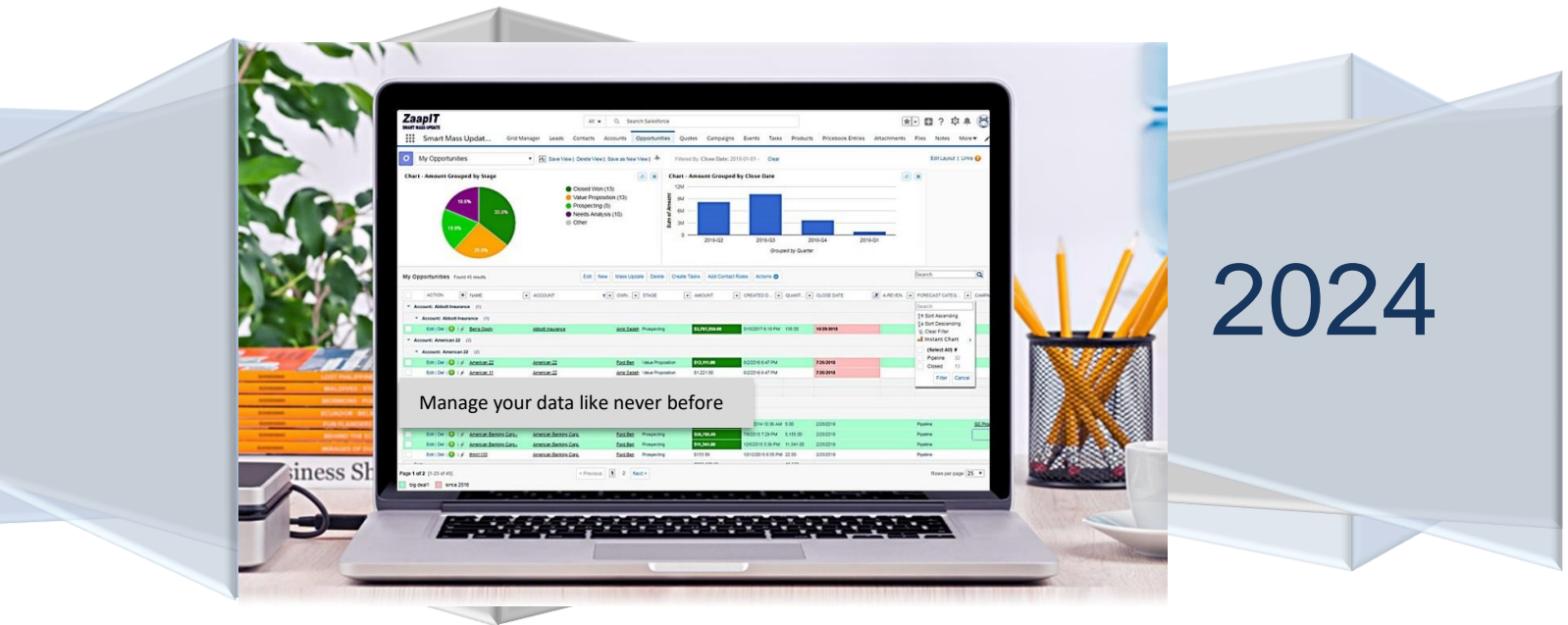


ZaapIT's - Smart-Tools

Getting Started / Training Guide

Created by Ben Ford

App Version: 1.1295(Apr-2024)



INTRODUCTION

ZaapIT's Apps can save up to 95.6% of your time in Salesforce.com, by enhancing non-optimal workflows, and by cleaning duplicate data in bulk and automatically. ZaapIT's allow anyone to perform their work en mass from one smart-list.

With a few clicks you can see all the desired data taken from any desired objects in one place. You can instantly see what is missing and what needs to be changed through ZaapIT's actionable grids and reports.

Beyond visibility you can use ZaapIT's smart-tools to apply mass actions on any set of rows. The apps allow you to change your data via inline editing and through mass actions, and to modify any or all records without ever leaving the current page/screen and Salesforce.

ZAAPIT CORE FUNCTIONALITY

ZaapIT has all the following core functionality:

1. **Mass Inline editing:** click the edit button on the grid's top to change the view into mass inline edit mode (spreadsheet style).
2. **Fast Inline editing:** hover a grid-cell and click the edit-button to edit the cell's content.
3. **Search functionality:** search the current grid and find a matching record based on the displayed columns.
4. **Mass Actions:** Edit, inline add, created (sub-records), delete, update, Merge, Clone, Convert, email blast, drill up and down, plot on map and more.
5. **Lighting icon-button:** opens related information (overview, contacts, task and etc) in a pop.
6. **[+] Button:** allows for bulk adding of new rows / records inline. For example: add new leads, contacts, accounts, opportunities, campaigns inline (or any SF object).
7. **Multi-Sort and filters:** available for any grid and at any column-name & objects.
8. **Smart Inline Edit:** allows you to change your data inline while obeying permissions, validations and native CRM functionality.
9. **Drag data:** to mass update/edit appropriate records aka fill series or drag & copy.
10. **Merge:** Merge your accounts/contacts/leads via a pop-up or via dedup-manager in mass and automatically.
11. **Add to Campaign** from contacts & leads grids. With multi-campaign filtering and visibility.
12. **Create or edit multiple events** from events screen.
13. **Create or update multiple tasks** from task screen view s.
14. **Conditional Styling:** paint fields and rows based on the data they contain, or based on manual selection.
15. **Create tasks and events:** for any set of records from master screen.
16. **Mass create related records** based for any object e.g. mass create tasks for accounts...

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ACCESS THE TOOLS

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



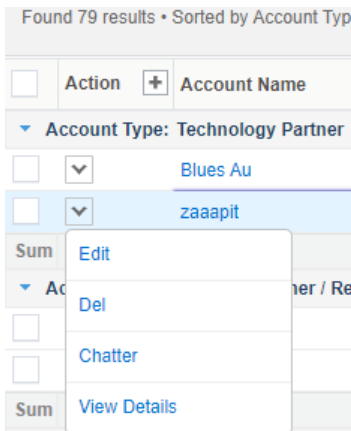
Click the Arrow and the you will see Smart-Mass-Update / Dedup-manager / Smart-Activity-Manager / ZaapIT-Console now you will see Salesforce in the ZaapIT's app. To go back Salesforce Classic, click the same arrow and then click Sales.

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

1. CORE FUNCTIONALITY ACTION SECTION

1.1. ACTION COLUMN

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



Explanations:

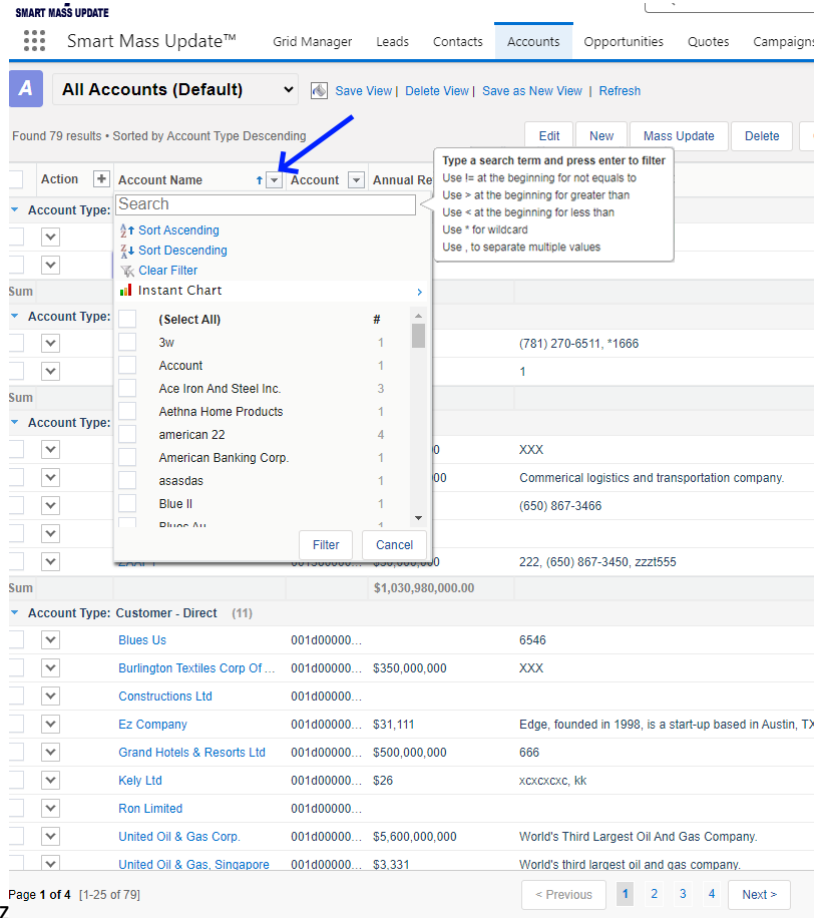
- Click the Check-Box next to each row to select individual rows / records

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- Click the checkbox on the top to select all the rows / records in the current page. You would use this to apply an action to all the rows / records
- The Edit link allows you to edit a single record from this view.
- The Del link allows you to delete a single record from this view.
- The view details link allows you to open more details.
- The chatter link allows you to open salesforce's chatter.

1.2. FILTER FUNCTIONALITY

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



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

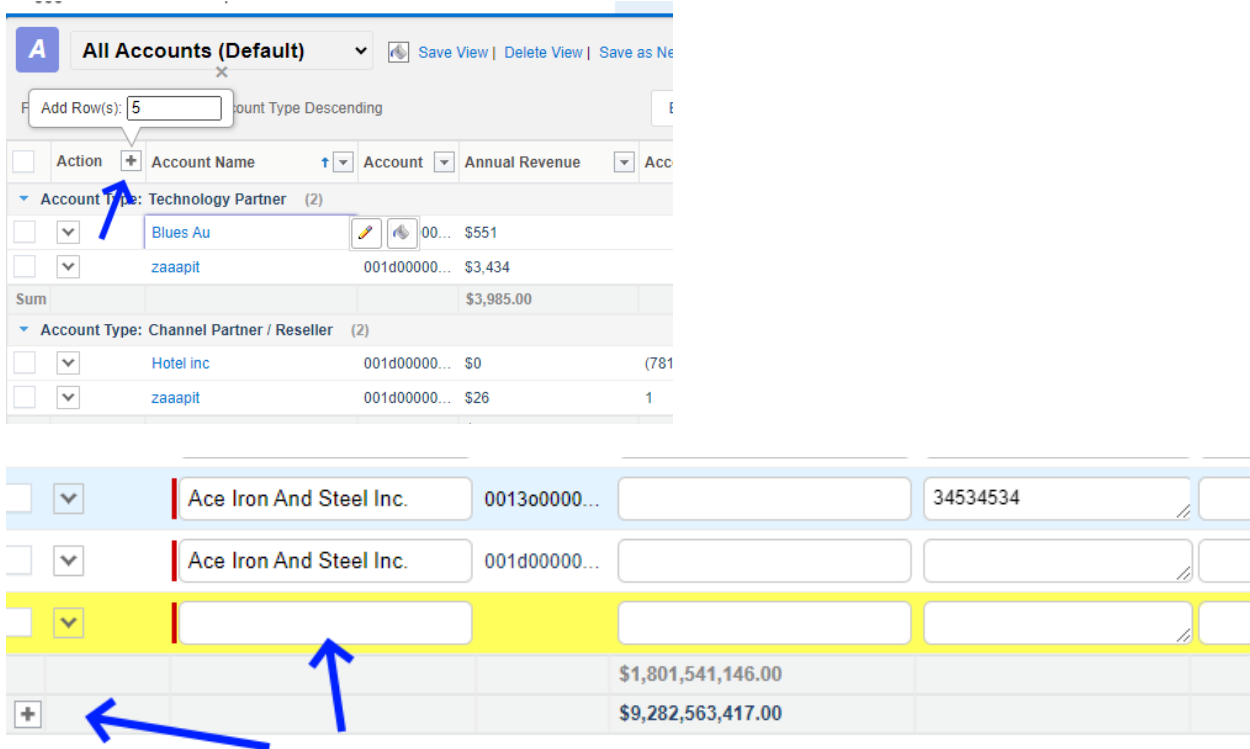
- Click account type and select prospects
- Click Billing country and sort descending
- Click billing city and choose a city
- Use the filter’s search for “start-with” search, use *,>, < and != for advanced searches.

