



# ZaapIT's - Smart-Tools

### **Getting Started / Training Guide**

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### INTRODUCTION

ZappIT'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 trough 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. Mutli-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.



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

Click this button or move your mouse to the preset the number of new rows where you can then edit this number. Change it to 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.

All Accounts (Defaul	t) 🗸 🔞 Save V	iew   Delete View	Save as Ne		
F Add Row(s): 5 ount Typ	e Descending		E		
Action + Account Name	↑ ▼ Account ▼	Annual Revenue	Acc		
<ul> <li>Account The: Technology Partner</li> </ul>	(2)				
Blues Au	Ø 00	\$551			
zaaapit	001d00000	\$3,434			
Sum		\$3,985.00			
<ul> <li>Account Type: Channel Partner / Re</li> </ul>	eseller (2)				
✓ Hotel inc	001d00000	\$0	(781		
✓ zaaapit	001d00000	\$26	1		
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Ace Iron A	nd Steel Inc.	001d00000			
					j,
	T		\$1,801,541,146.00		
+			\$9,282,563,417.00		

Same functionality in all objects.

### 1.4. LIGHTING 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.



CMA		Search			Searc	ch										
AING	ART N	ASS OPDATE		Related	Inform	ation										
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	0	Accounts (Default)	🚳 Save	Over	view	Contacts	n –	Tasks	Notes		test					
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Sum																
▼ Ac	coun	t Type: Customer - Channel														
	*	Dickenson Plc														

#### 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).



Acco	ounts Foun	id 79 results.		
	Action	Account Name	Parent Account	Billing Country
		Blues AU	Blues Entertainment Corp.	USA
		Joby	Blues Entertainment Corp. 🖉 🕙	USA
		kely	Blues Entertainment Corp. 29	USA
		Joby	Blues Entertainment Corp. 🖉 🔩	USA
		Bon	<u></u>	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.

SN	ART MASS	UPDATE			L.	-									
1	S	Gmart Mass Update™ Grid	d Manager Leads	Contacts Accounts Oppo	rtuniti	es Quotes	Campaigns	Events Tas	ks Products Pricebook Er	ntries	Attachments Files No	tes Explorer 1 Ex	cplore	r 2 Explorer S	ub Tabs
4	0	pportunities (Default)	✓ 🔊 Save View   De	lete View   Save as New View										Edit	Layout   Links 🄇
Fo	und 145 i	results • Sorted by Account Descending	Save	Cancel 3 Changed Row(s	N	ew Mass U	Jpdate Mass	Clone Dele	e Create Tasks Add Co	ontact	Roles Actions O			Search	
	Action	+ Name	Last Modified Date	Owner	-	Created 💌	Last Acti 💌	Billing 💌	Account	• •	Amount 💌	Stage	1 -	Created D 💌	Close Date
*	Account	t: Zaapit1 (1)													
	~	zaapit11	12/2/2023 12:31 AM	Amir Sadeh	Q	Ford Ben	11/30/2017		Zaapit1	Q	235,000.00	Qualification	~	7/5/2017 10:38 AM	9/30/2017
*	Account	t: ZaapIT 333 (2)													
	*	aaa	11/12/2021 8:35 AM	Ford Ben	Q	Ford Ben		New York	ZaapIT 333	Q	333.00	Prospecting	~	8/17/2021 10:11 AM	8/20/2021
	~	Pakima project	12/2/2023 12:31 AM	Ford Ben	Q	Ford Ben		New York	ZaapiT 333	Q	145,200.00	Needs Analysis	~	5/4/2020 9:09 PM	5/26/2020
											\$145,533.00				
*	Account	t: zaaapit (1)												400047.0.40	
*	~	zaaapit	3/19/2024 6:09 PM	Amir Sadeh	Q	Ford Ben		UK	zaaapit	٩	111.00	Qualification	*	PM	3/29/2023
*	Account	t: Vimount (5)												40000404040	
~	~	ascascas	5/16/2019 9:34 PM	Ford Ben	Q	Ford Ben			Vimount	Q	11.00	Value Proposition	*	AM	11/12/2015
~	~	Pakima project	6/30/2023 6:13 PM	Ford Ben	Q	Ford Ben			Vimount	٩	442,526.00	Needs Analysis	۲	5/4/2020 9:09 PM	5/26/2020
	٧	Vimount 3	8/24/2020 11:07 PM	Ford Ben	Q	Ford Ben			Vimount	Q		Closed Won	۲	11/12/2015 1:02 PM	11/12/2015
	٧	Vimount 2	8/24/2020 11:07 PM	Ford Ben	Q	Ford Ben			Vimount	Q	2.00	Closed Won	•	11/12/2015 1:02 PM	11/12/2015
	۷	Vimount 1	8/24/2020 11:07 PM	Ford Ben	Q	Ford Ben			Vimount	Q	2.00	Closed Won	•	11/12/2015 1:02 PM	11/12/2015
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*	Account	t: University Of Arizona (9)												514/2020 0:00	
	$\mathbf{v}$	Pakima project	8/13/2020 1:17 AM	Ford Ben	Q	Ford Ben			University Of Arizona	Q	500.00	Prospecting	•	PM	5/26/2020
	۷	University of AZ Portable Ge	2/26/2023 12:19 PM	Ron Roy	Q	Ford Ben			University Of Arizona	Q	45,135.30	Prospecting	•	1/18/2012 9:00 PM	3/29/2023
	~	University of AZ Installations	2/26/2023 12:19 PM	Ron Roy	Q	Ford Ben			University Of Arizona	Q	115,000.00	Prospecting	~	1/18/2012 9:00 PM	3/29/2023
Pag	e 1 of 6	[1-25 of 145]		< Previous	1	2 3 4	5 6 Next	>						440/2042 0.00	• lows per page 2
	big deal	и													_



