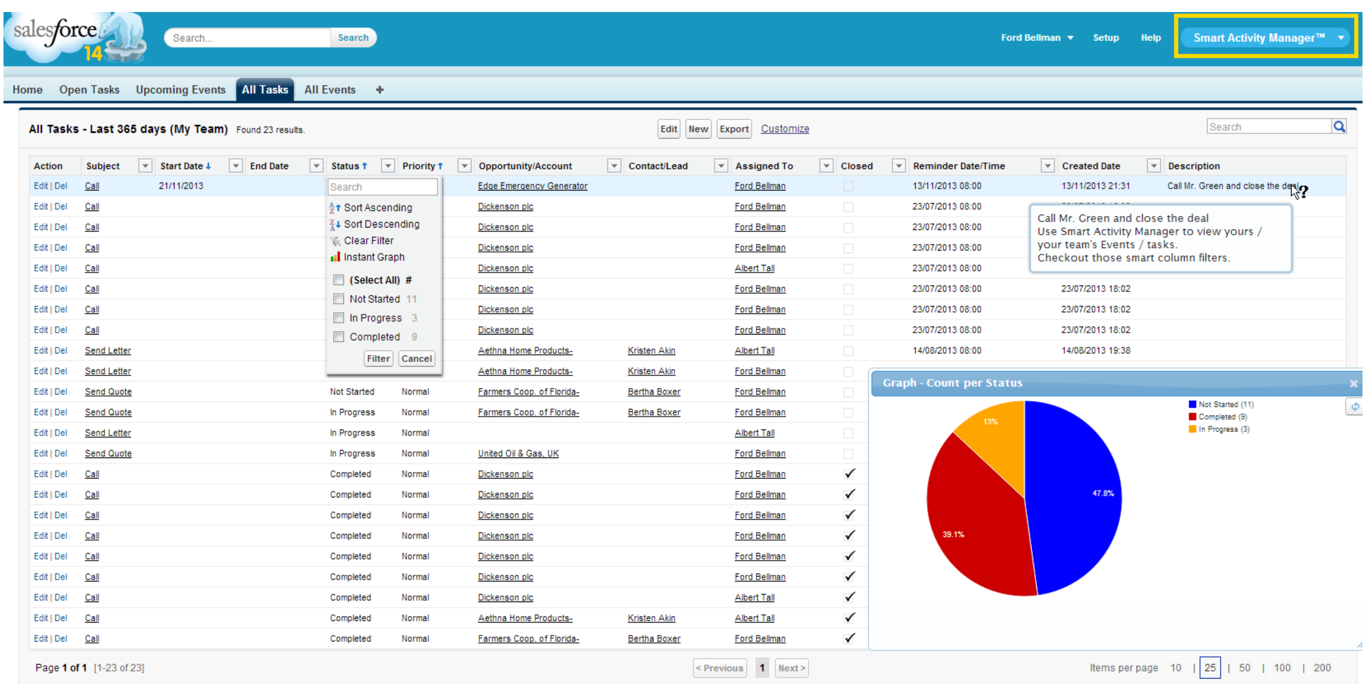


Figure 34 - Smart Activity Manager

DEDUP-Manager™

The DEDUP-Manager app for Salesforce is a native Salesforce app located on the Salesforce application dropdown (Figure 35). 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

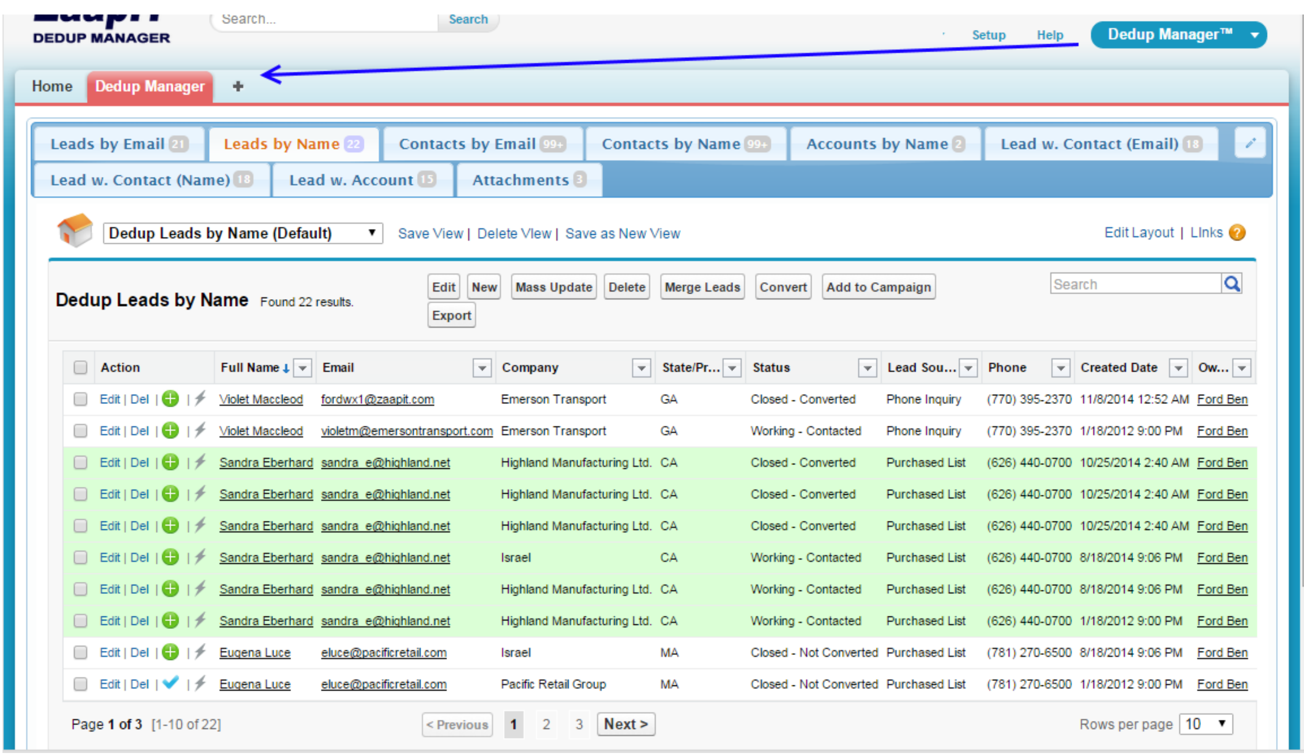


Figure 35 - DEDUP-Manager™

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 36. 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 37). To add a new visualforce-tab please read "Placing a Smart-Table as a regular Tab" section.

