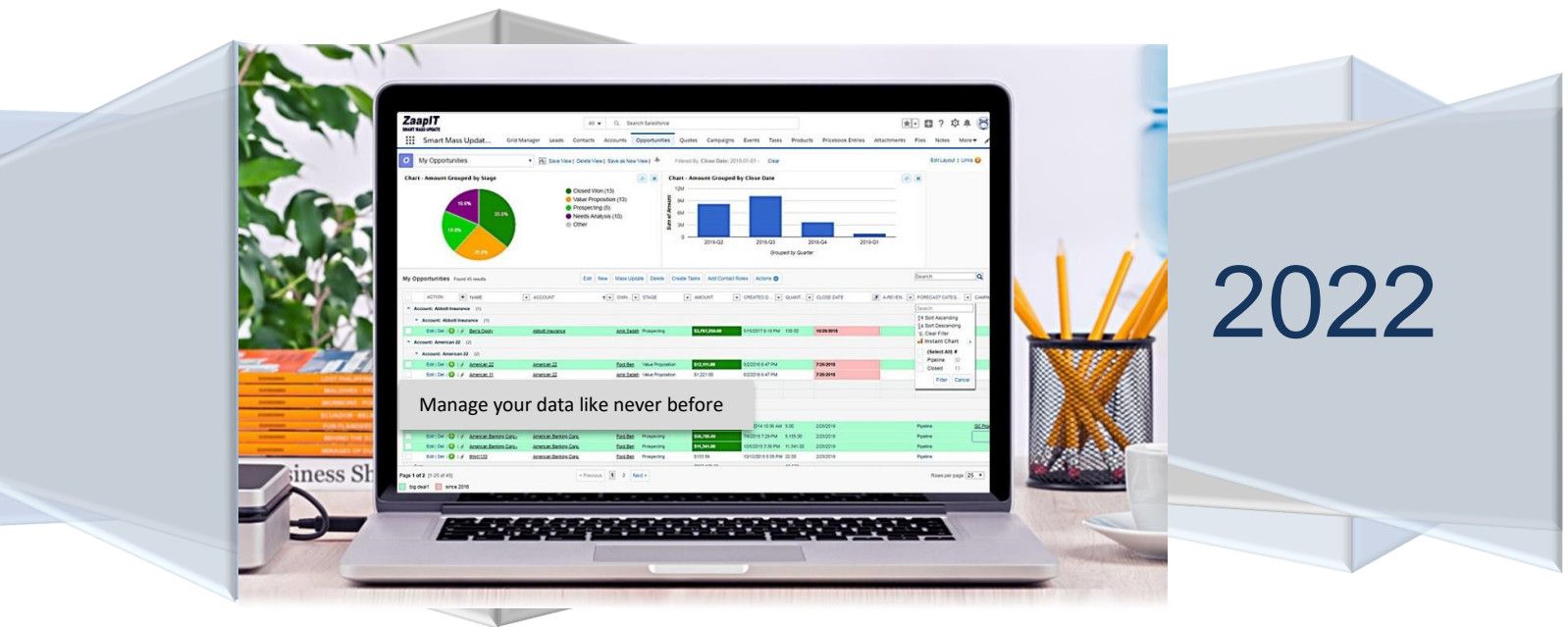


ZaapIT's - Smart-Tools

Getting Started / Training Guide

Created by Ben Ford

App Version: 1.1231(Jan-2022)



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).



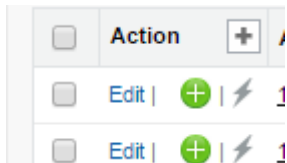
Click the Arrow and the you will see Smart-Mass-Update / Dedup-manager / Smart-Activity-Manager / ZaapIT-Console now you will see Salesforce in the ZaapIT's app. To go back Salesforce Classic, click the same arrow and then click Sales.

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:

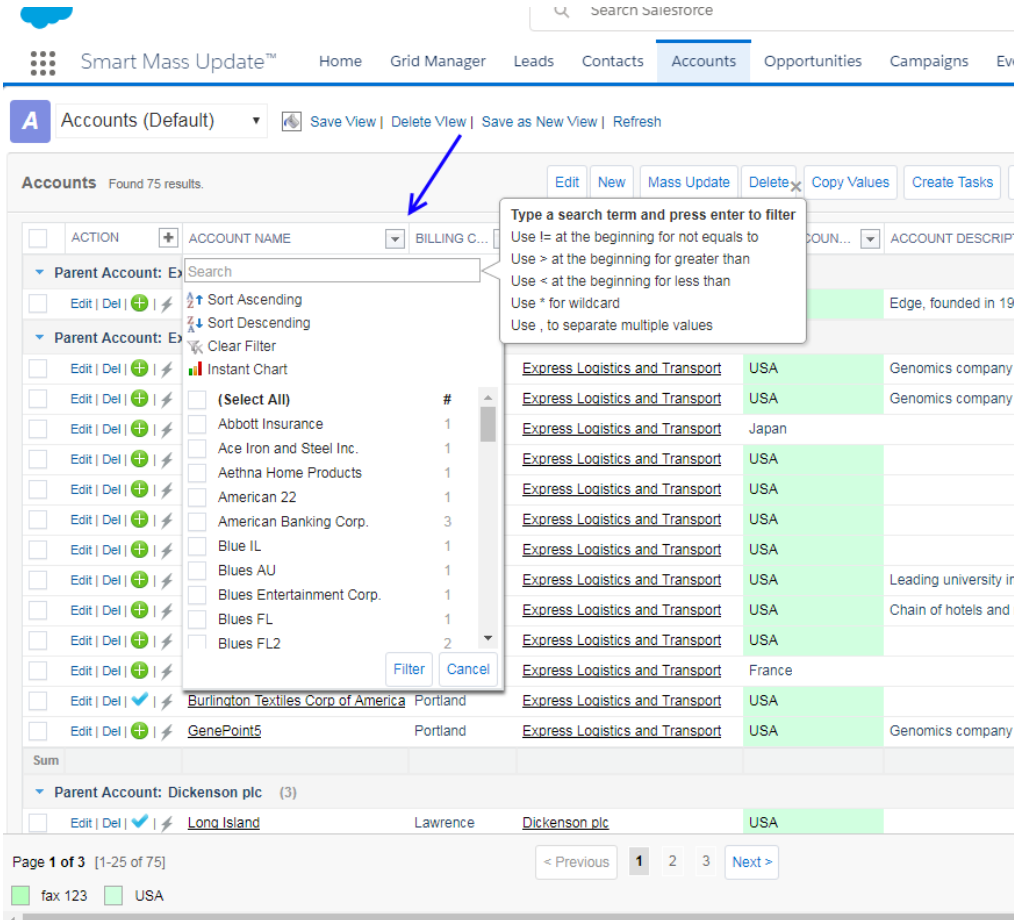


Explanations:

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

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.

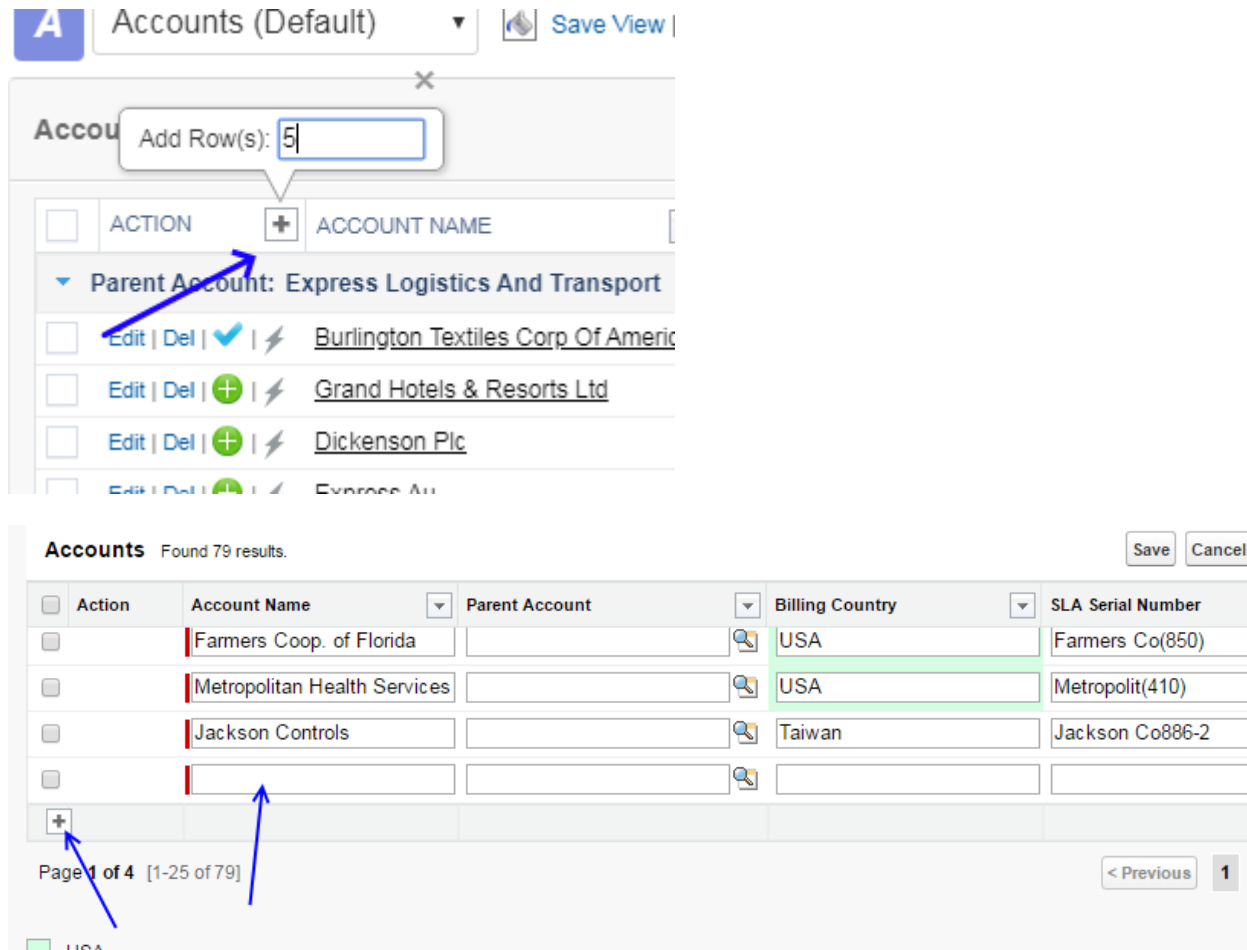
- Click account type and select prospects
- Click Billing country and sort descending
- Click billing city and choose a city
- Use the filter's search for "start-with" search, use *, >, < and != for advanced searches.