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

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

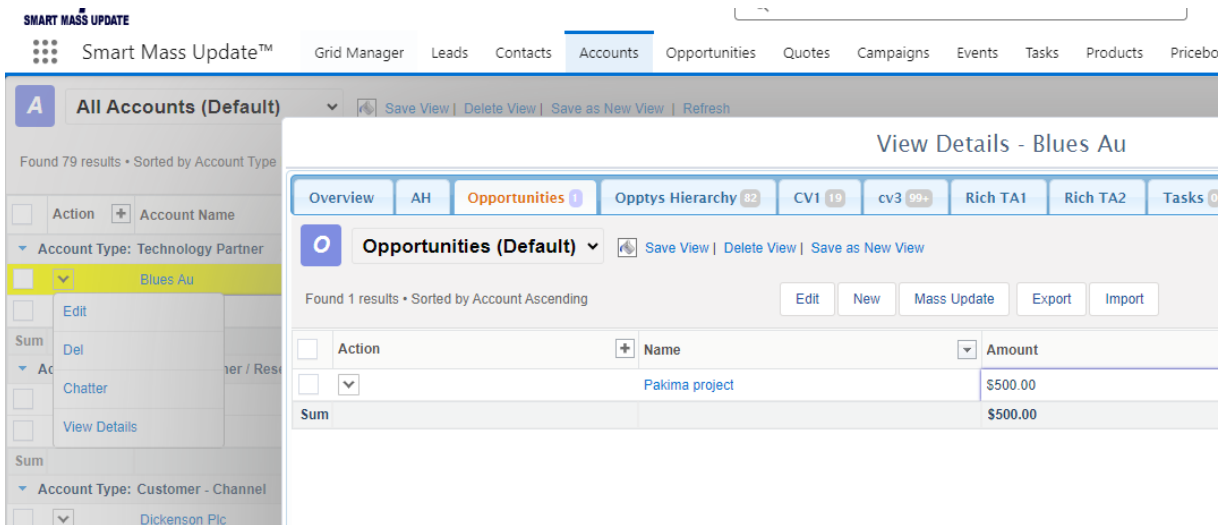
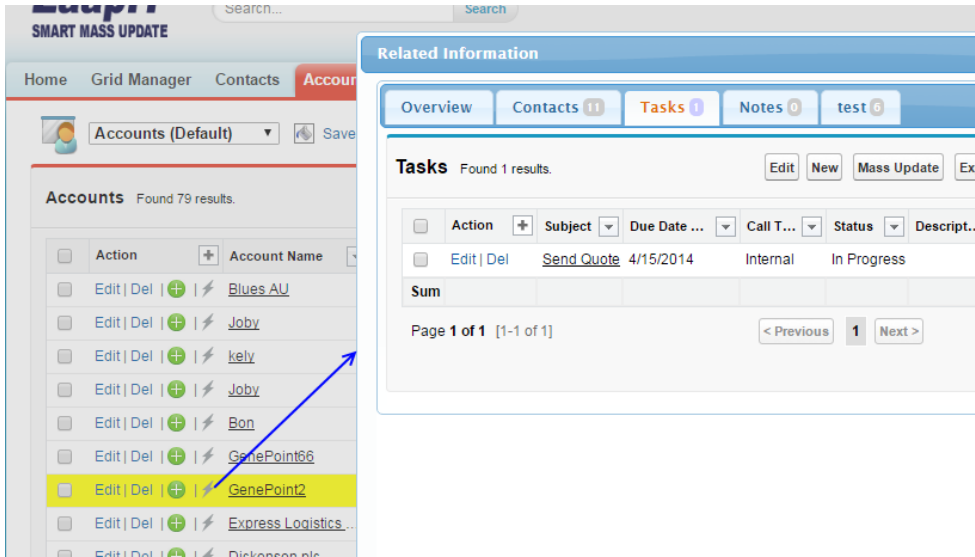
Click this button or move your mouse to the preset the number of new rows where you can then edit this number. Change it to 5 and hit enter or [+], you will see 5 blank lines at the bottom of the page. Here you can add the records from this page.



Same functionality in all objects.

1.4. LIGHTNING ICON / BUTTON / VIEW DETAILS

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



1.5. DRAG AND REPLACE AKA “FILL SERIES”

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

Accounts Found 79 results.

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

2. CORE BUTTON FUNCTIONALITY

The following buttons have the same functionality across all objects.

2.1. EDIT BUTTON

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

SMART MASS UPDATE

Smart Mass Update™ Grid Manager Leads Contacts Accounts Opportunities Quotes Campaigns Events Tasks Products Pricebook Entries Attachments Files Notes Explorer 1 Explorer 2 Explorer Sub Tabs

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

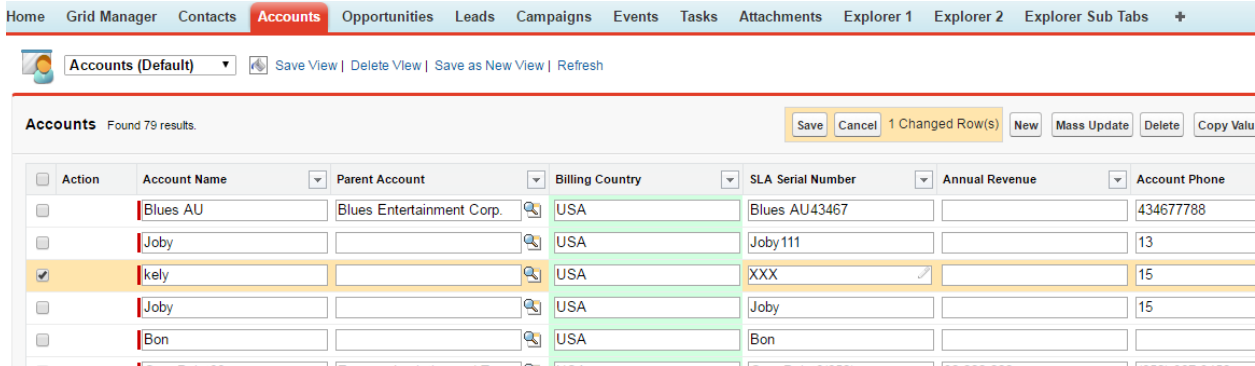
Found 145 results • Sorted by Account Descending Save Cancel 3 Changed Row(s) New Mass Update Mass Clone Delete Create Tasks Add Contact Roles Actions Search

<input type="checkbox"/>	Action	Name	Last Modified Date	Owner	Created...	Last Acti...	Billing ...	Account	Amount	Stage	Created D...	Close Date
<input type="checkbox"/>		Account: ZaapIT (1)										
<input type="checkbox"/>		zaapIT1	12/2/2023 12:31 AM	Amir Sadeh	Ford Ben	11/30/2017	ZaapIT1	235,000.00	Qualification	7/5/2017 10:38 AM	9/30/2017	
<input type="checkbox"/>		Account: ZaapIT 333 (2)										
<input type="checkbox"/>		aaa	11/12/2021 8:35 AM	Ford Ben	Ford Ben		New York ZaapIT 333	333.00	Prospecting	8/17/2021 10:11 AM	8/20/2021	
<input type="checkbox"/>		Pakima project	12/2/2023 12:31 AM	Ford Ben	Ford Ben		New York ZaapIT 333	145,200.00	Needs Analysis	5/4/2020 9:09 PM	5/26/2020	
								\$145,533.00				
<input type="checkbox"/>		Account: zaaapit (1)										
<input checked="" type="checkbox"/>		zaaapit	3/19/2024 6:09 PM	Amir Sadeh	Ford Ben		UK zaaapit	111.00	Qualification	1/3/2017 2:16 PM	3/29/2023	
<input type="checkbox"/>		Account: Vimount (5)										
<input checked="" type="checkbox"/>		ascasca	5/16/2019 9:34 PM	Ford Ben	Ford Ben		Vimount	11.00	Value Proposition	1/22/2019 10:05 AM	11/12/2015	
<input checked="" type="checkbox"/>		Pakima project	6/30/2023 6:13 PM	Ford Ben	Ford Ben		Vimount	442,526.00	Needs Analysis	5/4/2020 9:09 PM	5/26/2020	
<input type="checkbox"/>		Vimount 3	8/24/2020 11:07 PM	Ford Ben	Ford Ben		Vimount		Closed Won	11/12/2015 1:02 PM	11/12/2015	
<input type="checkbox"/>		Vimount 2	8/24/2020 11:07 PM	Ford Ben	Ford Ben		Vimount	2.00	Closed Won	11/12/2015 1:02 PM	11/12/2015	
<input type="checkbox"/>		Vimount 1	8/24/2020 11:07 PM	Ford Ben	Ford Ben		Vimount	2.00	Closed Won	11/12/2015 1:02 PM	11/12/2015	
								\$442,541.00				
<input type="checkbox"/>		Account: University Of Arizona (9)										
<input type="checkbox"/>		Pakima project	8/13/2020 1:17 AM	Ford Ben	Ford Ben		University Of Arizona	500.00	Prospecting	5/4/2020 9:09 PM	5/26/2020	
<input type="checkbox"/>		University of AZ Portable Ga	2/26/2023 12:19 PM	Ron Roy	Ford Ben		University Of Arizona	45,135.30	Prospecting	1/18/2012 9:00 PM	3/29/2023	
<input type="checkbox"/>		University of AZ Installations	2/26/2023 12:19 PM	Ron Roy	Ford Ben		University Of Arizona	115,000.00	Prospecting	1/18/2012 9:00 PM	3/29/2023	

Page 1 of 6 [1-25 of 145] < Previous 1 2 3 4 5 6 Next > Rows per page 2

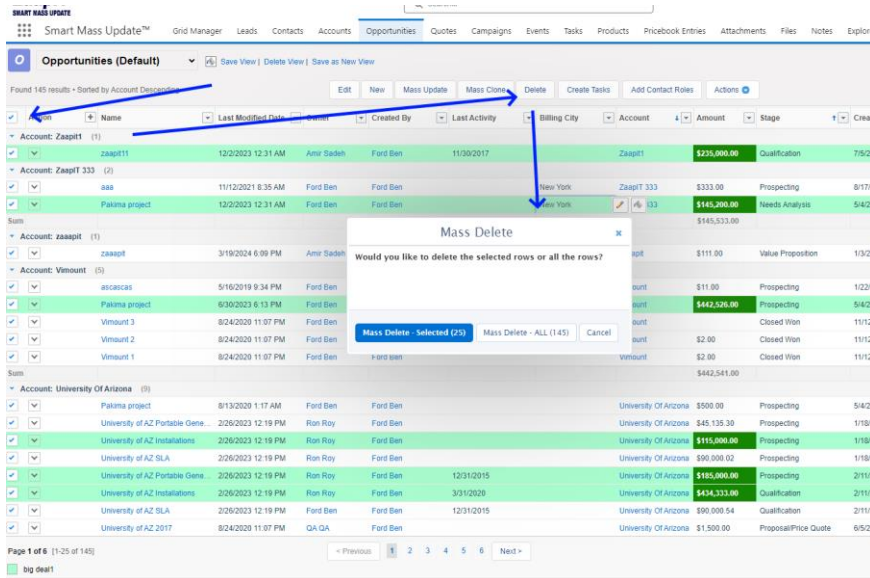
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Please notice that you now have the ability to do inline editing off any or all of your records. Simply pick the records you wish to update and type in the info. If you are editing a drop-down box, click the arrow and change. When you are done click the save to keep your changes. The following screenshot demonstrate this feature in Salesforce classic.