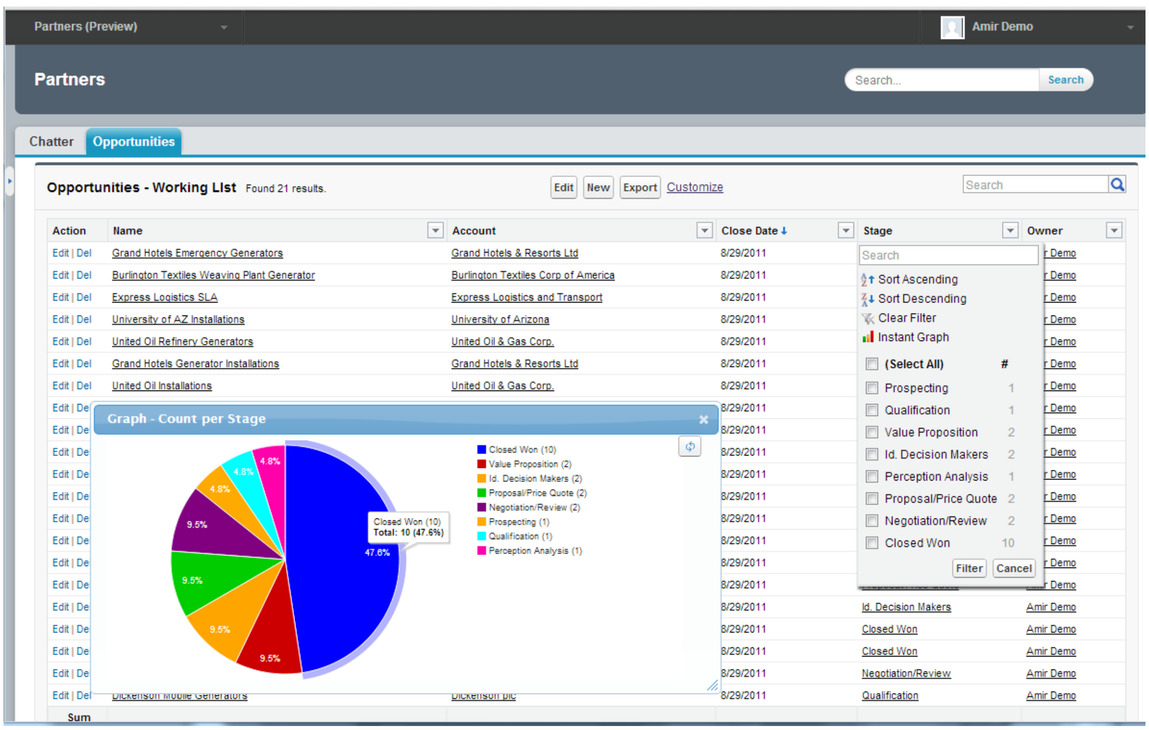


Figure 36 - Community Grids

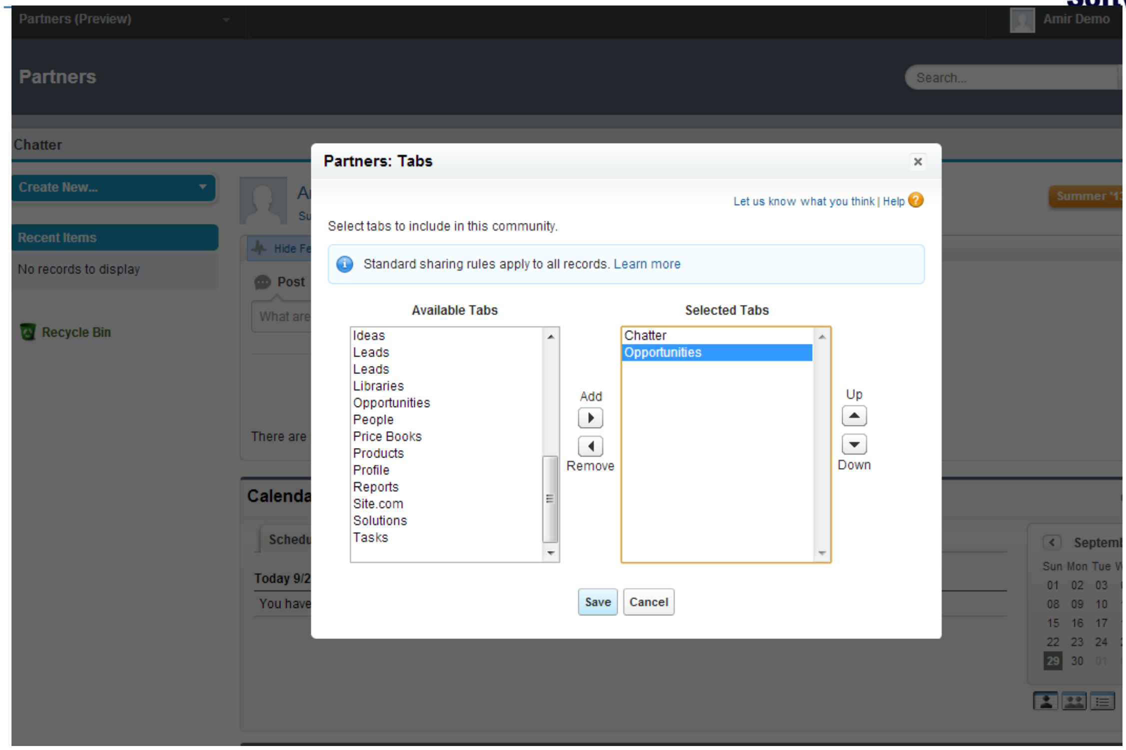


Figure 37 - Community Grids Tabs

Smart-Related-Grids

The smart Related Grids are Smart-Tables that can function as a related list. They have the same ability and functionality as the regular Smart-Tables – please refer to the Smart-Tables section for more information about the Smart-Related-Grids abilities and functionality. Next is the explanation on how to setup a smart related grid.

Setting up your first Smart-Related-Grids / Sub Tabs

Step 1 – Override the object view link (to enable auto-resize of related list)

Go to setup> object name (e.g. opportunity) > buttons, links & actions and edit the view link (Figure 38).

Override the with a Visualforce page named "[Object name] view"(Figure 38) – if you can't find this Visualforce page you will need to create it – we placed the instructions for that after Figure 38.

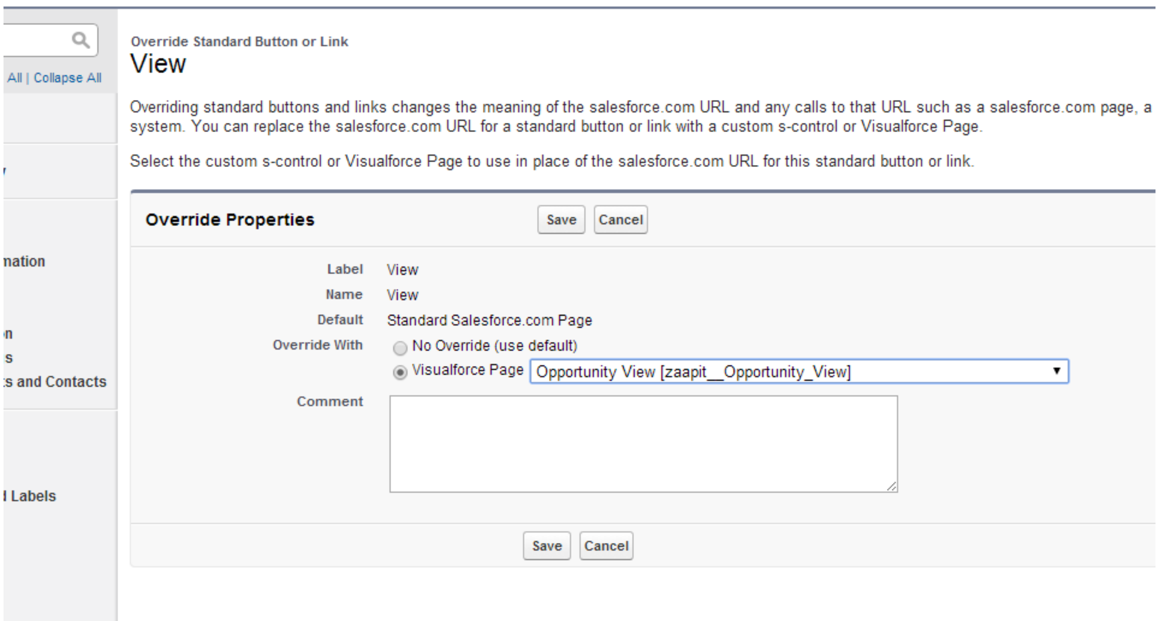


Figure 38 - Show Custom Sidebar Components on All Pages

If you can't find a Visualforce page named "[Object name] view" you will need to create a new visual force page. Use the following code as an example – replace the 2 yellow parts with the object API-name (contact us if you need help).

<u>Code Example for a new page (just copy & paste):</u>

```
<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}
div.bPageBlock.brandSecondaryBrd.bDetailBlock.secondaryPalette  .pbBottomButtons{margin-top:30px} </style><zaapit:resize_include />
</apex:page>
```

Step 2 – Add a new Smart-Related-Grid to your main object layout.

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

1. Go to one of your setup>object (e.g. opportunities) >layouts and click the “edit layout” next to the page the chosen layout (Figure 39).
2. Create a new Visualforce page section (Figure 40).
3. Uncheck the “edit page” & detail page checkboxes and choose 1 column layout (Figure 41).
4. Place the smart table “`zaapit_tb_opportunity_rl`” inside the newly created section (Figure 42) – if you can’t find the page please create one by following the steps on the bottom of page 25, 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 43.