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)

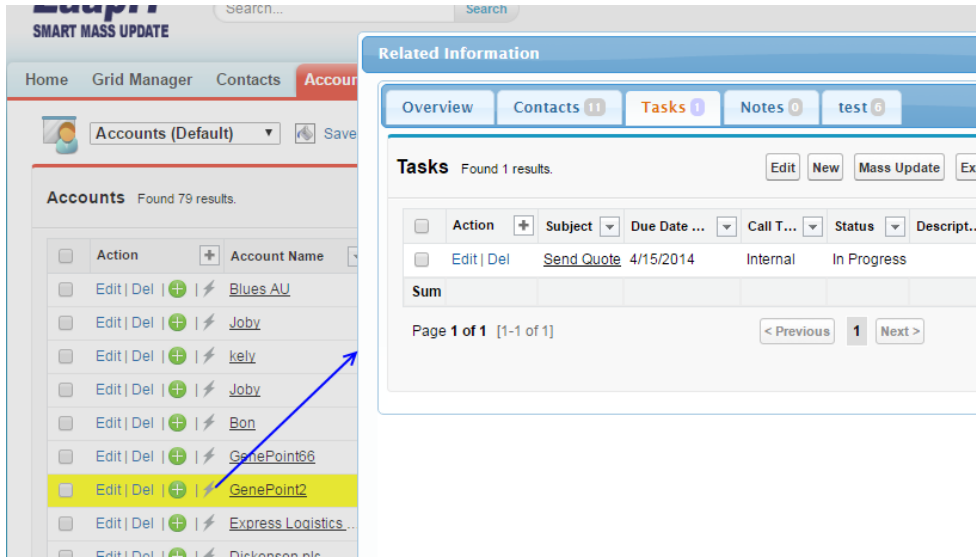
Click this button or move your mouse to the preset the number of new rows where you can then edit this number. Change it to 5 and hit enter or [+], you will see 5 blank lines at the bottom of the page. Here you can add the records from this page.



Same functionality in all objects.

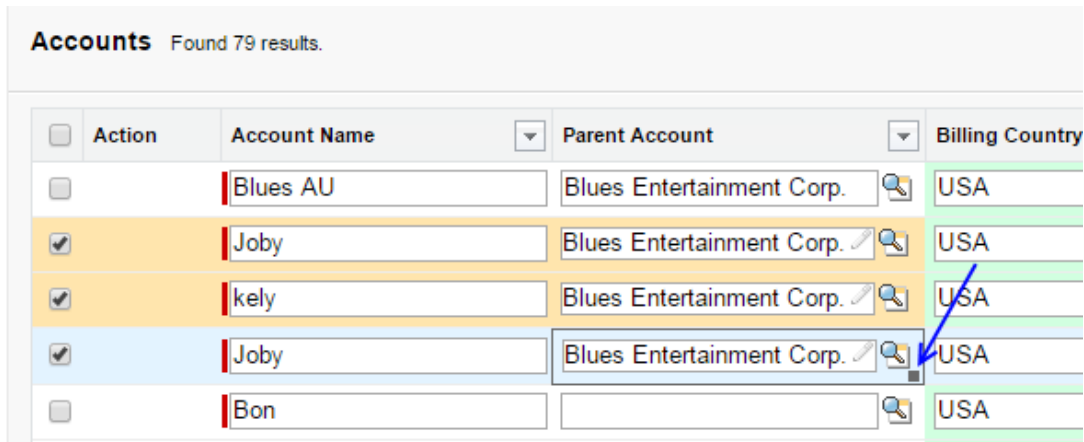
1.4. LIGHTNING ICON / BUTTON

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).



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.

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Opportunities - Working List (Default) Found 163 results.

ACTION	NAME	ACCOUNT	BILLING C...	AMOUNT	CREATED D...	QUANTITY	STAGE	CLOSE DATE	PRODUCTS	FORECAST CA
Stage: Won (2)										
				\$1,544.18			22			
Stage: Closed Won (45)										
<input type="checkbox"/>	Air France	Blues US	New York	23.01	11/12/2015 2:19 PM		Closed Won	11/17/2015		Closed
<input type="checkbox"/>	Vimount 1	vimount		2.00	11/12/2015 1:02 PM		Closed Won	11/12/2015		Closed
<input type="checkbox"/>	Vimount 2	vimount		2.00	11/12/2015 1:02 PM		Closed Won	11/12/2015		Closed
<input type="checkbox"/>	Vimount 3	vimount			11/12/2015 1:02 PM		Closed Won	11/12/2015		Closed
<input type="checkbox"/>	University of AZ 2016	University of Arizona	Tucson	80,000.99	1/19/2015 12:01 AM	15.00	Closed Won	9/30/2016		Closed
<input type="checkbox"/>	Grand Hotel	Long Island	Tel Aviv	835,000.00	6/19/2014 3:35 PM	3.00	Closed Won	1/13/2015		Closed
<input type="checkbox"/>	Burlington Textiles Weavr	Burlington Textiles Corp of	Burlington	4,740,000.00	2/20/2014 1:38 AM	3.00	Closed Won	7/6/2014		Closed
<input type="checkbox"/>	Grand Hotels SLA	Grand Hotels & Resorts L	Chicago	2,230,000.00	2/19/2014 10:16 PM	123.00	Closed Won	5/5/2017	Gen/Watt_Diesel 18k/W Gen/Watt_Diesel 200k/W	Closed

Please notice that you now have the ability to do inline editing off any or all of your records. Simply pick the records you wish to update and type in the info. If 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.

Accounts (Default) Found 79 results.

Action	Account Name	Parent Account	Billing Country	SLA Serial Number	Annual Revenue	Account Phone
<input type="checkbox"/>	Blues AU	Blues Entertainment Corp.	USA	Blues AU43467		434677788
<input type="checkbox"/>	Joby		USA	Joby111		13
<input checked="" type="checkbox"/>	kely		USA	XXX		15
<input type="checkbox"/>	Joby		USA	Joby		15
<input type="checkbox"/>	Bon		USA	Bon		

1.1 MASS DELETE BUTTON

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

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SMART MASS UPDATE

Smart Mass Updat... Grid Manager Leads Contacts Accounts Opportunities Quotes Campaigns Events **Tasks** Pr

Tasks Working List (Default) Save View Delete View Save as New View

Tasks Working List Found 60 results. Edit New Mass Update Mass Clone Delete Import2 Billing Map Actions

ACTION	SUBJECT	NAME	DUE DATE ONLY	CALL RES...	ARCHIV...	RELATED T...	DESCRIPTION	ASS
Status: Completed (1)								
<input checked="" type="checkbox"/>	Mass Email			111		Account		Ford
Status: In Progress (6)								
<input checked="" type="checkbox"/>	Mass Email			111		Opportunity	2221111	Ford
<input checked="" type="checkbox"/>	Mass Email		5/16/2019					Ford
<input checked="" type="checkbox"/>	Mass Email		5/16/2019					Ford
<input checked="" type="checkbox"/>	Send quote		5/16/2019					Ford
<input checked="" type="checkbox"/>	Send quote		5/16/2019					Ford
<input checked="" type="checkbox"/>	Mass Email							Ford
Status: Not Started (3)								
<input checked="" type="checkbox"/>	Aaa	Ron Roy						Ford
<input checked="" type="checkbox"/>	Aaa	Ron Roy	5/16/2019					Ford
<input checked="" type="checkbox"/>	Szfsd		5/16/2019					Ford

Mass Delete

Would you like to delete the selected rows or all the rows?