1.1 MASS DELETE BUTTON

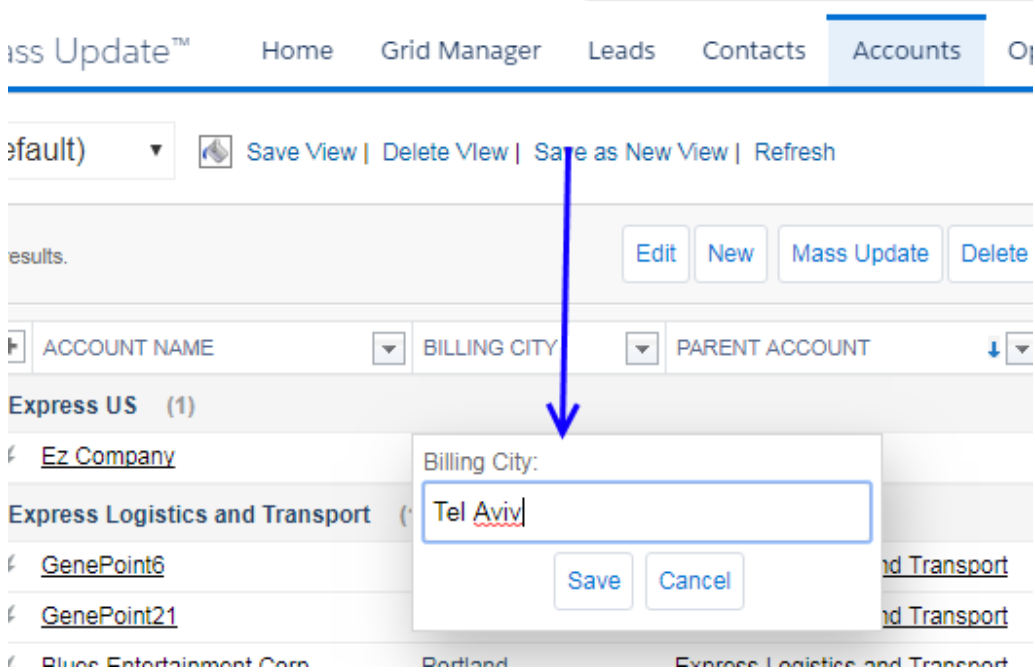
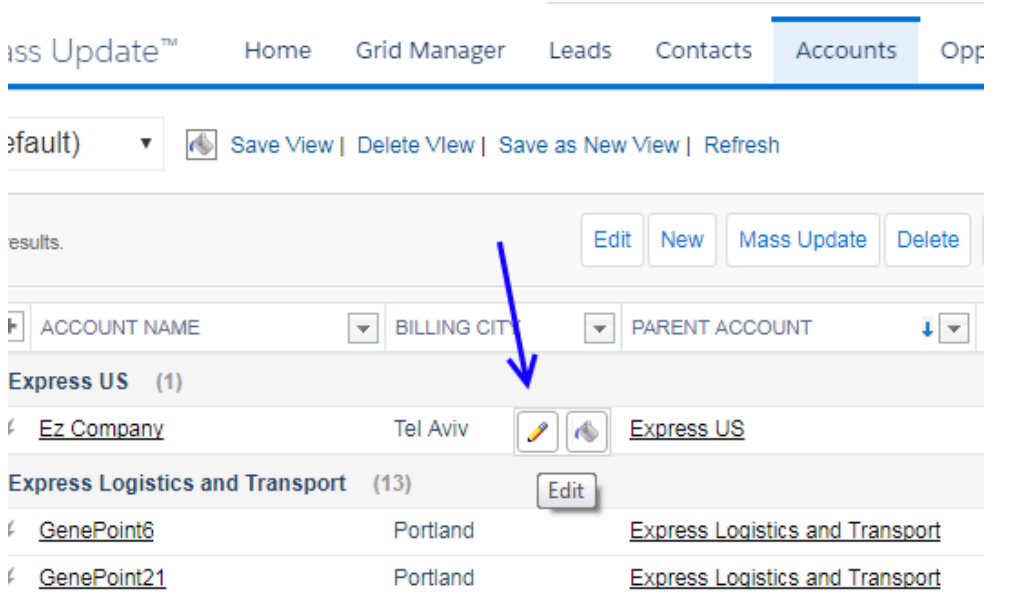
Click the delete button to delete multiple records that is to move them to Salesforce's recycle bin.



2.1. FAST INLINE EDIT

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

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2.2. NEW BUTTON

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

Account Edit Help for this Page

New Account

Account Edit Save Save & New Cancel

Account Information * = Required Information

Account Owner	Ford Ben	Rating	--None--
Account Name	<input type="text"/>	Phone	<input type="text"/>
Parent Account	<input type="text"/>	Fax	<input type="text"/>
Account Number	<input type="text"/>	Website	<input type="text"/>
Account Site	<input type="text"/>	Ownership	--None--
Type	--None--	Employees	<input type="text"/>
Industry	--None--	SIC Code	<input type="text"/>

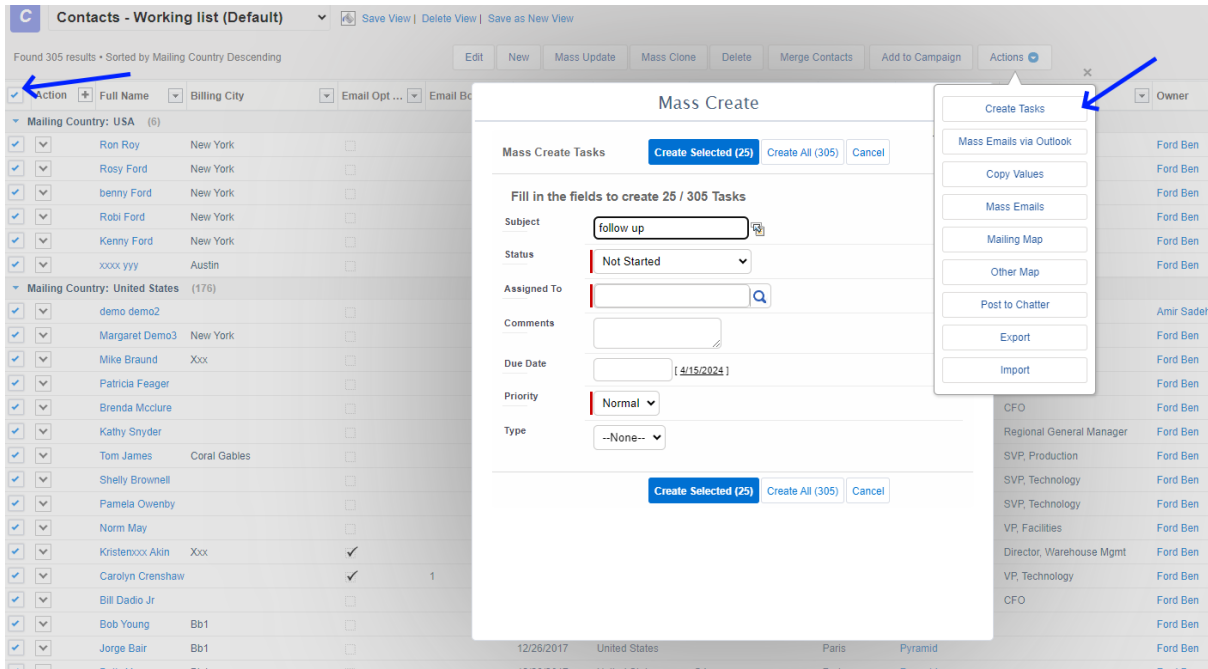
The screenshot shows the 'Smart Mass Update' interface with a 'New Account' modal window. The modal form contains the following fields:

- Account Owner: Ford Ben
- Account Name:
- Parent Account: Search Accounts...
- Account Number:
- Account Site:
- Type: --None--
- Industry: --None--
- Rating: --None--
- Phone:
- Fax:
- Website:
- Ownership: --None--
- Employees:
- SIC Code:
- Annual Revenue:
- Account Record Type: rtype
- Account Source: --None--
- has open cases:

Below the form is a rich text editor with a toolbar and a 'Table without sub-tabs' section containing a 'long text' field.

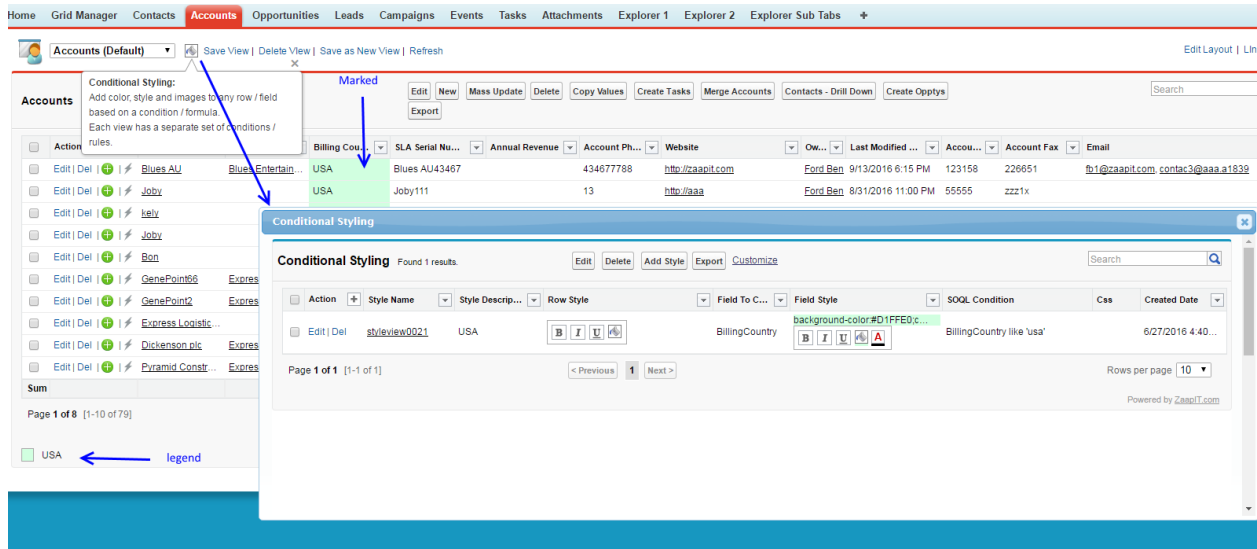
2.3. CREATE TASK

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



2.4. CONDITIONAL STYLING

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



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SMART MASS UPDATE

Smart Mass Update™ Grid Manager Leads Contacts Accounts Opportunities Quotes Campaigns Events Tasks Products Pricebook Entries Attachments Files Notes Explorer 1 Explor

Opportunities (Default) Save View | Delete View | Save as New View

Found 145 results • Sorted by Account Descending

Conditional Styling

Conditional Styling Found 1 results Edit Mass Clone Delete Add Style Export Import Customize

Action	Style Name	Style Description	Row Style	Field To Color	Field Style	SOQL Condition
	styleview0008	big deal1	background-color:#A9FF...	Amount	background-color:#148701;col...	Amount > 105000

Page 1 of 1 [1-1 of 1] < Previous 1 Next >

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big deal1

2.1. MANUAL STYLING

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

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

The screenshot shows a table with columns: ACTION, ACCOUNT NAME, BILLING CITY, PARENT ACCOUNT, and AC. The table is grouped by parent accounts. The row for 'Blue IL' is highlighted in green. A blue arrow points from the 'Blue IL' row to the 'Blue UK' row, which has a bucket icon next to its 'PARENT ACCOUNT' cell. Another blue arrow points from the 'Blue UK' row to the 'Blue US' row, which also has a bucket icon next to its 'PARENT ACCOUNT' cell.