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

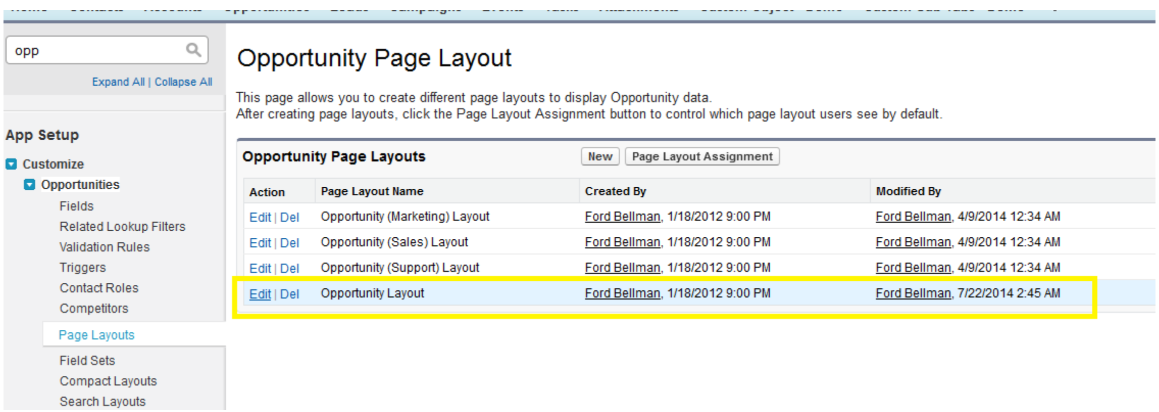


Figure 39 - Edit Layout

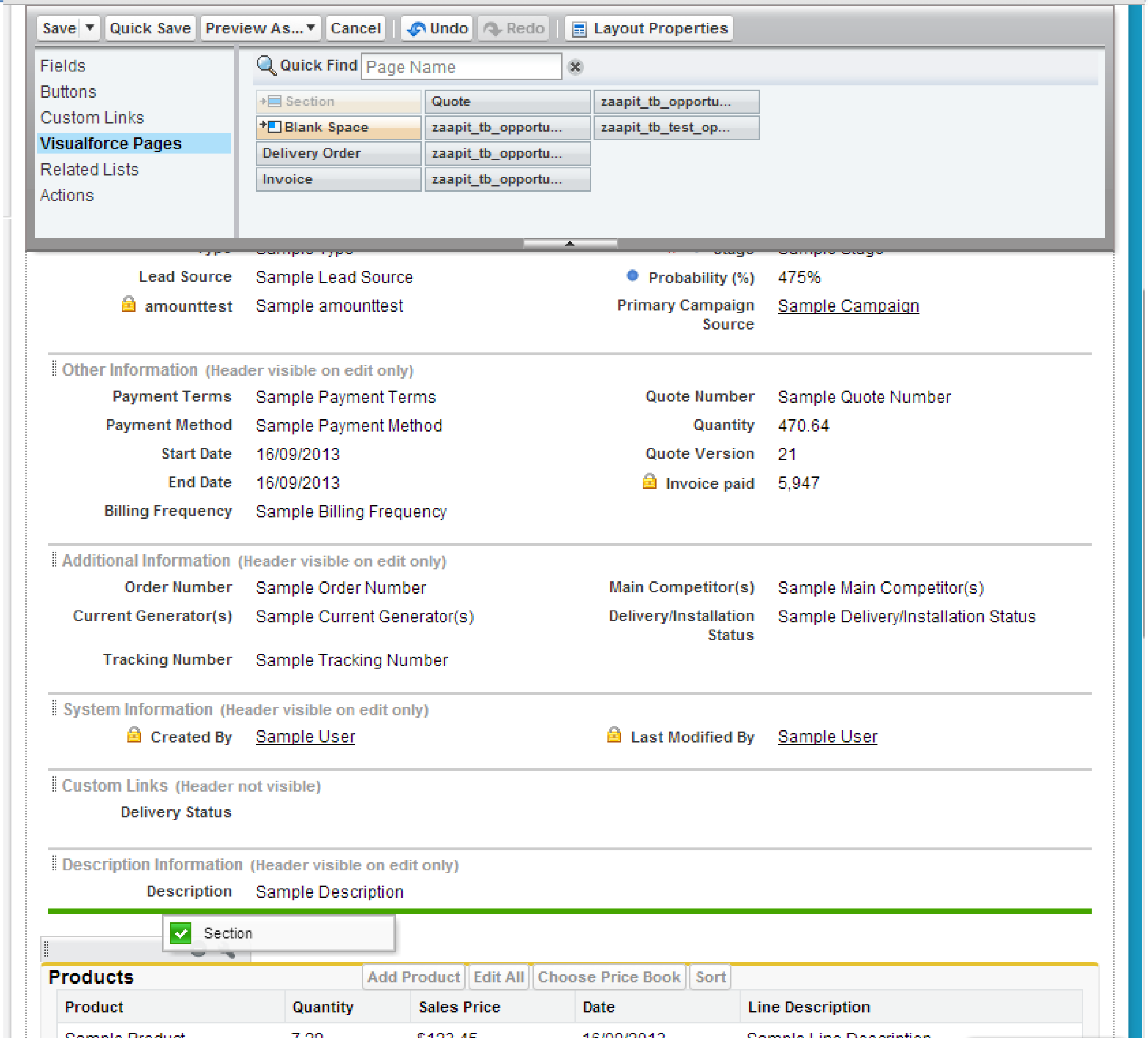


Figure 40 - Create a new Visualforce page section

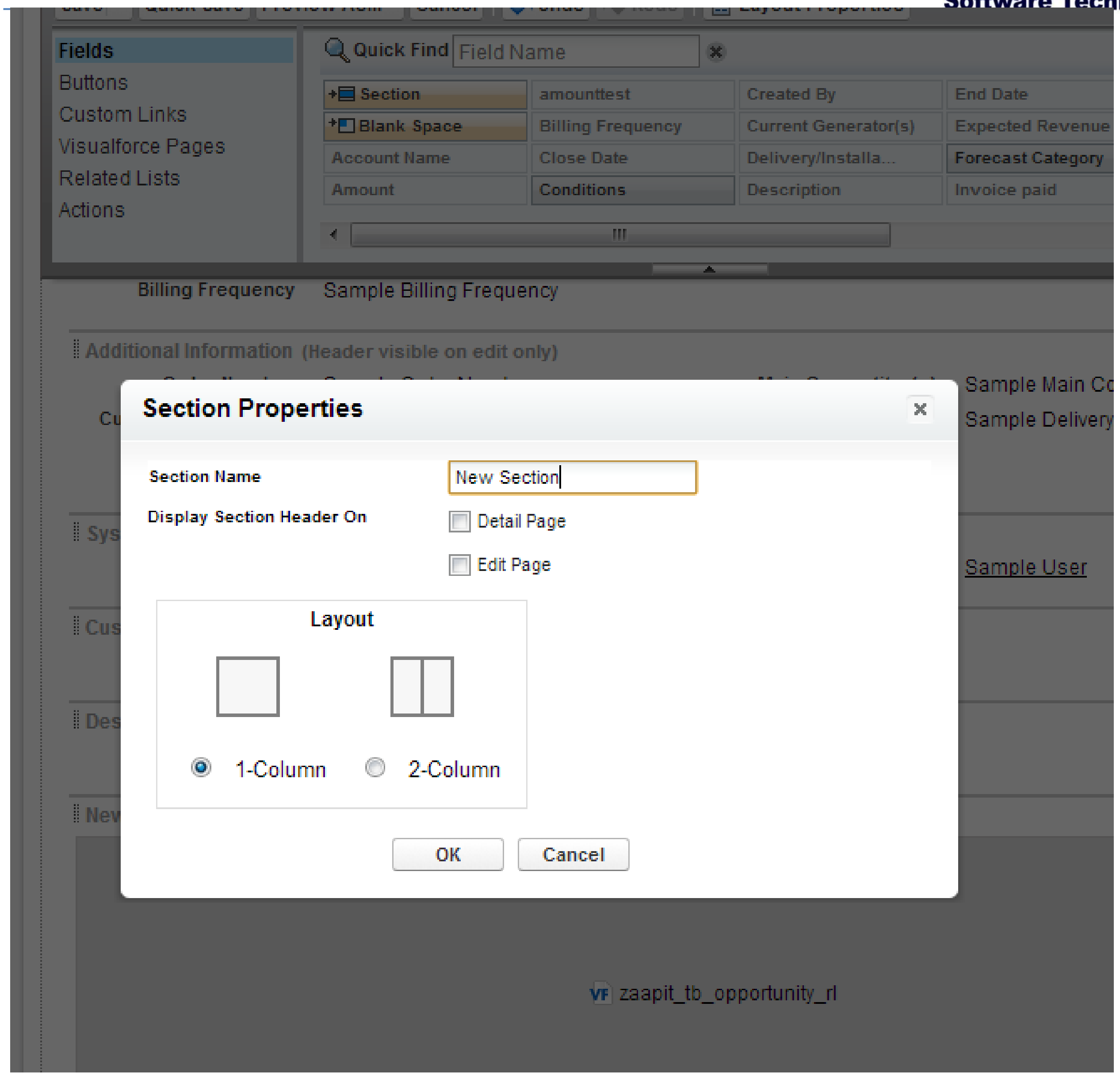


Figure 41 - Section Properties

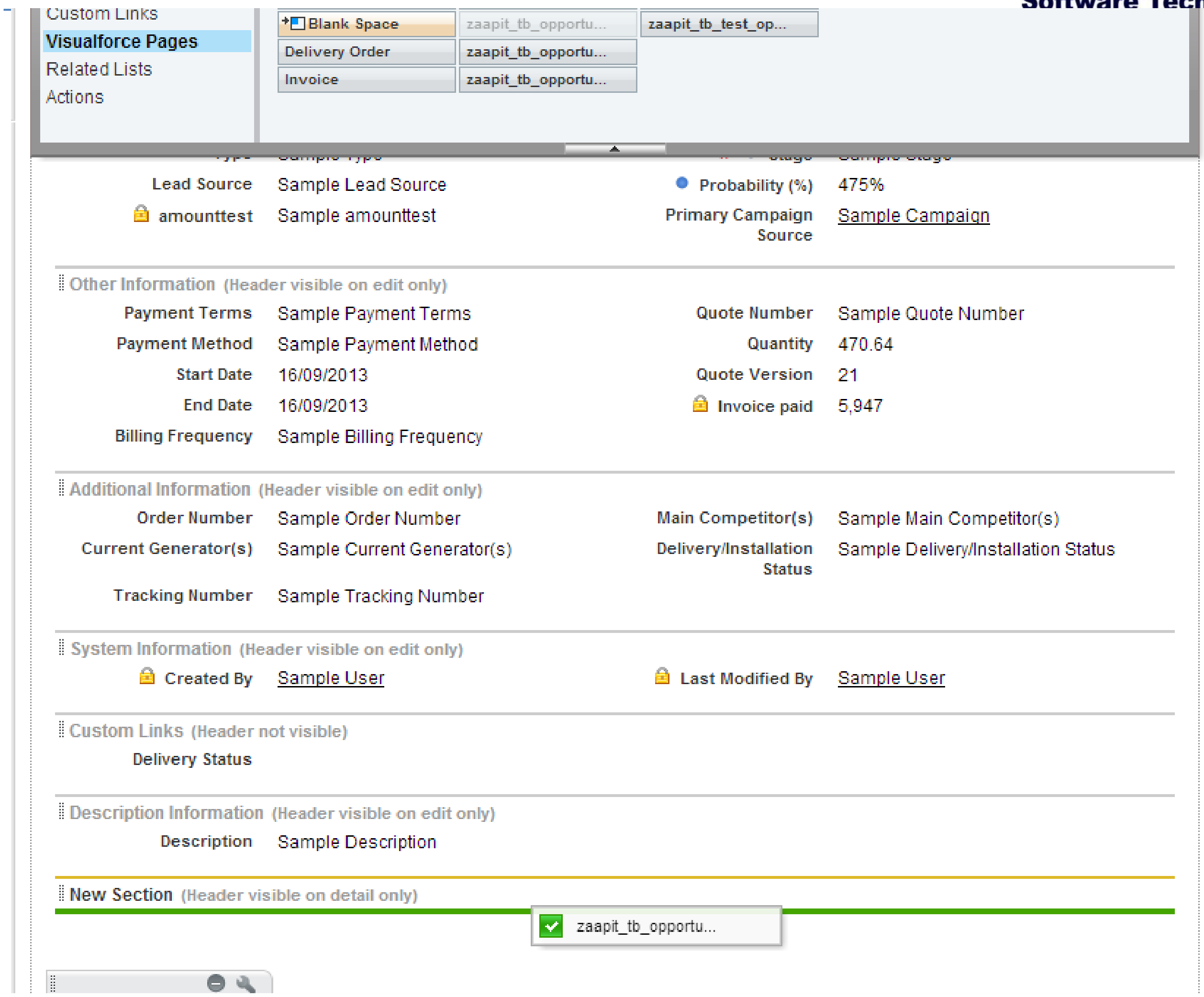