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.

Home	Grid Manag	er Contacts	Accounts	Opportunities	Leads Car	npaigns	Events Tasks	; A	Attachments	Explorer 1	Explorer 2	Explorer Sub Ta	bs +
	Accounts (	Default) ▼	\delta Save View	w∣Delete Vlew∣S	ave as New Viev	v   Refresh							
Acco	ounts Found	79 results.						Save	Cancel 1 Cha	nged Row(s)	New Mass Update	Delete Copy Valu	
	Action	Account Name		Parent Account		Billing Co	ountry	¥	SLA Serial Num	iber	Annual Rev	enue 👻	Account Phone
	1	Blues AU		Blues Entertainm	ient Corp.	USA			Blues AU434	67			434677788
	1	Joby			9	USA			Joby 111				13
	1	kely			9	USA			XXX	Û	2		15
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	1	Bon			9	USA			Bon				
-		o o	1	e • • • •	·- 0			_	D	50			10501-007-0150

#### 1.1 MASS DELETE BUTTON

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

0	Opportu	nities (Default) 🛛 👻 🛛	Save View   Delete Vi	ew   Save as Ne	w View						
Founi	1 145 results + So	inted by Account Descending	5	Edi	New Mass U	Jpdate Mass Clone	Delete Create Tasks	Add Contact Role	Actions O		
	Tion	+ Name	Last Modified Date	enner	Treated By	- Last Activity	Billing City	Account 4 -	Amount 💌	Stage 1	· Crev
Ac	count: Zaapit1	(1)									
	Y	zaapit11	12/2/2023 12:31 AM	Amir Sadeh	Ford Ben	11/30/2017		Zaapit1	\$235,000.00	Qualification	7/5/
Ac	count: ZaapIT 3	133 (2)									
	*	888	11/12/2021 8:35 AM	Ford Ben	Ford Ben		New York	ZaapiT 333	\$333.00	Prospecting	8/17
	Y	Pakima project	12/2/2023 12:31 AM	Ford Ben	Ford Ben		View York	/ 1/0 133	\$145,200.00	Needs Analysis	5/4/2
-						Mass Dalata			\$145,533.00		
Ac	count: zaaapit	(1)				mass Delete		x			
	¥	zaaapt	3/19/2024 6:09 PM	Amir Sadeh	Would you like to	delete the selected r	ows or all the rows?	spit	\$111.00	Value Proposition	1/3/
Ac	count: Vimount	(5)									
	¥	ascascas	5/16/2019 9:34 PM	Ford Ben				ount	\$11.00	Prospecting	1/22
	*	Pakima project	6/30/2023 6:13 PM	Ford Ben				punt	\$442,526.00	Prospecting	5/4/
	Y	Vimpunt 3	8/24/2020 11:07 PM	Ford Ben	Marco Delate - Se	Acted (25) Mars Dal	Cancel	ount		Closed Won	11/1
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	¥	Vimpunt 1	8/24/2020 11:07 PM	Ford Ben	Ford Ben			Vimount	\$2.00	Closed Won	11/1
-									\$442,541.00		
Ac	count: Universi	ty Of Arizona (9)									
	~	Pakima project	8/13/2020 1:17 AM	Ford Ben	Ford Ben			University Of Arizona	\$500.00	Prospecting	5/4/2
	*	University of AZ Portable Gene	2/26/2023 12:19 PM	Ron Roy	Ford Ben			University Of Arizona	\$45,135.30	Prospecting	1/18
	~	University of AZ Installations	2/26/2023 12:19 PM	Ron Roy	Ford Ben			University Of Arizona	\$115,000.00	Prospecting	1/18
	*	University of AZ SLA	2/26/2023 12:19 PM	Ron Roy	Ford Ben			University Of Arizona	\$90,000.02	Prospecting	1/18
	×.	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
	Y	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
	*	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
	~	University of AZ 2017	8/24/2020 11:07 PM	QAQA	Ford Ben			University Of Arizona	\$1,500.00	Proposal/Price Quote	6/5/7