ACTION	ACCOUNT NAME	BILLING CITY	PARENT ACCOUNT	AC
Parent Account: Burlington Textiles Corp of America (1)				
<input type="checkbox"/>	United Oil & Gas_UK	Burlington	Burlington Textiles Corp of America	
Parent Account: Blues FL (1)				
<input type="checkbox"/>	Blue_IL	ttv	Blues_FL	
Parent Account: Blues Entertainment Corp. (4)				
<input type="checkbox"/>	Blues_US		Blues Entertainment Corp.	
<input checked="" type="checkbox"/>	Blues_UK		Blues Entertainment Corp.	
<input checked="" type="checkbox"/>	Blues_NZ		Blues Entertainment Corp.	
<input type="checkbox"/>	Blues_AU		Blues Entertainment Corp.	
Sum				

The screenshot shows the 'Conditional Styling' dialog box. It has a title bar with a close button. The main content is titled 'Set the styling for 2 selected row(s)'. It contains the following fields and options:

- Style Description:** A text input field containing 'VIP'.
- Row Style:** A text input field containing 'background-color:#CDFFCD;color:#000000;'. Below it are icons for Bold (B), Italic (I), Underline (U), and Text Color (A).
- Field To Color:** A text input field containing 'parentid'.
- Field Style:** A text input field containing 'background-color:#006B00;color:#FFFFFF;'. Below it are icons for Bold (B), Italic (I), Underline (U), and Text Color (A).

At the bottom of the dialog are 'Save' and 'Cancel' buttons.

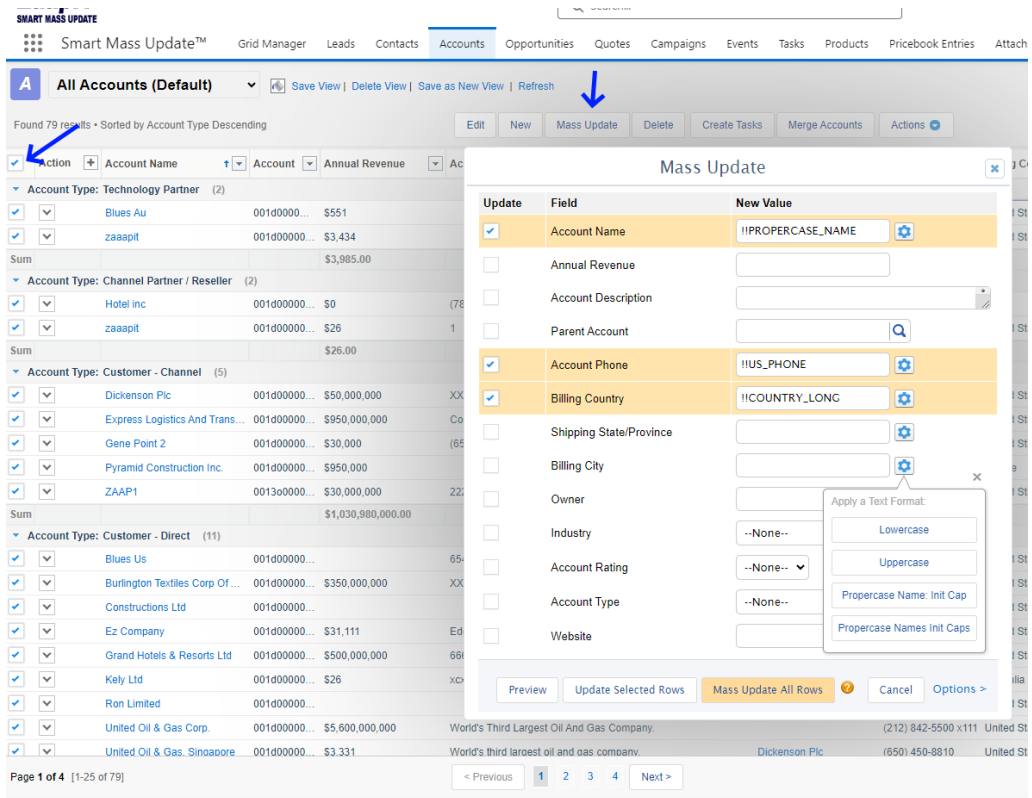
3. UNIQUE FUNCTIONALITY BY OBJECT

3.1. LEADS OBJECTS

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

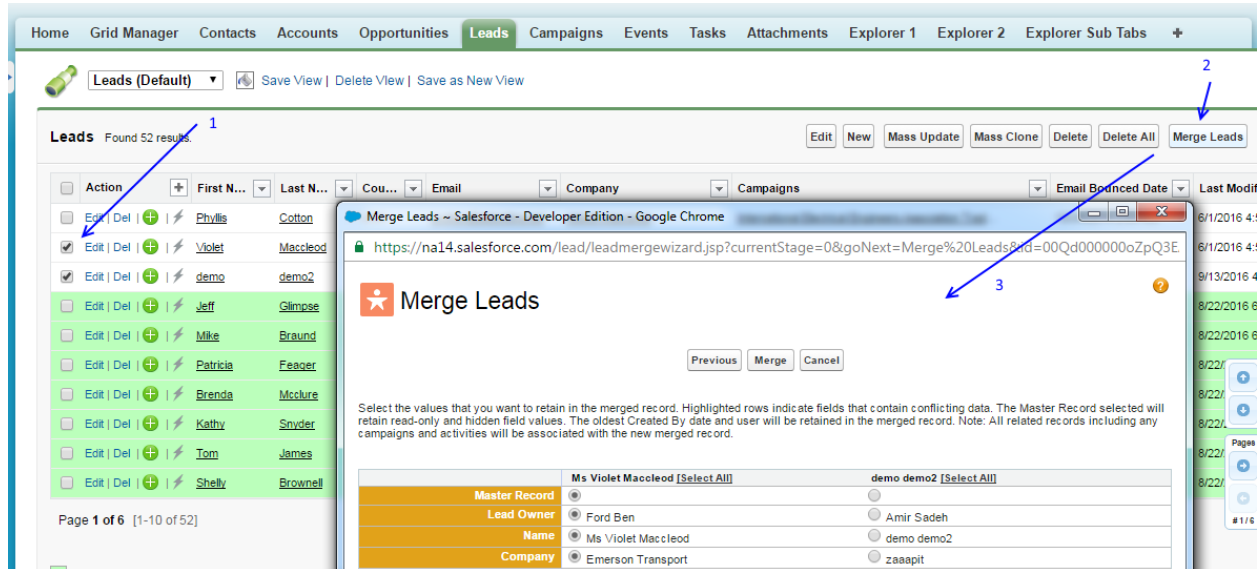
3.1.1. MASS UPDATE BUTTON

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



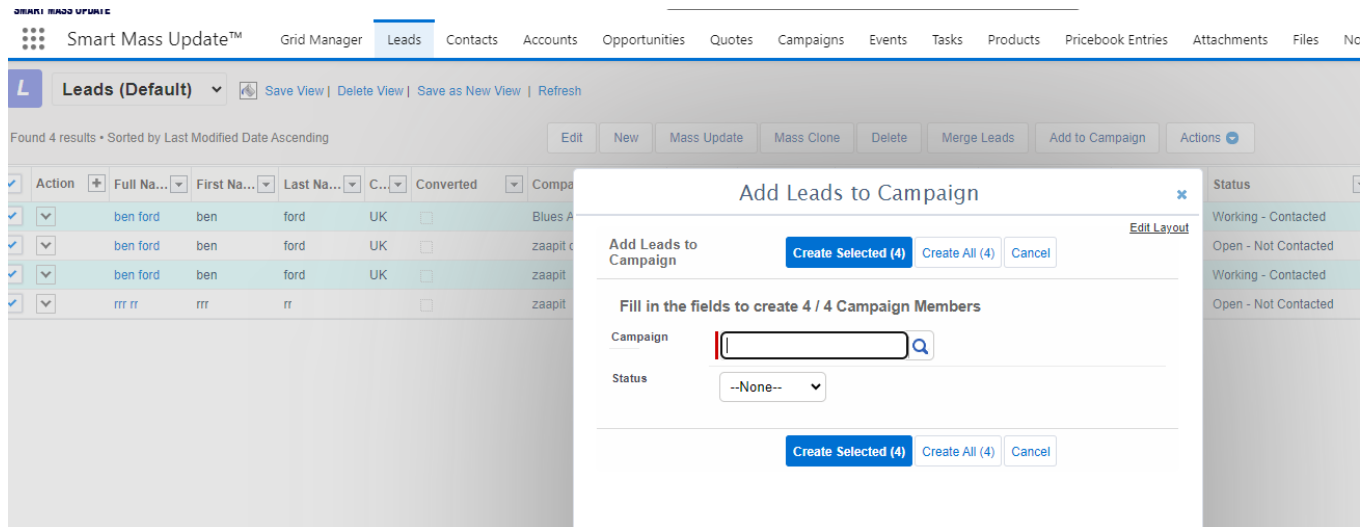
3.1.2. MERGE LEADS BUTTON (SIMPLE)

Identify duplicate leads then hit Merge Leads and the following screen pops up for merging. Use the dedup-manager app to create duplicates reports and to mass merge the relevant records.