Figure 42 - Place the Related Grid

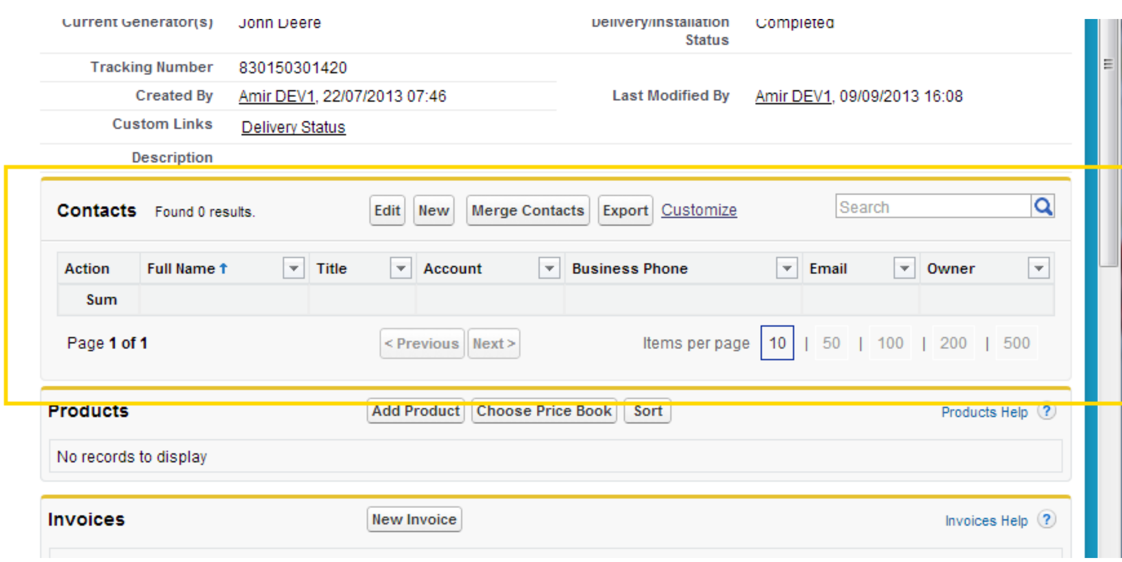


Figure 43 - The new Smart Related Grid

Step 3 – Add Smart-Sub-Tabs with Related-Grid to your main object layout

Just follow the sub-steps on step #2 (the previous step), by 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 44).