#### 2.1. FAST INLINE EDIT

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

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ass Update™	Home	Grid Manager	Leads	Contacts	Accounts	Opp	
fault) 🔻 💰	Save View	∣ Delete Vlew   Sa	ve as New	View   Refres	h		
esults.		1	Edit	t New Ma	ss Update D	elete	
ACCOUNT NAME		BILLING CIT	-	PARENT ACCO	UNT	t 💌	
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efault) 🔹 🖪	Save Vie	ew   Delete View	Sare as l	New View   R	efresh		
esults.				Edit New	Mass Updat	te De	
		BILLING C	ITY [	▼ PARENT	ACCOUNT		
Express US (1)			1				
Ez Company		Billing City	<i>r</i> :				
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GenePoint21			Gave				
Pluce Entortainm	ont Corn	Portland		Evoroce	opictics and	Transpo	

#### 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.

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Public



	•	Account Edit New Accou	nt							Help for this Page
	Acc	ount Edit			Save	Save & New Cancel				
	Acc	ount Information								= Required Information
		Account O	wner	Ford Ben				Rating	None T	
		Account	Name I					Phone		
		Desert								
		Parent Acc	ount					Fax		
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			Туре	None		•	E	Employees		
		Ind	ustrv	None	-			SIC Code		
			,	INONE	•					
SMAR	T MASS UPDATE	t Mass Update™ ⊂	Grid Manage	r Leads C		Q Search	w Account: rtype			Notes Ex
Α	All Ac	counts (Default)	✓ ▲ Sa	ve View   Delete						-
		, ,							* = Required Information	
Foun	d 79 results •	Sorted by Account Type Desce	inding		Account Information	1				
	Action +	Account Name T	Account	<ul> <li>Annual Rev</li> </ul>	Account Owner	🖰 Ford Ben	Rating	None	•	ing State/P
- A	count Type:	Technology Partner (2)			* Account Name		Phone			
	¥	Blues Au	001d00000	\$551					]	
	*	zaaapit	001d00000	\$3,434	Parent Account	Search Accounts	Q Fax			
- A	count Type:	Channel Partner / Reseller	(2)	\$3,565.00	Account		Website			
	*	Hotel inc	001d00000	\$0	* Account Site		Ownership	None		
	*	zaaapit	001d00000	\$26					*	
um		Quartering Observation (7)		\$26.00	Туре	None	Employees			
A	v	Dickenson Plc	001d00000	\$50,000,000	Industry	None	TSIC Code			15
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	~	Gene Point 2	001d00000	\$30,000			Туре			achusetts
	~	Pyramid Construction Inc.	001d00000	\$950,000	has open cases		Account Source	None	•	
	~	ZAAP1	001300000	\$30,000,000						
um	count Tuno	Customer Direct (11)		\$1,030,980,	Table without sub-ta	bs				
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	¥	Kely Ltd	001d00000	\$26						
	¥	Ron Limited	001d00000			Cancel	Save & New Save			
	V	United Oil & Gas Corp.	001d00000	\$5,600,000,0				-		US IS