3.1.3. ADD TO CAMPAIGN

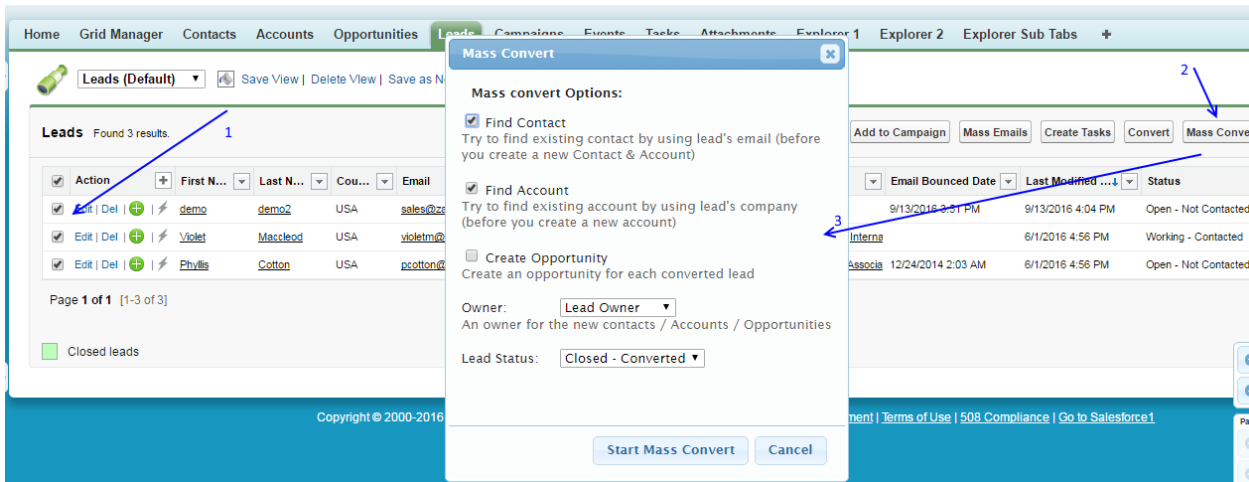
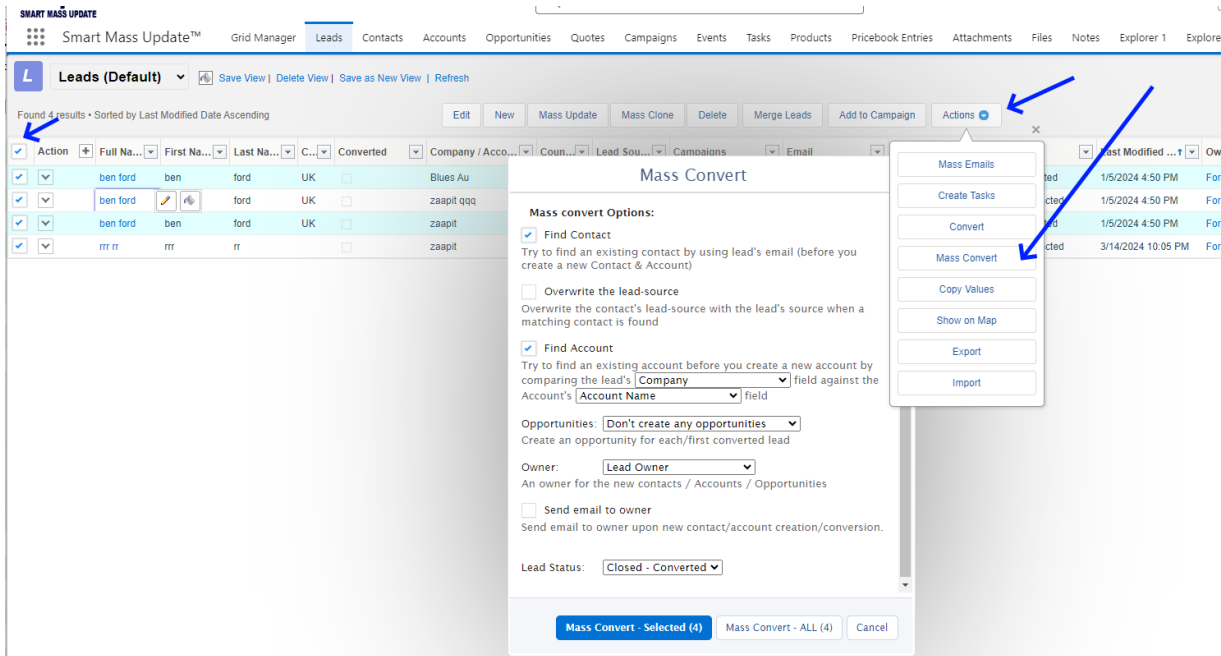
By looking through your leads you can sort and add them to a campaign easily and quickly. Select the records you want click Add to Campaign and then complete the screen to add the records.



3.1.4. MASS CONVERT

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



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

The screenshot displays the ZaapIT interface. On the left is a sidebar menu with categories like 'Maps and Location', 'Home', 'Activities', 'Campaigns', and 'Leads'. Under 'Leads', 'Fields' is selected. The top part of the interface shows a table of fields with columns for field names and data types. Below this is a section titled 'Lead Custom Fields & Relationships' with buttons for 'New', 'Map Lead Fields', and 'Field Dependencies'. A table lists various custom fields with their actions, labels, API names, and installed packages. A blue arrow points from the 'Fields' menu item to the 'Map Lead Fields' button.

Action	Field Label	API Name	Installed Package
Edit	Correlation Data	SFGA__Correlation_Data__c	Salesforce for Google AdWords
Edit	CorrelationID	SFGA__CorrelationID__c	Salesforce for Google AdWords
Edit Del Replace	Create Task	zaapit__Create_Task2__c	ZaapIT Tools
Edit Del Replace	Create Task (M)	zaapit__Create_Task__c	ZaapIT Tools
Edit Del	dup	dup__c	
Edit Del	Email Domain	Email_Domain__c	
Edit	Subscriber Org Type	sflma__Subscriber_Org_Type__c	License Management App
Edit Del	version appexchange link	version_appexchange_link__c	

3.2. ACCOUNTS OBJECT

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

3.2.1. MERGE ACCOUNTS

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

3.2.2. CONTACTS – DRILL DOWN

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

SMART MASS UPDATE

Smart Mass Update™ Grid Manager Leads Contacts Accounts Opportunities Quotes Campaigns Events Tasks Products Pricebook Entries Attachments Files No

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

Found 79 results - Sorted by Account Type Descending

Action
 Account Name
 Account
 Annual Revenue
 Account Description
 Parent Account
 Billing Country
 Shipping State

Account Type: Technology Partner (2)

<input checked="" type="checkbox"/>	Blues Au	001d00000...	\$551		Blues Entertainment C...						
<input checked="" type="checkbox"/>	zaapit	001d00000...	\$3,434								
Sum			\$3,985.00								

Account Type: Channel Partner / Reseller (2)

<input checked="" type="checkbox"/>	Hotel inc	001d00000...	\$0	(781) 270-6511, *1666							
<input checked="" type="checkbox"/>	zaapit	001d00000...	\$26	1							
Sum			\$26.00								

Account Type: Customer - Channel (5)

<input checked="" type="checkbox"/>	Dickenson Plc	001d00000...	\$50,000,000	XXX	Express Logistics						
<input checked="" type="checkbox"/>	Express Logistics And Trans...	001d00000...	\$950,000,000	Commerical logistics and transportation company.							
<input checked="" type="checkbox"/>	Gene Point 2	001d00000...	\$30,000	(650) 867-3466							
<input checked="" type="checkbox"/>	Pyramid Construction Inc.	001d00000...	\$950,000		Express Logistics And ...	(014) 427-4427	France		WA		
<input checked="" type="checkbox"/>	ZAAP1	001300000...	\$30,000,000	222, (650) 867-3450, zzzt555			111	United States	CA		
Sum			\$1,030,980,000.00								

Account Type: Customer - Direct (11)

<input checked="" type="checkbox"/>	Blues Us	001d00000...		6546	Blues Entertainment C...	(456) 577-8888 x8	United States				
<input checked="" type="checkbox"/>	Burlington Textiles Corp Of ...	001d00000...	\$350,000,000	XXX	Express Logistics And ...	(336) 222-7000	United States		Louisiana		
<input checked="" type="checkbox"/>	Constructions Ltd	001d00000...				22	United States				
<input checked="" type="checkbox"/>	Ez Company	001d00000...	\$31,111	Edge, founded in 1998, is a start-up based in Austin, TX. The c...		(512) 757-6000 x1	United States		Texas		
<input checked="" type="checkbox"/>	Grand Hotels & Resorts Ltd	001d00000...	\$500,000,000	666	Express Logistics And ...	(312) 596-1000 x1	United States		IL		
<input checked="" type="checkbox"/>	Kely Ltd	001d00000...	\$26	xcxcxc, kk		(386) 868-3525	Australia				
<input checked="" type="checkbox"/>	Ron Limited	001d00000...				123	United States				
<input checked="" type="checkbox"/>	United Oil & Gas Corp.	001d00000...	\$5,600,000,000	World's Third Largest Oil And Gas Company.		(212) 842-5500 x111	United States		Kansas		
<input checked="" type="checkbox"/>	United Oil & Gas. Singapore	001d00000...	\$3,331	World's third largest oil and gas company.	Dickenson Plc	(650) 450-8810	United States				

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

Found 40 results - Sorted by Account Ascending

Action
 Full Name
 Email
 Owner
 Campaign
 Account
 Mailing State/Province
 Mailing Country
 Acc.Billing Country
 First Name
 Last Name
 Created By ID

<input type="checkbox"/>	Carolyn Cren...	carolync@acei...		International Electrical Engineers Associato...	Ace Iron And Ste...	Alabama	United States		Carolyn	Crenshaw	Ford Ben
<input type="checkbox"/>	Suzi Ford	rosa@zaapit.com	Ford Ben	DM Campaign to Top Customers - Nov 12-2...	Blues Au		United States	United States	Suzi	Ford	Ford Ben
<input type="checkbox"/>	Jack Rogers	sales_us33@za...	Ford Ben	International Electrical Engineers Associato...	Burlington Textile...	North Carolina	United States	United States	Jack	Rogers	Ford Ben
<input type="checkbox"/>	Barbara Levy	b.levy@express...	Ford Ben	DM Campaign to Top Customers - Nov 12-2...	Express Logistics ...	zzz	United States	United States	Barbara	Levy	Ford Ben
<input type="checkbox"/>	Josh Davis	j.davis@expres...	Ford Ben	GC Product Webinar Jan 7 2017, DM Camp...	Express Logistics ...		United States	United States	Josh	Davis	Ford Ben
<input type="checkbox"/>	Ruth Jones	ruth@jones.com	Ford Ben	DM Campaign to Top Customers - Nov 12-2...	Express Logistics ...		United States	United States	Ruth	Jones	Ford Ben
<input type="checkbox"/>	Benz Young	sales_xxx@zaa...	Ford Ben	DM Campaign to Top Customers - Nov 12-2...	Ez Company		United States	United States	Benz	Young	Ford Ben
<input type="checkbox"/>	xxxx yyy	sales_non@zaa...	Ford Ben	DM Campaign to Top Customers - Nov 12-2...	Ez Company		USA	United States	xxxx	yyy	Ford Ben
<input type="checkbox"/>	xxxx yyyy	sales_us44@za...	Ford Ben	DM Campaign to Top Customers - Nov 12-2...	Ez Company	aaa	United States	United States	xxx	yyyy	Ford Ben
<input type="checkbox"/>	Rose Gonzalez	rosa@edge.com	Ford Ben	DM Campaign to Top Customers - Nov 12-2...	Ez Company	A	United States	United States	Rose	Gonzalez	Ford Ben

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Rows per page 10
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3.3. CONTACTS

All functionalities under contacts have been previously discussed.

3.4. OPPORTUNITIES OBJECT

Edit, new, delete, mass update, create tasks and accounts have all been previously discussed same functionality as previously discussed.

3.4.1. ACCOUNTS - DRILL DOWN

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

The screenshot shows the 'Opportunities (Default)' view in the ZaapIT system. The table displays various opportunity records grouped by account. A context menu is open over the 'Pakima project' record under the 'Vimount' account, with the 'Drill Accounts' option highlighted. A blue arrow points to this option. Another blue arrow points to the 'Action' column header. The table includes columns for Name, Last Modified Date, Owner, Created By, Last Activity, Billing City, Account, and a 'Created' column. The 'Pakima project' record under 'Vimount' has a value of \$442,526.00 in the value column.