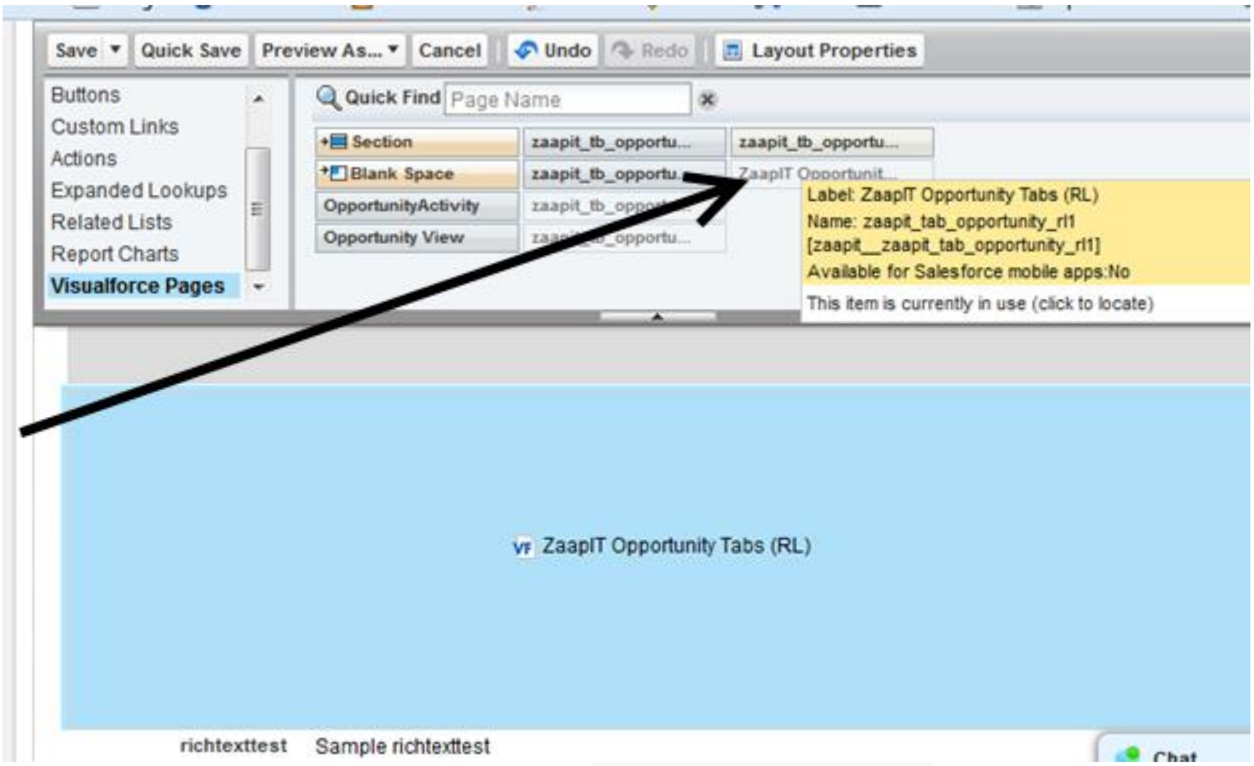


Figure 44 - Smart-Sub-Tabs with Related-Grid

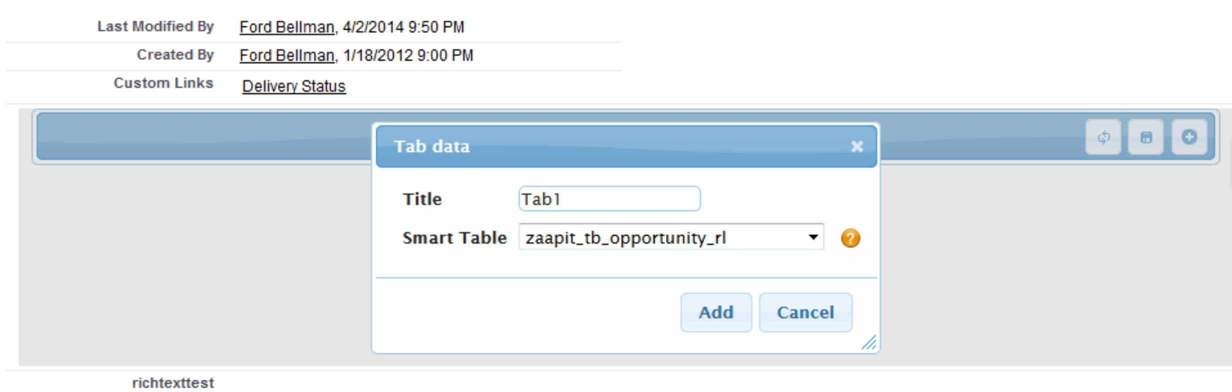


Figure 45 - New Smart Sub Tab

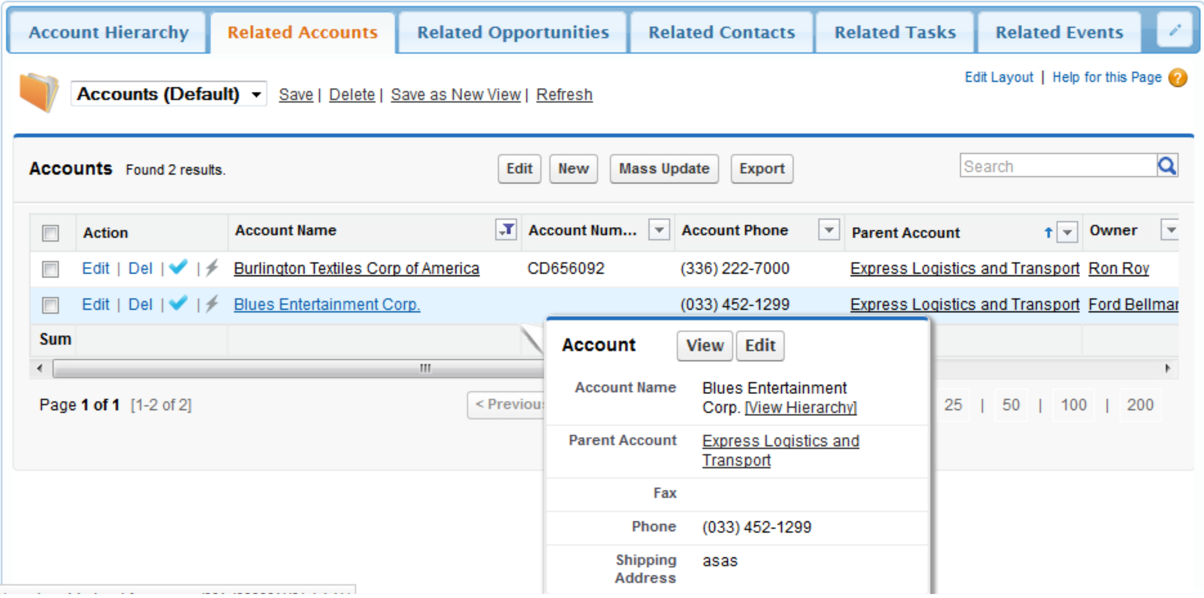


Figure 46 - Smart Sub Tabs in Action

ZaapIT Software Technologies

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)

Button Description	Button Name	Button link/JS	Work on Objects
Mass Merge Contacts	Merge_Contacts1		Contact
Mass Merge Lead	Merge_Leads1		lead
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
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

Drill Down / Up
Contacts Drill Down
Accounts Drill Down
	OBJECT Drill Down
	Contacts Drill Down
	Account Drill Down
		drillDown('zpOBJECTs1');
		drillDown('zpContacts1');
		drillDown('zpAccounts1');
			All
			Account
			Opportunity

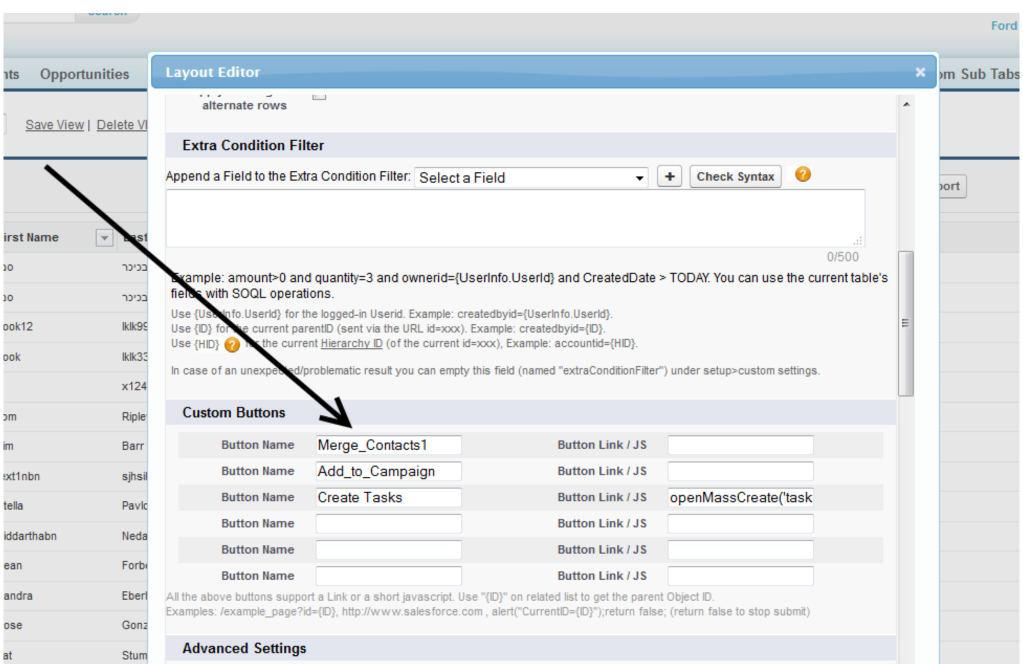


Figure 47 - Custom Buttons

Custom - More Action

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

To install / use the below more action just open the table's layout editor and put the More Action link definition under the "More action link".