### 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



(	Cor	itacts - Workin	g list (Default)	✓ Save View   Delete Vie	w   Save as New View					
Fo	ound 305 res	ults • Sorted by Mailing	g Country Descending	E	Edit New Mas	s Update Mass Clone	Delete Merge C	Contacts Add to Car	npaign Actions O	1
~	Action	+ Full Name 💌	Billing City	▼ Email Opt ▼ Email B	c	Mass	s Create		Create Tasks	Cwner
*	Mailing Co	untry: USA (6)								
~	$\checkmark$	Ron Roy	New York		Mass Create	Tasks Create S	elected (25) Create All	(305) Cancel	Mass Emails via Outlook	Ford Ben
~	$\sim$	Rosy Ford	New York						Copy Values	Ford Ben
~	~	benny Ford	New York		Fill in the f	ields to create 25 / 30	05 Tasks		Mass Emplie	Ford Ben
~	~	Robi Ford	New York		Subject	follow up			Mass Elitais	Ford Ben
•	$\sim$	Kenny Ford	New York		Status	Conon ab			Mailing Map	Ford Ben
~	~	хххх ууу	Austin		54443	Not Started	~		Other Map	Ford Ben
*	Mailing Co	untry: United States	(176)		Assigned To		Q		Deaths Obatta	
~	~	demo demo2			Comments	·			Post to Chatter	Amir Sadeh
~	*	Margaret Demo3	New York				li		Export	Ford Ben
1	*	Mike Braund	Xxx		Due Date	[ 4/15	5/2024 1		Import	Ford Ben
1	*	Patricia Feager			Priority					Ford Ben
~	~	Brenda Mcclure				Normal 🗸			CFO	Ford Ben
~	$\checkmark$	Kathy Snyder			Туре	None 🗸			Regional General Manage	r Ford Ben
~	$\sim$	Tom James	Coral Gables						SVP, Production	Ford Ben
•	$\sim$	Shelly Brownell				Create S	elected (25) Create All	(305) Cancel	SVP, Technology	Ford Ben
~	$\sim$	Pamela Owenby				Croate o	ordato / art	ounor	SVP, Technology	Ford Ben
~	$\sim$	Norm May							VP, Facilities	Ford Ben
~	$\sim$	Kristenxxx Akin	Xxx	~					Director, Warehouse Mgm	t Ford Ben
~	$\sim$	Carolyn Crenshaw	/	✓ 1					VP, Technology	Ford Ben
~	~	Bill Dadio Jr							CFO	Ford Ben
•	~	Bob Young	Bb1							Ford Ben
-	~	Jorge Bair	Bb1		12/26/2017	United States		Paris Pyrami	d	Ford Ben
										- 10

### 2.4. CONDITIONAL STYLING

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

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SMART MASS	<b>suppare</b> Smart Mass Update™	Grid Manager Leads	Contacts Accounts	Opportunities Quo	otes Campaigns	Events Tasks	Products P	 Pricebook Entries	Attachments	Files Note	s Explorer 1	Explor
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Page 1 of 6	[1-25 of 145]					_						
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#### 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.

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<ul> <li>Parent A</li> </ul>	Account: B	lucs Entertainment Corp.	(4)				
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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.

SM	ART MASS UPDATE				_		~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~			
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2	*	Gene Point 2	001d00000	\$30,000	(65					I St
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<b>~</b>	~	United Oil & Gas Corp.	001d00000	\$5,600,000,000	Wo	orld's Third Large	st Oil And Gas Company.		(212) 842-5500 ×111	United St
~	¥	United Oil & Gas. Sindapore	001d00000	\$3.331	Wo	orld's third largest	oil and das company.	Dickenson Plo	(650) 450-8810	United St
Pag	e 1 of 4 [1-25	of 79]				< Previous	2 3 4 Next>			

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### 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.

Home	Grid Manage	r Contacts	Accounts	Opportunities Lea	ds Campaigns	Events Tasks	Attachments	Explorer 1	Explorer 2	Explorer Sub Tabs	+	
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					Company   Eme	erson Transport		🔘 zaaapit				

### 3.1.3. ADD TO CAMPAIGN

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

ama						_		-										
:	Smar	t Mass Up	date™	Grid Manager	Leads	Contacts	Accounts	Opportuniti	es Quotes	Campaigns	Events	Tasks	Products	Pricebook Entrie:	s At	ttachments	Files	No
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#### 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

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ind 4 re	sults • Sorted by Las	st Modified Date	e Ascending			Ed	t New	Mass Update	Mass Clone	Delete	Merge Leads	Add to Campa	gn Actions 🕥	K		
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### 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.

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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.

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### 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).

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#### 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...

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

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### 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.