Action	Name	Last Modified Date	Owner	Created By	Last Activity	Billing City	Account	Created		
Account: Zaaapit1 (1)										
✓	zaapit11	12/2/2023 12:31 AM	Amir Sadeh	Ford Ben	11/30/2017		Zaaapit1	7/5/2017		
Account: Zaaapit 333 (2)										
✓	aaa	11/12/2021 8:35 AM	Ford Ben	Ford Ben		New York	Zaaapit 333	8/17/2021		
✓	Pakima project	12/2/2023 12:31 AM	Ford Ben	Ford Ben		New York	Zaaapit 333	5/4/2023		
Sum										
Account: zaaapit (1)										
✓	zaapit	3/19/2024 6:09 PM	Amir Sadeh	Ford Ben		UK	zaapit	1/3/2017		
Account: Vimount (5)										
✓	ascascas	5/16/2019 9:34 PM	Ford Ben	Ford Ben			Vimount	\$11.00	Prospecting	1/22/20
✓	Pakima project	6/30/2023 6:13 PM	Ford Ben	Ford Ben			Vimount	\$442,526.00	Prospecting	5/4/2023
✓	Vimount 3	8/24/2020 11:07 PM	Ford Ben	Ford Ben			Vimount		Closed Won	11/12/20
✓	Vimount 2	8/24/2020 11:07 PM	Ford Ben	Ford Ben			Vimount	\$2.00	Closed Won	11/12/20
✓	Vimount 1	8/24/2020 11:07 PM	Ford Ben	Ford Ben			Vimount	\$2.00	Closed Won	11/12/20
Sum										
								\$442,541.00		
Account: University Of Arizona (9)										
✓	Pakima project	8/13/2020 1:17 AM	Ford Ben	Ford Ben			University Of Arizona	\$500.00	Prospecting	5/4/2023
✓	University of AZ Portable Gene...	2/26/2023 12:19 PM	Ron Roy	Ford Ben			University Of Arizona	\$45,135.30	Prospecting	1/18/20
✓	University of AZ Installations	2/26/2023 12:19 PM	Ron Roy	Ford Ben			University Of Arizona	\$115,000.00	Prospecting	1/18/20
✓	University of AZ SLA	2/26/2023 12:19 PM	Ron Roy	Ford Ben			University Of Arizona	\$90,000.02	Prospecting	1/18/20
✓	University of AZ Portable Gene...	2/26/2023 12:19 PM	Ron Roy	Ford Ben	12/31/2015		University Of Arizona	\$185,000.00	Prospecting	2/11/20
✓	University of AZ Installations	2/26/2023 12:19 PM	Ron Roy	Ford Ben	3/31/2020		University Of Arizona	\$434,333.00	Qualification	2/11/20
✓	University of AZ SLA	2/26/2023 12:19 PM	Ford Ben	Ford Ben	12/31/2015		University Of Arizona	\$90,000.54	Qualification	2/11/20
✓	University of AZ 2017	8/24/2020 11:07 PM	QA QA	Ford Ben			University Of Arizona	\$1,500.00	Proposal/Price Quote	6/5/2017

3.5. CAMPAIGNS OBJECT

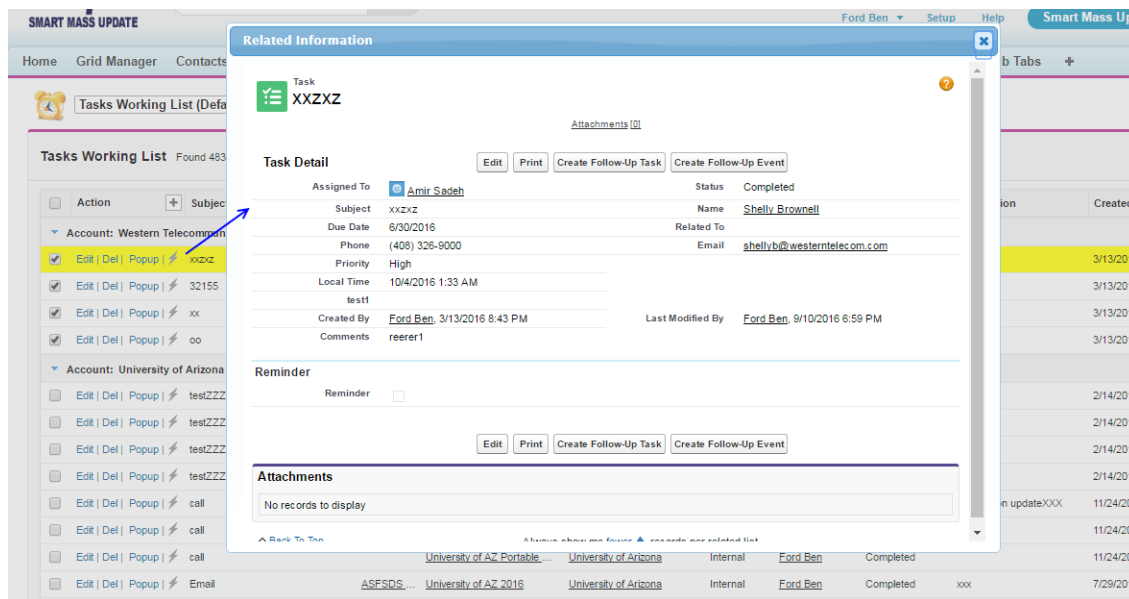
Edit, mass update, delete and new are only functionality, previously discussed.

3.5.1. EVENTS & TASK OBJECT

Edit and New were previously discussed.

3.5.2. LIGHTNING ICON / BUTTON / VIEW DETAILS

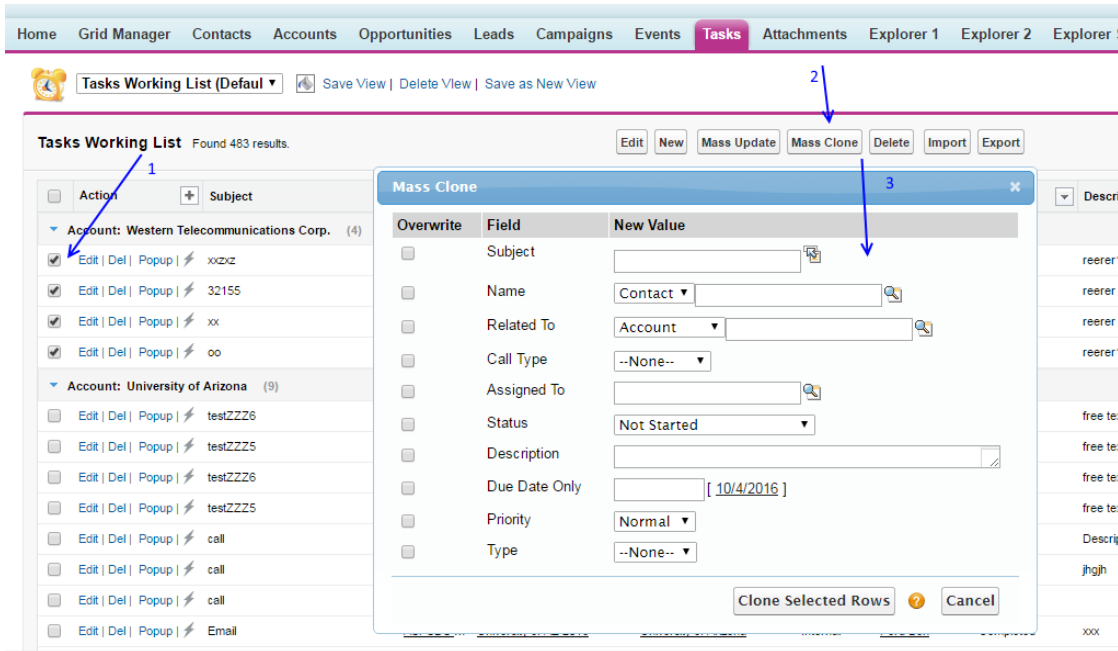
The lightning icon shows the entire tasks + attachments (you can change the default popup screen to sub-tabs with custom smart grids).



3.5.3. MASS CLONE

If you have multiple events / task that need to be re-created select the records and then hit mass clone and then complete the pop up. This option could be very useful for follow up tasks or events...

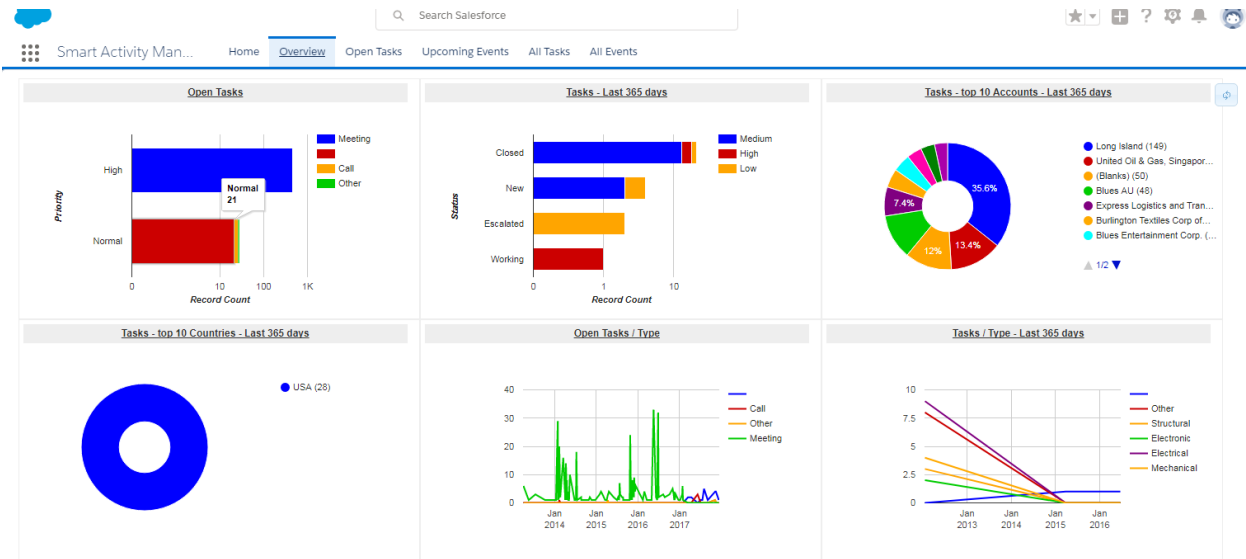
The mass clone option can be activated for any object via the edit-layout link.



4. APPS & FEATURES

4.1. SMART-ACTIVITY-MANAGER>OVERVIEW TAB

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



4.2. DEDUPE-MANAGER > OVERVIEW TAB

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



Figure 1 - Dedupe Overview

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

1. Start by backing up your data - you can do a full backup via setup>data management> data export... (it will be very handy in case you will need to compare / restore something later).
2. Our advice is to start with the pre-built report-tab and/or to use the app first in your sandbox especially when creating an auto merge job.
3. Starting with the dedupe report-tabs
 - a. Decide which object you want to dedupe first (contacts or lead) and then our recommendation is to use email (because it is usually a unique identifier and there are no “spelling related issues” in compare to exact name detection...)
 - b. You can use the sort-field#2 & sort-field#3 to tell the mass-merge process which row to auto-pick as the master (the first row in each cluster is auto-picked as the master unless you overwrite that manually by marking the checkbox in pink...)
 - c. Before you start the mass-merging process make sure you pick the fields (by clicking the fields on the grid) that you want to transfer to the master from the clone records (if needed). You can specify field merge strategy via the field’s column filter (combine/copy if empty/ copy to a different field) – a video is attached: <https://www.youtube.com/watch?v=Cl13Owu9SiY&t=24>
 - d. Start with a small number of clusters to experience the mass-merge result (before you do that on everything)
 - e. Once you complete #2 you can use the “leads with contact (email)” sub-tab and decide if you need to mass convert your leads that already got a matching contact (in order to save the lead’s activities and pass that to the existing contact) or just to mass-delete those leads (if you don’t need the lead’s related records).
 - f. You can even mass convert other leads via smart-mass-update>leads tab... (this mass convert also tries to find duplicates before it creates new records).
 - g. If you need to search “free style” for a specific duplicate lead/contact/account then use smart-mass-update> tabs> search / filter, those tabs also got a merge button on the top...
4. Getting started with an auto merge jobs / merge jobs / custom dedupe
 - a. Optional step: Try the following first in your Salesforce’s sandbox to understand how works.
 - b. Go to the jobs tab under the dedup-manager app and click the new merge job button
 - c. Decide which object you want to dedupe, and choose it in the wizard
 - d. Set the following selections: “Field Used to detect duplicates”, “Master selection field”, “Master selection order”, “copy field / merge strategy” (text fields has more merge object in their dedicated drop down), “Merge Related Lists” strategy (for objects other then contacts/leads/account).
 - e. Add / refine the the “Custom advanced / SOQL filter”, you can use a SOQL condition to filter out non-relevant rows (for example: `CALENDAR_YEAR(CreatedDate) = 2020`), [more examples/options](#).
 - f. Mark the run daily checkbox to run the job on a daily/hourly basis (select hours:* to run the job on an hourly basis, it is recommended to use that option on a limited number of rows for exmample that were created during the current year: `CALENDAR_YEAR(CreatedDate)= THIS_YEAR`)

- g. Set the batch size, select a small batch size for objects other than contacts/leads/accounts or if you got complex triggers or a lot of validation/flows.
- h. Click the preview duplicates to create a manual/custom dedupe or click the create merge job to schedule the job.
- i. Click the job's "view details" link to preview the duplicates & the settings (you can manually mass merge the duplicates from the "view details" link if you used the preview button).