Mass Delete - Selected (10) Mass Delete - ALL (60) Cancel

2.1. FAST INLINE EDIT

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

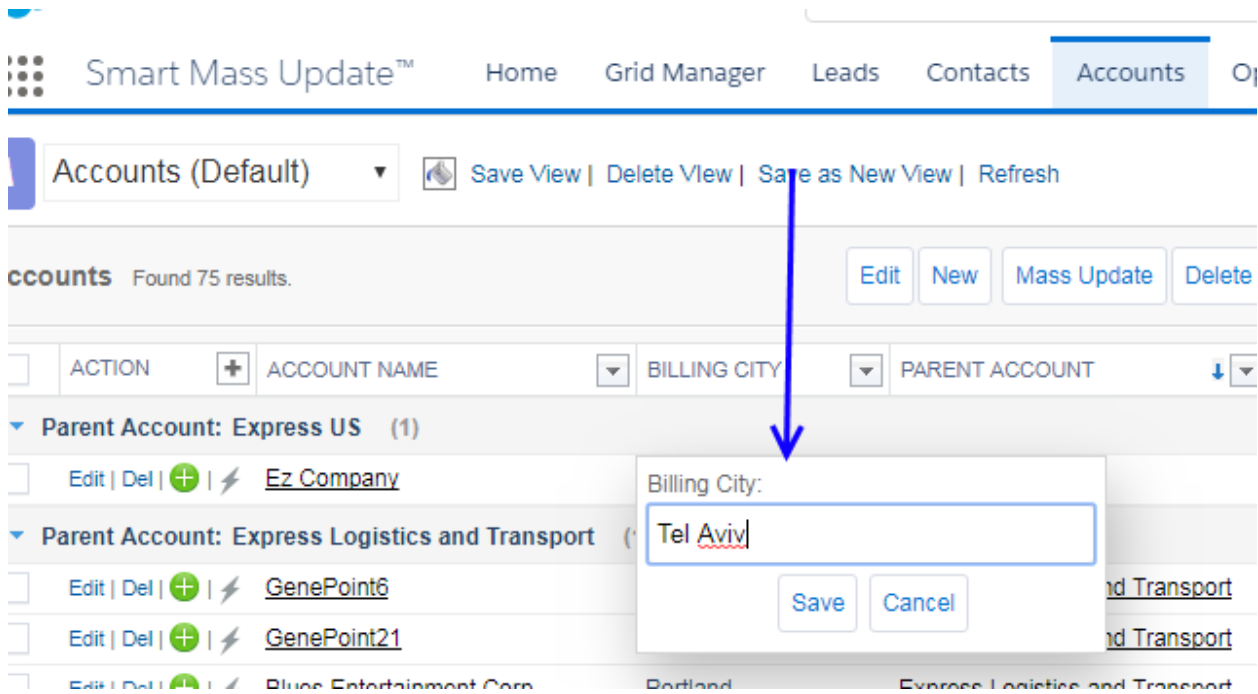
Smart Mass Update™ Home Grid Manager Leads Contacts **Accounts** Op

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

Accounts Found 75 results. Edit New Mass Update Delete

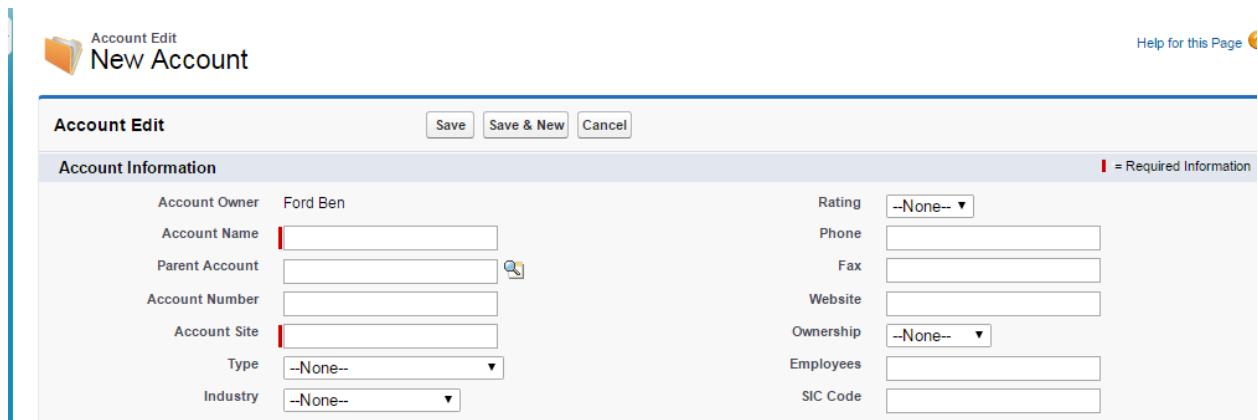
ACTION	ACCOUNT NAME	BILLING CITY	PARENT ACCOUNT
Parent Account: Express US (1)			
<input type="checkbox"/>	Ez Company	Tel Aviv	Express US
Parent Account: Express Logistics and Transport (13)			
<input type="checkbox"/>	GenePoint6	Portland	Express Logistics and Transport
<input type="checkbox"/>	GenePoint21	Portland	Express Logistics and Transport

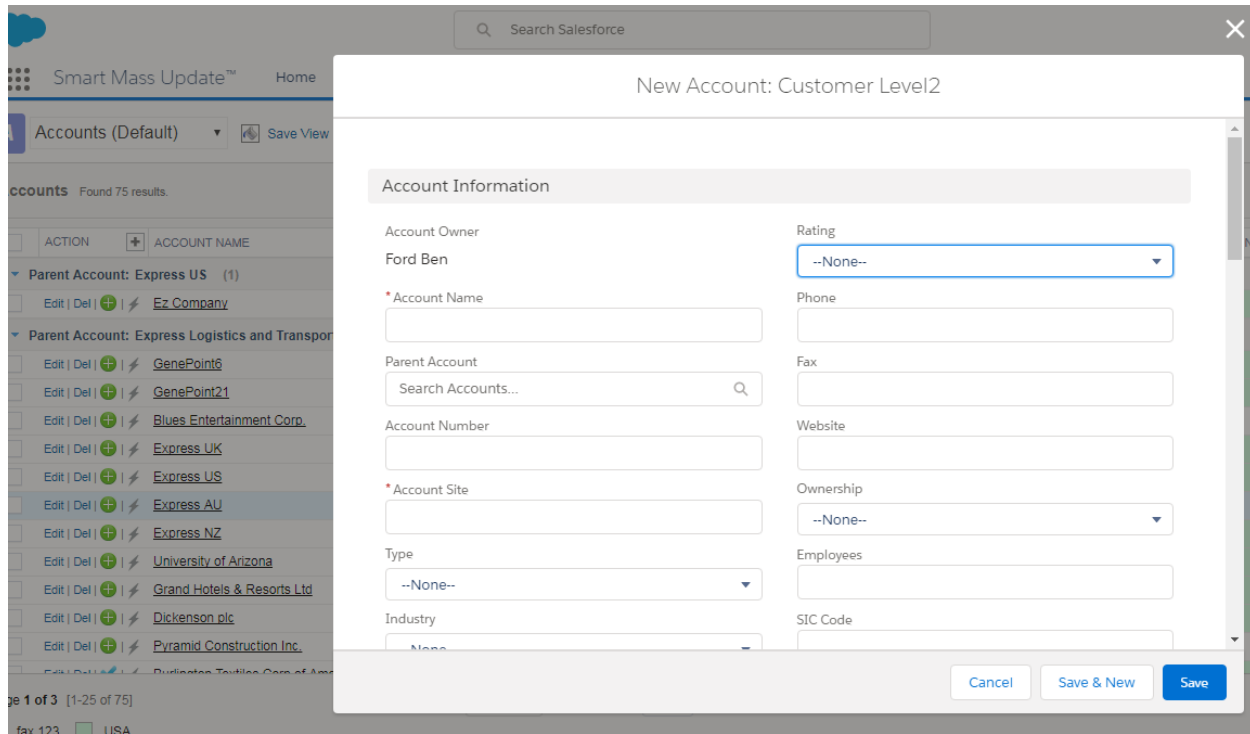
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2.2. NEW BUTTON

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.