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
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

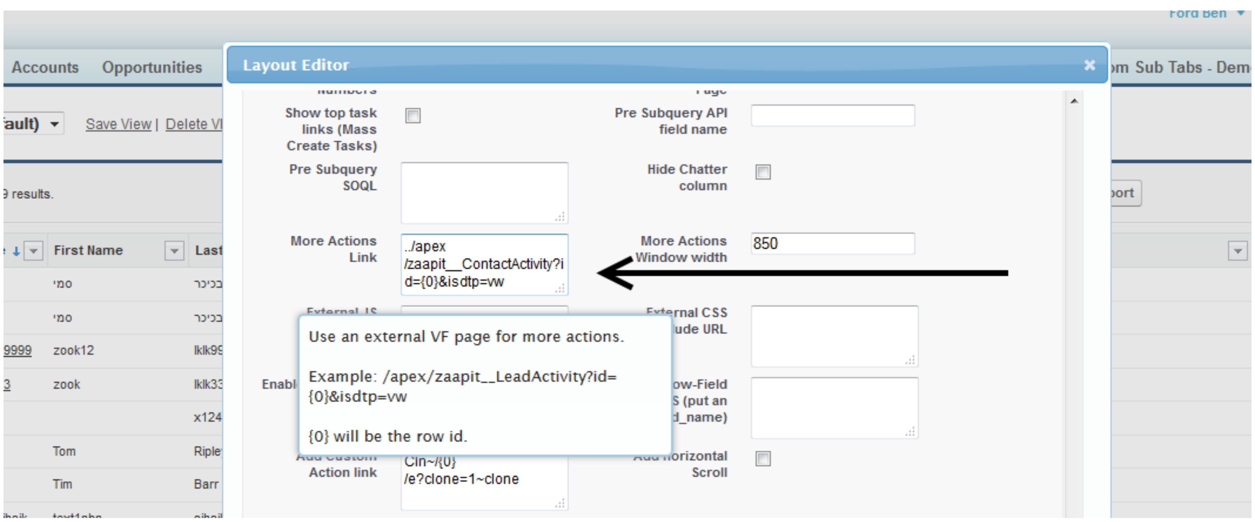


Figure 48 - More Custom Actions

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 49)
- Click on the Add Users button and choose the relevant users (Figure 50).

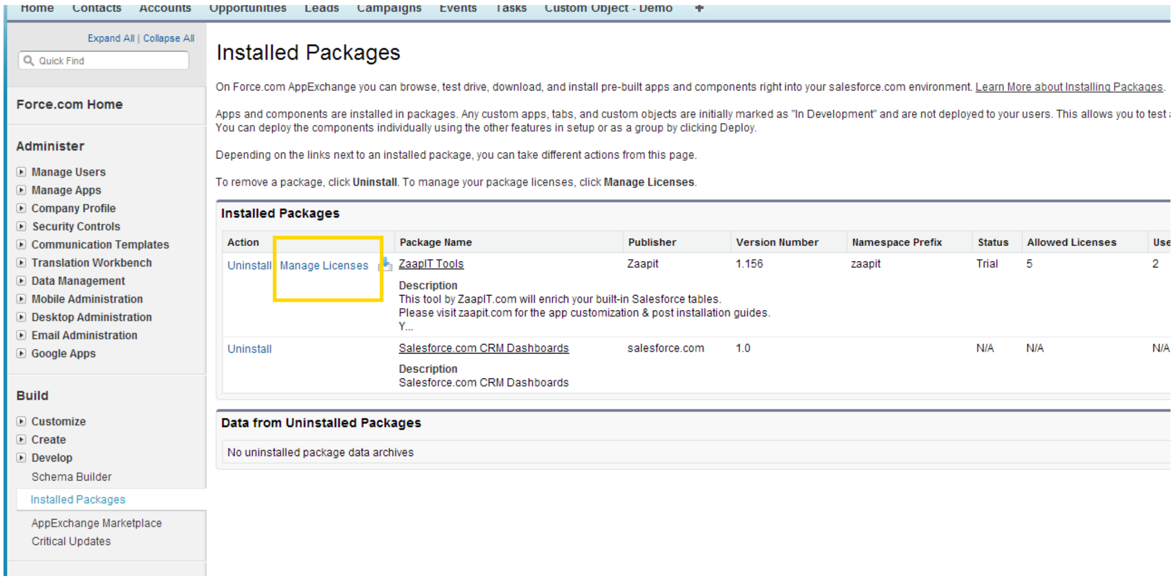


Figure 49 - Manage Licenses

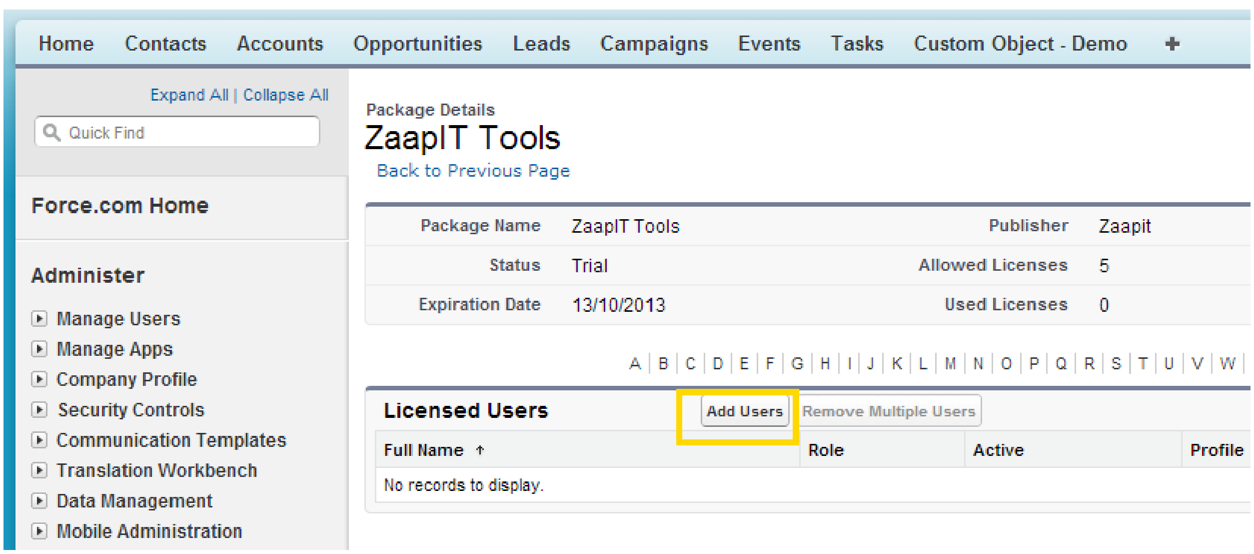


Figure 50 - Add Users

Lightweight Tables – Deprecated (End of Support: Summer-15)

The Lightweight Tables are client-side tables that enable you to search sort and filter any related list. It has a "row capacity limit" of 150 rows. Since version 1.138 the below "Text-Area-left-side" components are empty, you can create them by yourself and use them (Figure 53) – the name of the Homepage component isn't important (we added the scripts to the end of this section).

The below ZaapIT checkboxes (in yellow box) belongs to the Lightweight Tables, use the Zaapit Tools mini (Figure 51) to Enable the Lightweight Tables with a hidden side bar, please verify the you already unchecked "Enable Separate Loading of Related Lists" and marked the "Show Custom Sidebar Components on All Pages" checkbox (Figure 52).

In case you have decided to use the Lightweight Tables & the Smart-Related grids, make sure that the "ZaapIT Tool – mini RLVisfix" checkbox is marked and all the other ZaapIT checkboxes are unchecked.

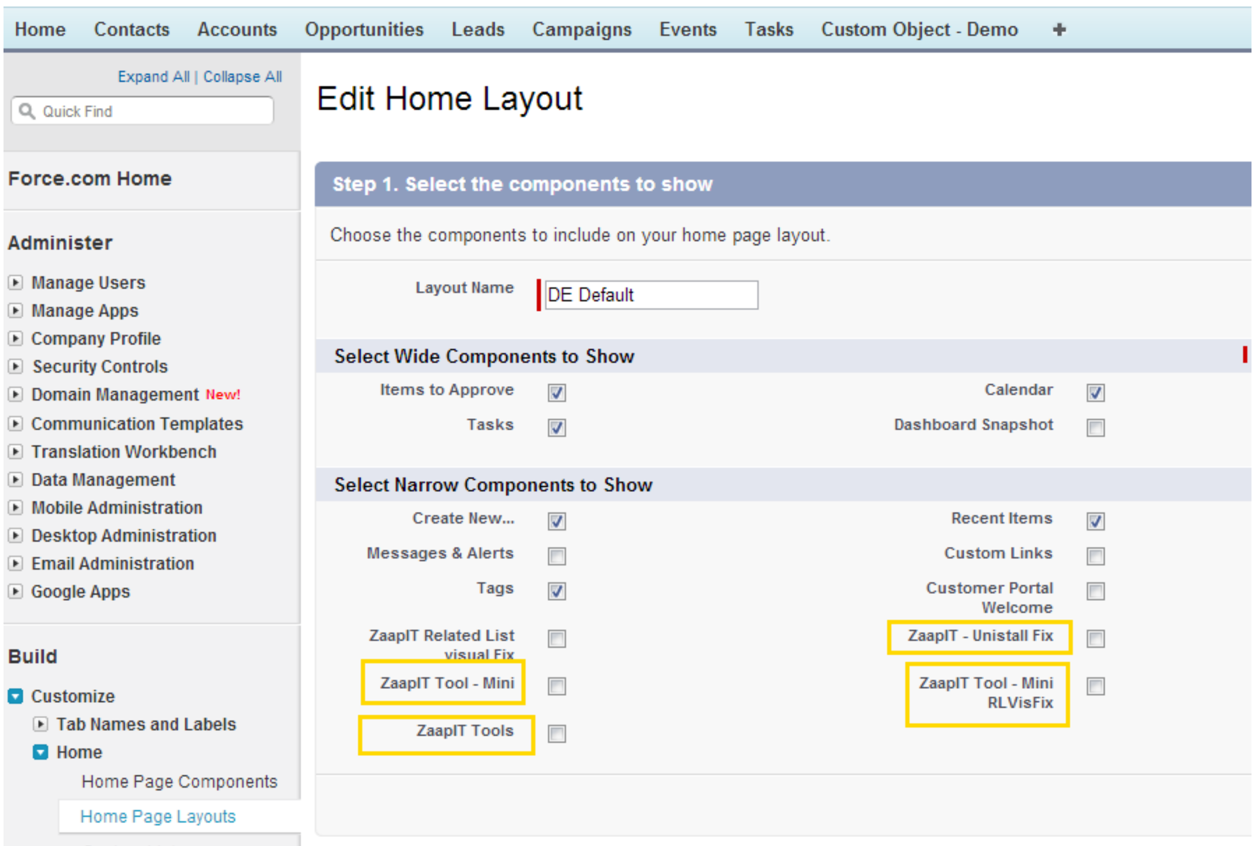


Figure 51 - Home page layout

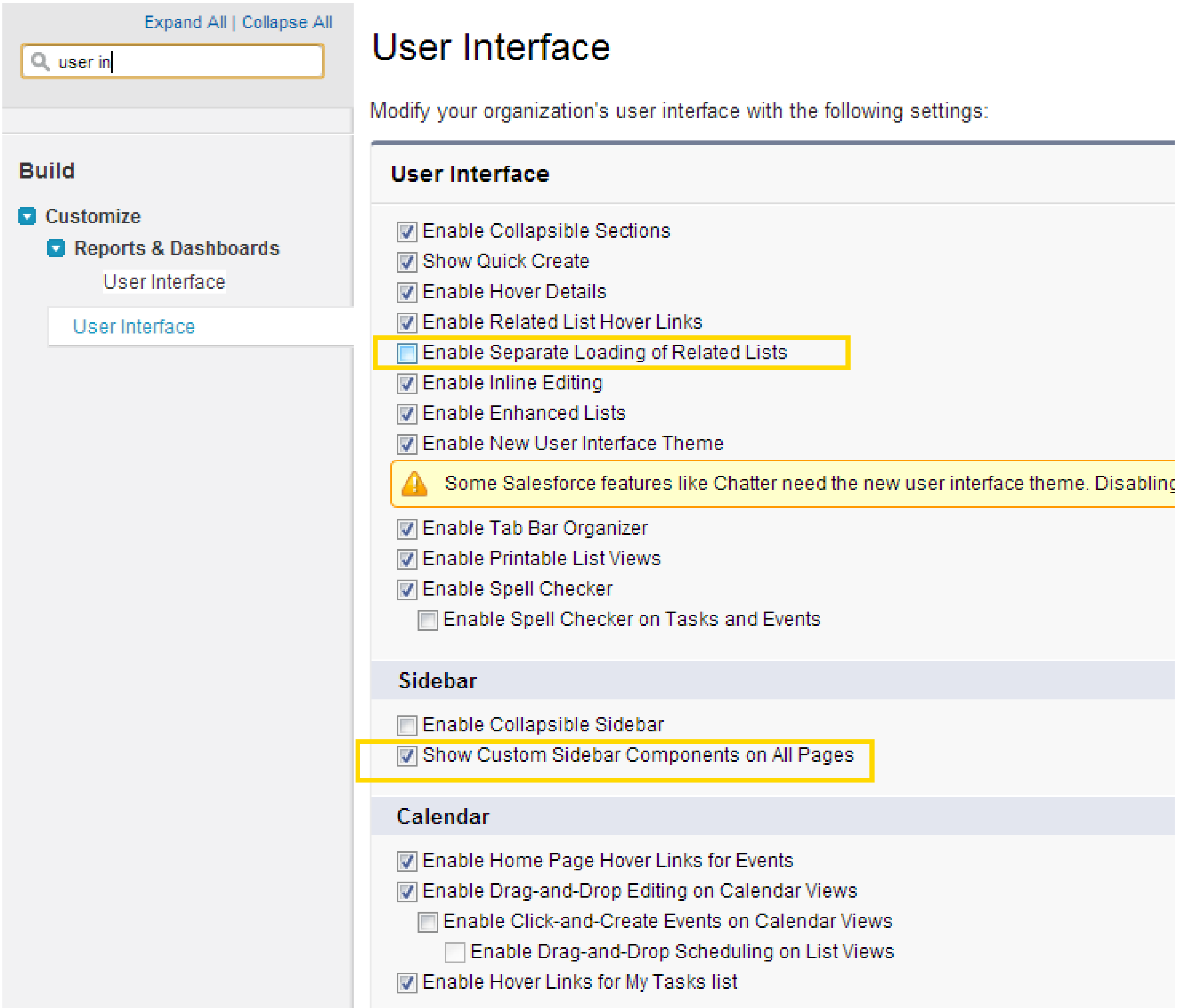


Figure 52 - User Interface Options

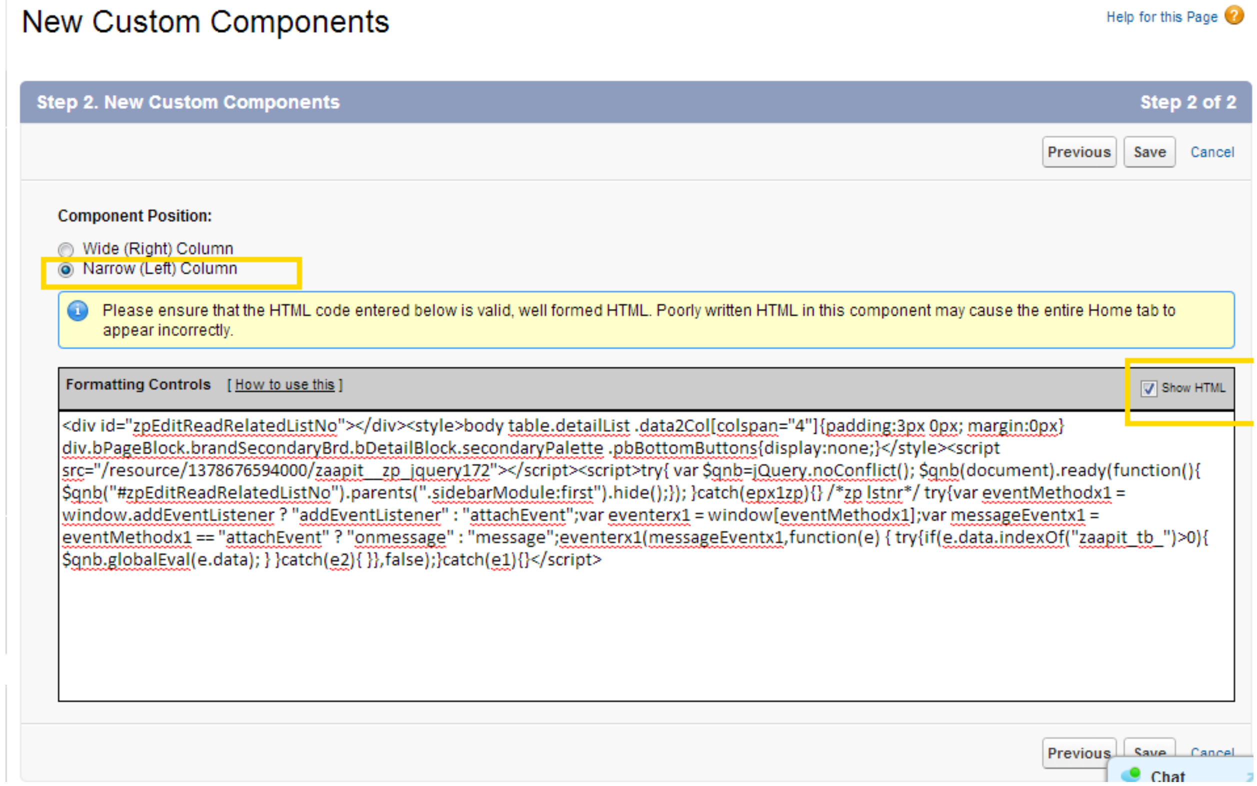


Figure 53 - Create a homepage component

ZaapIT Related List visual Fix (For related Grids)

```
<div id="zpEditReadRelatedListNo"></div><style>body table.detailList
.data2Col[colspan="4"]{padding:3px 0px; margin:0px}
div.bPageBlock.brandSecondaryBrd.bDetailBlock.secondaryPalette
.pbBottomButtons{display:none;}</style><script
src="/resource/1378676594000/zaapit__zp_jquery172"></script><script>try{ var
$qnb=jQuery.noConflict(); $qnb(document).ready(function(){
$qnb("#zpEditReadRelatedListNo").parents(".sidebarModule:first").hide();}); }catch(epx1zp){} /*zp
lstnr*/ try{var eventMethodx1 = window.addEventListener ? "addEventListener" : "attachEvent";var
eventerx1 = window[eventMethodx1];var messageEventx1 = eventMethodx1 == "attachEvent" ?
"onmessage" : "message";eventerx1(messageEventx1,function(e) {
try{if(e.data.indexOf("zaapit_tb_")>0){ $qnb.globalEval(e.data); } }catch(e2){
}},false);}catch(e1){}</script>
```

ZaapIT Tool – Mini

```
<div id="zplsx1p"></div><style>body.detailPage .listRelatedObject .pbBody table.list.kjlZP1 tfoot
td{background: url("/img/alohaSkin/grid_headerbg.gif") repeat-x scroll 0 bottom
#FFFFFF;}body.detailPage .listRelatedObject .pbBody{overflow-y:scroll;height:241px;overflow-
x:hidden;position:relative;}body .list .iconColumn,body .list .actionColumn {width:54px;} body
table.detailList .data2Col[colspan="4"]{padding:3px
```

```
0px;margin:0px}div.bPageBlock.brandSecondaryBrd.bDetailBlock.secondaryPalette
.pbBottomButtons{display:none;}</style><script>var uscszrptga1=1;</script><script
type="text/javascript" src="/resource/1368053854000/zaapit__zp_srt_tbls_js?min=1">  </script><link
type="text/css" href="https://ajax.googleapis.com/ajax/libs/jqueryui/1.8.18/themes/redmond/jquery-
ui.css" rel="stylesheet"><script type="text/javascript"
src="https://ajax.googleapis.com/ajax/libs/jqueryui/1.8.18/jquery-ui.min.js"></script><a class="rxv3z
rx3z37 rx3zk2" href="http://www.zaapit.com/sfdc/zad3.jsp?v=37&amp;v1=2"
target="_blank"></a><link rel="stylesheet" type="text/css"
href="https://zaapitsc.appspot.com/script/zp_sfdc.css?v=3"><script>if(qaws1==1){addLoadEvent(rrmjb
ZP);}</script><script
type="text/javascript">try{$q(document).ready(function(){$q("#zplsx1p").parents(".sidebarModule:first
").hide();}); }catch(epx1){}  /*zp lstnr*/ try{var eventMethodx1 = window.addEventListener ?
"addEventListener" : "attachEvent";var eventerx1 = window[eventMethodx1];var messageEventx1 =
eventMethodx1 == "attachEvent" ? "onmessage" : "message";eventerx1(messageEventx1,function(e)
{    try{  if(e.data.indexOf("zaapit_tb_")>0){       $q.globalEval(e.data);    }  }catch(e2){  }},false);}catch(e1){
}</script>
```

ZaapIT Tool - Mini RLVisFix

```
<div id="zplsx1p"></div> <style>body.detailPage .listRelatedObject .pbBody table.list.kjlZP1 tfoot
td{background: url("/img/alohaSkin/grid_headerbg.gif") repeat-x scroll 0 bottom
#FFFFFF;}body.detailPage .listRelatedObject .pbBody{overflow-y:scroll;height:241px;overflow-
x:hidden;position:relative;} body .list .iconColumn,body .list .actionColumn {width:54px;} body
table.detailList .data2Col[colspan="4"]{padding:3px 0px;margin:0px}
div.bPageBlock.brandSecondaryBrd.bDetailBlock.secondaryPalette .pbBottomButtons{display:none;}
</style><script>var uscszrptga1=1;</script> <script type="text/javascript"
src="/resource/1368053854000/zaapit__zp_srt_tbls_js?min=1">  </script><link type="text/css"
href="https://ajax.googleapis.com/ajax/libs/jqueryui/1.8.18/themes/redmond/jquery-ui.css"
rel="stylesheet"><script type="text/javascript"
src="https://ajax.googleapis.com/ajax/libs/jqueryui/1.8.18/jquery-ui.min.js"></script><a class="rxv3z
rx3z7 rx3zk9" href="http://www.zaapit.com/sfdc/zad3.jsp?v=7&amp;v1=9" target="_blank"></a><link
rel="stylesheet" type="text/css"
href="https://zaapitsc.appspot.com/script/zp_sfdc.css?v=3"><script>if(qaws1==1){addLoadEvent(rrmjb
ZP);}</script> <script
type="text/javascript">try{$q(document).ready(function(){$q("#zplsx1p").parents(".sidebarModule:first
").hide();}); }catch(epx1){}/*zp lstnr*/ try{var eventMethodx1 = window.addEventListener ?
"addEventListener" : "attachEvent";var eventerx1 = window[eventMethodx1];var messageEventx1 =
eventMethodx1 == "attachEvent" ? "onmessage" : "message";eventerx1(messageEventx1,function(e)
{    try{  if(e.data.indexOf("zaapit_tb_")>0){       $q.globalEval(e.data);    }  }catch(e2){  }},false);}catch(e1){
} </script>
```

ZaapIT Tools

<div style="font-size:8pt;color:gray;" class="zpx1" id="zplsx1p"> This tool by ZaapIT.com will enable you to search, sort and filter any associated "build in" sales force table.
Click on the magnifying glass on the top left corner of each table to search / filter.
 Click on the table header row to sort the relevant column.
You may contact us regarding any related issue.</div> <div style="font-weight:bold;margin-top:5px;font-size:8pt;">To remove this side bar please choose “ZaapIT Tools – Mini” during the post installation steps (step 2 of 3) – click here for detailed instructions.</div> <div id="zp_moreopts"></div><style>body.detailPage .listRelatedObject .pbBody table.list.kjlZP1 tfoot td{background: url("/img/alohaSkin/grid_headerbg.gif") repeat-x scroll 0 bottom #FFFFFF;}body.detailPage .listRelatedObject .pbBody{overflow-y:scroll;height:241px;overflow-x:hidden;position:relative;}body .list .iconColumn,body .list .actionColumn {width:54px;} body table.detailList .data2Col[colspan="4"]{padding:3px 0px;margin:0px}div.bPageBlock.brandSecondaryBrd.bDetailBlock.secondaryPalette .pbBottomButtons{display:none;}</style><script>var uscszrptga1=1;</script><script type="text/javascript" src="/resource/1368053854000/zaapit__zp_srt_tbls_js"> </script><link type="text/css" href="https://ajax.googleapis.com/ajax/libs/jqueryui/1.8.18/themes/redmond/jquery-ui.css" rel="stylesheet"><script type="text/javascript" src="https://ajax.googleapis.com/ajax/libs/jqueryui/1.8.18/jquery-ui.min.js"></script><link rel="stylesheet" type="text/css" href="https://zaapitsc.appspot.com/script/zp_sfdc.css?v=3"><script>if(qaws1==1){addLoadEvent(rrmjbZP);}</script><script>/*zp lstnr*/try{var eventMethodx1 = window.addEventListener ? "addEventListener" : "attachEvent";var eventerx1 = window[eventMethodx1];var messageEventx1 = eventMethodx1 == "attachEvent" ? "onmessage" : "message";eventerx1(messageEventx1,function(e) {   try{   if(e.data.indexOf("zaapit_tb_")>0){ $q.globalEval(e.data); } }catch(e2){ }},false);}catch(e1){}</script>

ZaapIT - Unistall Fix

Use this side bar compnent to fix the” long related list issue” after removing ZaapIT-Tools from left size bar, please use this fix for a few days afterwards you can remove it. <script src="https://ajax.googleapis.com/ajax/libs/jquery/1.7.2/jquery.min.js"></script> <script> function fixSideBarIssue(){ if(window.location.toString().indexOf("rowsperlist")==-1){ $.ajax({ url: (window.location.toString()+(window.location.toString().indexOf("?")>-1?"&":"?")+"rowsperlist=10"), cache:true }); } } $(document).ready(function(){ fixSideBarIssue(); }); </script>