Useful videos:

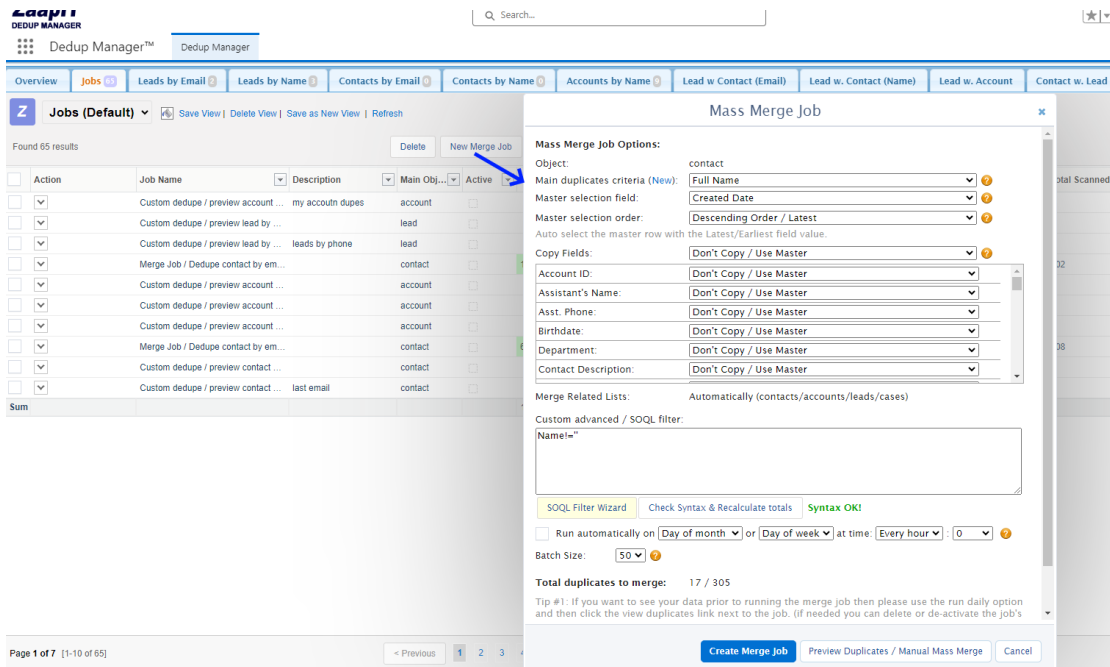


Figure 2 - Merge Jobs / Auto Merge

Custom dedupe – new way: <https://www.youtube.com/watch?v=SEBSFRlhNnw>

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

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

4.4. CREATING A CUSTOM DEDUPE FORMULA FIELD

Before you do the following you also might want to check the find-matching-records option that has a built-in fuzzy matching/clean-text options that you can utilize to detect more duplicates (load your records and filter out the one that has the same ids)

Creating the formula field: Start by creating a [custom salesforce formula field](#) and use that inside the custom dedupe (you can mix and match the following examples and then use formula as the main

4.5. DEDUPE-MANAGER > SMILIAR OBJECT BY CRITIRIA TABS

The “similar object by criteria tabs” show you the first 1200 duplicates based on your criteria, once you will start the merging process more rows will be fetched (**use the jobs tab to mass merge unlimited number of duplicates**).

Use the following demo video to learn how to use mass merging process. The mass merge will merge all the related records, but you need to specify the fields (for the top-object) that you want to copy to the master record. Before you click the mass-merge button you need to select the rows that you want to merge then the fields that you want to keep, and then (optionally) you need to select the master record for each colored-based-group of rows. You can use the field’s column filters to select the merge strategy that you want to use (copy if empty/combine/copy to a different field, the combine-auto option is picked automatically when you use the combine non-master with XXX options)

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

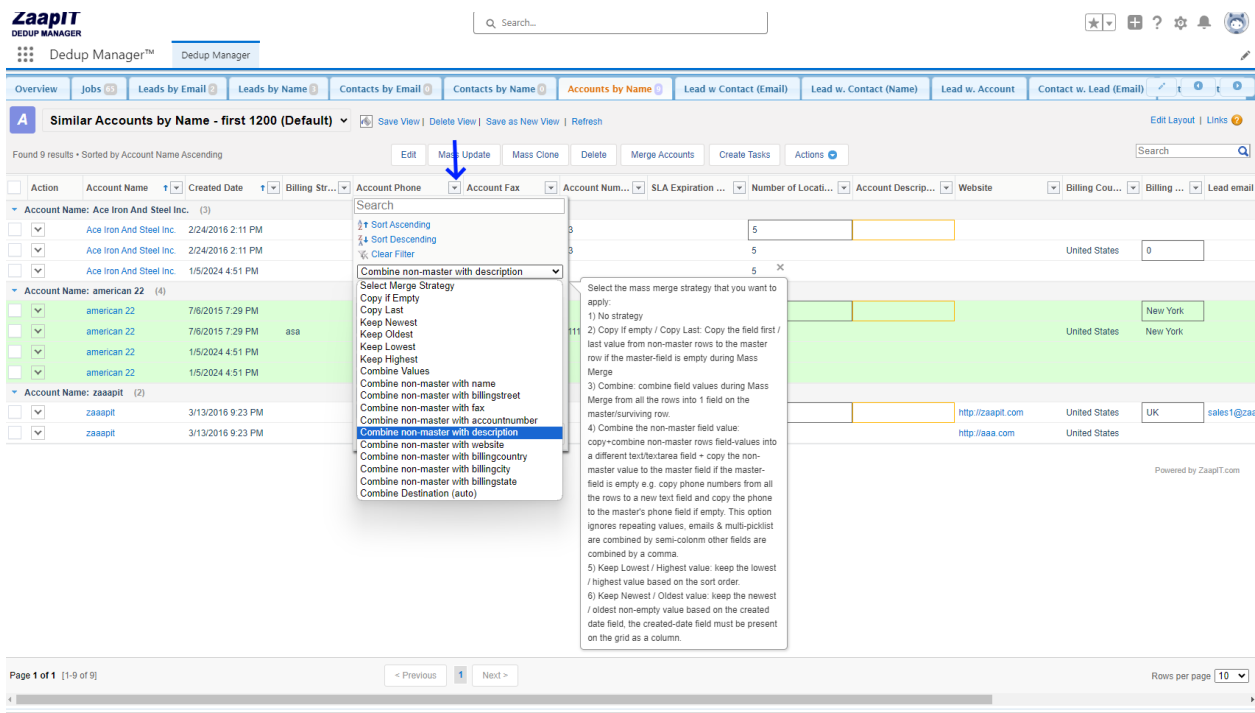


Figure 3 - dedup-manager Combine values!

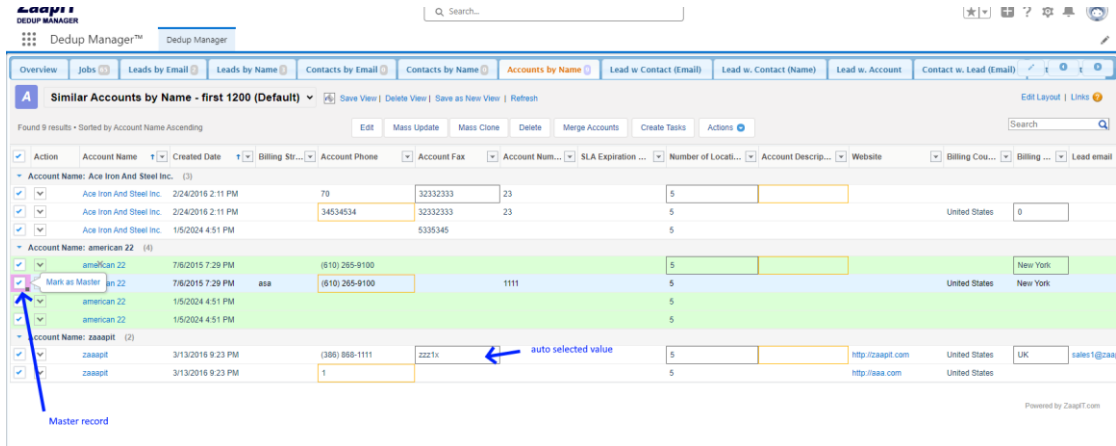


Figure 4 - Mass Merge

4.6. DEDUPE-MANAGER > CREATING A CUSTOM DEDUPE TAB (FORMULA / SOQL) – OLD WAY (SEE THE GETTING STARTED FOR MORE OPTIONS)

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

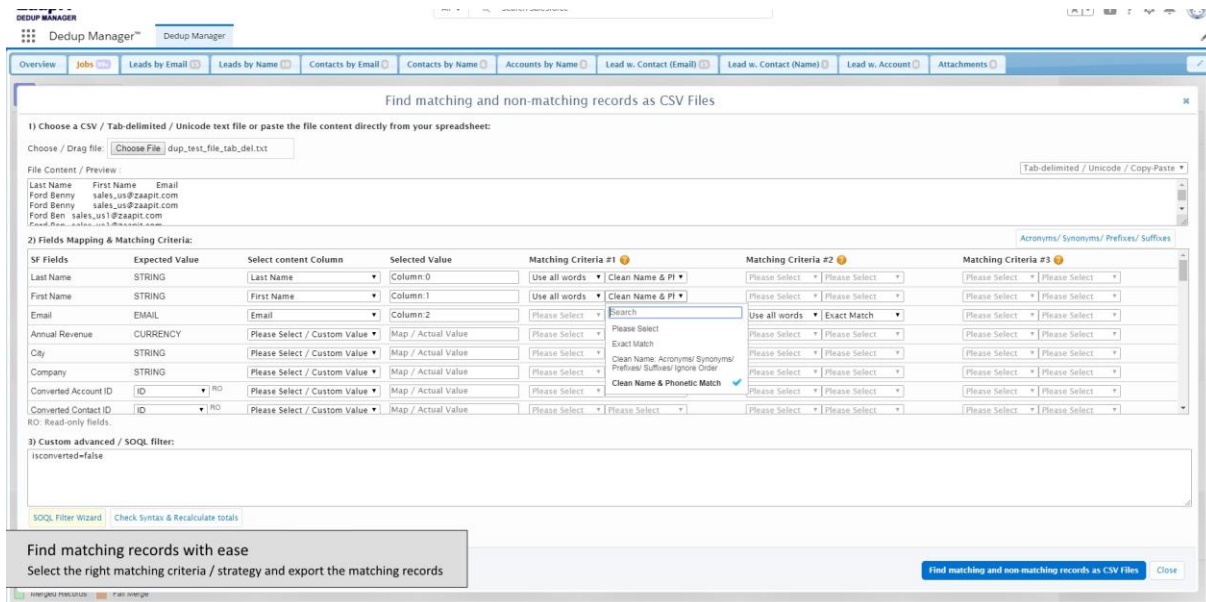
Custom formula/fuzzy dedupe: <https://www.youtube.com/watch?v=nR0vKnIca7k>

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

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

4.7. DEDUP-MANAGER > JOBS > FIND MATCHING RECORDS:

This find-matching-records feature allows you to load a file and compare it against any object. That is to fetch any existing salesforce recordID or to verify that your records are not in Salesforce. You can specify multiple criteria and select multiple matching algorithms. Available matching algorithms: Fuzzy phonetic matching, clean text (from acronyms, suffixes, prefixes and order), first X chars or words.