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### 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: <a href="https://www.youtube.com/watch?v=Cl13Owu9SiY&t=24">https://www.youtube.com/watch?v=Cl13Owu9SiY&t=24</a>
  - 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).
  - 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 exmaple 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:

Laapii Dedup Manager	er <sup>TM</sup> Dedup Manager		Q Search					**
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			1	Total duplicates to merge:	17/305			
			1 a	Tip #1: If you want to see you and then click the view duplica	r data prior to running the ates link next to the job. (	e merge job then please use if needed you can delete or	the run daily option de-activate the job's	-
Page 1 of 7 [1-10 of 65]		< Previous	1 2 3 4		Create Merge Job	Preview Duplicates / Manua	I Mass Merge Can	cel

#### Figure 2 - Merge Jobs / Auto Merge

Custom dedupe – new way: <u>https://www.youtube.com/watch?v=SEBSFRlhNnw</u> Custom formula/fuzzy dedupe (old way): <u>https://www.youtube.com/watch?v=nR0vKnlca7k</u> Custom dedupe via grouping SOQL (old way): <u>https://www.youtube.com/watch?v=bQ-ee2jO0w4</u>

#### 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 <u>custom salesforce formula field</u> and use that inside the custom dedupe (you can mix and match the following examples and then use formula as the main

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#### dedupe field: <a href="https://www.youtube.com/watch?v=SEBSFRIhNnw">https://www.youtube.com/watch?v=SEBSFRIhNnw</a>

Since version 1.1124 you can create the custom formula field directly form the new merge job popup.

- 1) Formula field that ignores/removes "inc.", "LTD", "company", "co": SUBSTITUTE(SUBSTITUTE(SUBSTITUTE(SUBSTITUTE(lower(YOUR\_FIELD(S)), 'Itd', "), 'inc.', "), 'company', "), 'co', ")
- 2) Formula for account name and phone: *lower(name &' '& phone)*
- 3) Formula for contact name and phone: *lower(firstname &' '& lastname &' '& phone)*
- 4) Formula for the first word in the account name: if(find(' ',Name)>0,left(Name,find(' ',Name)),Name)
- 5) Clean phone number: SUBSTITUTE(SUBSTITUTE(SUBSTITUTE(phone, "(",""), ")",""), "-","")
- 6) Formula for the 2 first words in the account name: lower(SUBSTITUTE(SUBSTITUTE(SUBSTITUTE(if(find(' ',Name,max(find(' ',Name)+1,5)))>0,left(Name,find(' ',Name,max(find(' ',Name)+1,5))),Name),'.', "), ',', "), '&', "))
- 7) Formula for the 2 first words in the account name + common suffixes removed: lower(SUBSTITUTE(SUBSTITUTE(SUBSTITUTE(SUBSTITUTE(SUBSTITUTE(SUBSTITUTE(SUBSTITUTE(SUBSTITUTE(SUBSTITUTE( SUBSTITUTE(SUBSTITUTE(SUBSTITUTE( if(find(' ',Name,max(find(' ',Name)+1,5))>0,left(Name,find(' ',Name,max(find(' ',Name)+1,5))),Name) ,'.', "), ',', "), '&', "),' ltd',"),' inc',"),' company',"),' co',"),' llc',"))
- Formula for cleaned website without http https or www: SUBSTITUTE( SUBSTITUTE( SUBSTITUTE(website, 'http://', "), 'https://', "), 'www.', ")
- 9) Fuzzy formula that ignores spelling mistakes:

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#### 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

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Figure 3 - dedup-manager Combine values!

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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 dedup for custom formula fields / any salesforce field:

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

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

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#### 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.

DEDUP MANAGER				Q Search					× • •	7
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Page 1 of 7 [1-10 of 65]								Impor		Rows
Merged Records										



### 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.

				All 🔻 🔍	Search Salesforce					
Dedup Mana	ager <sup>™</sup> Dedup M	anager								
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Page 1 of 2 [1-10 of 15]			< Prev	ious 1 2 Next >						

### 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 <u>custom settings</u>).

#### Creating a custom formula to de-duplicate your data:

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

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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):



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

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Before the update:

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

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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: <u>https://www.youtube.com/watch?v=-ly2C\_aI7PA</u> Adding a related list in Classic: <u>https://www.youtube.com/watch?v=fxaLcHxePbI</u> Adding a customer view: <u>https://www.youtube.com/watch?v=9jJw9RRydW8</u>



#### Setting the Related List Reference Field:



Using the Advanced filter to set the connection:

Frable without sub-tabs		
Customer View		
Overview Account Hierarchy Related Accounts 💿	Related Contacts 💯 Related Opportunities 💯 Related Tasks 💯 Related Events 🕕 Campgins 🖯	
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	In case of an unexpected/problematic result you can empty this field (named "extraConditionFilter") under setup-custom settings.	