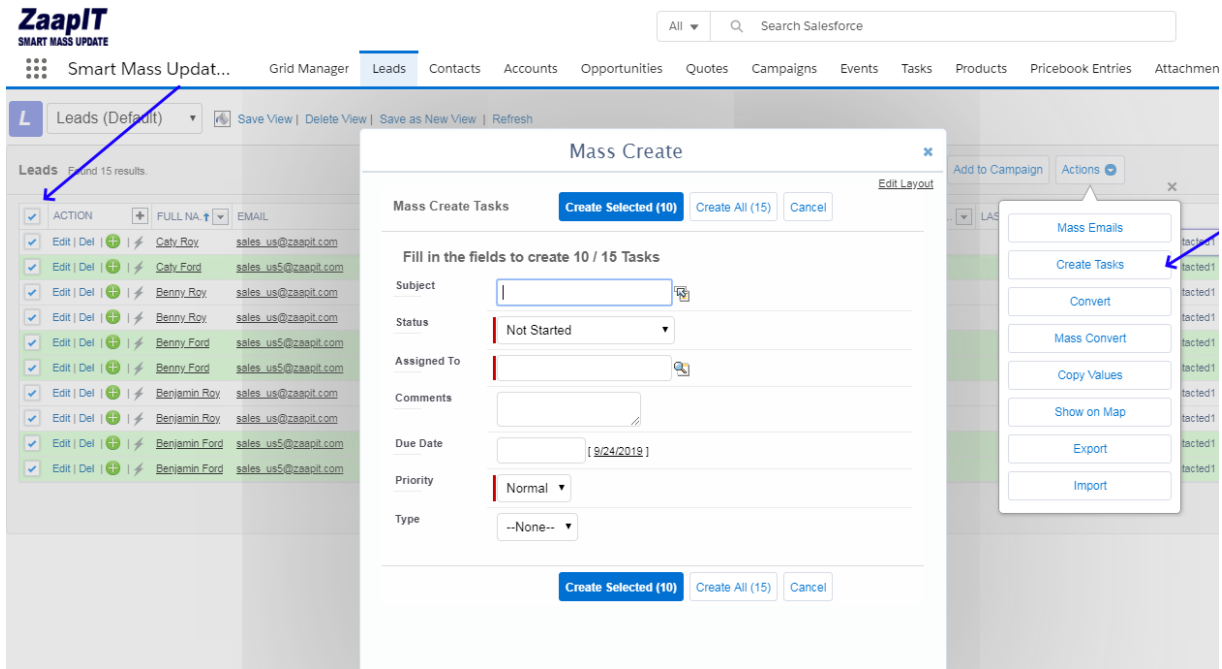




2.3. CREATE TASK

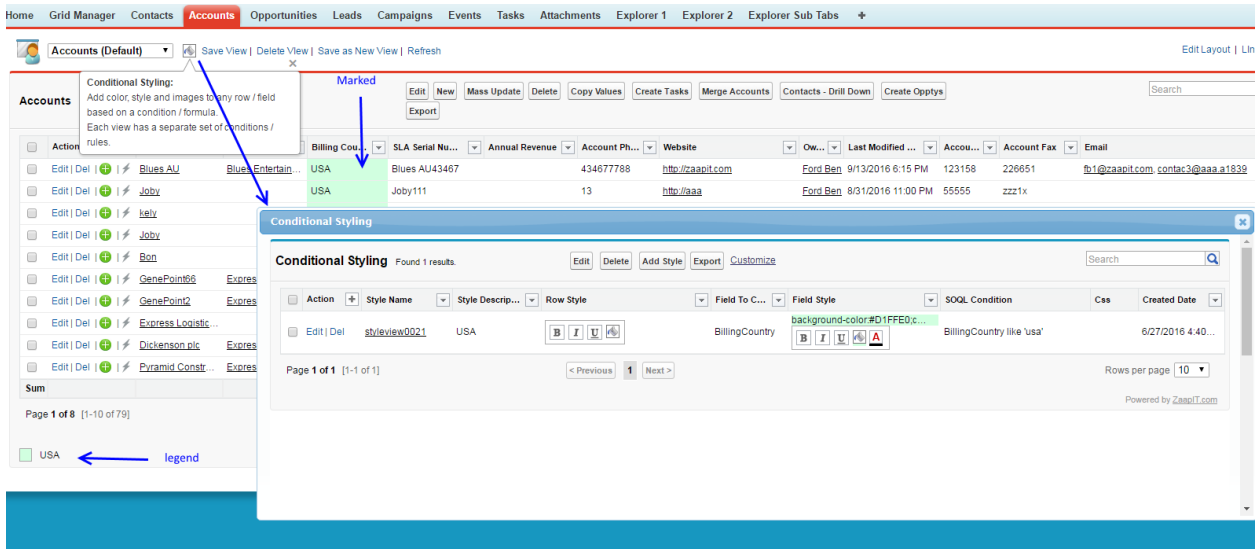
From any tab/object you can create tasks, select a record and then hit create task and fill in the relevant fields. This works for Accounts, Contacts, and Opportunities. In Events and Task tabs / Objects just hit the [+] or new button. The Screen shot below is from Accounts

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2.4. CONDITIONAL STYLING

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

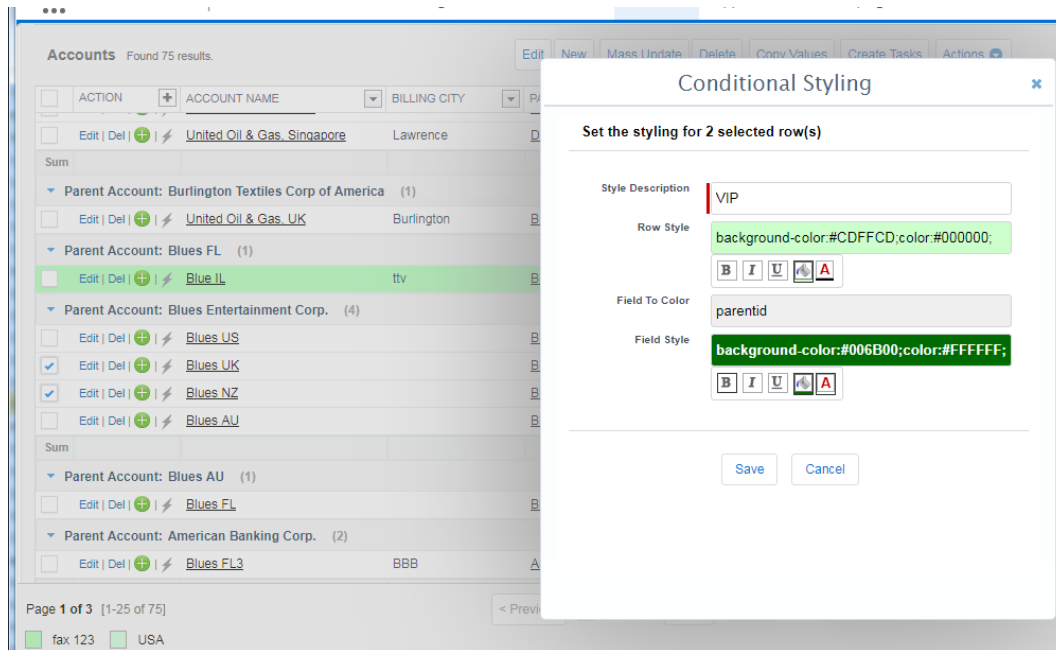
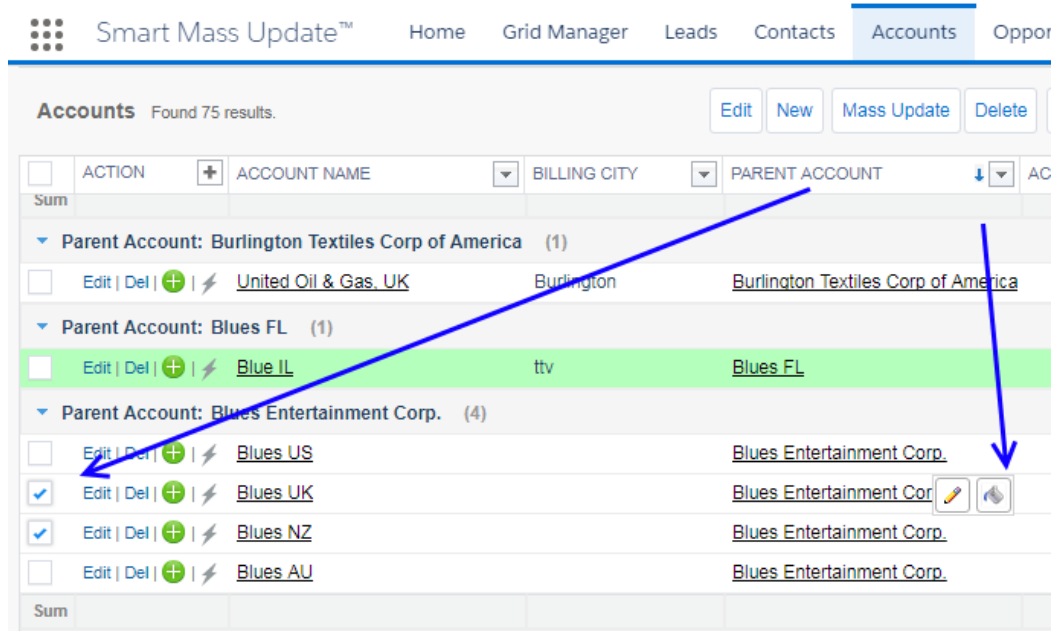


2.1. MANUAL STYLING

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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.



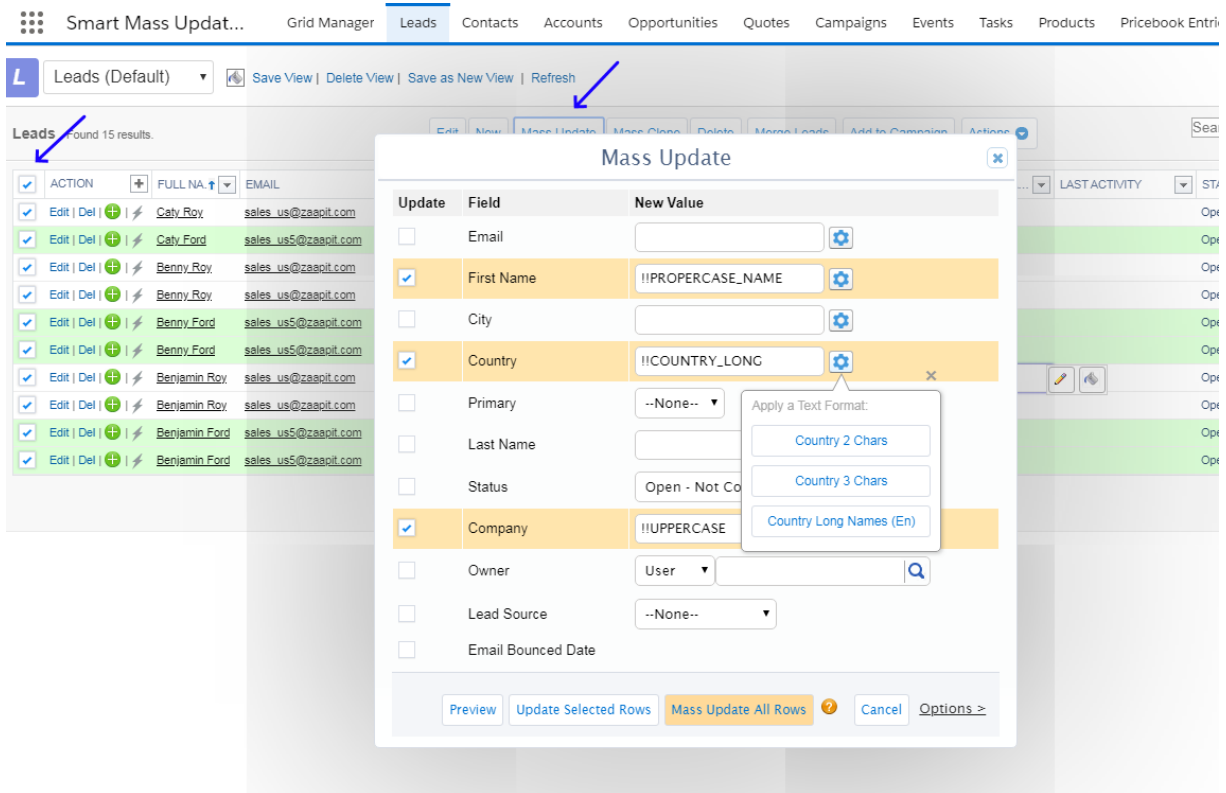
3. UNIQUE FUNCTIONALITY BY OBJECT

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.

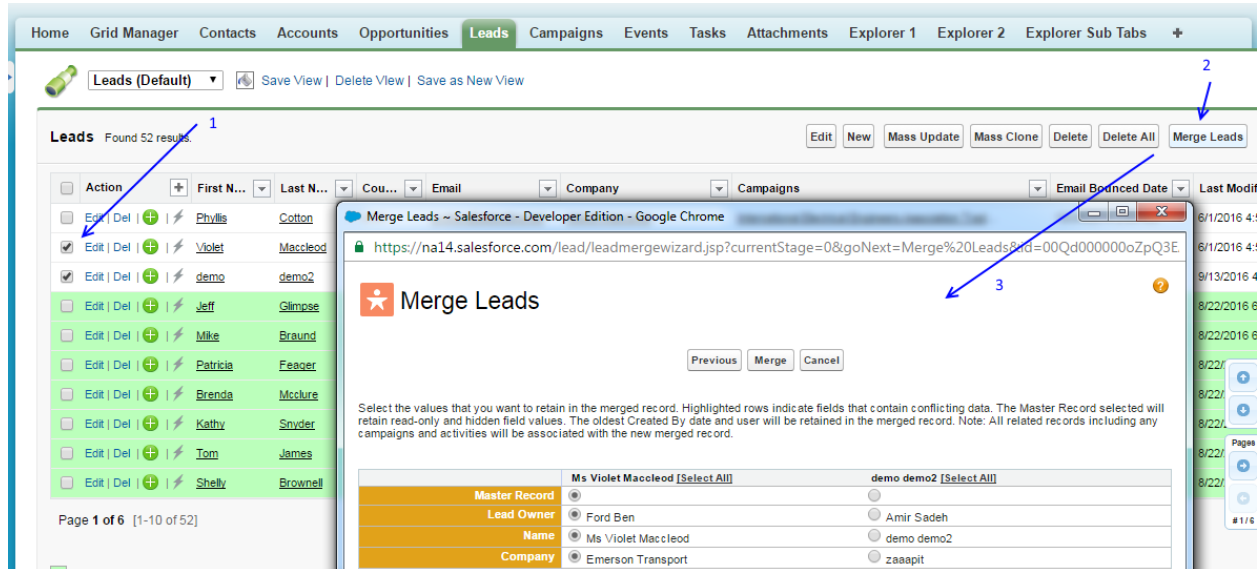
3.1.1. MASS UPDATE BUTTON

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.



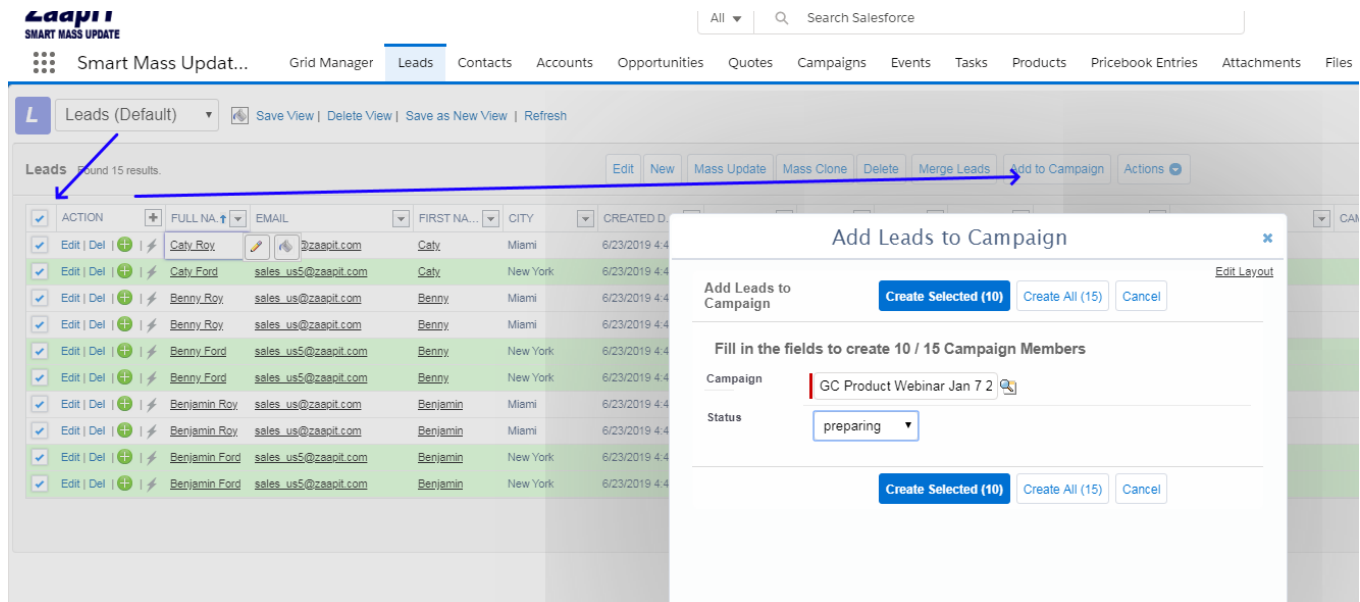
3.1.2. MERGE LEADS BUTTON (SIMPLE)

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.



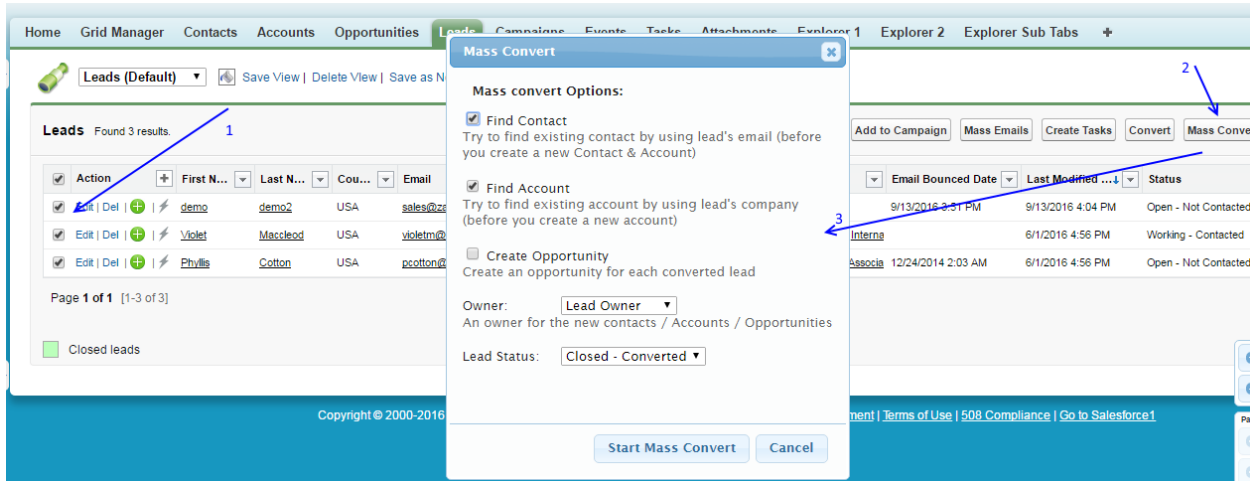
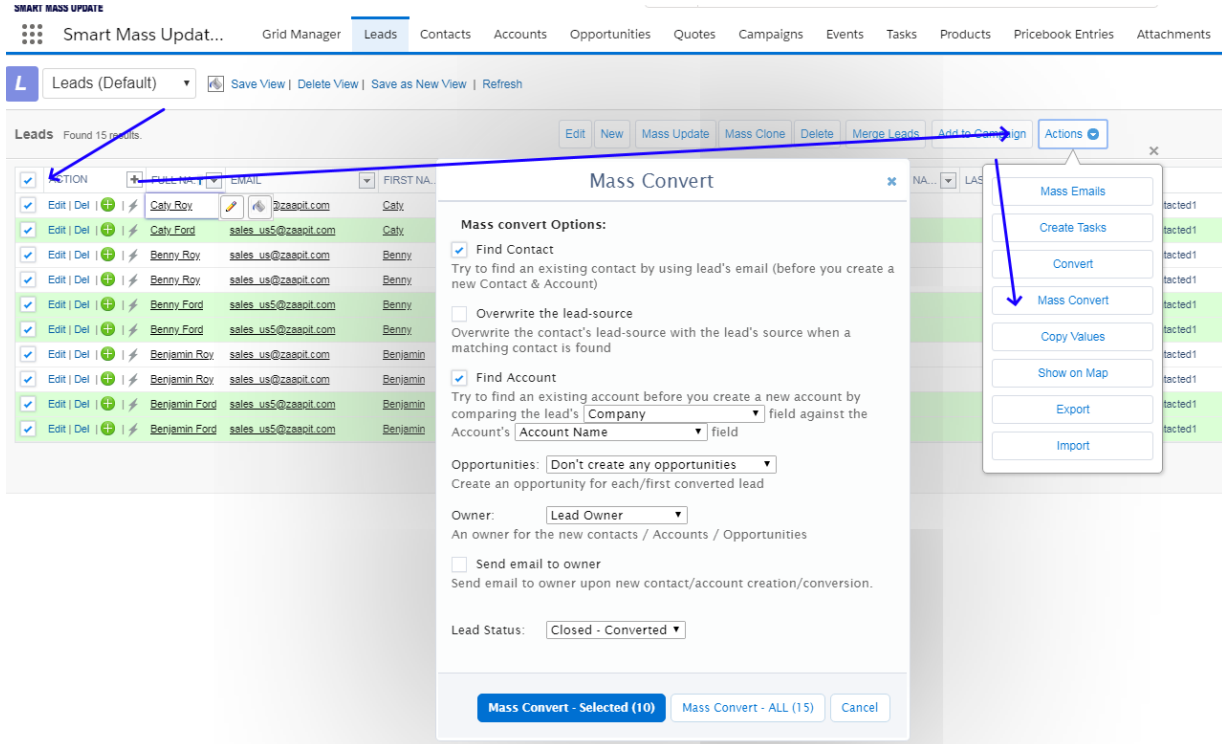
3.1.3. ADD TO CAMPAIGN

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

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

Lead Custom Fields & Relationships

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	sfl_ma__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.

Accounts Found 79 results.

Action	Account Name	Parent Acco...	Billing Cou...	SLA Serial Nu...	Annual R...	Account Ph...	Website	Ow...	Last Modified ...
<input checked="" type="checkbox"/> Edit Del + ↻	Blues AU	Blues Entertai...	USA	Blues AU43467		434677788	http://zaapit.com	Ford Ben	9/13/2016 6:15
<input checked="" type="checkbox"/> Edit Del + ↻	Joby		USA	Joby111		13	http://aaa	Ford Ben	8/31/2016 11:00
<input type="checkbox"/> Edit Del + ↻	kely		USA	kely11		15		Ford Ben	8/31/2016 11:00
<input type="checkbox"/> Edit Del + ↻	Joby		USA	Joby		15		Ford Ben	8/31/2016 11:00

Action	Full Name	Email	Owner	Campai...	Account	Mailing State/Provi...	Mailing Country	Acc. Billing Coun...	First Name	Last Name
Edit Del Cln + -	Joe Last1817	contac3@aaa.a1839	Ford Ben		Blues AU		USA	USA	Joe	Last1817
Edit Del Cln + -	zzz asdf12	fb1@zaapit.com	Ford Ben		Blues AU	zzz	USA	USA	zzz	asdf12

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.

Action	Name	Account	Amount	Product	Created Date	Quan...	Stage	Fon
Edit Del + -	xxx1	xxx1	\$11.00		8/2/2016 6:54 PM		Prospecting	Pipe
Edit Del + -	xxx2	xxx2	\$11.00		8/2/2016 6:54 PM		Prospecting	Pipe

3.5. CAMPAIGNS OBJECT

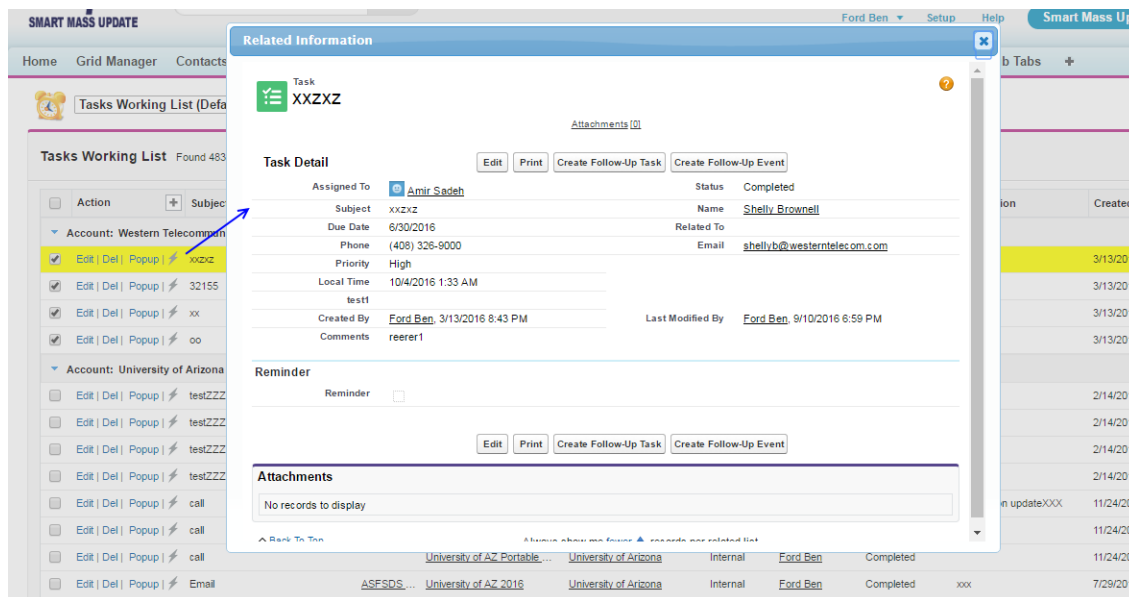
Edit, mass update, delete and new are only functionality, previously discussed.

3.5.1. EVENTS & TASK OBJECT

Edit and New were previously discussed.

3.5.2. LIGHTNING ICON / BUTTON

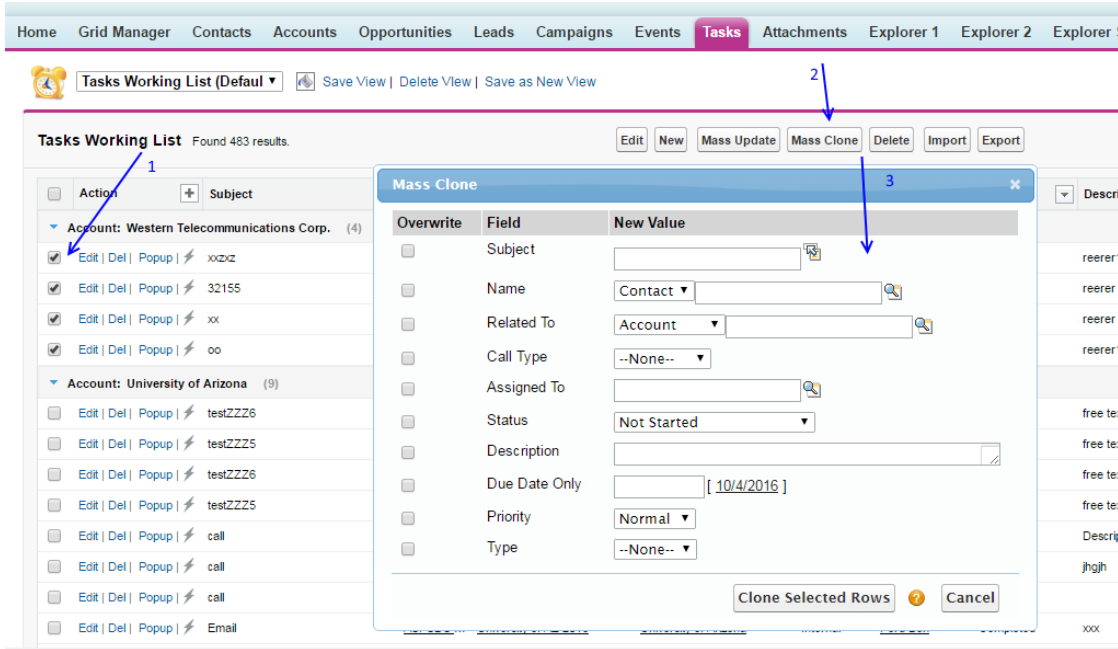
The lightning icon shows the entire tasks + attachments (you can change the default popup screen to sub-tabs with custom smart grids).



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...

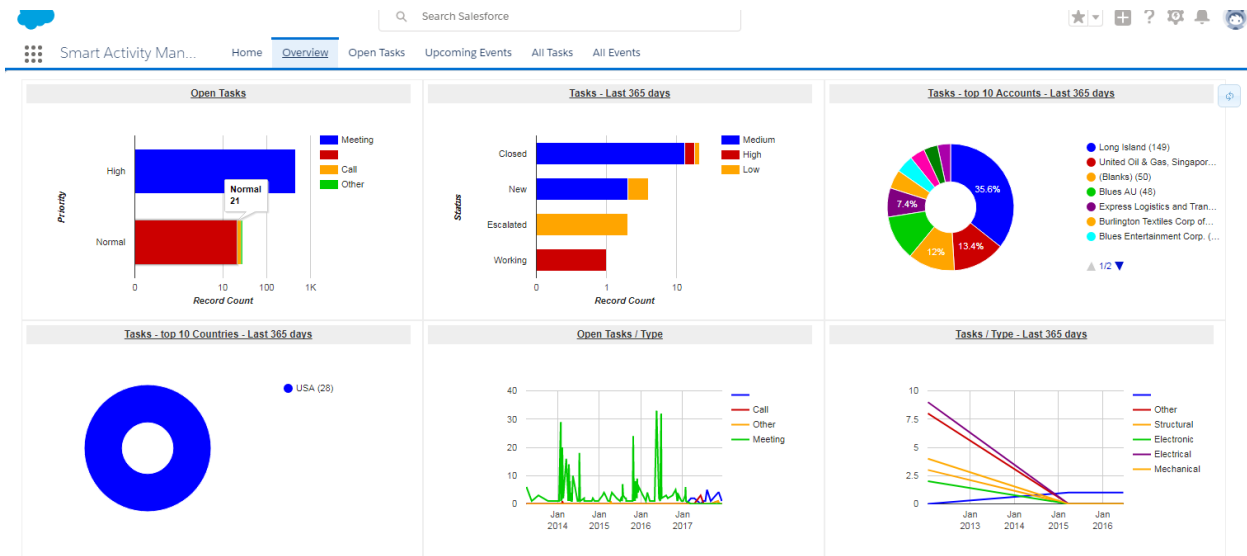
The mass clone option can be activated for any object via the edit-layout link.



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).

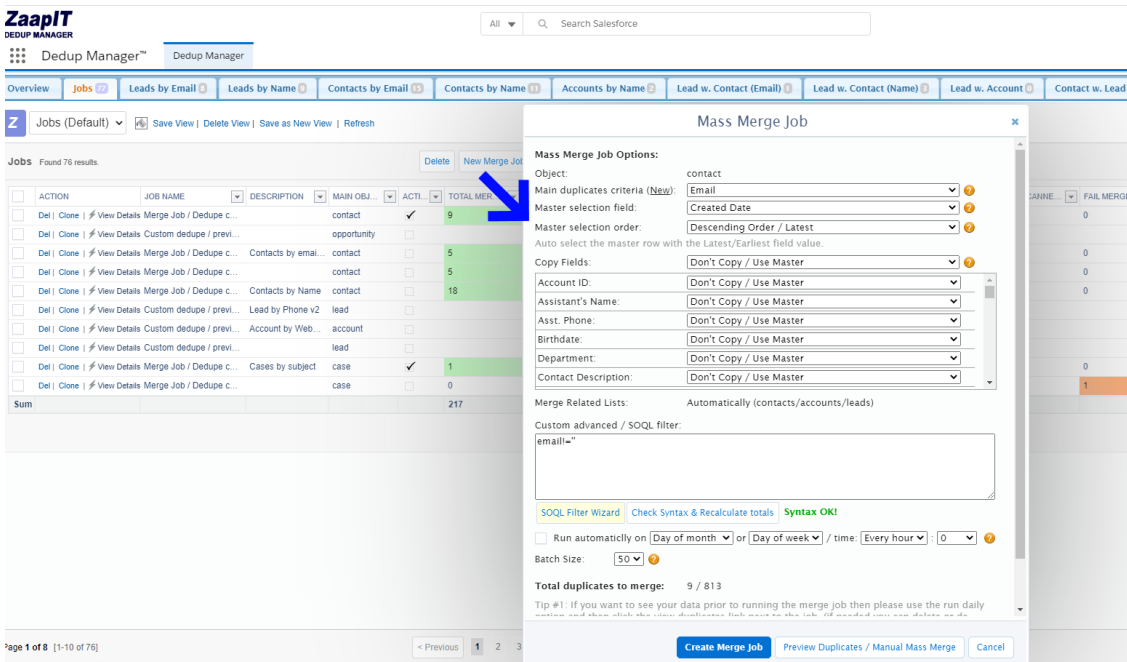


Figure 2 - Merge Jobs / Auto Merge

Useful videos:

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)

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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 dedupe field: <https://www.youtube.com/watch?v=SEBSFRlhNnw>

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

- 1) Formula field that ignores/removes "inc.", "LTD", "company", "co":
`SUBSTITUTE(SUBSTITUTE(SUBSTITUTE(SUBSTITUTE(lower(YOUR_FIELD(S)), ' ltd', ''), ' 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(if(find(' ', Name, max(find(' ', Name)+1, 5))>0, left(Name, find(' ', Name, max(find(' ', Name)+1, 5))), Name) , ' ', ' '), ' ', ' '), '&', ' '), ' ltd', ' '), ' inc', ' '), ' company', ' '), ' co', ' '), ' llc', ' '))`
- 8) 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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```

YOUR_FIELD(S)_HERE_OR FORMULA

```
), 'a', '0'), 'b', '1'), 'c', '2'), 'd', '3'), 'e', '0'), 'f', '1'), 'g', '2'), 'h', '0'), 'i', '0'), 'j', '2'), 'k', '2'), 'l', '4'), 'm', '5'), 'n', '5'), 'o', '0'), 'p', '1'), 'q', '2'), 'r', '6'), 's', '2'), 't', '3'), 'u', '0'), 'v', '1'), 'w', '0'), 'x', '2'), 'y', '0'), 'z', '2'), '00', '0'), '11', '1'), '22', '2'), '33', '3'), '44', '4'), '55', '5')
```

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

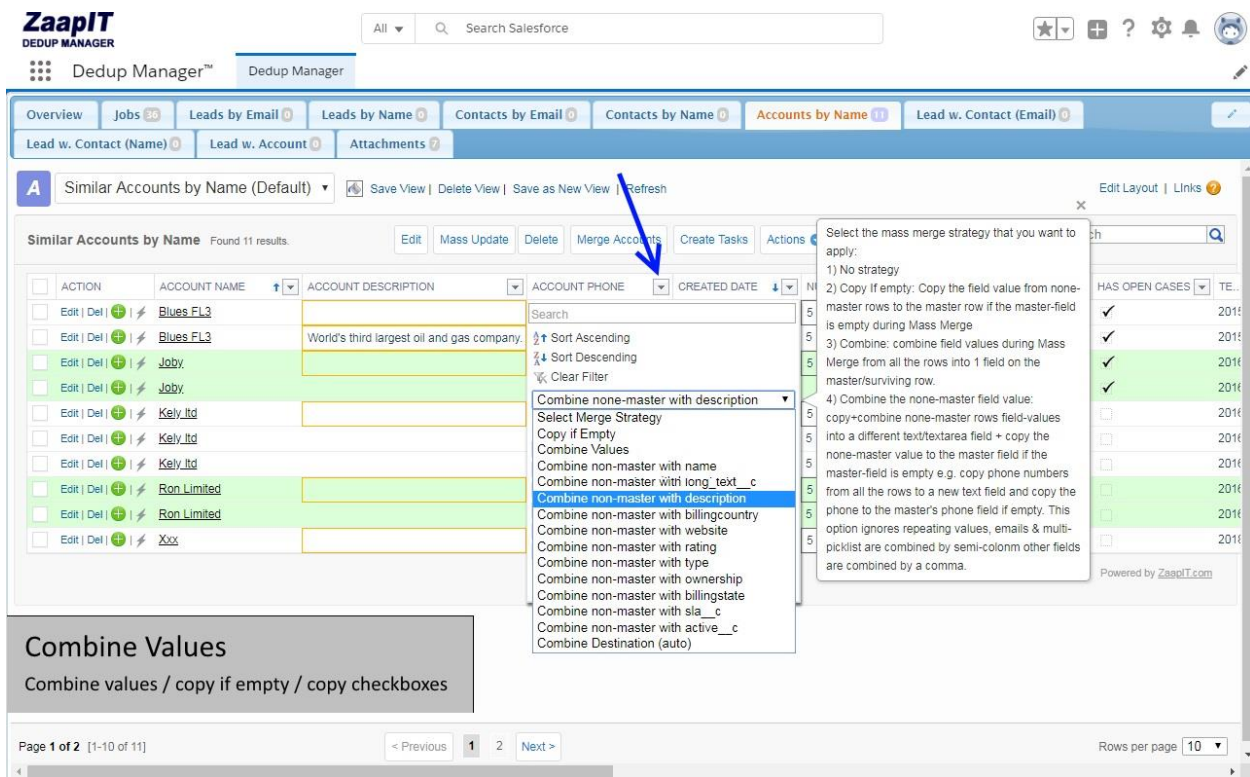


Figure 3 - dedup-manager Combin values

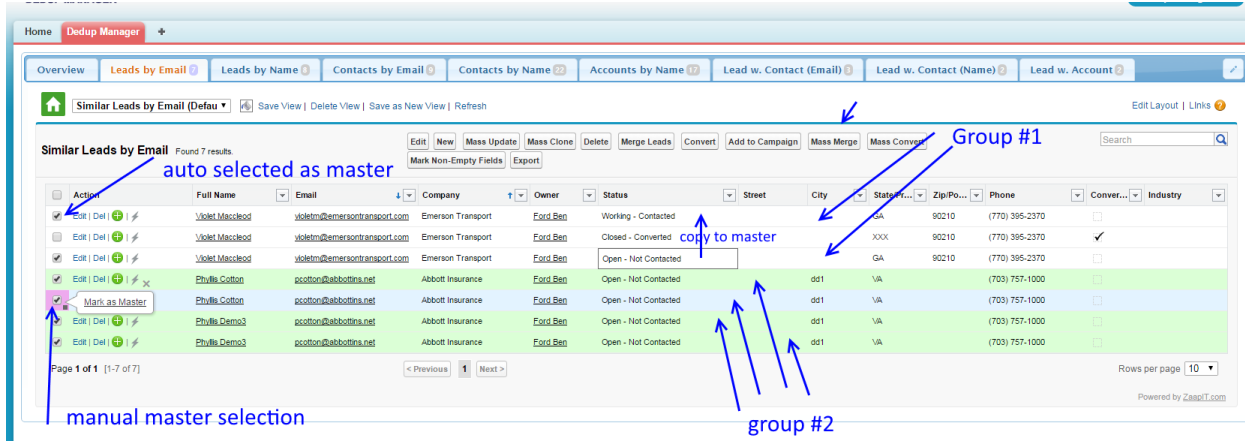


Figure 4 - Mass Merge

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 dedup for custom formula fields / any salesforce field:

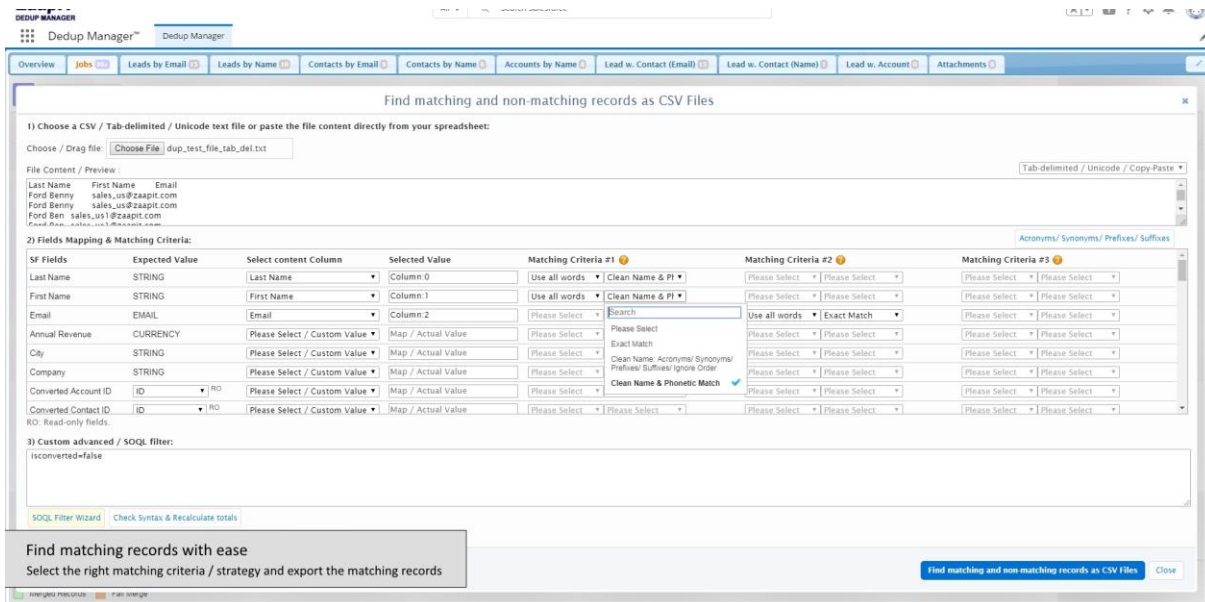
Custom formula/fuzzy dedupe: <https://www.youtube.com/watch?v=nR0vKnIca7k>

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.

Advanced Import
With Duplicates avoidance built in

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 : CSV
xxx@xxx.com,ben,ford,zaapit

2) Fields Mapping:

SF Fields	Expected Value	Select content Column	Selected Value	Unique / Dupe
Last Name	STRING	last name	Column:2	<input type="checkbox"/>
First Name	STRING	first name	Column:1	<input type="checkbox"/>
Email	EMAIL	email	Column:0	<input checked="" type="checkbox"/>
Account ID	Account-name	Account	Column:3	<input type="checkbox"/>
Assistant's Name	STRING	Please Select / Custom Value	Map / Actual Value	<input type="checkbox"/>
Asst. Phone	PHONE	Please Select / Custom Value	Map / Actual Value	<input type="checkbox"/>

Skip Invalid Numbers during import (use null)
Duplicates Strategy:
RO: Use the read-only fields to search for dupes/existing 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.

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):

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

Before the update:

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

The screenshot shows the 'Accounts' table with 79 results. A 'Mass Update' dialog box is open, allowing the user to update multiple rows. The 'SLA Serial Number' field is selected for updating. The dialog includes a table with the following columns: Update, Field, and New Value. The 'SLA Serial Number' field is highlighted in yellow. The 'Update Selected Rows' button is visible, along with a 'Mass Update All Rows' button. A blue arrow points from the 'Mass Update All Rows' button to the 'SLA Serial Number' field. Another blue arrow points from the 'SLA Serial Number' field to the 'Update Selected Rows' button.

The mass update result:

The screenshot shows the 'Accounts' table after the mass update. The 'SLA Serial Number' column is now populated with values for all rows. A blue arrow points from the 'SLA Serial Number' column header to the 'Mass Update All Rows' button in the previous screenshot.

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

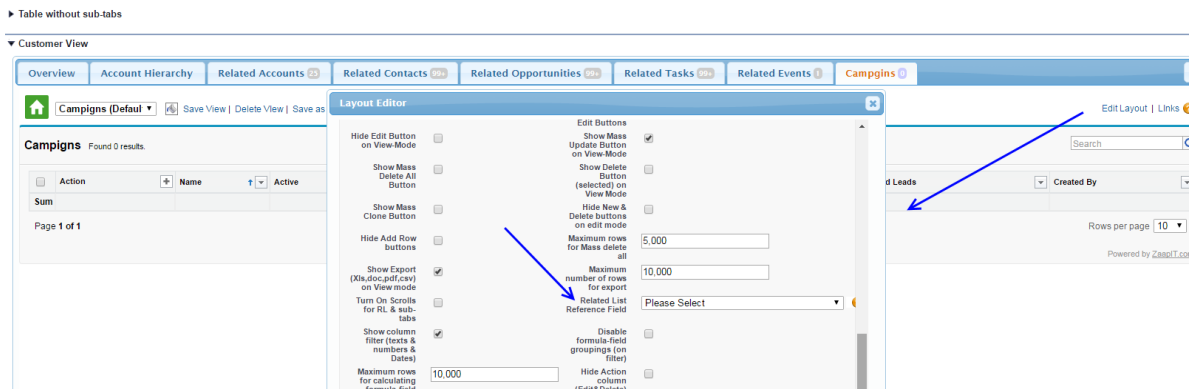
Edit the object's layout and add one of the visualforce pages named: "Object" RL1 / "Object"RL2 / "Object" tabs / Customer view (hierarchy tabs) > afterwards save the layout and edit the new related list grid to > change the object, add fields and use the Related List Reference Field or Advanced filter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



Using the Advanced filter to set the connection:

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The screenshot displays the 'Customer View' interface for 'Campaigns'. The top navigation bar includes 'Overview', 'Account Hierarchy', 'Related Accounts (2)', 'Related Contacts (2)', 'Related Opportunities (2)', 'Related Tasks (2)', 'Related Events (1)', and 'Campaigns (0)'. The 'Campaigns' section is active, showing 'Found 0 results'. A 'Layout Editor' window is open, displaying an 'Advanced Filter (SOQL style)' with the following configuration:

- Sort by Field #3: Please Select
- Sort by Direction: Ascending
- Apply shading to alternate rows:
- Group different/alternate rows by sort:
- Advanced Filter (SOQL style):
 - Add Condition: Select a Field | equals
 - Filter: id in (select CampaignId from CampaignMember where ContactId=ID)
- Check Syntax:
- Examples: amount=0 and quantity=3 and ownerId=(UserInfo.UserId) and CreatedDate > TODAY. You can use the current table's fields with SOQL operations.
- Use (UserInfo.UserId) for the logged-in Userid. Example: createdBy=UserInfo.UserId.
- Use (ID) for the current parentID (sent via the URL id=xxx). Example: createdBy=ID.
- Use (id) for the current hierarchy ID (of the current object). Example: accountId=ID.
- In case of an unexpected/problematic result you can empty this field (named "extraConditionFilter") under setup/custom settings.

Two blue arrows point to the 'Advanced Filter' section and the 'Layout Editor' window.