4.8. DEDUP-MANAGER > JOBS > IMPORT JOB:

This import-job feature allows you to load a file and to insert or update the relevant records into salesforce with ease.

The dupe / unique checkbox tells the app how to detect an existing record. For example, we run the following import job on the lead object and marked the unique checkbox next to the email field and specify that we want to update existing records. Based on our selection the app uses that dupe-mark and search for an existing lead record before it inserts a new record.

1) Choose a CSV / Tab-delimited / Unicode Text File or paste the file content directly from your spreadsheet:

Choose / Drag file: No file chosen

File Content / Preview:

2) Fields Mapping:

SF Fields	Expected Value	Select content Column	Selected Value	Unique / Dupe
Email	EMAIL	email	Column:0	<input checked="" type="checkbox"/>
Annual Revenue	CURRENCY	Please Select / Custom Value	Map / Actual Value	<input type="checkbox"/>
City	STRING	Please Select / Custom Value	Map / Actual Value	<input type="checkbox"/>
Company	STRING	Please Select / Custom Value	Map / Actual Value	<input type="checkbox"/>
Country	STRING	Please Select / Custom Value	Map / Actual Value	<input type="checkbox"/>
Description	TEXTAREA	Please Select / Custom Value	Map / Actual Value	<input type="checkbox"/>
Fax	PHONE	Please Select / Custom Value	Map / Actual Value	<input type="checkbox"/>
First Name	STRING	Please Select / Custom Value	Map / Actual Value	<input type="checkbox"/>
Geocode Accuracy	PICKLIST	Please Select / Custom Value	Map / Actual Value	<input type="checkbox"/>
Individual ID	ID	Please Select / Custom Value	Map / Actual Value	<input type="checkbox"/>
Industry	PICKLIST	Please Select / Custom Value	Map / Actual Value	<input type="checkbox"/>

Decimal / Currency value cleanup:

Empty cells strategy:

4.9. DEDUP-MANAGER > MERGING CROSS OBJECT DUPLICATES:

The dedup-manager app allow you detect and merge cross object duplicates such as leads and contacts.

In the following example, we have created a cross object report for leads and contacts based on the email field.

Cross object detection and elimination
With Mass-merge, mass-convert, mass-update,etc

4.10. DEDUP-MANAGER > DEDUPE BY FORMULA (VIA PROCESS BUILDER) – OLD WAY

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

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

Creating a custom formula to de-duplicate your data:

1. Create a custom text field (250 chars) for the relevant object via via setup>"object name">fields>create custom field in the following example I will use the account object and I will

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create a custom field named "SLA Serial number".

2. Build the formula to populate your field via process builder (setup>create>Workflow & Approvals>Process Builder> use the update record action):

The screenshot shows the Process Builder interface. On the left is a flowchart starting with an 'Account' object, leading to a 'not empty phone' decision. The 'true' path includes 'IMMEDIATE ACTIONS' (update custom field, Add Action), 'SCHEDULED ACTIONS' (Set Schedule, Add Action), and 'STOP'. The 'false' path includes 'Add Criteria', 'IMMEDIATE ACTIONS' (Add Action), 'SCHEDULED ACTIONS' (Set Schedule, Add Action), and 'STOP'. On the right is the 'Update Records' configuration panel. The 'Action Name' is 'update custom field'. The 'Record' is '[Account]'. The 'Criteria for Updating Records' is 'No criteria—just update the records'. The 'Set new field values for the records you update' section shows a table with columns 'Field*', 'Type*', and 'Value*'. The 'SLA Serial Number' field is set to 'Formula' with the value 'left([Account] name,10) & left([Account] Phone ,5)'. The 'Insert' dropdown is set to 'Field', and the 'Operator' dropdown is set to '&'. There are 'Use this Formula' and 'Cancel' buttons, and an 'Add Row' button at the bottom.

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

Before the update:

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

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

Accounts Found 79 results.

Action	Account Name	Parent Account	Billing Cou...	SLA Serial Nu...	Website	Ow...	Last Modified ...
<input checked="" type="checkbox"/>	Blues AU	Blues Entertainment Corp.	USA		http://zaapit.com	Ford Ben	7/31/2016 11:56
<input checked="" type="checkbox"/>	Joby		USA		http://aaa	Ford Ben	8/8/2016 10:37
<input checked="" type="checkbox"/>	kely					Ben	7/31/2016 11:56
<input checked="" type="checkbox"/>	Joby					Ben	7/31/2016 11:56
<input checked="" type="checkbox"/>	Bon					Ben	7/31/2016 11:56
<input checked="" type="checkbox"/>	GenePoint66	Exp...				Ben	7/31/2016 11:56
<input checked="" type="checkbox"/>	GenePoint2	Exp...				Ben	7/31/2016 11:56
<input checked="" type="checkbox"/>	Express Logistics...					Roy	3/13/2016 9:22
<input checked="" type="checkbox"/>	Dickenson plc	Exp...				Roy	4/19/2016 11:45
<input checked="" type="checkbox"/>	Pyramid Construct...	Exp...				Roy	2/24/2016 2:11
<input checked="" type="checkbox"/>	GenePoint5	Exp...				Ben	7/31/2016 11:56
<input checked="" type="checkbox"/>	Ron					Ben	7/31/2016 11:56
<input checked="" type="checkbox"/>	Blues US	Blu...				Ben	7/31/2016 11:56
<input checked="" type="checkbox"/>	test11					Roy	5/18/2016 8:13
<input checked="" type="checkbox"/>	Constructions Ltd					Ben	7/31/2016 11:56
<input checked="" type="checkbox"/>	United Oil & Gas C...	Dic...				Roy	7/3/2016 10:45
<input checked="" type="checkbox"/>	University of Arizona	Exp...				Roy	7/3/2016 10:45
<input checked="" type="checkbox"/>	Grand Hotels & Re...	Exp...				Roy	7/3/2016 10:45
<input checked="" type="checkbox"/>	Burlington Textiles...	Exp...				Roy	6/28/2016 7:30
<input checked="" type="checkbox"/>	Edge Communicat...	Express US	USA	2657	http://edgecomm.com	Ron Roy	11/26/2015 6:22
<input checked="" type="checkbox"/>	United Oil & Gas...	Dickenson plc	USA	2457	http://uos.com	Ron Roy	7/3/2016 10:45
<input checked="" type="checkbox"/>	United Oil & Gas...	Burlington Textiles Corp of Amer...	USA	3470	http://uos.com	Ben Roy	7/3/2016 9:22

Mass Update dialog box:

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

Buttons: Preview, Update Selected Rows, Mass Update All Rows, Cancel

The mass update result:

Accounts Found 79 results.

Action	Account Name	Parent Account	Billing Cou...	SLA Serial Nu...	Account Ph...	Website
<input type="checkbox"/>	Blues AU	Blues Entertainment Corp.	USA	Blues AU43467	434677788	http://zaapit.com
<input type="checkbox"/>	Joby		USA	Joby111	111	http://aaa
<input type="checkbox"/>	kely		USA	kely11	11	
<input type="checkbox"/>	Joby		USA	Joby		
<input type="checkbox"/>	Bon		USA	Bon		
<input type="checkbox"/>	GenePoint66	Express Logistics and Transport	USA	GenePoint6(650)	(650) 867-3450	http://www.genepoint.com
<input type="checkbox"/>	GenePoint2	Express Logistics and Transport	USA	GenePoint2(650)	(650) 867-3450	http://genepoint.com
<input type="checkbox"/>	Express Logistics...		USA	Express Lo(503)	(503) 421-7800	http://expressl&t.net
<input type="checkbox"/>	Dickenson plc	Express Logistics and Transport	USA	Dickenson i(8i)	i(8i)8mm9	http://dickenson-consult
<input type="checkbox"/>	Pyramid Construct...	Express Logistics and Transport	France	Pyramid Co(014)	(014) 427-4427	http://pyramid.com
<input type="checkbox"/>	GenePoint5	Express Logistics and Transport	USA	GenePoint5(650)	(650) 867-3450	http://www.genepoint.com
<input type="checkbox"/>	Ron		USA	Ron123	123	
<input type="checkbox"/>	Blues US	Blues Entertainment Corp.	USA	Blues US45657	45657788888	http://zaapit.com
<input type="checkbox"/>	test11			test11		
<input type="checkbox"/>	Constructions Ltd		USA	Construct22	22	
<input type="checkbox"/>	United Oil & Gas C...	Dickenson plc	USA	United Oil(212)	(212) 842-55001	http://www.uos.com
<input type="checkbox"/>	University of Arizona	Express Logistics and Transport	USA	University(520)	(520) 773-9050	http://universityofarizona
<input type="checkbox"/>	Grand Hotels & Re...	Express Logistics and Transport	USA	Grand Hotel(312)	(312) 596-1000	http://grandhotels.com
<input type="checkbox"/>	Burlington Textiles...	Express Logistics and Transport	USA	Burlington(336)	(336) 222-7000	http://burlington.com
<input type="checkbox"/>	Edge Communicat...	Express US	USA	Edge Commu(512)	(512) 757-60001	http://edgecomm.com
<input type="checkbox"/>	United Oil & Gas...	Dickenson plc	USA	United Oil(650)	(650) 450-8810	http://uos.com
<input type="checkbox"/>	United Oil & Gas US	Burlington Textiles Corp of Amer...	USA	United Oil+44 1	+44 191 4956...	http://uos.com
<input type="checkbox"/>	Farmers Coop. of ...		USA	Farmers Co(850)	(850) 644-4200	

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

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

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

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

4.11. ADDING A SMART RELATED LIST / CUSTOMER VIEW

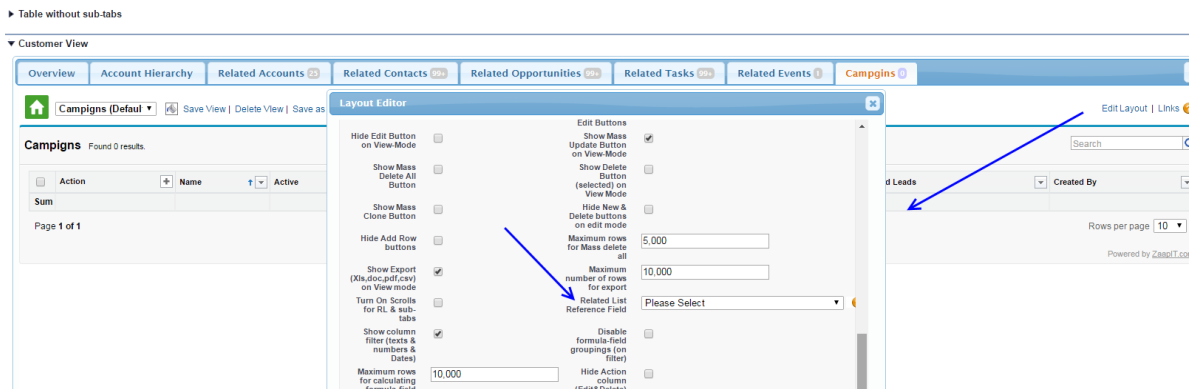
Edit the object's layout and add one of the visualforce pages named: "Object" RL1 / "Object"RL2 / "Object" tabs / Customer view (hierarchy tabs) > afterwards save the layout and edit the new related list grid to > change the object, add fields and use the Related List Reference Field or Advanced filter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

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

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

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

Setting the Related List Reference Field:



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Using the Advanced filter to set the connection:

