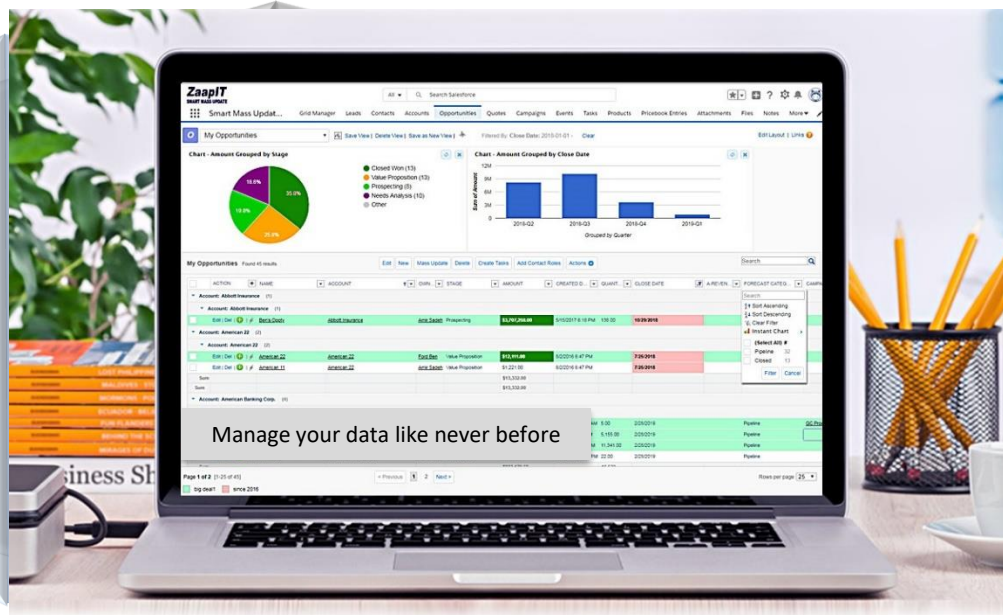


# ZaapIT Tools – Admin / User Guide

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

Version: 1.1312 (Sep-2024)



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

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## Overview

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

### ZaapIT's Tools:

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

### Common Key Features:

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

### Smart Mass Update

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

The Smart mass update feature offers you three working modes:

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

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

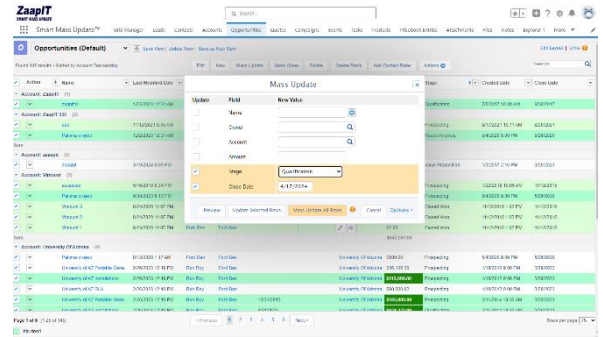
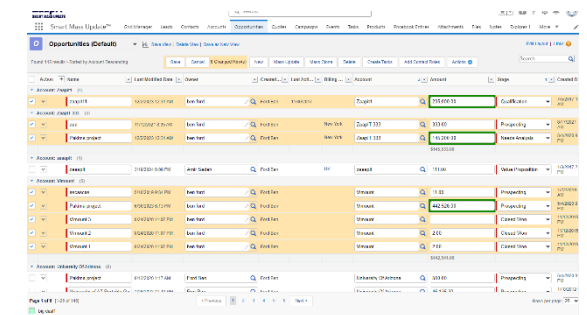


Figure 1 - Mass Update



### Mass Create

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

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

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

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

Example:

- 1) On the relevant tab/grid, add the following buttonButton name: Create Events, Button link/JS: `openMassCreate('XXX','whatid','Mass Create','1');`
- 2) Go to this page: `/apex/zaapit__zaapit_tb_generalWL?tp=XXX`
- 3) Edit the grid’s layout >Select the main object >add the relevant fields> set the advanced filter: id in {{ID}} > save settings

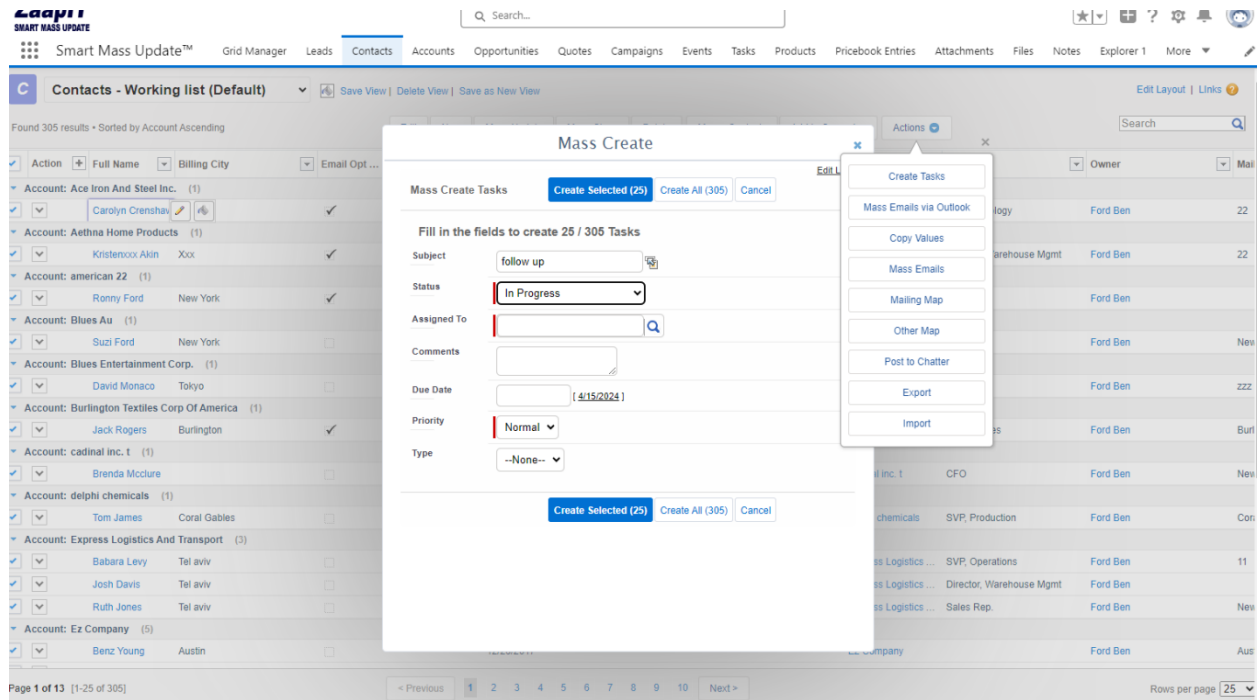


Figure 3 - Mass Create

### Mass Delete

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

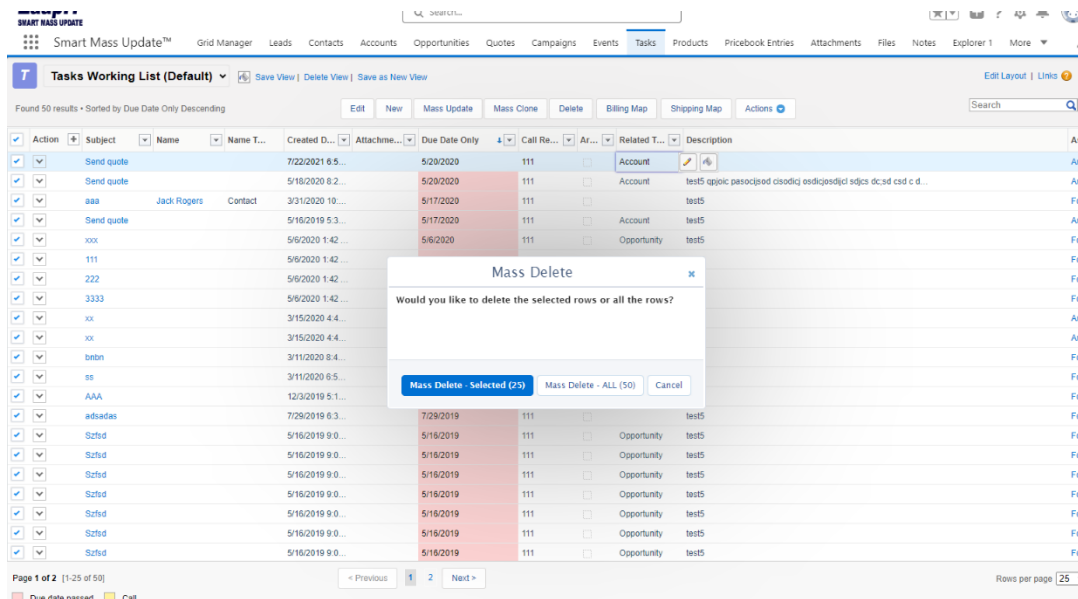


Figure 4 - Mass Delete

### Mass Inline Edit

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

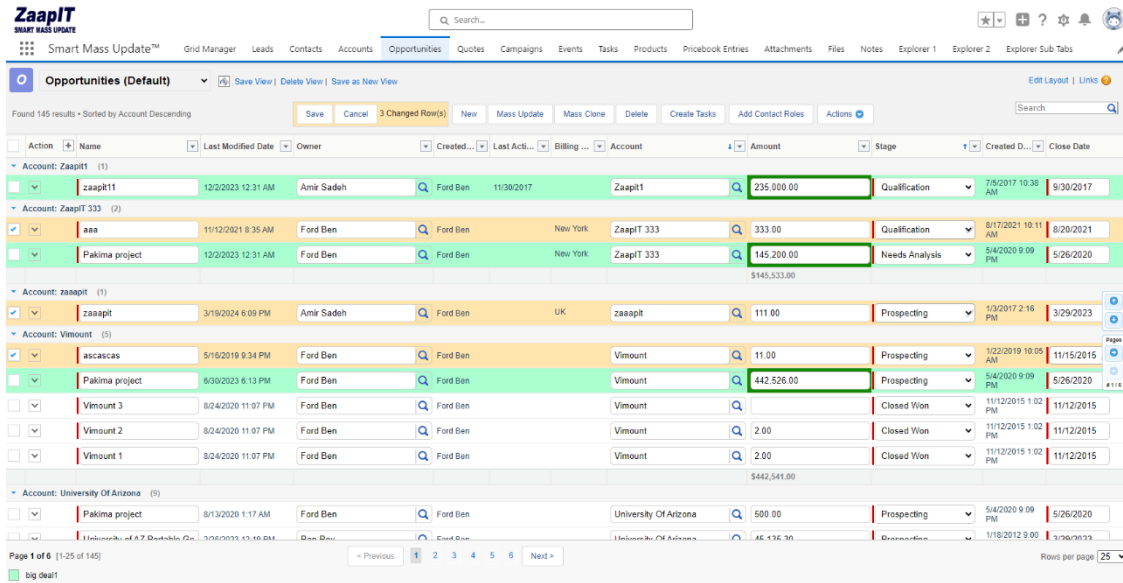


Figure 5 - Mass Inline edit



### Mass restore / Undo changes

The mass restore feature can recover Salesforce records that were deleted, updated, or merged using ZaapIT’s mass actions. The restore/undo for merged records will also reconnect the relevant related records in the related lists. The restore files are being saved inside your Salesforce, you can create a scheduled SF flow to delete the old files or delete them yourself using the mass-delete button on the list’s top Figure 6. You can use JSON files that start begins with “Restore-Rows”, hover the title to see the changed details. The restore is available under smart-mass-update>files tab (Figure 6) and under dedup-manager>jobs tab (Figure 7)

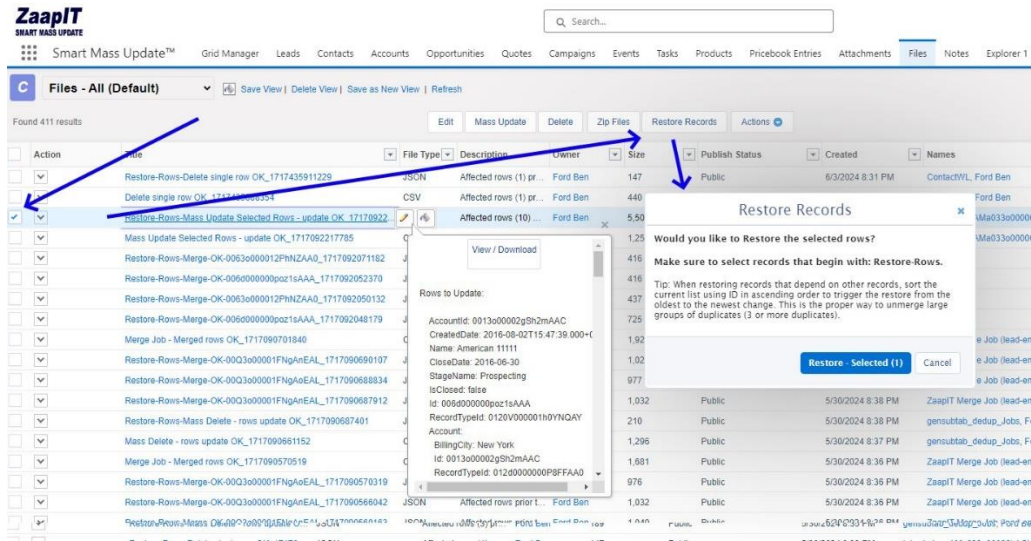


Figure 6 - Restore changed records through the files tab

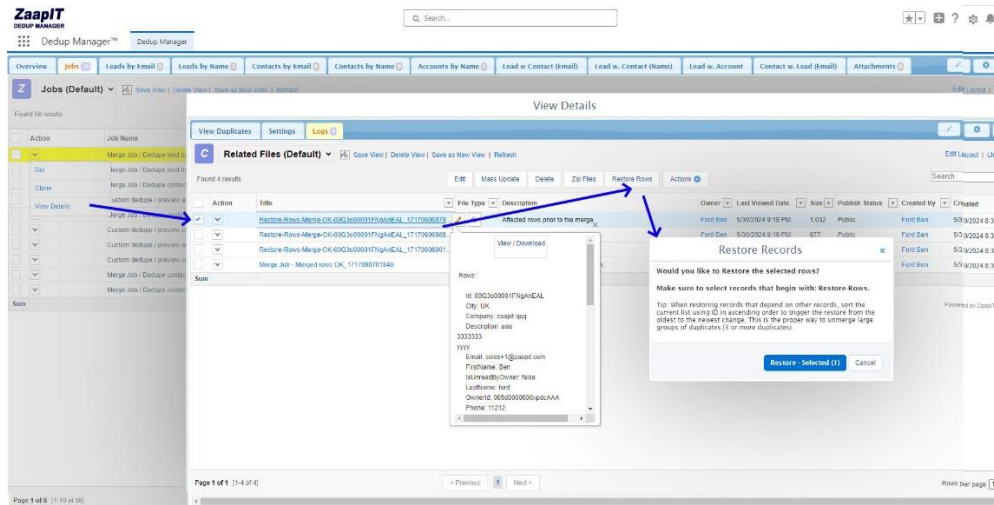


Figure 7 - Restore auto-merged records through dedupe-manager>jobs tab

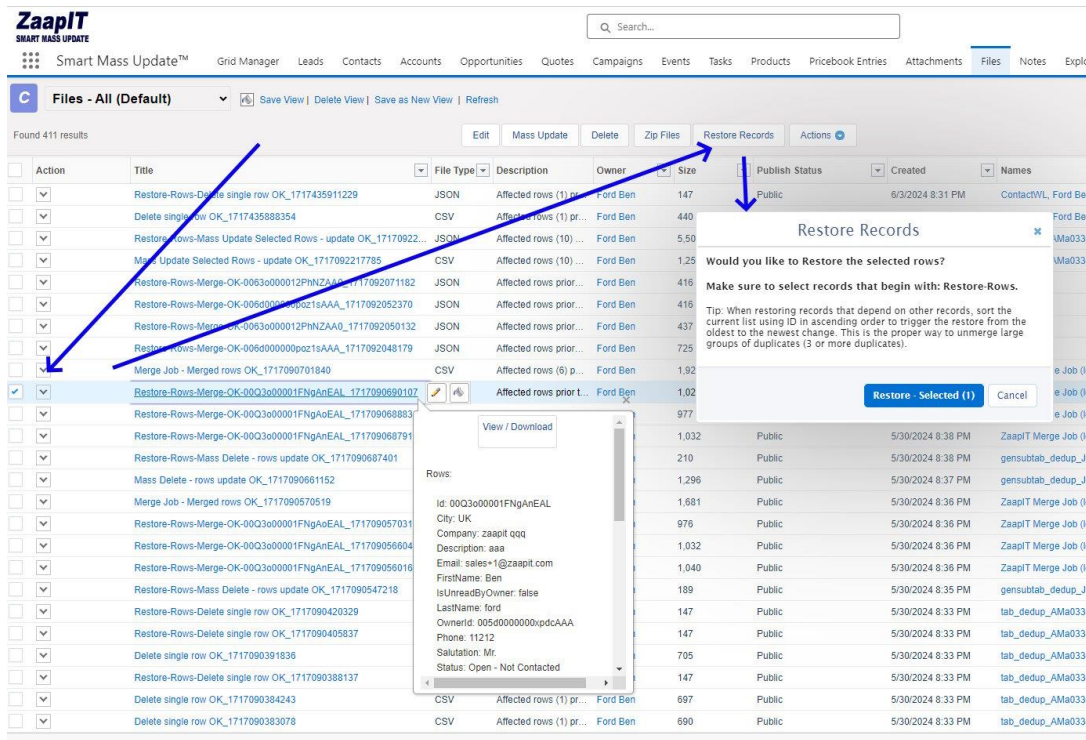


Figure 8 - Restore merged records through smart-mass-update> files tab

### Smart Search

The Smart Search feature (Figure 9) enables you to search the entire table’s text fields and find the relevant rows.

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

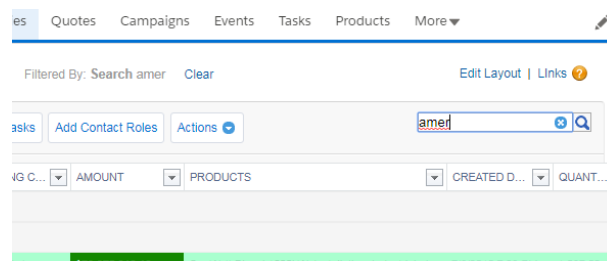


Figure 9 - Smart Search

### A Smart Search Example:

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

The screenshot shows the ZaapIT interface with the search bar containing 'oil close'. The results are filtered to show opportunities with 'oil' in the account name and 'Closed Won' in the stage. The table below represents the data shown in the screenshot.

Action	Name	Last Modified Date	Owner	Created By	Last Activity	Billing City	Account	Amount	Stage	Created Date	Close Date
	United Oil SLA	7/11/2019 6:41 PM	Ron Roy	Ford Ben			United Oil & Gas, Singapore (1)	\$120,000.05	Closed Won	1/18/2012 9:00 PM	
	United Oil Installations	5/15/2019 3:56 PM	Ron Roy	Ford Ben			United Oil & Gas, Singapore (1)	\$270,000.05	Closed Won	1/18/2012 9:00 PM	6/12/2016
	United Oil Refinery Generators	5/17/2020 10:51 AM	Ron Roy	Ford Ben			United Oil & Gas, Singapore (1)	\$399.00	Closed Won	1/18/2012 9:00 PM	7/31/2019
	United Oil Installations	2/26/2023 12:21 PM	Ron Roy	Ford Ben			United Oil & Gas, Singapore (1)	\$1,215,000.00	Closed Won	1/18/2012 9:00 PM	3/31/2023
	United Oil Emergency Generators	7/11/2019 6:41 PM	Ron Roy	Ford Ben			United Oil & Gas, Singapore (1)	\$440,000.06	Closed Won	1/18/2012 9:00 PM	7/31/2019
	United Oil Standby Generators	7/11/2019 6:41 PM	Ron Roy	Ford Ben			United Oil & Gas, Singapore (1)	\$120,000.03	Closed Won	1/18/2012 9:00 PM	7/31/2019
	United Oil Installations	1/22/2019 7:06 PM	Ron Roy	Ford Ben			United Oil & Gas, Singapore (1)	\$725,000.00	Closed Won	2/11/2014 10:36 AM	12/29/2009
	United Oil Installations	1/31/2019 4:28 PM	Ron Roy	Ford Ben			United Oil & Gas, Singapore (1)	\$270,000.05	Closed Won	2/11/2014 10:36 AM	12/29/2009
Sum								\$3,220,999.24			
	United Oil SLA	1/7/2021 9:15 PM	Amir Sadeh	Ford Ben		Mountain view3	Gene Point 2 (1)	\$120,000.04	Closed Won	2/11/2014 10:36 AM	12/29/2009
Sum								\$3,340,999.28			

Page 1 of 1 [1-9 of 9]      Rows per page 25

Figure 10 - A Smart Search Example

### Smart Column Filters

The Smart Column Filters (Figure 11) enables you to filter a specific table column by choosing / typing the relevant data – “Spreadsheet Style”. For your convenience we also placed two sorting links on the Smart-Column-Filter menu, so you will be able to control the sorting direction easily, i.e. in addition to the regular click-a-column header sorting. The Smart Column filters also include the optional Instant Charts™ feature. For more information, please read the next Instant Charts™ section.

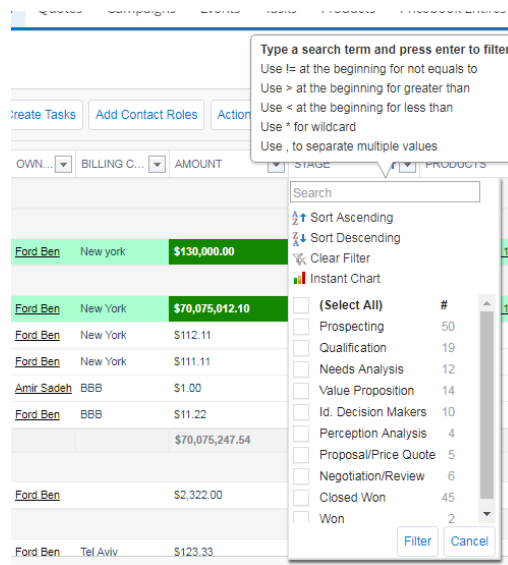


Figure 11 – Smart Column Filter (Text)

Figure 11 and Figure 12 illustrate the different types of Smart-Column-Filter: free text, integer, checkbox, currency / decimal and date filed type.

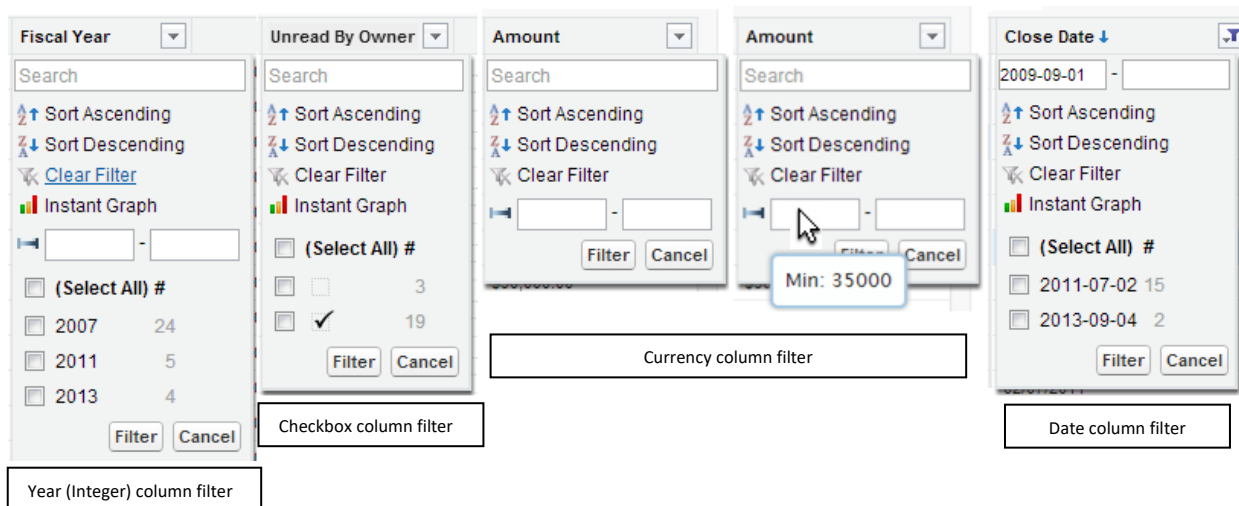


Figure 12 - Different types of Smart Column Filters

### Instant Charts™

The Instant Chart™ feature (Figure 13) enables you to create a quick graphic illustration of your data in just 2 clicks, just open the column filter and click on the Instant- Charts™ link. Our entire collections of Instant Charts™ are touchable action charts, meaning you can click and filter any Smart-Table grid from the chart itself. You can even do it while editing, sorting and filtering by another field, the chart will stay on the page until you close it or leave the page. Pinning the chart to the grid's top will enable you to save that chart for the current view Figure 14 (you can pin several charts to the grid's top).

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

By default, the Instant-Charts™ groups similar rows and show the count for each group using different charts / graphs. To add an additional dimension such as a currency-field to the totals of each group use the top edit-layout link, you can find more information for this option on the Layout Editor section. Figure 13 illustrates the usage of opportunity-amount field as the additional dimension; please note that the groups on chart (right & left side) are sorted by amount (and not by count).

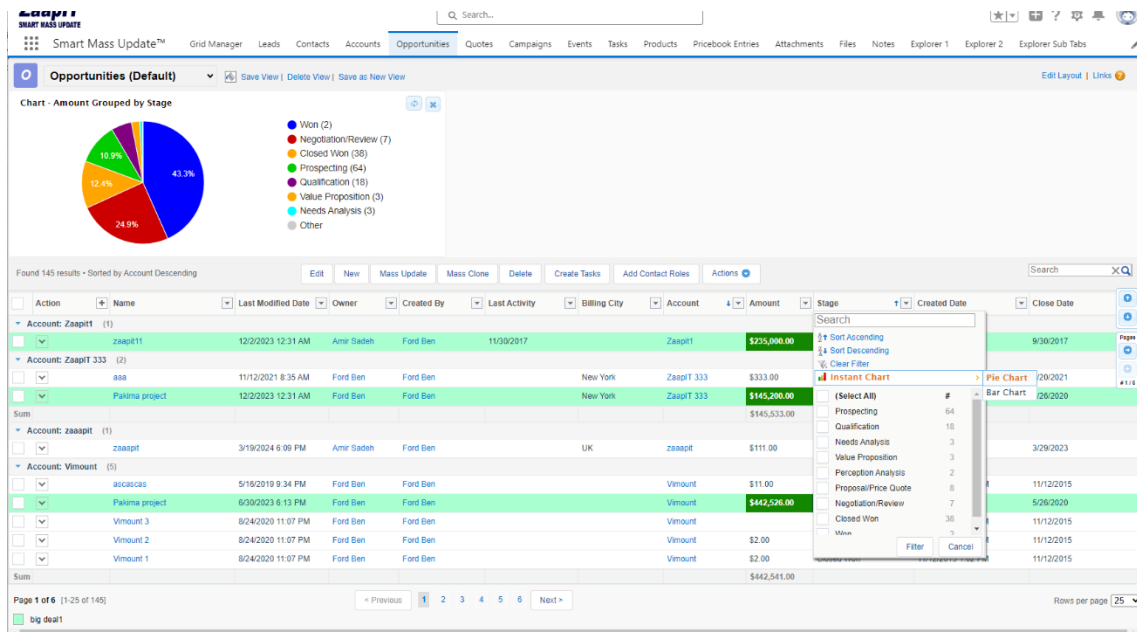


Figure 13 - Instant Charts®

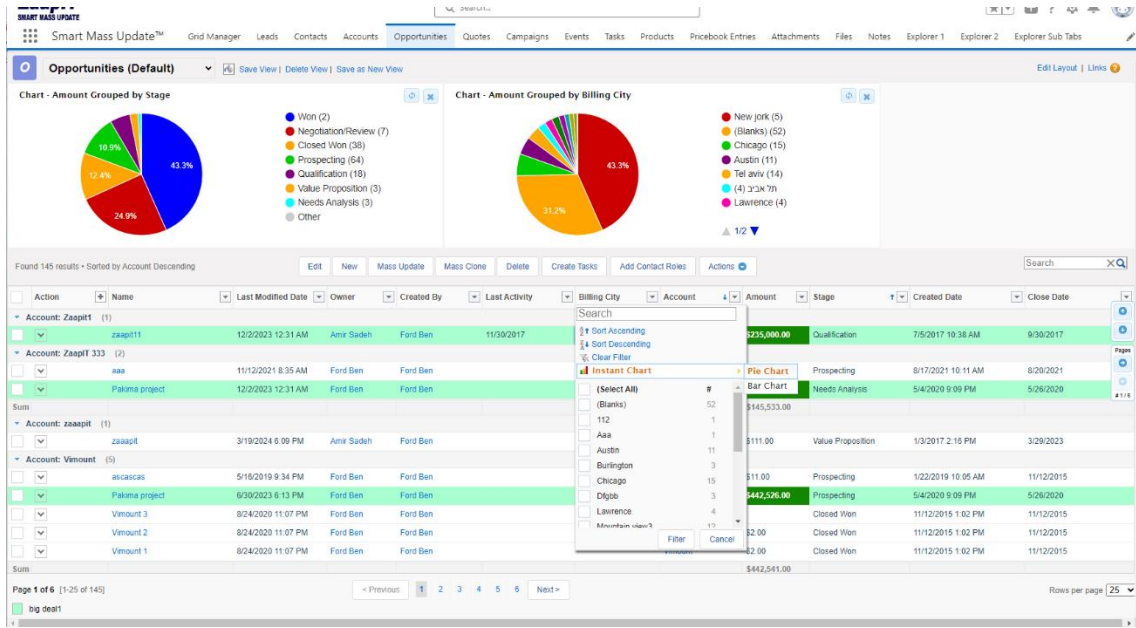


Figure 14 - Instant Charts pinned to the grid's top

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

Figure 15 illustrates the date chart in action. In the following example we filtered the Smart-Table grid by using the Date Chart itself and restrict the chosen date range to 16-Apr-2016 - 08-Aug-2018 (also reflected in the column filter date range).

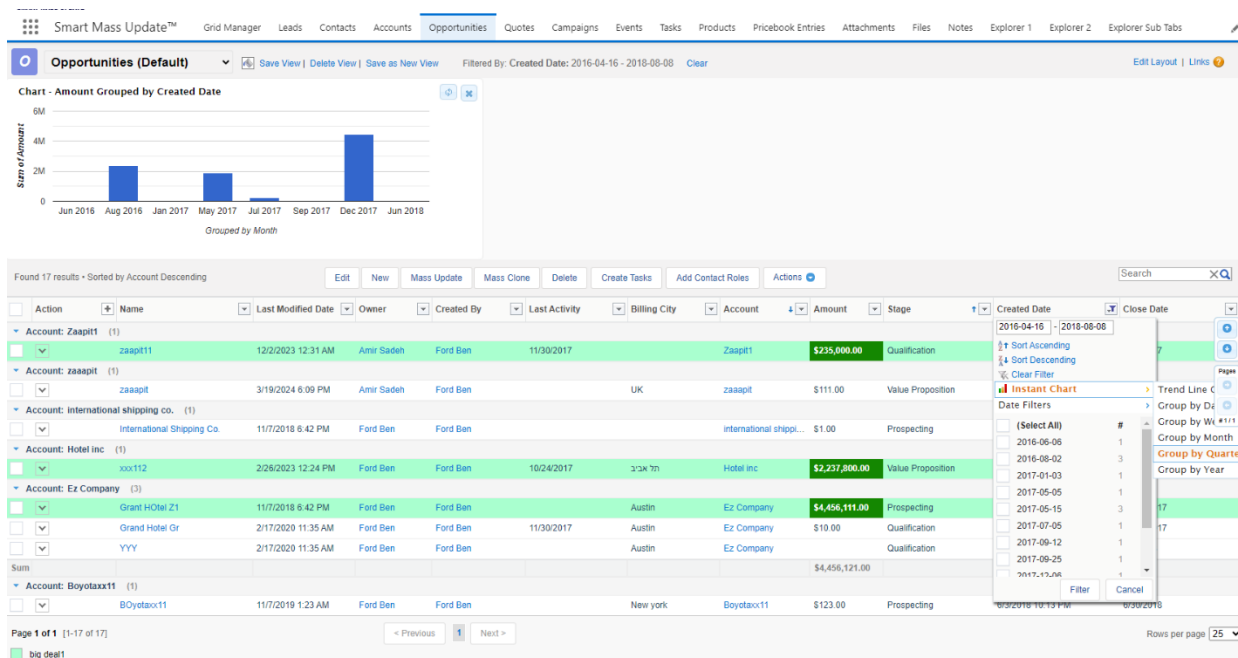


Figure 15 - Date Chart in action

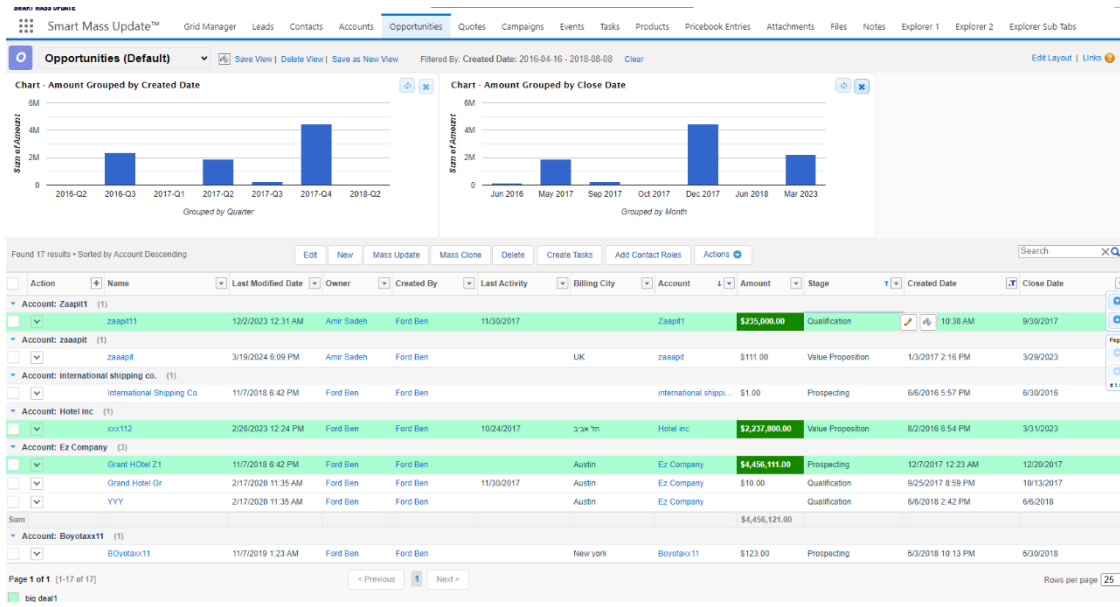


Figure 16 – 2 Date charts pinned to the grid's top

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

The data export feature (Figure 17) enables you to export any data to PDF, Word, Excel, CSV & XML. Just click on the export button on the grid's top to enter the export popup (Figure 17). For your convenience, when exporting to Excel a new filter row is generated for you (Figure 18).

Please note: The data export feature takes into account the search & filters i.e. you can choose and export only the relevant data for any business use case. As an example, on Figure 18 we exported all the opportunities that match our searching criteria: "uni".

## ZaapIT Tools – Admin / User Guide

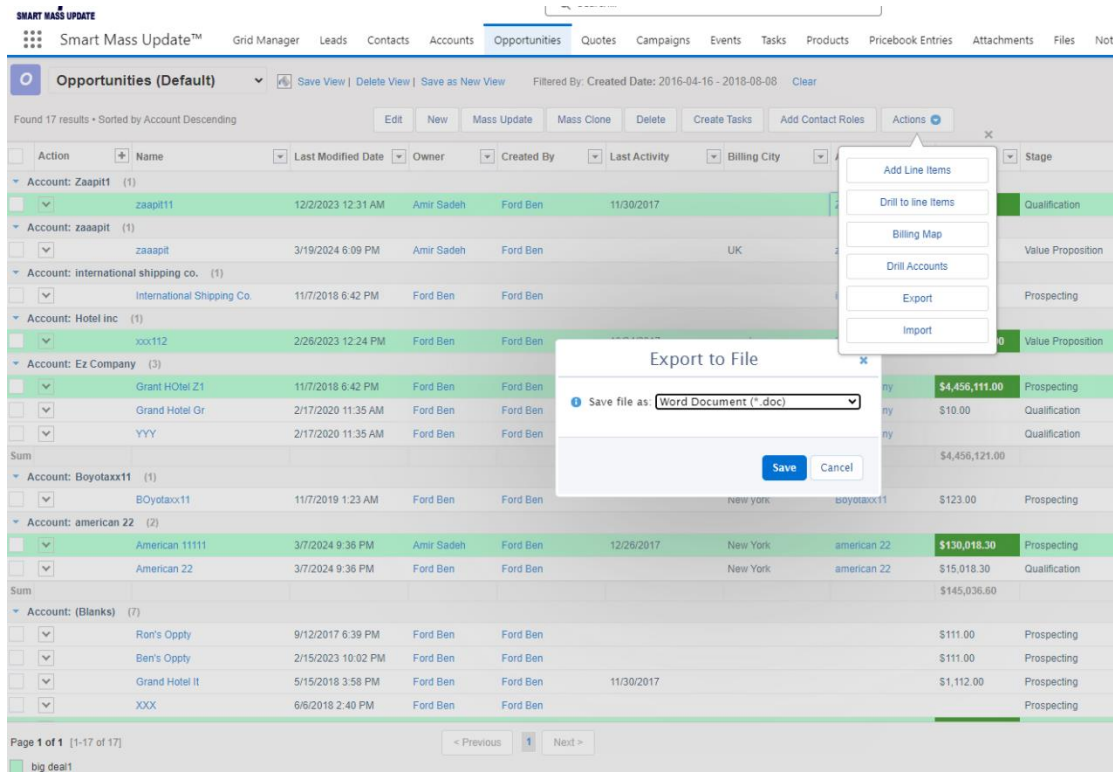


Figure 17 - Data export - PDF, Word, Excel, CSV

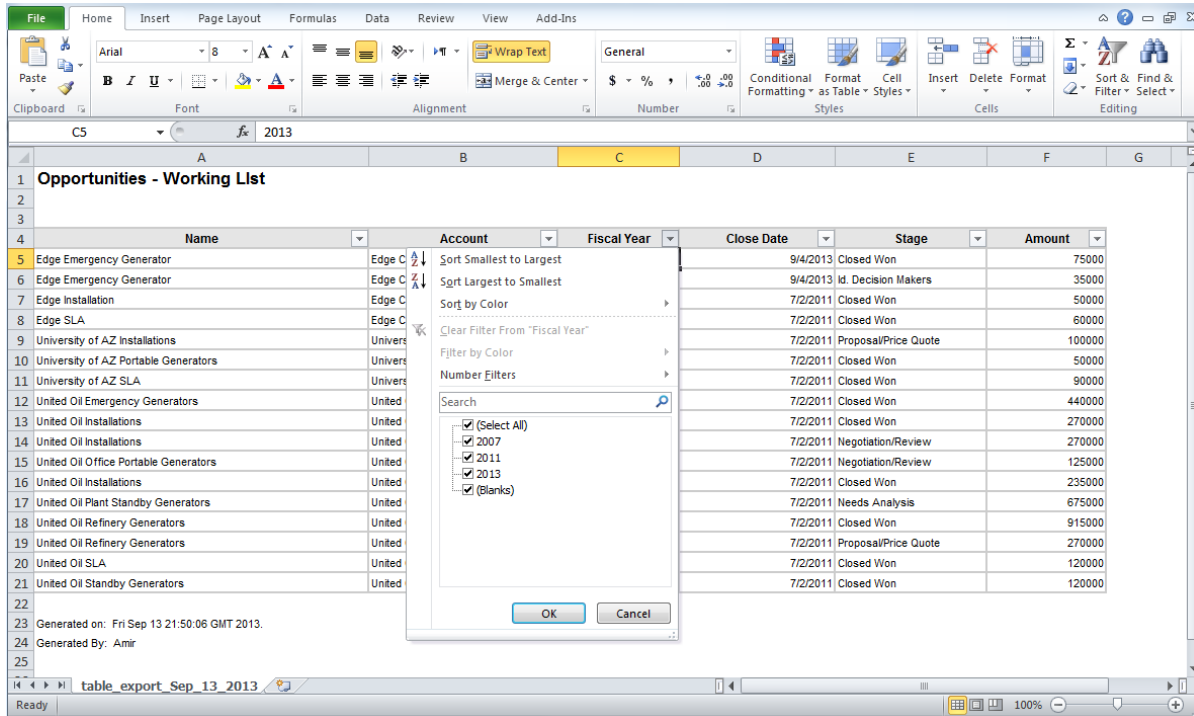


Figure 18 - Export to Excel



### Multi Column Sorting & Multi Level Groupings

The multi column sorting (Figure 19) serves as the default sorting for a view/ grid. It is being controlled from the edit layout link. This feature compliments the regular point & click column sorting. The multi-level grouping and group similar values into groups and auto-calculate totals & sub-totals for those groups.

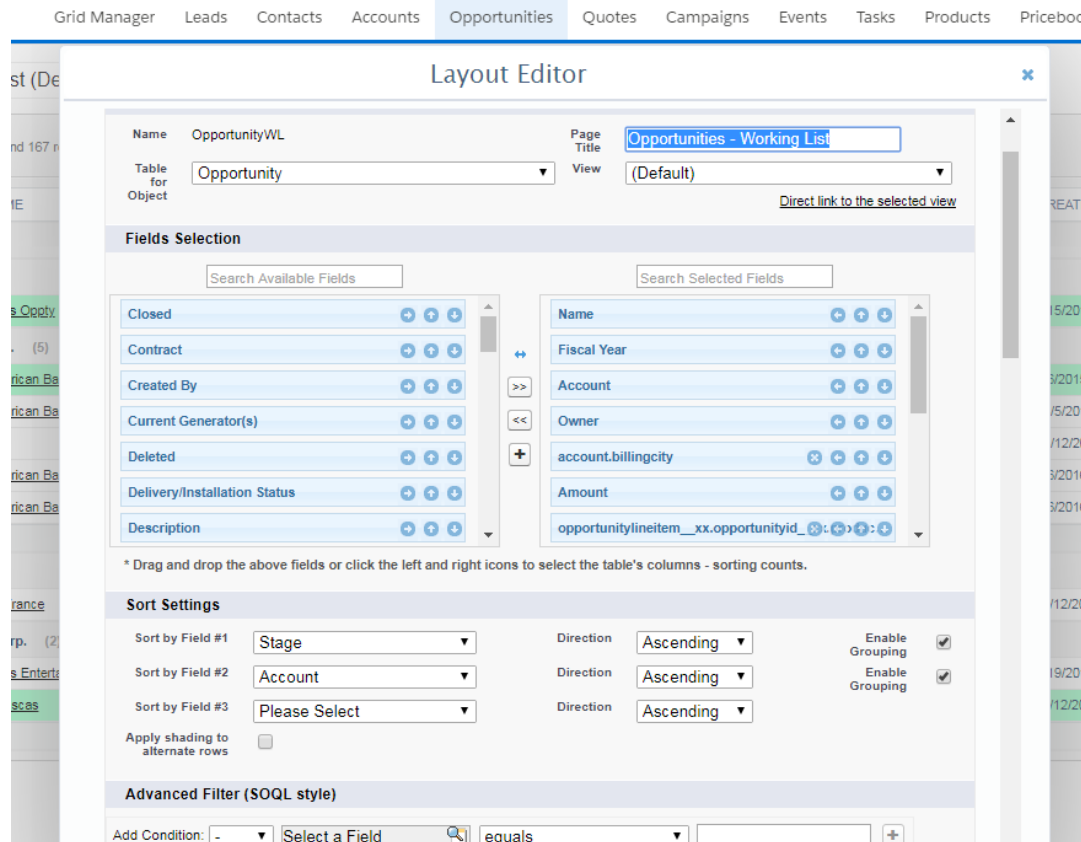


Figure 19 - Multi Column Sorting & Multi Level Groupings

### Layout Editor

The Layout Editor (Figure 20) enables any users / administrator to control the grid layout, columns, content, buttons and general behavior. Each grid / view has its own Edit-layout settings; those settings are shared among all the users. To restrict a user / all users from changing those settings read the “Restricting Edit Layout Link Access” section or set the sharing settings for zaapit tables object (setup>>search > sharign settings>zaapit tables>...).

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

### Basic Settings

Filling-in the basic settings section (Figure 20):

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

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

### Columns / Fields Selection

Set up the field selection section by dragging the fields from left side and dropping them on the right side in the desired order (Figure 20).

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

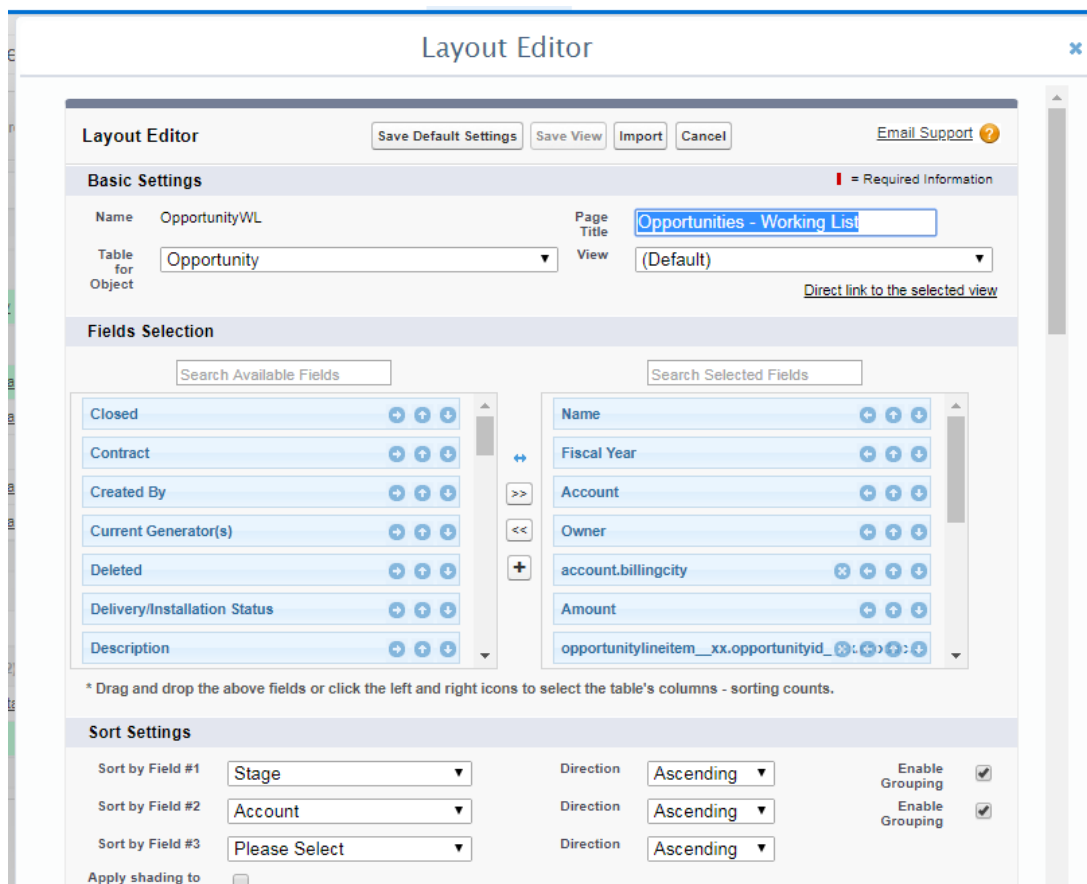


Figure 20 – Layout Editor

### Advanced Columns / Field Selection

Add any regular / lookup / related child field with the Advance-Add-a-Column option. Click the [+] button located between the Available-Fields section and the Selected-Fields section (Figure 20). Choose

the relevant fields then type your column title, filter column records, add a custom Ajax tooltip page or a custom link (Figure 21). Stand on the orange question mark in the small window for more details.

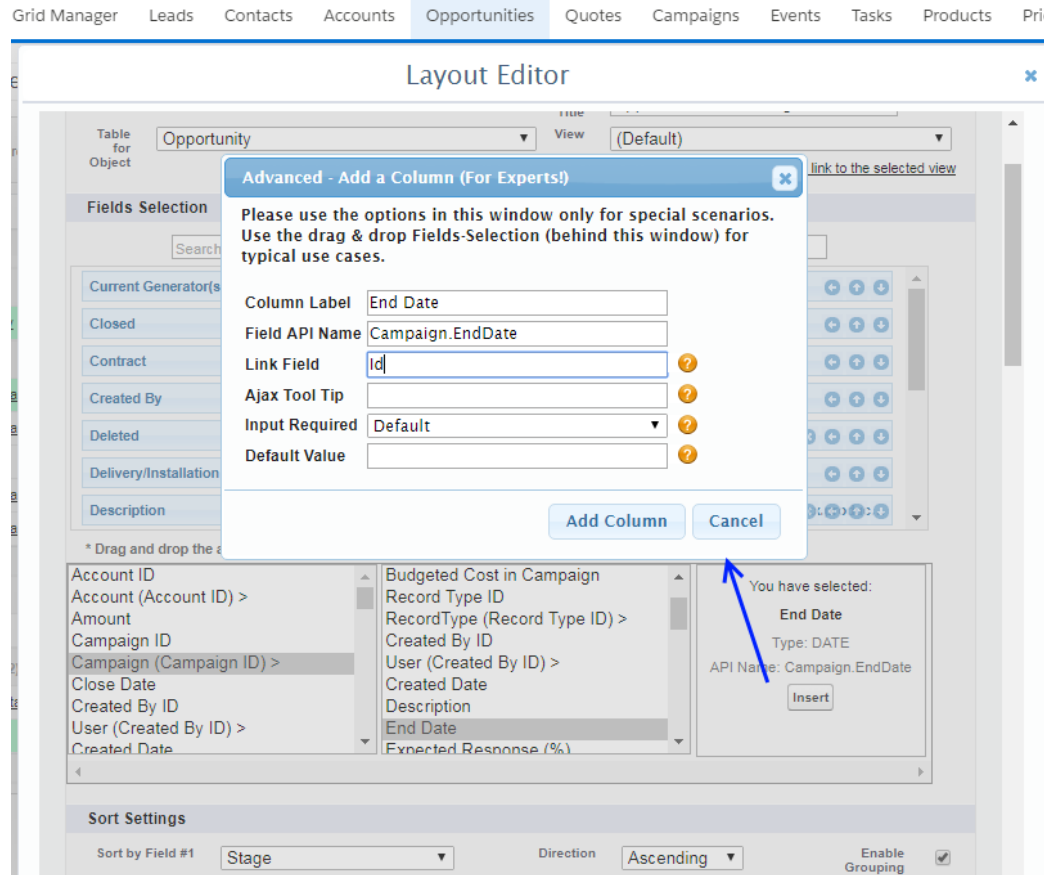


Figure 21 - Advanced field selection

### Custom Buttons

Create as many custom buttons as you need – on each save the system will offer you 3 more buttons (Figure 22).

#### Button types:

- Link / JavaScript button – Enter the name of the button on the left input field and type a link/URL or add a small JavaScript on the right input field. You can use {ID} to reference the parent object (useful in related list mode – see related grids). “Demo Button 2” and “Demo Button 3” are a link & JS examples (Figure 22).
- Salesforce custom buttons – Create a regular Salesforce JavaScript button for the current grid’s object and put its API name in the left button name field e.g. see “button\_demo1” on Figure 22 and its Salesforce definition on Figure 23.

**Developer Tip:** currently only the related list parent field {ID} is available. Please use the

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



Figure 22 - Custom Buttons

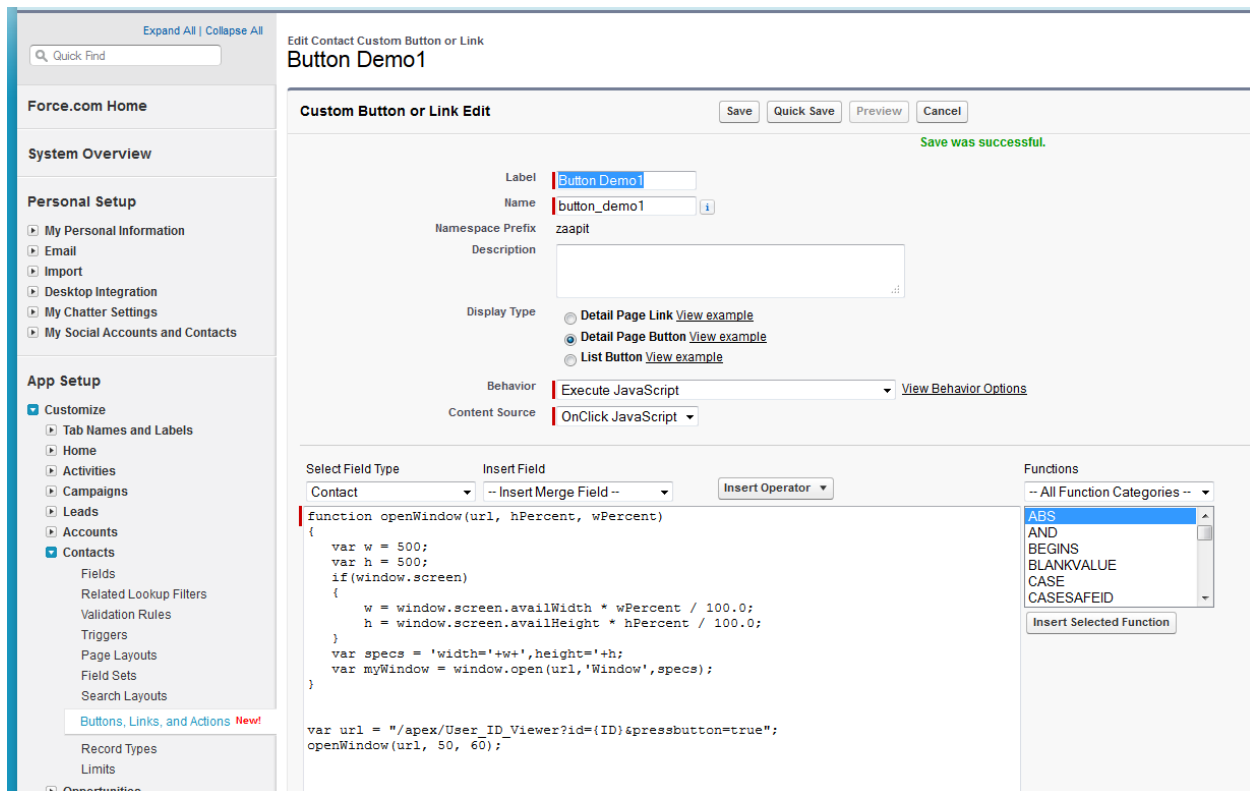


Figure 23 - Custom Demo Button

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

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

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

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

### Advanced Settings:

Customize your Smart-Table grid to fit your company needs by using the following advance settings (Figure 24):

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

- Hide instant graph link – mark this checkbox to hide the Instant-Graph™ link placed on your Smart-Column-Filter.
- Apply shading to alternate rows - Apply shading to alternate rows based on Sort by Field #1. Use Sort\_color1 & Sort\_color2 custom labels to change the colors.
- Group different/alternate rows by sort - Group different/alternate rows based on “Sort by Field #1” / user sorting.
- Enable Advanced Text Search – supports textareas & long-text fields, does not support pick-lists (SOSL style)
- New record link - Replace the URL/Address for the top “New button” (use that to autofill data). Example: /a01/e?parent\_id={ID}&parent\_\_c={NAME}  
\* {ID} and {NAME} are the parent’s id and name, returnUrl will be added automatically so please omit that from the url.
- Add X Empty Rows (default) – set the default number of new empty rows that you want to add upon clicking the add in place / add row / “+” button.
- Apex-Class Logic Extend – Write your own apex-class and trigger them on specific events. Your class must implement ZPTableHandler (it may also need to be global class).  
Format: EventName~classNameSpace~ClassName#EventName2~classNameSpace2~ClassName2  
Supported Events: BeforeSaveUpdate, AfterSaveUpdateOK, BeforeSaveInsert, AfterSaveInsertOK, AfterAllSaveOK,AfterAllSaveNOTOK, BeforeMassClone,AfterMassClone, BeforeMassUpdateAll,AfterMassUpdateAll, OnAddRow
- Amount field for Charts – Choose an amount/currency field for your Instant-Graph™, the selected field will be used to calculate the graph’s group-value. Leave this field on the “please select” choice to use the default row-count group-value. For example: Choosing Opportunity amount for an opportunity Smart-Table will lead to an Instant-Graph™.
- Remove name-field from export (for no-name tables) – mark that option for objects/tables that doesn’t have the standard name field otherwise you may see a warning/error message during export

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

Add a SOQL condition and filter out unwanted data automatically from your Smart-Table.

In case of an unexpected or problematic result you can empty this field from setup>custom settings>table name> "ExtraConditionFilter" field.

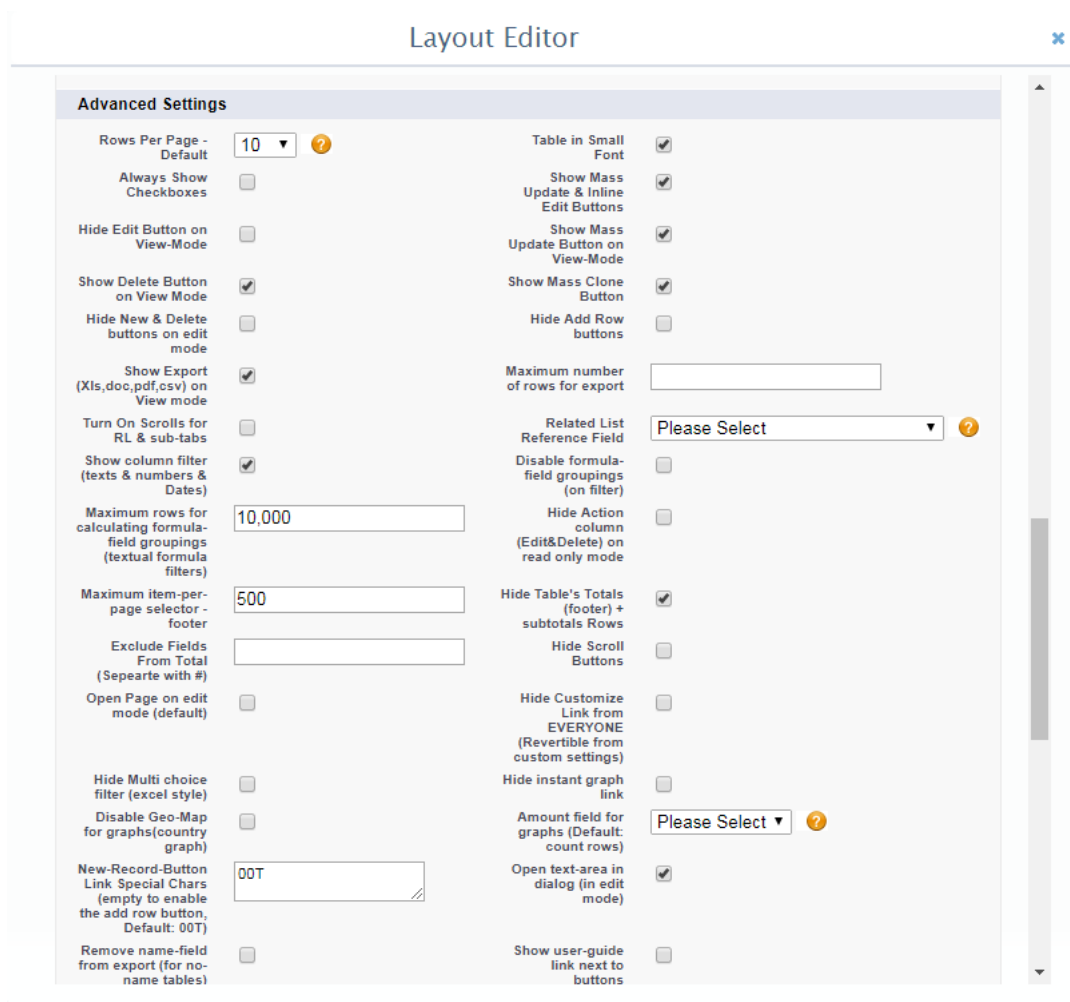


Figure 24 - Advanced Settings

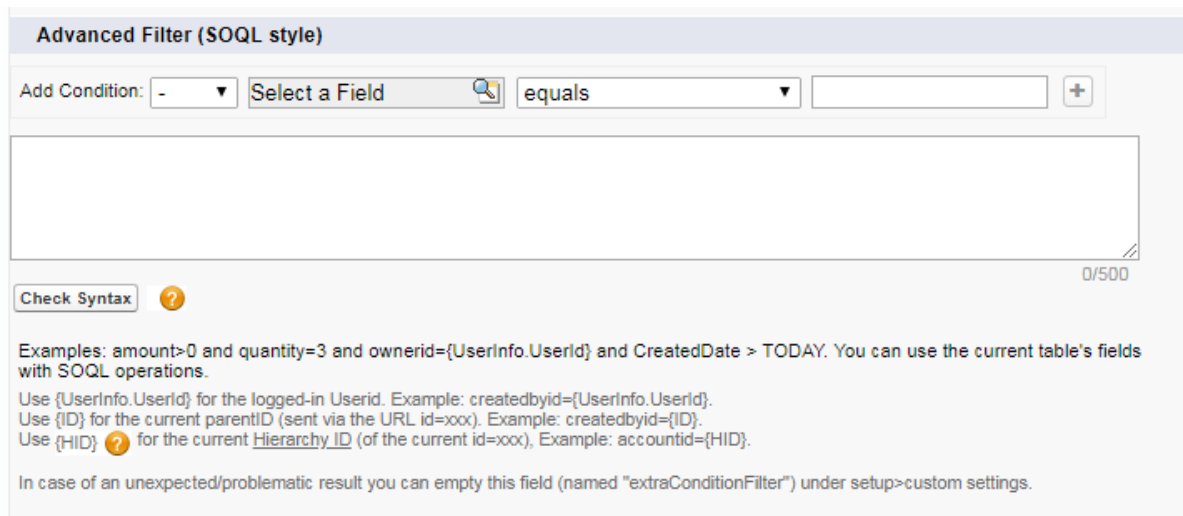


Figure 25 – Advanced Filter (SOQL Style)



### Restricting Edit Layout Link Access

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

- To give access to the Edit-Layout link for a specific user with admin-rights to all the Smart-Tables/ grids at once, just tick the “Enable ZaapIT's Layout Editor” checkbox under the user details: Go to setup>personal information>edit layout, add the “Enable ZaapIT's Layout Editor” field to your layout (Figure 26) and mark it for the checkbox (Figure 27). For none-admin users you tick the “Enable ZaapIT's **View** Editor” instead of “Enable ZaapIT's **Layout** Editor” which restricts the access to the advanced settings & custom buttons sections ( afterwards the user won't be able to change the table-for-object field i.e. to change the table-for-object drop down)

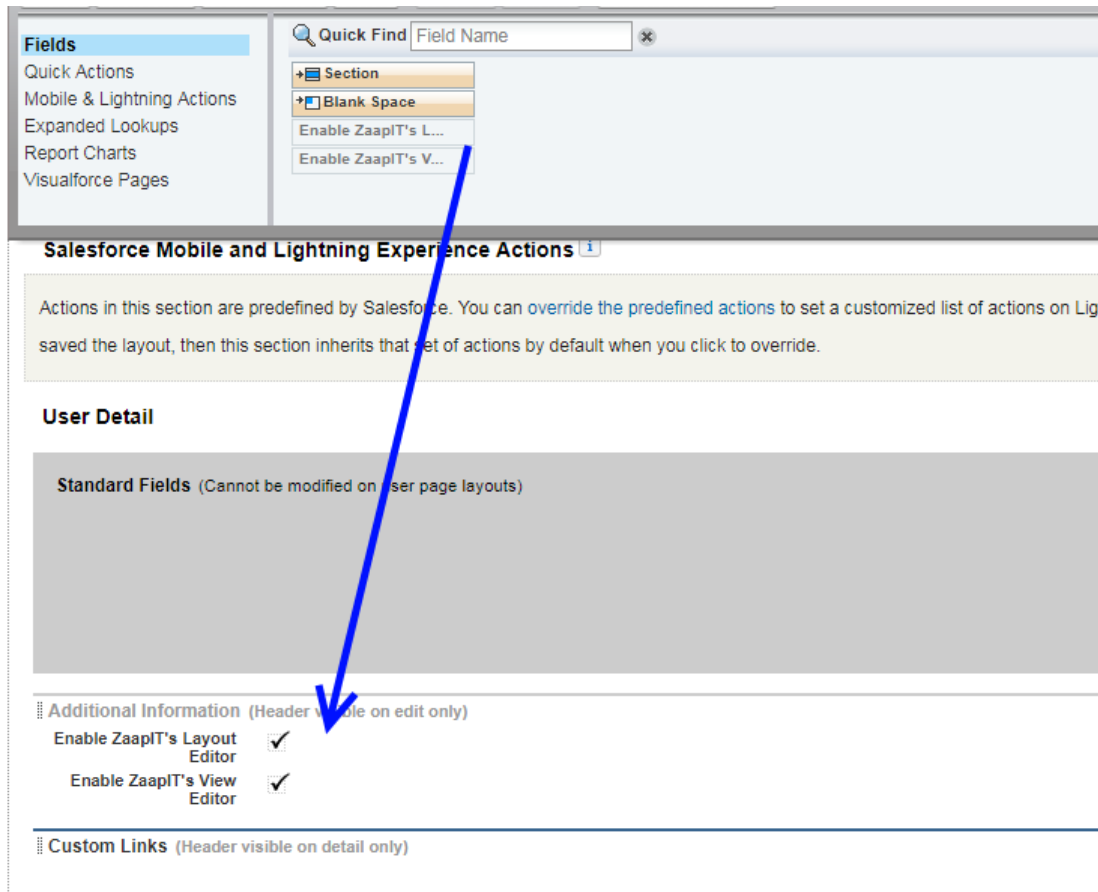


Figure 26 - Personal Information Layout

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

Figure 27 - Personal Information

- To hide the Edit Layout link from everyone – check the “hide Customize link checkbox” (Figure 28) to revert this option please go to setup>custom settings>Zaapit Smart Tables>”table name” and uncheck that checkbox (or do that from the grid manager tab...).

Figure 28 - Hide customize link from everyone

### Placing a Smart-Table as a regular Tab

To place/create a Smart-Table as a regular tab do the following: go to smart-mass-update>grid manager> new smart tab> follow the wizard> (Figure 29)... > enter the new tab > edit layout> set the object> choose a few field> save default settings (for the grid's default view).

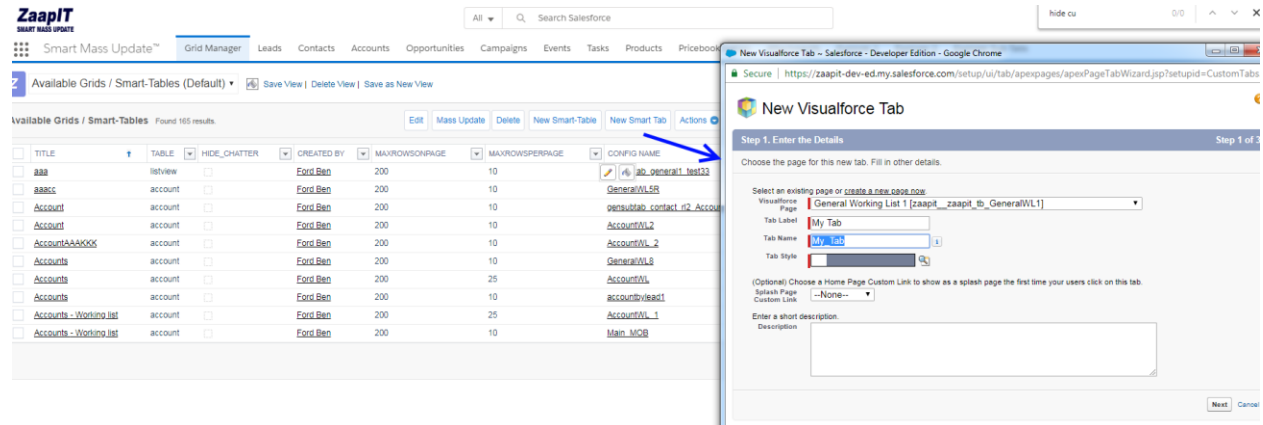


Figure 29 - Grid Manager new smart tab

**The old way for creating a smart tab:** go to setup>create>tab and press on the new button on the “Visualforce Tab” section (Figure 30,Figure 31). On the “New Visualforce Tab” page choose one of ZaapIT’s “General Working list” for custom(or native) objects or choose a predefined working list for the Salesforce-Native objects (Figure 32). Tip: WL is the abbreviation for “Working list”, RL is the abbreviation for “related list”.

**Custom Tabs**

You can create new custom tabs to extend salesforce.com functionality or to build new a Custom Object Tabs look and behave like the standard tabs provided with salesforce.com salesforce.com window. Visualforce Tabs allow you to embed Visualforce Pages.

**Custom Object Tabs** [New](#) [What Is This?](#)

No Custom Object Tabs have been defined

**Web Tabs** [New](#) [What Is This?](#)

No Web Tabs have been defined

**Visualforce Tabs** [New](#) [What Is This?](#)

Action	Label	Tab Style
Edit	Accounts	Presenter
Edit	Campaigns	Star
Edit	Contacts	Compass
Edit	Custom Object - Demo	People
Edit	Events	Presenter
Edit	Leads	Telescope
Edit	Opportunities	Treasure chest
Edit	Tasks	Alarm clock

Figure 31 - Creating a new tab

### New Visualforce Tab

**Step 1. Enter the Details**

Choose the page for this new tab. Fill in other details.

Select an existing page or [create a new page now](#).

Visualforce Page:

Tab Label:

Tab Name:  [i](#)

Tab Style:  [?](#)

Mobile Ready:  [What Is This?](#)

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.

Splash Page Custom Link:

Figure 30 - Creating a new tab Step 2

## New Visualforce Tab

Step 1. Enter the Details

Choose the page for this new tab. Fill in other details.

Select an existing page or [create a new page now](#).

Visualforce Page	General Working List [zaapit__zaapit_tb_GeneralWL]
Tab Label	zaapit_tb_campaign_rl [zaapit__zaapit_tb_campaign_rl]
Tab Name	zaapit tb CampaignWL [zaapit__zaapit tb CampaignWL]
Tab Style	zaapit_tb_case_rl [zaapit__zaapit_tb_case_rl]
Mobile Ready	zaapit_tb_case_rl1 [zaapit__zaapit_tb_case_rl1]
(Optional) Choose a Home Page	zaapit_tb_case_rl2 [zaapit__zaapit_tb_case_rl2]
Splash Page Custom Link	zaapit_tb_contact_rl [zaapit__zaapit_tb_contact_rl]
Enter a short description.	zaapit_tb_contact_rl1 [zaapit__zaapit_tb_contact_rl1]
Description	zaapit_tb_contact_rl2 [zaapit__zaapit_tb_contact_rl2]
	zaapit_tb_contactWL [zaapit__zaapit_tb_contactWL]
	zaapit_tb_contract_rl [zaapit__zaapit_tb_contract_rl]
	zaapit_tb_contract_rl1 [zaapit__zaapit_tb_contract_rl1]
	zaapit_tb_contract_rl2 [zaapit__zaapit_tb_contract_rl2]
	zaapit_tb_event_rl [zaapit__zaapit_tb_event_rl]
	zaapit_tb_event_rl1 [zaapit__zaapit_tb_event_rl1]
	zaapit_tb_event_rl2 [zaapit__zaapit_tb_event_rl2]
	zaapit_tb_eventWL [zaapit__zaapit_tb_eventWL]
	General Working List [zaapit__zaapit_tb_GeneralWL]
	General Working List 1 [zaapit__zaapit_tb_GeneralWL1]
	General Working List 10 [zaapit__zaapit_tb_GeneralWL10]

click on this tab.

Figure 32 - Creating a new tab for Salesforce-native objects

### Creating/Embedding a Smart-Table in your code

Before creating a new Smart-Table-visualforce-page, please note that we already created 3 visualforce-pages for every standard object for you to use (see Figure 32).

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

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

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

Label: free text

Api Name:zaapit\_tb\_XXX

Code:

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

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

Please create a new visual force page, the page API name must begin with “zaapit\_tab\_”:

Label: free text

Api Name:zaapit\_tab\_XXX

Code:

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

#### A related list Example (change the yellow parts):

Label: free text

Api Name:zaapit\_tb\_XXX

Code:

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

Visualforce Page

### zaapit\_tb\_test\_opp\_page

**Page Edit** Save Quick Save Cancel Where is this used? Component Reference

**Page Information** Re

Label

Name

Description

Available In Touch

Require CSRF protection on GET requests

**Visualforce Markup** **Version Settings**

```
1 <apex:page standardController="opportunity">
2 <apex:include pageName="zaapit__zaapit_tb_LeadWL"/>
3 </apex:page>
```

Figure 33 - Creating a new Visualforce Page

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

```

<apex:page standardController="Account">
<table>
<tr><td>
<iframe src="/apex/zaapit__zaapit_tb_account_rl1?isdtp=vw"
title="zaapit_tb_account_rl1" border="0" width="500" height="500" frameborder="0"
scrolling="no"/>
</td><td>
<iframe src="/apex/zaapit__zaapit_tb_account_rl2?isdtp=vw"
title="zaapit_tb_account_rl2" border="0" width="450" height="500" frameborder="0"
scrolling="no"/>
</td><td>
<iframe src="/apex/zaapit__zaapit_tb_account_rl?isdtp=vw" title="zaapit_tb_account_rl"
border="0" width="550" height="500" frameborder="0" scrolling="no"/>
</td></tr>
<tr>
<td colspan="3">
<iframe src="/apex/zaapit__zaapit_tb_account?isdtp=vw" title="zaapit_tb_account"
border="0" width="100%" height="500" frameborder="0" scrolling="no"/>
</td>
</tr>
</table>
<zaapit:resize_include />
</apex:page>

```

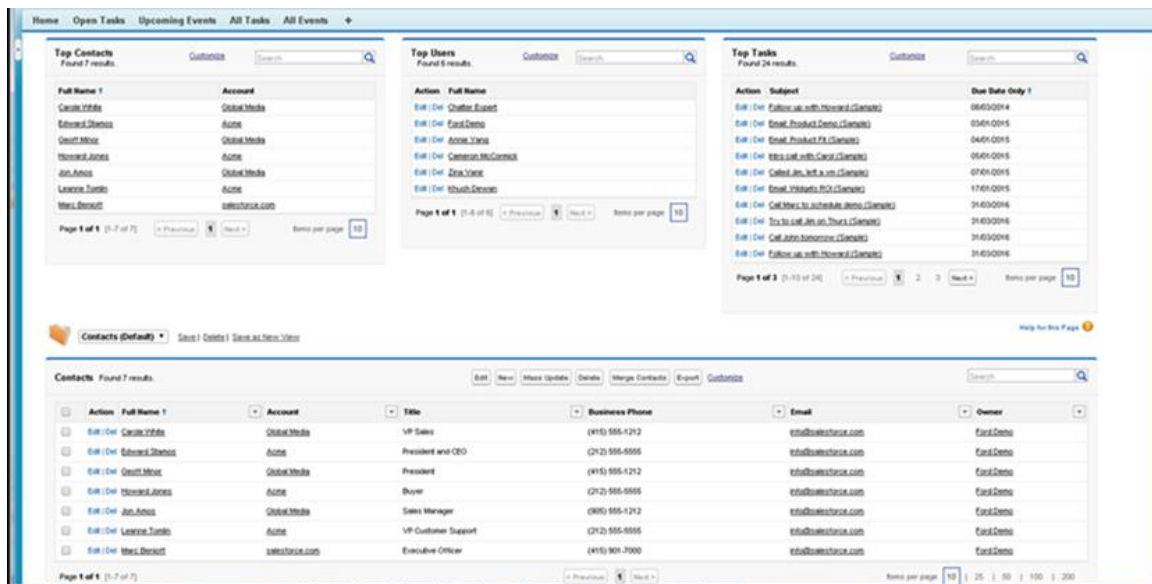


Figure 34 - Multi Tables in one page Example (4 Smart Tables in 1 page)

### Smart Tables in apex:tab example:

```

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

```



```

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

<zaapit:resize_include />

</apex:page>

```

Action	Subject	Call Result	Assigned To	Status
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Send Letter</a>			Albert Tall	In Progress
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Send Letter</a>			Ford Bellman	In Progress
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Call</a>			Albert Tall	Completed
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Send Letter</a>			Albert Tall	In Progress
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Send Letter</a>			Ford Bellman	In Progress
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Call</a>			Albert Tall	In Progress

Figure 35 - Smart Tables in apex:tab example

Overwrite the view link – example:

```

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

```

### Multi Language support

Since version 1.120 (Sep-2013), each one of our Smart-Tables support multi-language translations and customizations. Every organization can enter its own translation or customize the Smart-Tables texts to meet its own needs. Just go to setup>create>custom label> and alter / add your own translations (Figure 36).

The screenshot displays the 'Custom Label' configuration page in the ZaapIT Admin interface. The page title is 'Page\_x\_of\_y (Managed)'. A yellow warning box states: 'This Custom Label is managed, meaning that you may only edit certain attributes. [Display More Information](#)'. Below this, there are links for 'Local Translations / Overrides [0]' and 'Packaged Translations [0]'. The 'Custom Label Detail' section contains a table with the following data:

Short Description	Page x of y	Name	Page_x_of_y
Language	English		
Namespace Prefix	zaapit		
Installed Package	ZaapIT Tools		
Categories			
Value	Page <b>{0}</b> of {1}</b>		
Created By	Amir_DEV1, 02/08/2013 15:21	Modified By	Amir_DEV1, 02/08/2013 15:21

Below the table, there are two sections: 'Local Translations / Overrides' and 'Packaged Translations'. Both sections show a message: 'These translations were created by administrators in your company. Local translations override packaged ones.' and 'No records to display'. At the bottom, there are links for 'Back To Top' and 'Always show me more records per related list'.

Figure 36 - Multi Language support

### Override Existing Texts - labels / tab names / etc

To override existing text labels / tab names just go to setup>translation workbench>override, then choose the "ZaapIT Tools package" and choose the content that you want to override and in what language do you want to see it. Figure 37 illustrate how to override the Mass-Smart-Update tab names.

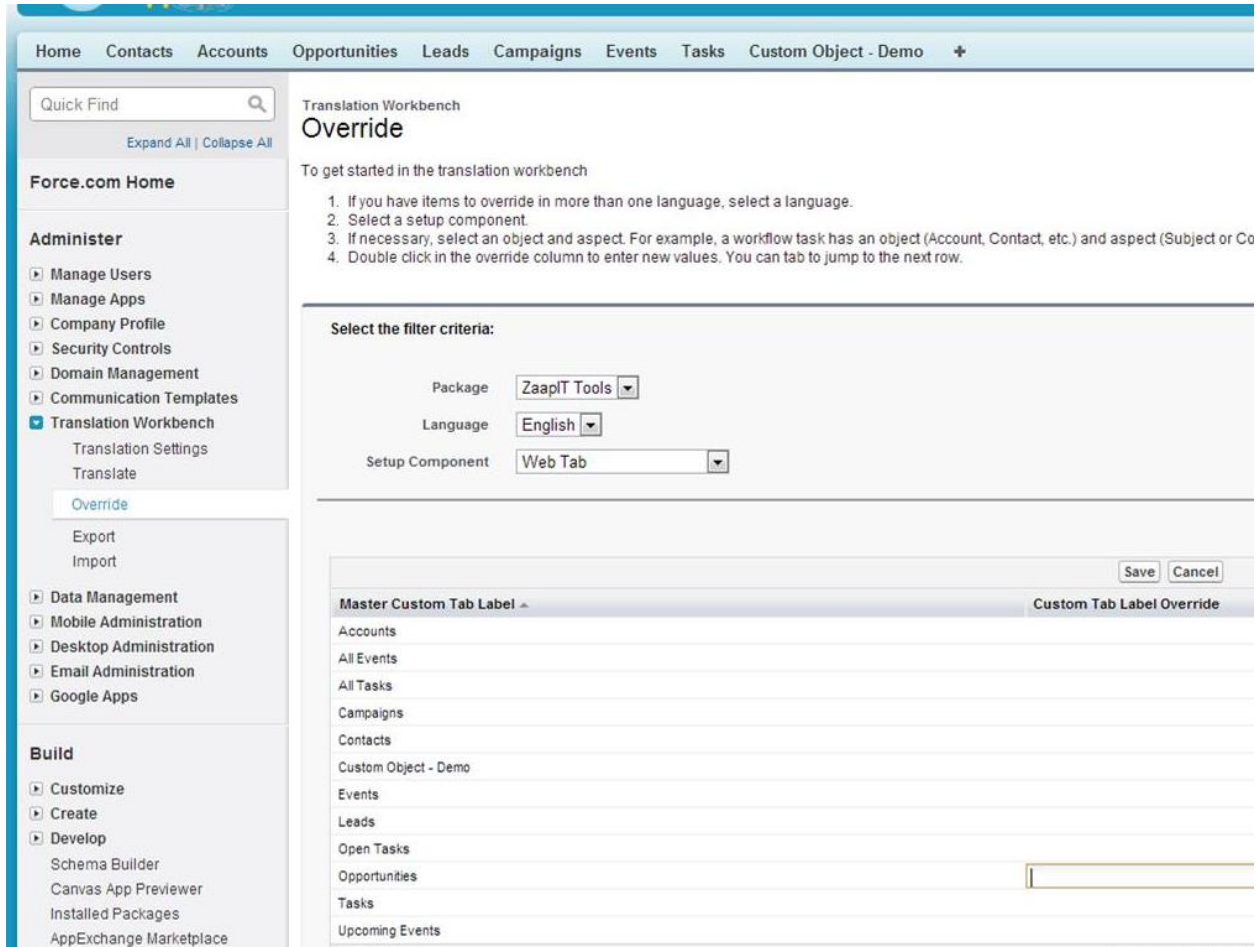


Figure 37 - Override Existing Texts

### Smart-Mass-Update™

The Smart-Mass-Update application for Salesforce is a native Salesforce hosted application located on the Salesforce application dropdown (Figure 38). This application is a collection of predefined Smart-Tables (as tabs) for the most common built-in Salesforce objects plus one custom object tab.

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

#### Application Tabs:

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

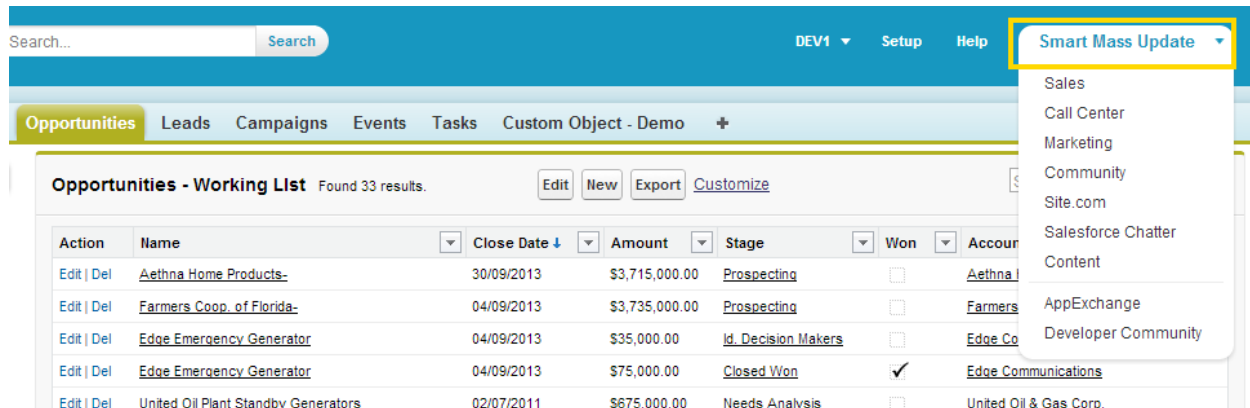


Figure 38 - Application Dropdown

### Smart-Activity-Manager™

The Smart-Activity-Manager application for Salesforce is a native Salesforce hosted application located on the Salesforce application dropdown (Figure 39). This application is a collection of predefined Tasks & Events Smart-Tables (as tabs) that’s enables you to control yours and your team’s tasks & events in one place.

#### Main Features:

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

#### Application Tabs:

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

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

For example: change the open task condition from “createddate = LAST\_N\_DAYS:90” to “createddate = LAST\_N\_DAYS:180” to view all the tasks created in the last 180 days.

The screenshot displays the Salesforce Smart Activity Manager interface. At the top, the Salesforce logo and navigation menu are visible. The main content area shows a table titled "All Tasks - Last 365 days (My Team)" with 23 results. A dropdown menu is open over the "Status" column, showing options like "Sort Ascending", "Sort Descending", "Clear Filter", "Instant Graph", and "(Select All) #". The table columns include Action, Subject, Start Date, End Date, Status, Priority, Opportunity/Account, Contact/Lead, Assigned To, Closed, Reminder Date/Time, Created Date, and Description. A pie chart titled "Graph - Count per Status" is overlaid on the right side of the table, showing the distribution of tasks by status: Not Started (11, 47.8%), Completed (9, 39.1%), and In Progress (3, 13%).

Action	Subject	Start Date	End Date	Status	Priority	Opportunity/Account	Contact/Lead	Assigned To	Closed	Reminder Date/Time	Created Date	Description
Edit   Del	Call	21/11/2013		Not Started	Normal	Edge Emergency Generator		Ford Belman	<input type="checkbox"/>	13/11/2013 08:00	13/11/2013 21:31	Call Mr. Green and close the deal
Edit   Del	Call			In Progress	Normal	Dickenson plc		Ford Belman	<input type="checkbox"/>	23/07/2013 08:00	23/07/2013 08:00	Use Smart Activity Manager to view yours / your team's Events / tasks. Checkout those smart column filters.
Edit   Del	Call			In Progress	Normal	Dickenson plc		Ford Belman	<input type="checkbox"/>	23/07/2013 08:00	23/07/2013 08:00	
Edit   Del	Call			Completed	Normal	Dickenson plc		Albert Tall	<input type="checkbox"/>	23/07/2013 08:00	23/07/2013 08:00	
Edit   Del	Call			Not Started	Normal	Dickenson plc		Ford Belman	<input type="checkbox"/>	23/07/2013 08:00	23/07/2013 18:02	
Edit   Del	Call			In Progress	Normal	Dickenson plc		Ford Belman	<input type="checkbox"/>	23/07/2013 08:00	23/07/2013 18:02	
Edit   Del	Call			Completed	Normal	Dickenson plc		Ford Belman	<input type="checkbox"/>	23/07/2013 08:00	23/07/2013 18:02	
Edit   Del	Send Letter			In Progress	Normal	Aethna Home Products-	Kristen Akin	Albert Tall	<input type="checkbox"/>	14/08/2013 08:00	14/08/2013 19:38	
Edit   Del	Send Letter			In Progress	Normal	Aethna Home Products-	Kristen Akin	Ford Belman	<input type="checkbox"/>			
Edit   Del	Send Quote			Not Started	Normal	Farmers Coop. of Florida-	Bertha Boxer	Ford Belman	<input type="checkbox"/>			
Edit   Del	Send Quote			In Progress	Normal	Farmers Coop. of Florida-	Bertha Boxer	Ford Belman	<input type="checkbox"/>			
Edit   Del	Send Letter			In Progress	Normal			Albert Tall	<input type="checkbox"/>			
Edit   Del	Send Quote			In Progress	Normal	United Oil & Gas, UK		Ford Belman	<input type="checkbox"/>			
Edit   Del	Call			Completed	Normal	Dickenson plc		Ford Belman	<input checked="" type="checkbox"/>			
Edit   Del	Call			Completed	Normal	Dickenson plc		Ford Belman	<input checked="" type="checkbox"/>			
Edit   Del	Call			Completed	Normal	Dickenson plc		Ford Belman	<input checked="" type="checkbox"/>			
Edit   Del	Call			Completed	Normal	Dickenson plc		Ford Belman	<input checked="" type="checkbox"/>			
Edit   Del	Call			Completed	Normal	Dickenson plc		Ford Belman	<input checked="" type="checkbox"/>			
Edit   Del	Call			Completed	Normal	Dickenson plc		Ford Belman	<input checked="" type="checkbox"/>			
Edit   Del	Call			Completed	Normal	Dickenson plc		Albert Tall	<input checked="" type="checkbox"/>			
Edit   Del	Call			Completed	Normal	Aethna Home Products-	Kristen Akin	Albert Tall	<input checked="" type="checkbox"/>			
Edit   Del	Call			Completed	Normal	Farmers Coop. of Florida-	Bertha Boxer	Ford Belman	<input checked="" type="checkbox"/>			

Figure 39 - Smart Activity Manager

### DEDUP-Manager™

The DEDUP-Manager app for Salesforce is a native Salesforce app located on the Salesforce application dropdown (Figure 40). This application provides a collection of tabs & related list that helps you to de-duplicate your data manually, automatically & in mass.

#### Main Features:

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

#### Application Tabs:

- Overview – global statistics
- Jobs – create & monitor merge jobs, auto-merge jobs, import jobs.
- Leads by Email / Name – detects lead with similar email / name
- Contacts by Email /Name – detects contacts similar same email / name.
- Accounts by Name – detects accounts with the same name
- Lead w. Contact Email / name – detects lead & contacts with similar email /name
- Lead w. Account – detects leads that has an account with a similar company name

- Attachments – detects duplicate attachment with similar name

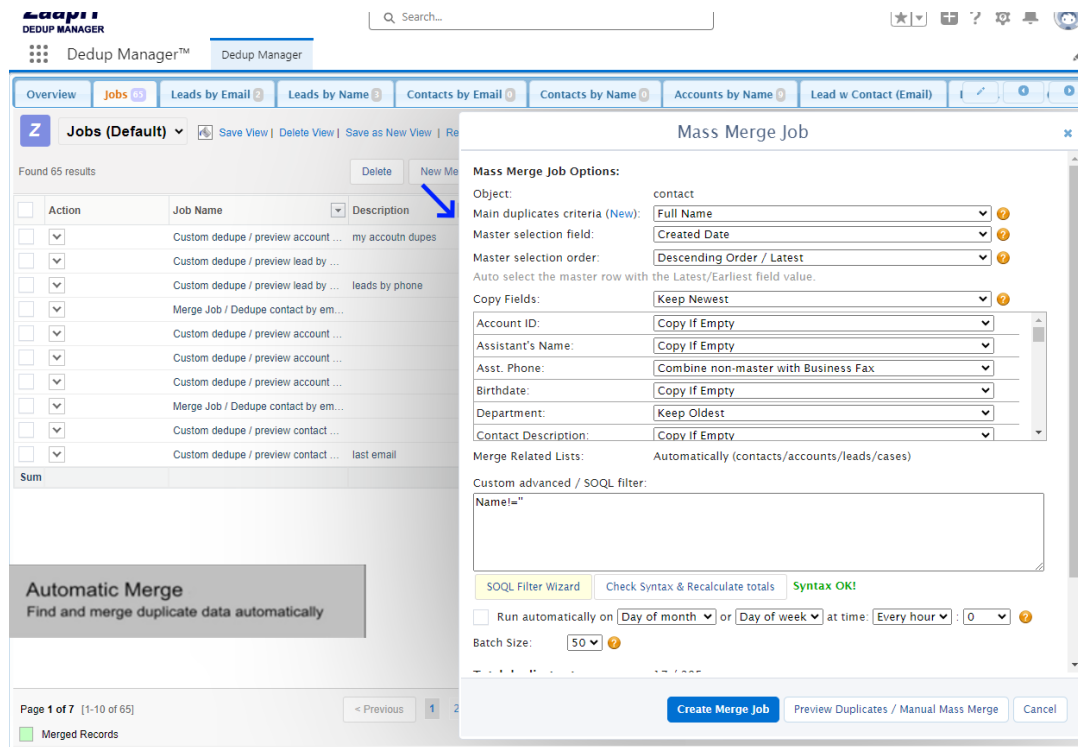


Figure 40 - DEDUP-Manager™

## Community-Grids

The Community-Grids tool for Salesforce is a native Salesforce hosted tool built for Salesforce’s communities. This tool will enable you to create Smart-Tables for your Salesforce communities. As an example, you can create a Salesforce community for you Partners and give them a Smart-Table tab(s) to maintain their opportunities (contacts & accounts) - Figure 41. You can use the owner field to assign your partner new opportunities created by your – such as upsell, renewal & upgrade opportunities.

The Community-Grids tool can support multi-Salesforce-communities such as Partners community, Distributors community, customer community and employee’s communities. Just use a different visualforce-tab for each community (Figure 42). To add a new visualforce-tab please read “Placing a Smart-Table as a regular Tab” section.

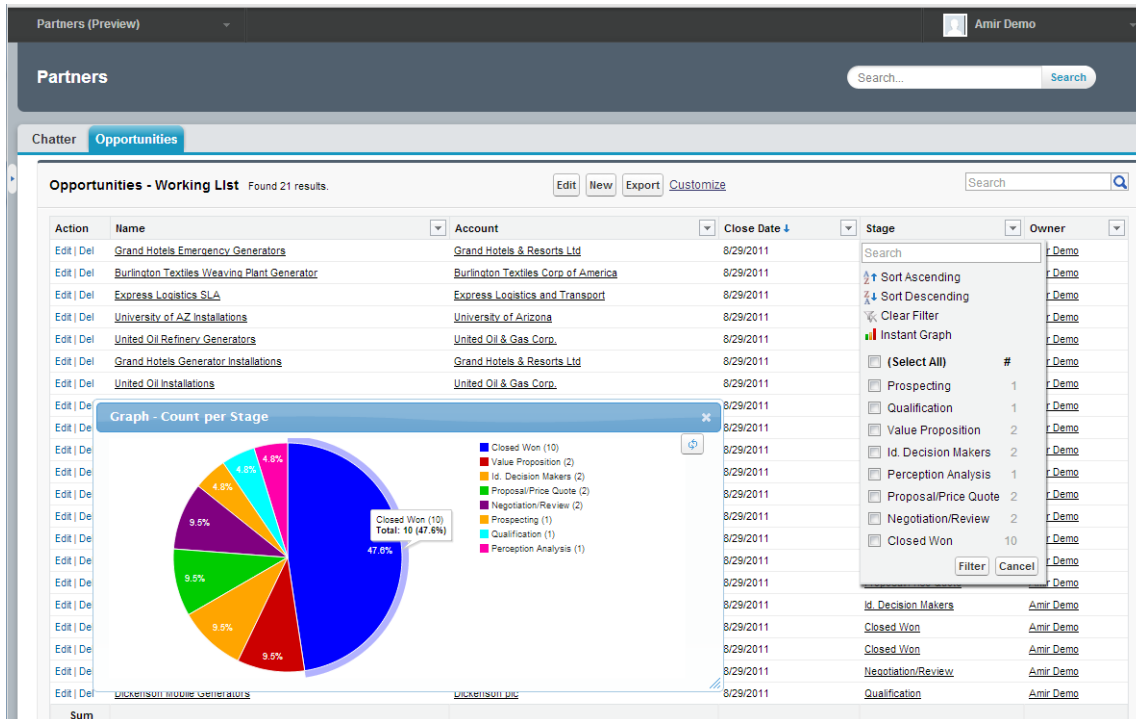


Figure 41 - Community Grids

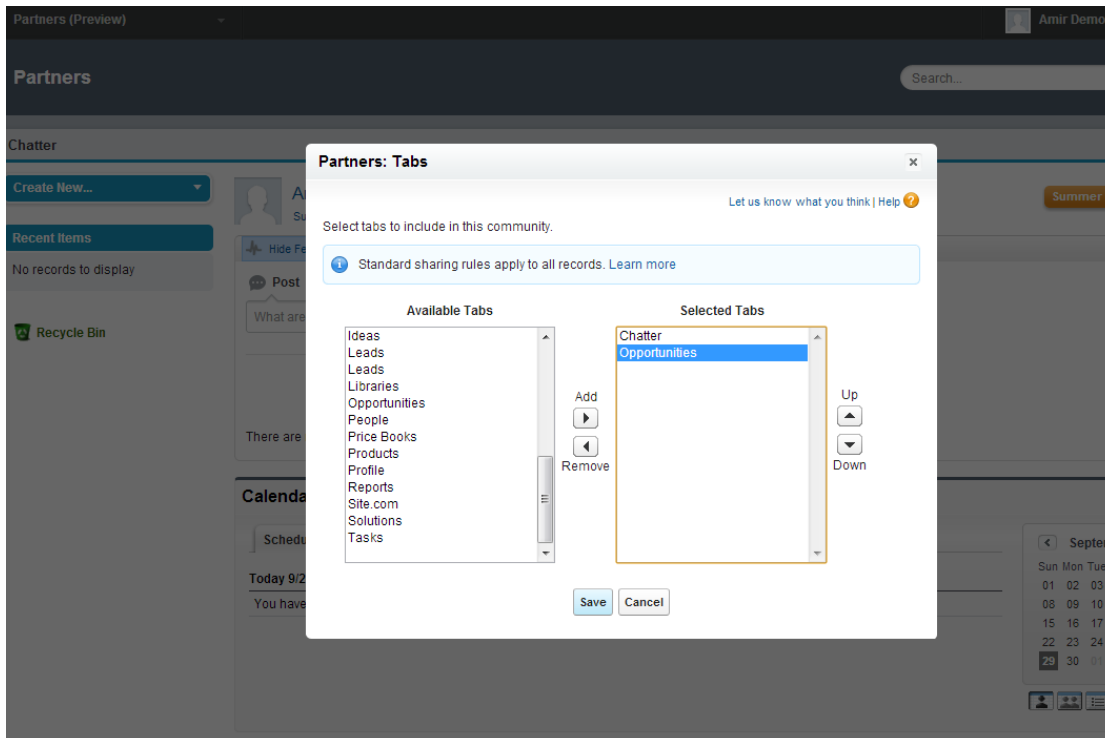


Figure 42 - Community Grids Tabs



### Smart-Related-Grids

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

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

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

1. Go to one of setup>search>object (e.g. opportunities) >layouts> click the “edit layout” next to the page the chosen layout (Figure 43).
2. Create a new page section (Figure 44).
3. Uncheck the “edit page” & detail page checkboxes and choose 1 column layout (Figure 45).
4. Place the grid “zaapit\_tb\_XXX” inside the newly created section (Figure 46) – if you can’t find the page please create one by following the steps on the bottom of page 29, create a “related list” page or a “related-sub-tabs” page (the examples are on page 24).
5. Save your layout.
6. The result - Figure 47.

How to video: <https://www.youtube.com/watch?v=fxaLCHxePbl>

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

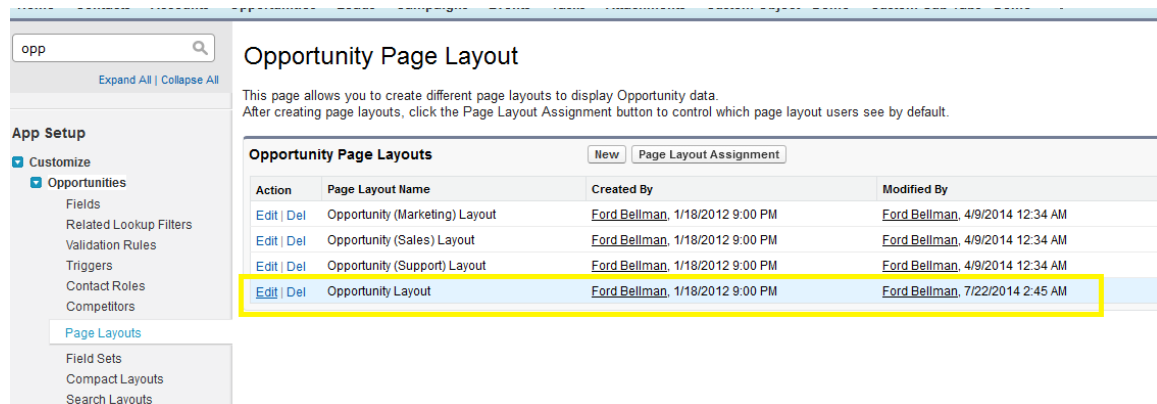


Figure 43 - Edit Layout

The screenshot shows the ZaapIT Admin interface. At the top, there is a toolbar with buttons for Save, Quick Save, Preview As..., Cancel, Undo, Redo, and Layout Properties. Below the toolbar is a 'Quick Find' search bar with the text 'Page Name'. A sidebar on the left contains a menu with options: Fields, Buttons, Custom Links, Visualforce Pages (highlighted), Related Lists, and Actions. The main content area displays a list of sections for a page layout, including 'Section', 'Blank Space', 'Delivery Order', and 'Invoice'. Below this, there are several information sections: 'Other Information' (Payment Terms, Payment Method, Start Date, End Date, Billing Frequency), 'Additional Information' (Order Number, Current Generator(s), Tracking Number), 'System Information' (Created By, Last Modified By), 'Custom Links' (Delivery Status), and 'Description Information' (Description). At the bottom, there is a 'Products' table with columns for Product, Quantity, Sales Price, Date, and Line Description.

Product	Quantity	Sales Price	Date	Line Description
Sample Product	7.00	\$402.45	16/09/2013	Sample Line Description

Figure 44 - Create a new Visualforce page section

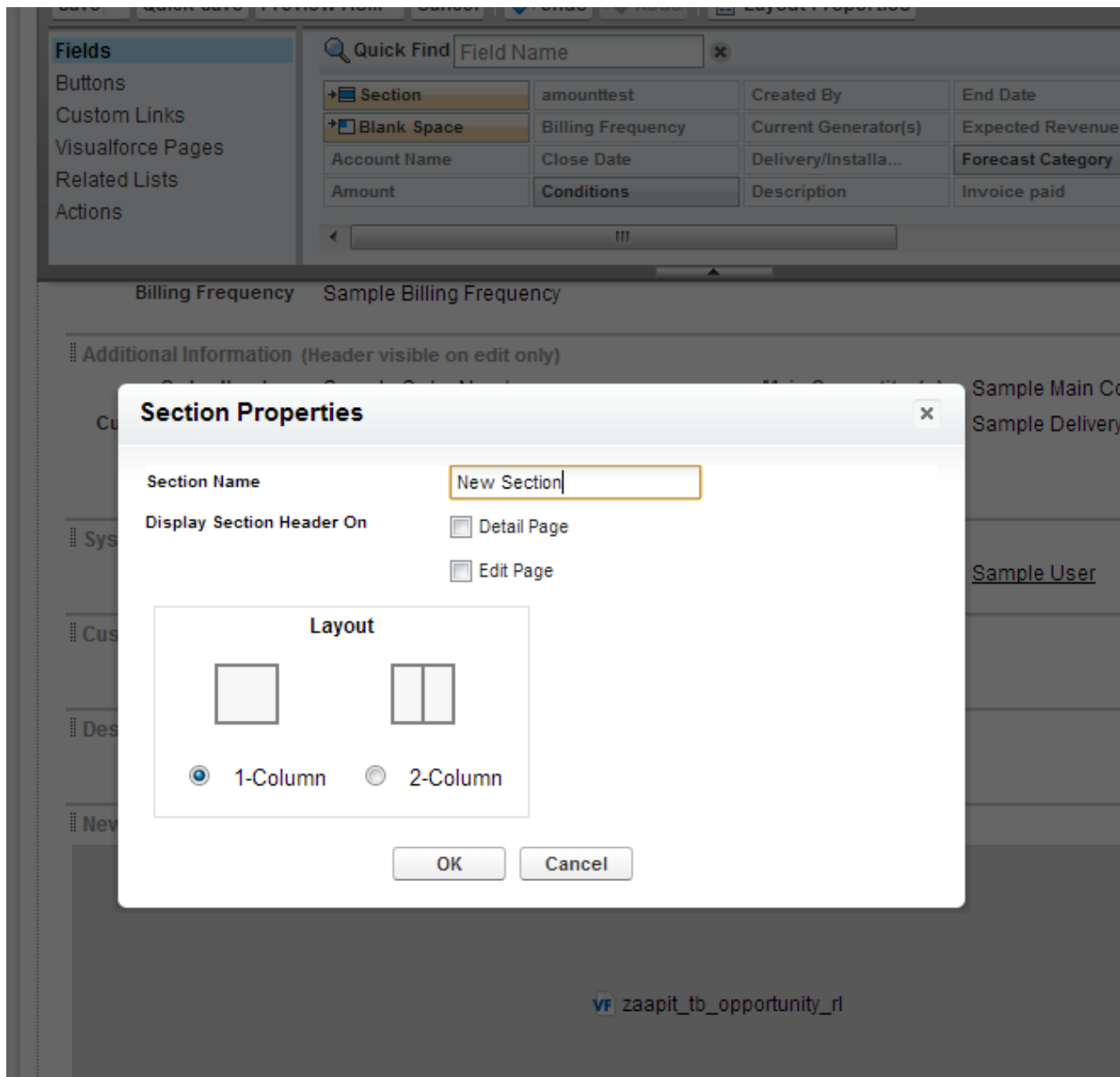


Figure 45 - Section Properties

The screenshot displays a detailed record view in ZaapIT. On the left, a sidebar contains navigation options: Custom Links, Visualforce Pages, Related Lists, and Actions. The main content area is organized into several sections:

- Custom Links:** A table with columns for type, sample type, and stage. It includes links for 'Blank Space', 'Delivery Order', and 'Invoice', all pointing to 'zaapit\_tb\_opportu...'.
- Other Information (Header visible on edit only):** Fields for Lead Source (Sample Lead Source), amounttest (Sample amounttest), Probability (%) (475%), Primary Campaign Source (Sample Campaign), Payment Terms (Sample Payment Terms), Payment Method (Sample Payment Method), Quote Number (Sample Quote Number), Quantity (470.64), Start Date (16/09/2013), End Date (16/09/2013), Quote Version (21), Invoice paid (5,947), and Billing Frequency (Sample Billing Frequency).
- Additional Information (Header visible on edit only):** Fields for Order Number (Sample Order Number), Main Competitor(s) (Sample Main Competitor(s)), Current Generator(s) (Sample Current Generator(s)), Delivery/Installation Status (Sample Delivery/Installation Status), and Tracking Number (Sample Tracking Number).
- System Information (Header visible on edit only):** Fields for Created By (Sample User) and Last Modified By (Sample User).
- Custom Links (Header not visible):** A link for Delivery Status.
- Description Information (Header visible on edit only):** A field for Description (Sample Description).
- New Section (Header visible on detail only):** A green bar with a checkmark icon and a link to 'zaapit\_tb\_opportu...'.

Figure 46 - Place the Related Grid

The screenshot shows a record view for a 'Current Generator(s)' with details like 'Jonn Deere', 'Tracking Number: 830150301420', and 'Created By: Amir DEV1, 22/07/2013 07:46'. A yellow box highlights the 'Smart Related Grid' for 'Contacts', which shows 'Found 0 results.' and a table with columns: Action, Full Name, Title, Account, Business Phone, Email, and Owner. Below the table are pagination controls: 'Page 1 of 1', '< Previous', 'Next >', and 'Items per page' with options for 10, 50, 100, 200, and 500. Below the grid are sections for 'Products' (Add Product, Choose Price Book, Sort) and 'Invoices' (New Invoice).

Figure 47 - The new Smart Related Grid

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

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

Alternative step: Place the smart tabs “ZaapIT opportunity **Tabs** (RL)” inside the newly created section (Figure 48).

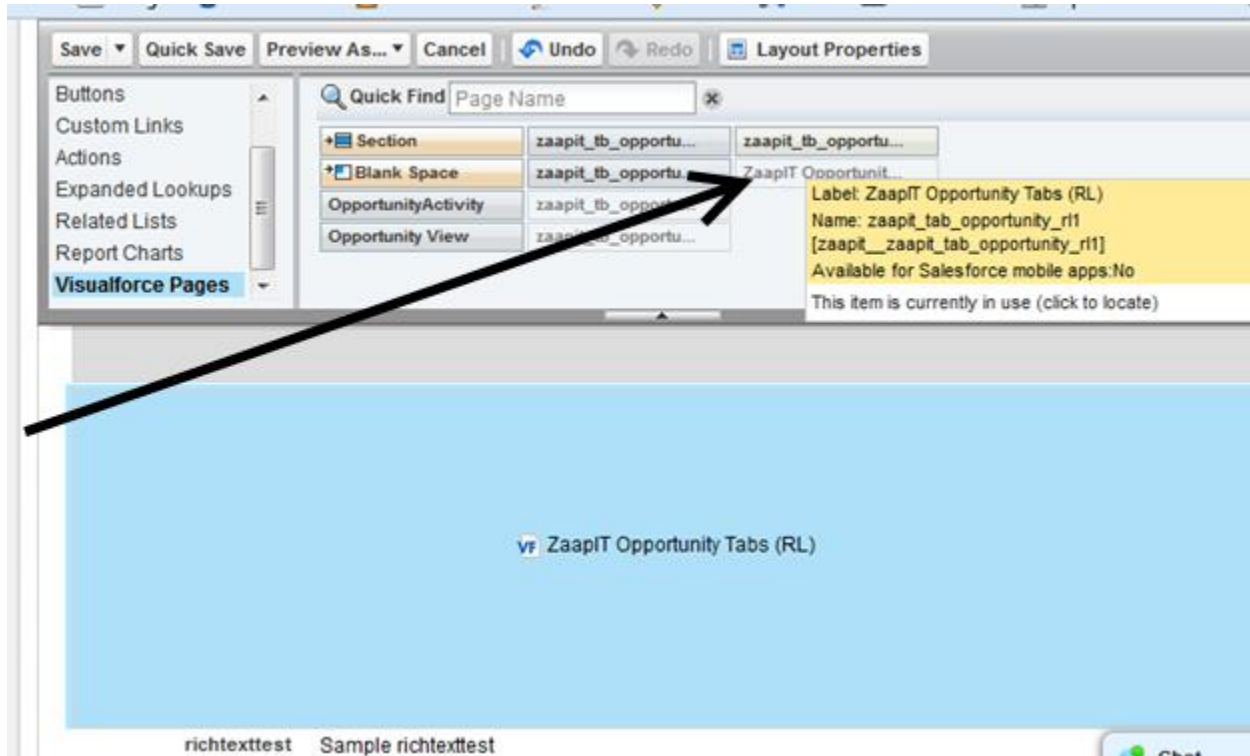


Figure 48 - Smart-Sub-Tabs with Related-Grid

Last Modified By [Ford Bellman](#), 4/2/2014 9:50 PM  
 Created By [Ford Bellman](#), 1/18/2012 9:00 PM  
 Custom Links [Delivery Status](#)

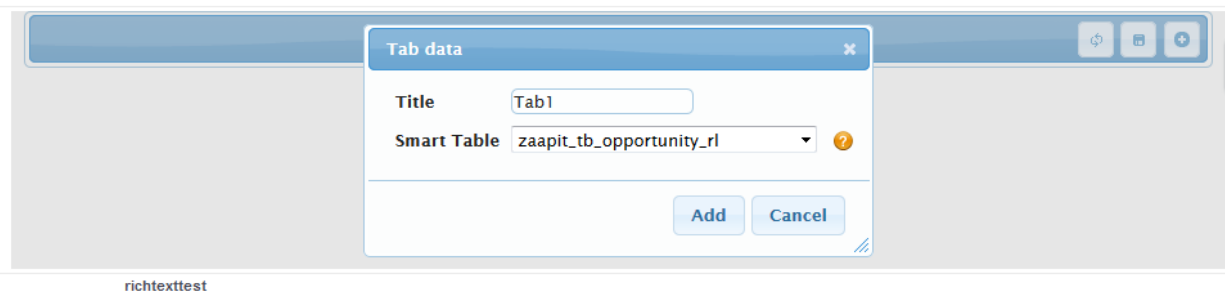


Figure 49 - New Smart Sub Tab

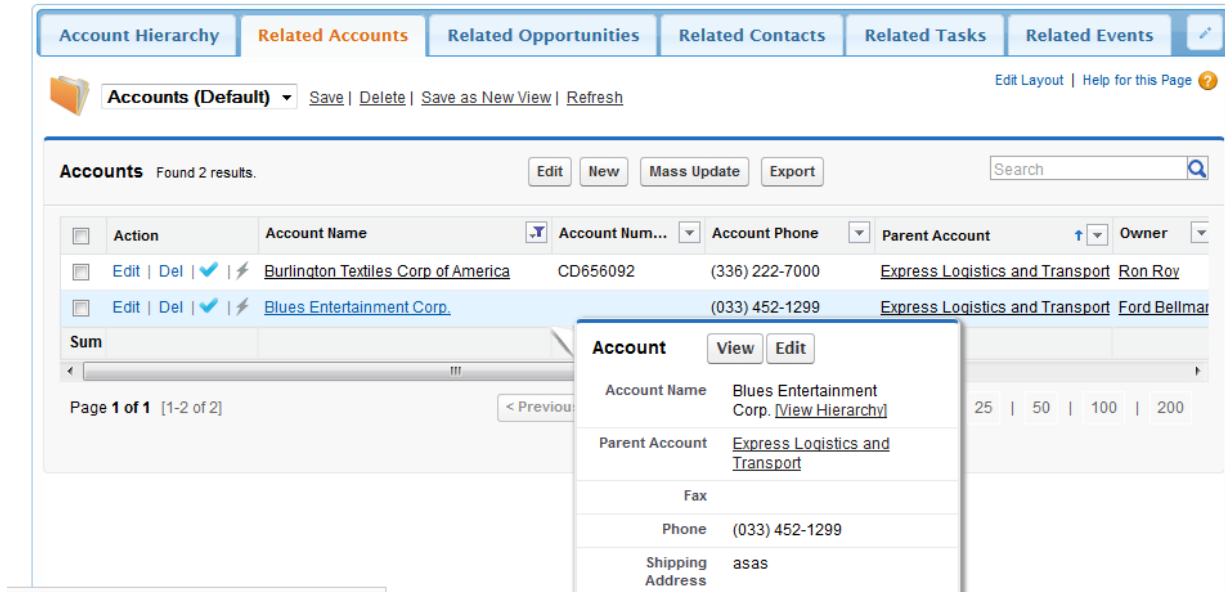


Figure 50 - Smart Sub Tabs in Action

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

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

- 1) Edit the opportunity page - Figure 51
- 2) Create a new custom sub-tab - Figure 53
- 3) If you have a custom salesforce domain (Figure 52) then continue with step 3.a otherwise and if you don't have a custom salesforce domain or you want to add a pre-configured grid then go to step 4
  - a. Drag the lightning component "Smart Related List - Choose a name first" in to it's place
  - b. Type a new grid api-name (text & numbers only) or use an existing name to loader the settings (Figure 55 - lightning grid component)
  - c. Save the page
- 4) If you don't have a custom salesforce domain (Figure 52) then do the following instead of step#3
  - a. Drag a visual force component to the page Figure 54
  - b. Choose the right page (e.g. opportunity products / quote products / or gen-mobX..)
  - c. Set the height to 690
  - d. Save the page
- 5) Enter the page (to one of the records)
- 6) If you chose a "blank gird" a grid that is not pre-configured do the following:
  - a. Edit the grid's layout (click the grid's layout on it's top-right)
  - b. Set the fields / objects/ sorting /buttons
  - c. Set the "related list reference field" to point to the parent object (located under the advanced setting section)
  - d. Save this grid default settings
- 7) Try the grid - Figure 56, How to video guide: [https://www.youtube.com/watch?v=-ly2C\\_al7PA](https://www.youtube.com/watch?v=-ly2C_al7PA)

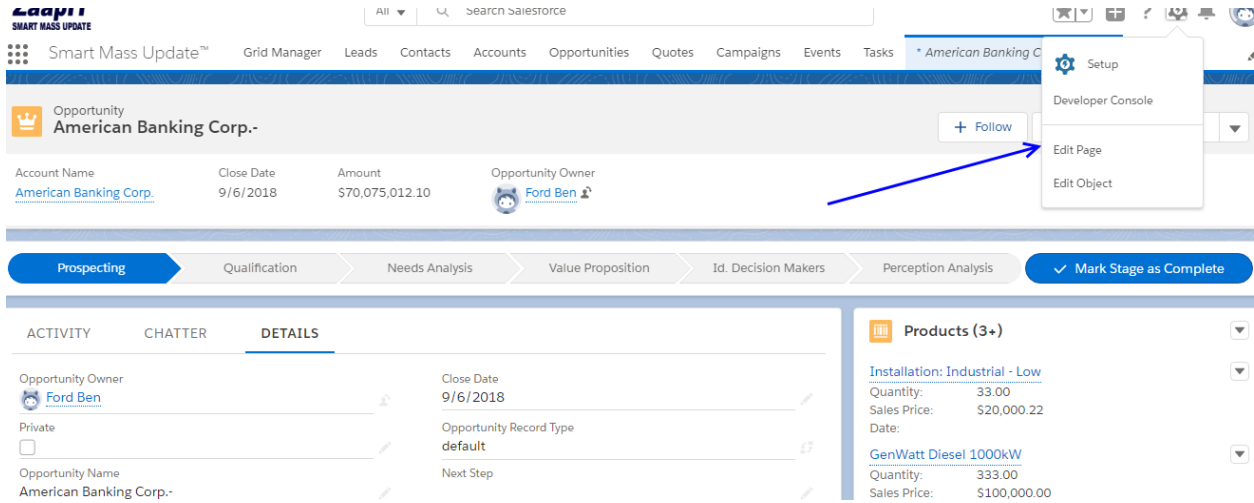


Figure 51 - Adding a related grid in lightning

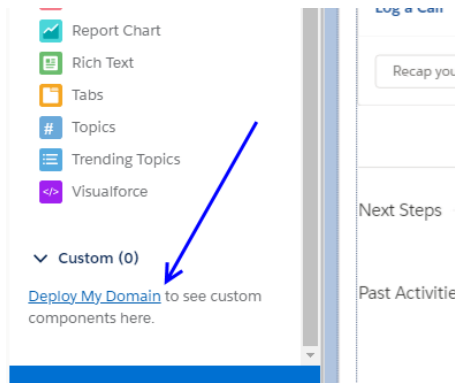


Figure 52 - custom domain indicator

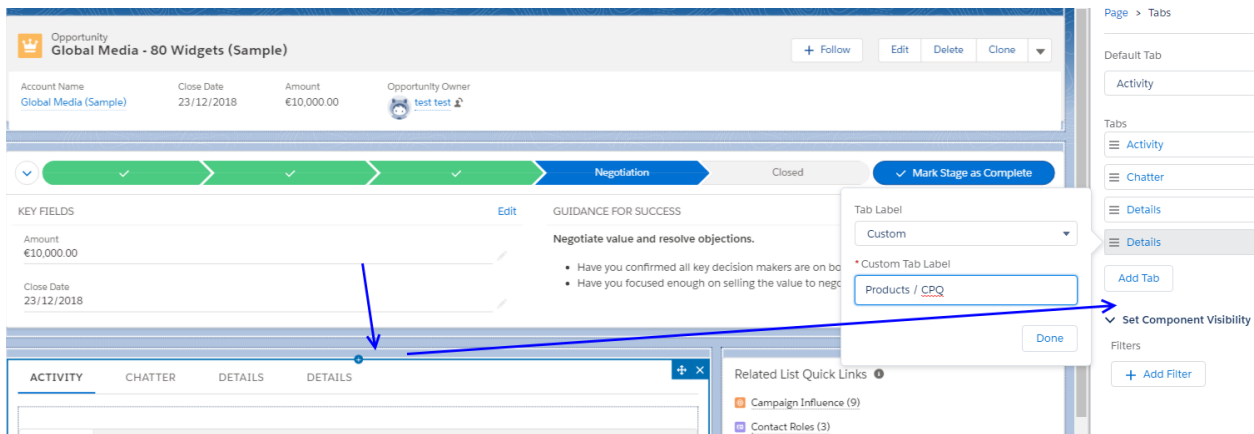


Figure 53 - adding a new sub-tab for a related list in lightning

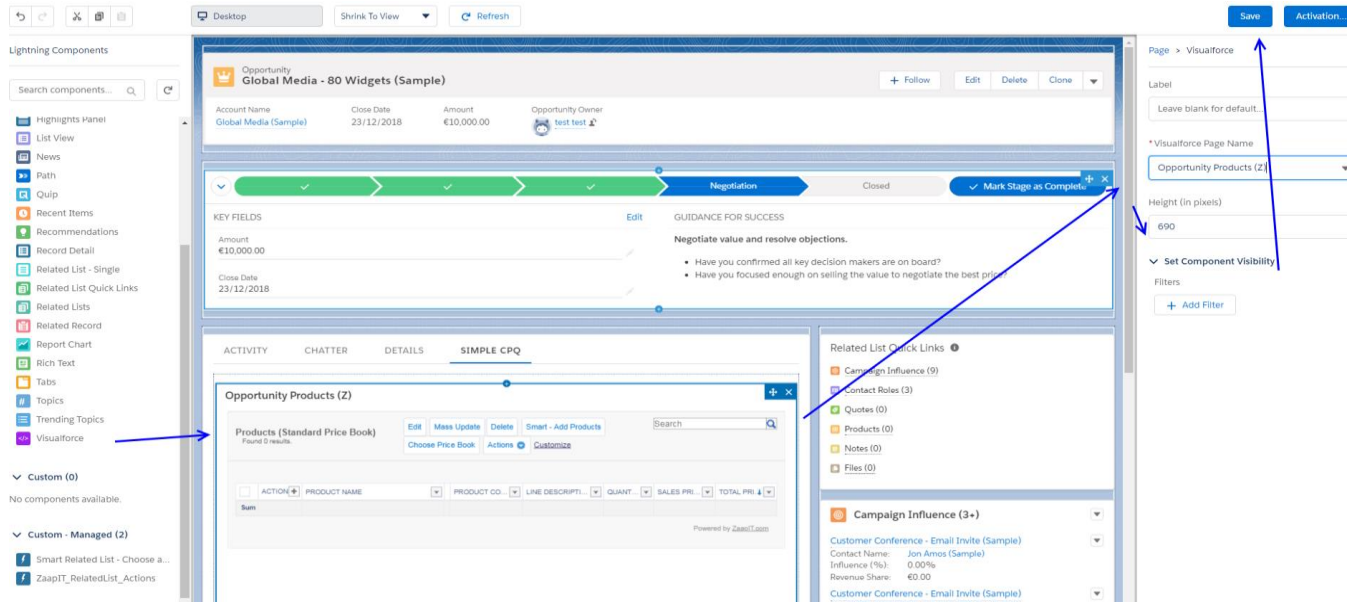


Figure 54 - adding simple CPQ

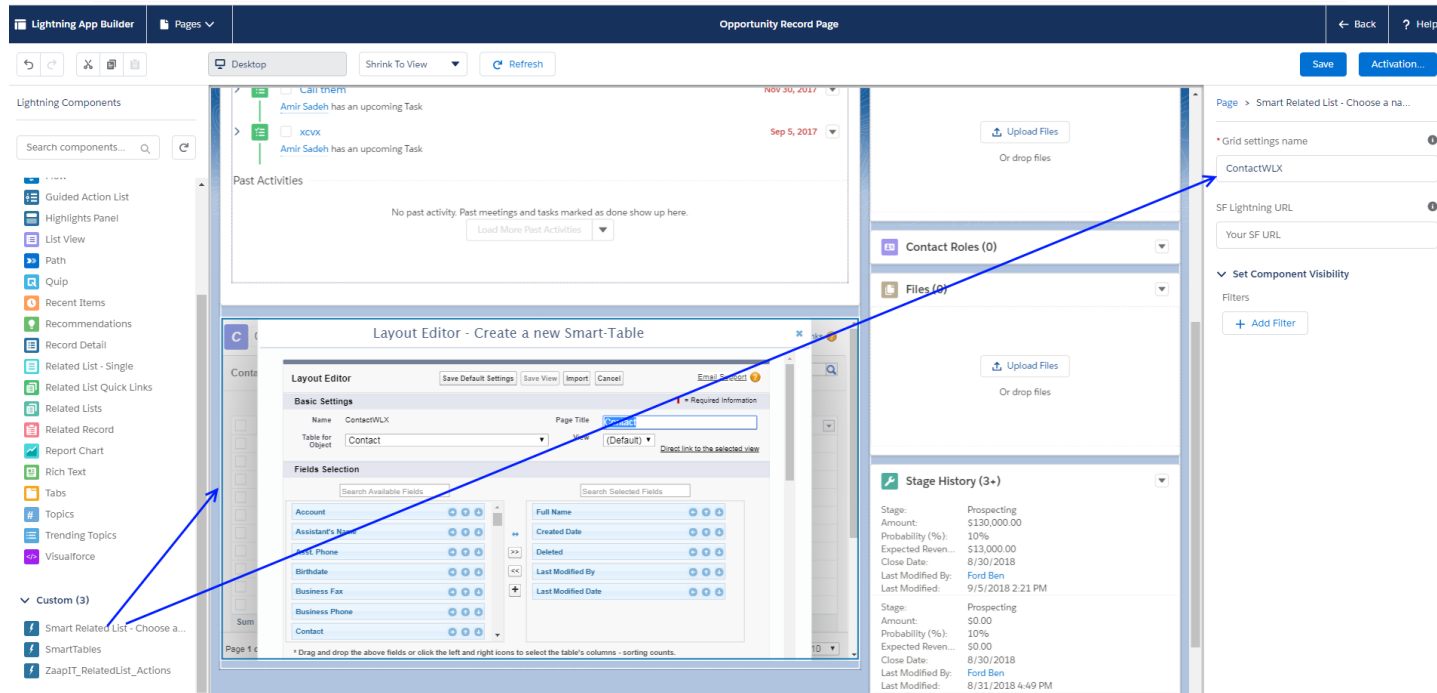


Figure 55 - lightning grid component



### Simple CPQ for opportunity products / quote line items

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

On Figure 56 the opportunity products grid is present as a sub-tab under the opportunity page in Salesforce lightning (you can place the grid anywhere and in any SF version).

On Figure 57 you can see the Smart-Add-Product button in action, we searched for products that contains 100 and added all of them in 1 click. To support product bundles/packages just add a custom bundle/package column and use the bundle column-filter to fetch the bundle...

Figure 58 the quote line items grid is present as a sub-tab under the quote page in Salesforce lightning (you can place the grid anywhere and in any SF version). In this example we add 1 new row and edit an edit the price next to installation portable row (the small pencils indicate the changed cells), after the changes were made the user can save the changes or click cancel button to revert.

The screenshot shows the Salesforce interface for an Opportunity named "American Banking Corp.-". The "Simple CPQ" sub-tab is active, displaying a table of Opportunity Products. The table has columns for ACTION, PRODUCT NAME, CO, QUANTITY, LIST PRICE, SALES PRICE, DISCOUNT, TOTAL PRICE, LAST MODIFIED, and DATE. The table contains 8 rows of products, including GenWatt Diesel, Propane, Gasoline, and Installation items. A blue arrow points to the "Simple CPQ" tab. The table shows a total sum of 1,087 units and a total price of \$70,075,012.10.

ACTION	PRODUCT NAME	CO	QUANTITY	LIST PRICE	SALES PRICE	DISCOUNT	TOTAL PRICE	LAST MODIFIED	DATE
Edit   Del	GenWatt Diesel 1000kW	GC1060	333.00	\$100,000.00	\$100,000.00		\$33,300,000.00	Ferd Ben	9/6/2018 6:11
Edit   Del	GenWatt Propane 100kW	GC3020	222.00	\$15,000.00	\$15,000.00		\$3,330,000.00	Ferd Ben	9/6/2018 6:11
Edit   Del	GenWatt Propane 100kW	GC3020	222.00	\$15,000.00	\$15,000.00		\$3,330,000.00	Ferd Ben	9/6/2018 6:11
Edit   Del	GenWatt Gasoline 2000kW	GC5060	111.00	\$150,000.00	\$150,000.00		\$16,650,000.00	Ferd Ben	8/29/2018 2:11
Edit   Del	GenWatt Diesel 1000kW	GC1060	111.00	\$100,000.00	\$100,000.00		\$11,100,000.00	Ferd Ben	9/6/2018 6:11
Edit   Del	Installation: Industrial - Low	IN7040	44.00	\$20,000.11	\$20,000.11		\$880,004.84	Ferd Ben	9/6/2018 6:11
Edit   Del	Installation: Industrial - Low	IN7040	33.00	\$20,000.11	\$20,000.22		\$660,007.26	Ferd Ben	9/6/2018 6:11
Edit   Del	GenWatt Gasoline 750kW	GC5040	11.00	\$75,000.00	\$75,000.00		\$825,000.00	Ferd Ben	8/29/2018 2:11
Sum			1,087	\$495,000.22	\$495,000.33		\$70,075,012.10		

Figure 56 - simple CPQ / opportunity line items



### 360 Customer View

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

The out of the box customer view is usually placed on the account page/layout (Figure 59). On Figure 60 the hierarchy charts are presented with all the relevant data points (customizable), this enables account managers to the understand the exact state of a customer, presented by the account-hierarchy, instantly. On Figure 61 all the opportunities from the entire hierarchy are present grouped by account (sales reps can utilize this information to find new upgrade/cross-sale opportunities and see the real value of a customer via the totals/sub-totals filters & sorting). All the sub-tabs are customizable, and an admin can add more tabs or enrich the grid’s data by pulling more fields/related information such as product line items (Figure 62), quotes/ cases/notes or custom objects.

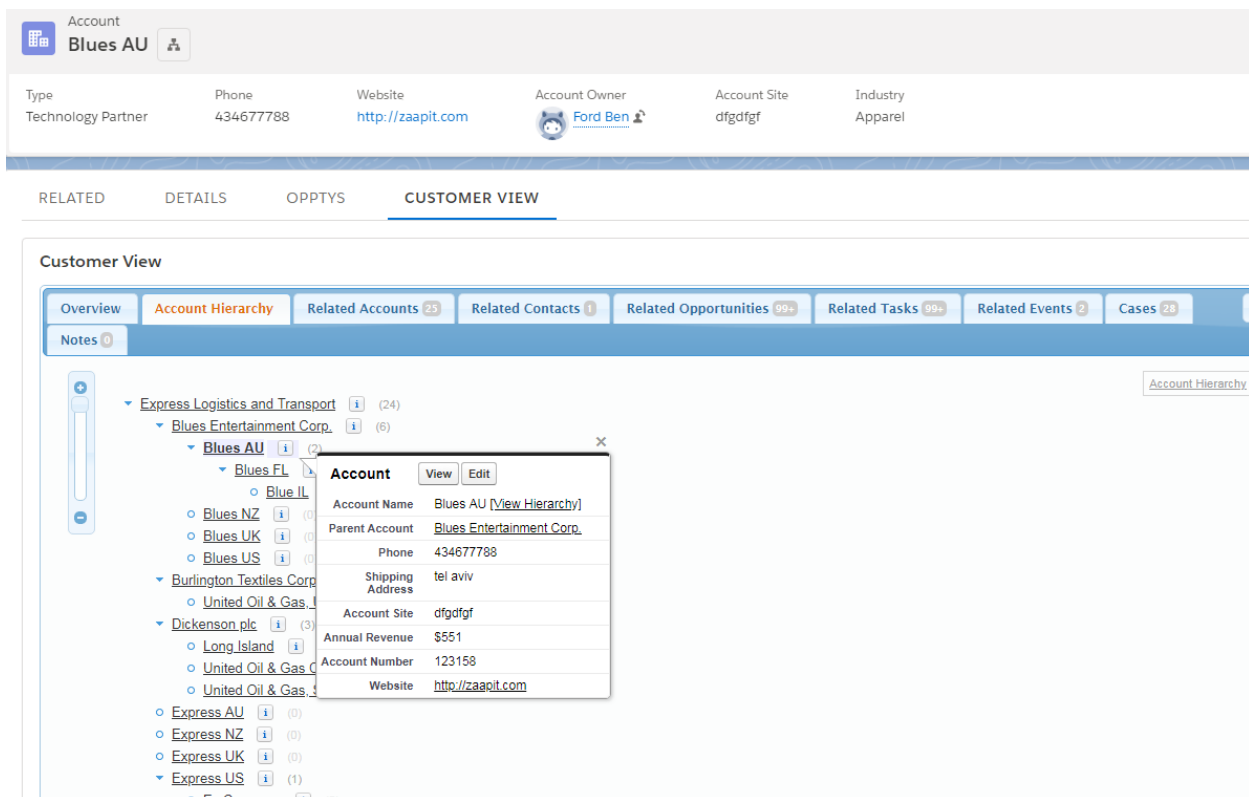


Figure 59 - Customer view tree

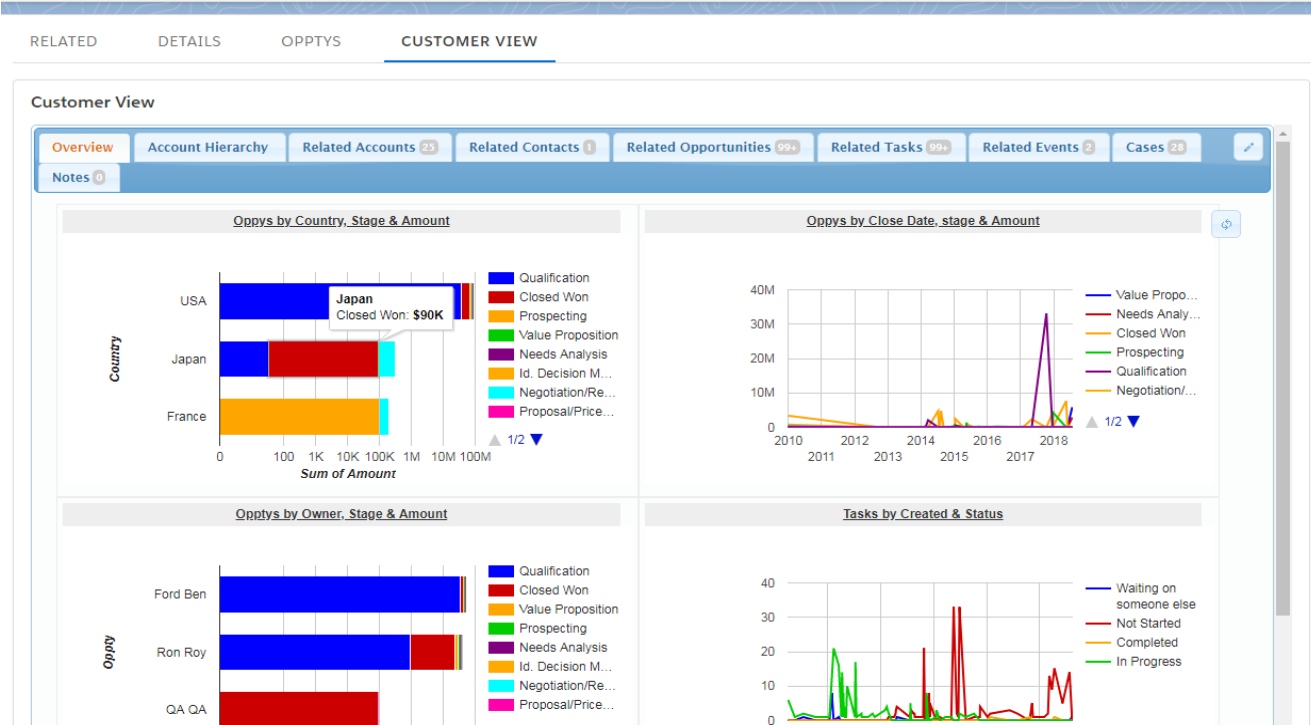


Figure 60 - Customer view overview

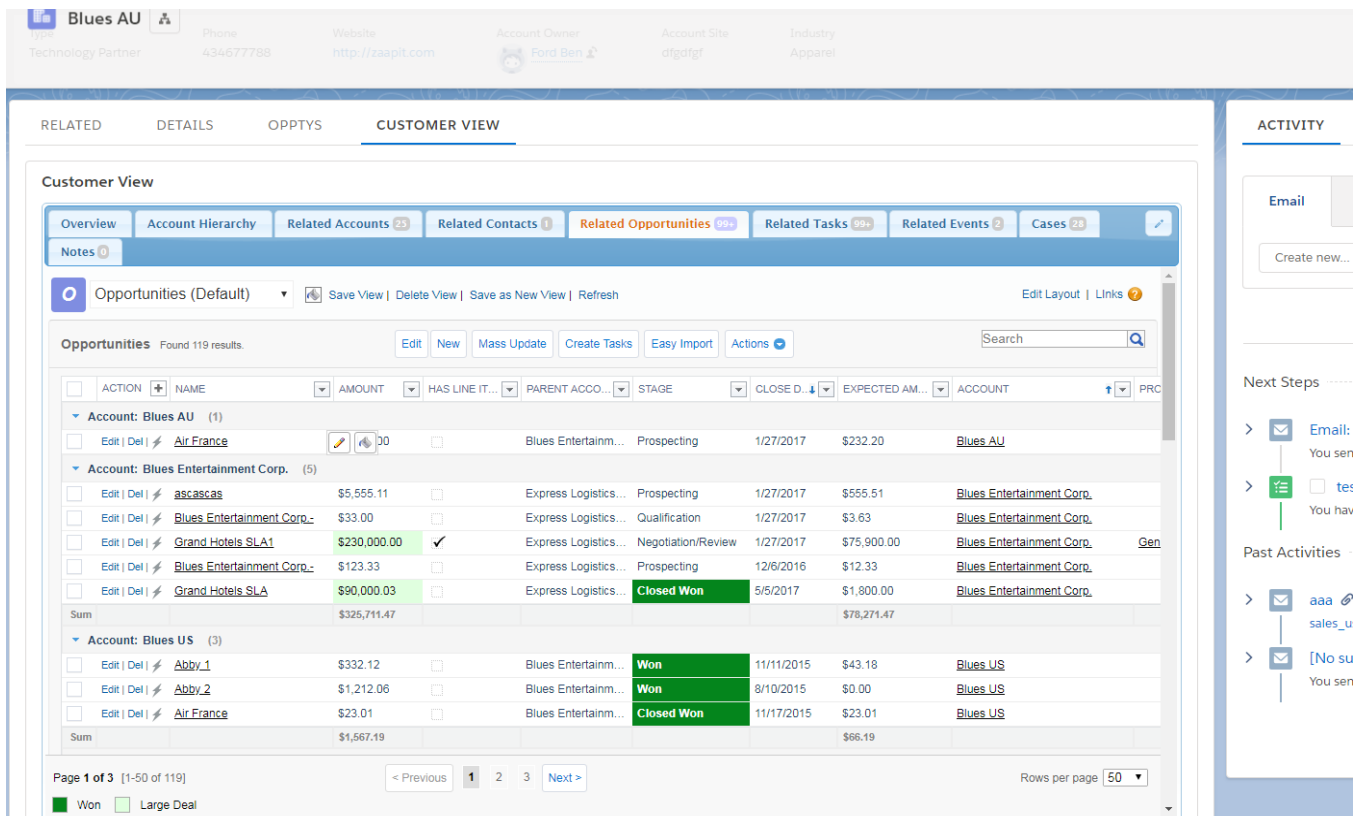


Figure 61- Customer view opportunities grouped by account

The screenshot shows the 'Customer View' interface for 'Dickenson Mobile Generators'. A modal window is open, displaying two tables:

**Open Activities**

Action	Subject	Name	Task	Due Date	Status	Priority	Assigned To
Edit   Cls	call them		✓	7/31/2018	Not Started	Normal	Ford Ben

**Products (Standard)**

Action	Product	Quantity	Sales Price	Date	Line Description	Product Code	Modified By
Edit   Del	GenWatt Diesel 1000kW	1.00	\$100,000.00			GC1060	Ford Ben, 5/4/2013 11:04 PM
Edit   Del	GenWatt Diesel 1000kW	1.00	\$1.00			GC1060	Ford Ben, 5/15/2013 5:22 PM
Edit   Del	GenWatt Diesel 1000kW	1.00	\$100,000.00			GC1060	Ford Ben, 3/22/2014 11:33 PM
Edit   Del	GenWatt Diesel 10kW	1.01	\$5,000.00			GC1020	Ford Ben, 3/22/2014 11:26 PM
Edit   Del	GenWatt Diesel 10kW	1.00	\$5,000.00			GC1020	Ford Ben, 3/22/2014 11:33 PM
Edit   Del	GenWatt Diesel 200kW	4.00	\$25,000.00			GC1040	Ford Ben, 5/4/2013 11:04 PM

Figure 62 - Customer view related opportunity info

### Custom Buttons

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

To install / use a button just open the table’s layout editor and put the button definitions under the custom buttons section i.e. put “button name” under “button name” and the “Button link/JS” under “Button link/JS” (some of the Button link/JS are empty on purpose and works without the link/JS) - Figure 63.

Button Description	Button Name	Button link/JS	Works on Object’s Grid
Mass Merge Contacts	Mass_Merge		Contact <small>Shading must be enabled</small>
Mass Merge Leads	Mass_Merge		Lead <small>Shading must be enabled</small>
Mass Merge Accounts	Mass_Merge		Account <small>Shading must be enabled</small>
Merge 3 Contacts	Merge_Contacts1		Contact
Merge 3 Leads	Merge_Accounts		Lead
Merge 3 Accounts	Merge_Leads1		Account
Mass add to Campaign	Add_to_Campaign		Contact / Lead
Create Tasks	Create Tasks	openMassCreate('tasksMC','whoid','Mass Create','1');	Contact / lead
Create Tasks	Create Tasks	openMassCreate('tasksMC','whatid','Mas s Create','1');	All objects except Contact / Lead
Create Opportunities	Create Opptys	openMassCreate('MassCreatedOpptys','a ccountid','Mass Create','1');	Account
Create Opportunities Line Items	Add Line Items	openMassCreate('MassCreateOpptyPRDS','opportunityid','MassCreate','1');	Opportunity
Add Contact Roles	Add Contact Roles	openMassCreate('MassCreateOpptyContactR oles','opportunityid','Mass Create','1');	Opportunity
Copy column Values	Copy Values	copyValuesX1();return false;	All
Multi User Calendar	Multi User Calendar	/00U/c?cType=2	Tasks/events
My Calendar	My Calendar	/00U/c	Tasks/events
Mass Emails (SF)	Mass Emails	Mass_Emails	Contact / lead**
Mass Emails (outlook)	Mass Emails	Mass_Emails2	Contact / lead
Drill Down / Up	OBJECT Drill Down	drillDown('zpAPI_NAME_OBJECT1');	All (table setup needed)
Contacts Drill Down	Contacts Drill	drillDown('zpContacts1');	Account
Accounts Drill Down	Down	drillDown('zpAccounts1');	Opportunity
	Account Drill Down	Make you add the relation in the advanced filter- for example: accountid in ({{ID}})	
Mass Convert	Mass_Convert		Lead
Single Convert	Convert_leads		Lead
Mailing Map	Mailing Map	plotAddressMap('Mailing');	Contact
Other Map	Other Map	plotAddressMap('Other');	Contact

<b>Billing Map</b>	Billing Map	plotAddressMap('Billing');	Account
<b>Shipping Map</b>	Shipping Map	plotAddressMap('Shipping');	Account
<b>Billing Map</b>	Billing Map	plotAddressMap('Account.Billing');	Opportunity
<b>Add Picklist value</b>	Add value to Field	addRemoveMPVal("field_api_name_lower_case");	Any object
<b>Remove Picklist value</b>	Remove value	addRemoveMPVal("field_api_name_lower_case", "1");	Any object
<b>Mass Post to chatter</b>	Post to Chatter	openMassCreate('chatterMC','parentid','Mass Create','1');	Any object
<b>Custom import</b>	Create JS Button and use name	openAdvancedImport({"skipInvalidNums":1,"FIELD_API_NAME_TO_MAKE_UNIQUE__c-dupe":1,"FIELD_API_NAME_TO_MAKE_UNIQUE__c-dupe":2,"FIELD_API_NAME_MAPPED_COLUMN_0__c":"0","FIELD_API_NAME_MAPPED_COLUMN_1__c":"1","FIELD_API_NAME_MAPPED_COLUMN_2__c":"2","batchSize":1,"skipBackup":1,"detectDups":"update"});	Any object

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

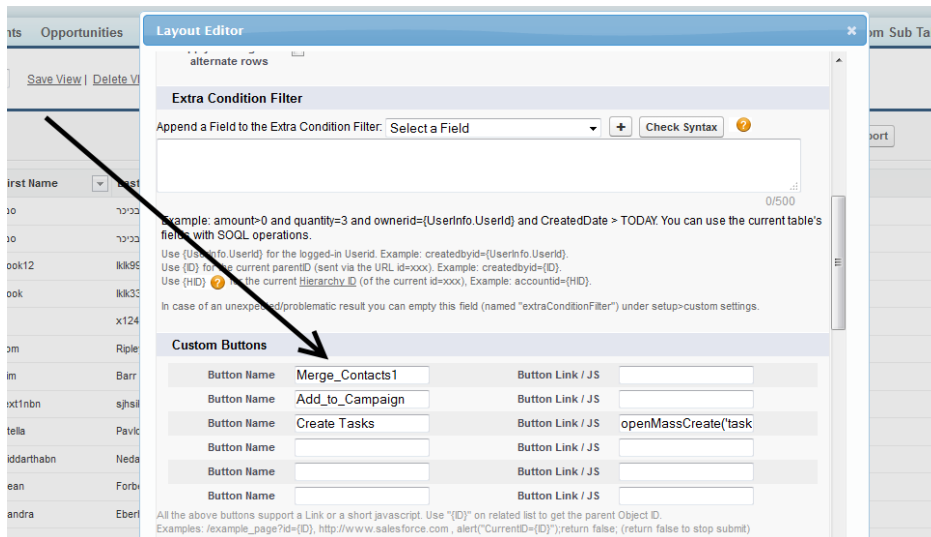


Figure 63 - Custom Buttons

### Custom – Related Information / Lightning Icon / More Actions

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

To use the below just open the table’s layout editor and put the link definition under the “Related Information vf Link” - Figure 64, you can also use the built-in page available under the “Related Information type” options.

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

The screenshot shows the 'Layout Editor' interface. At the top, there is a table with columns for 'Button Name' and 'Button Link / JS'. Below this table, there is a section titled 'Related Information - lightning Icon'. This section contains a dropdown menu for 'Related Information type' set to 'Custom', a text input for 'Max popup width' set to '1,200', and a text area for 'Related Information vf Link' containing the URL: `../apex/zaapit\_\_zaapit\_tab\_\_opportunity\_r12?id={0}&isdtp=vw`. A blue arrow points to this text area. Below the 'Related Information' section is an 'Advanced Settings' section with various checkboxes and dropdowns for table display options.

Figure 64 - More Custom Actions



### Manage licenses

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

- Go to setup>”installed packages” and click the “manage licenses” link (Figure 65)
- Click on the Add Users button and choose the relevant users (Figure 66).

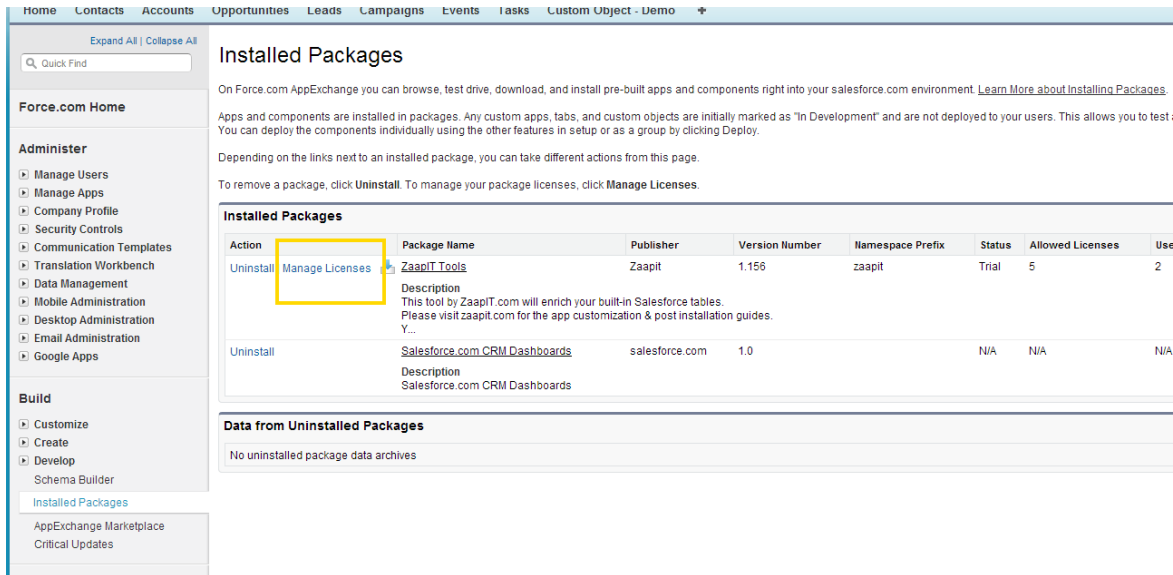


Figure 65 - Manage Licenses

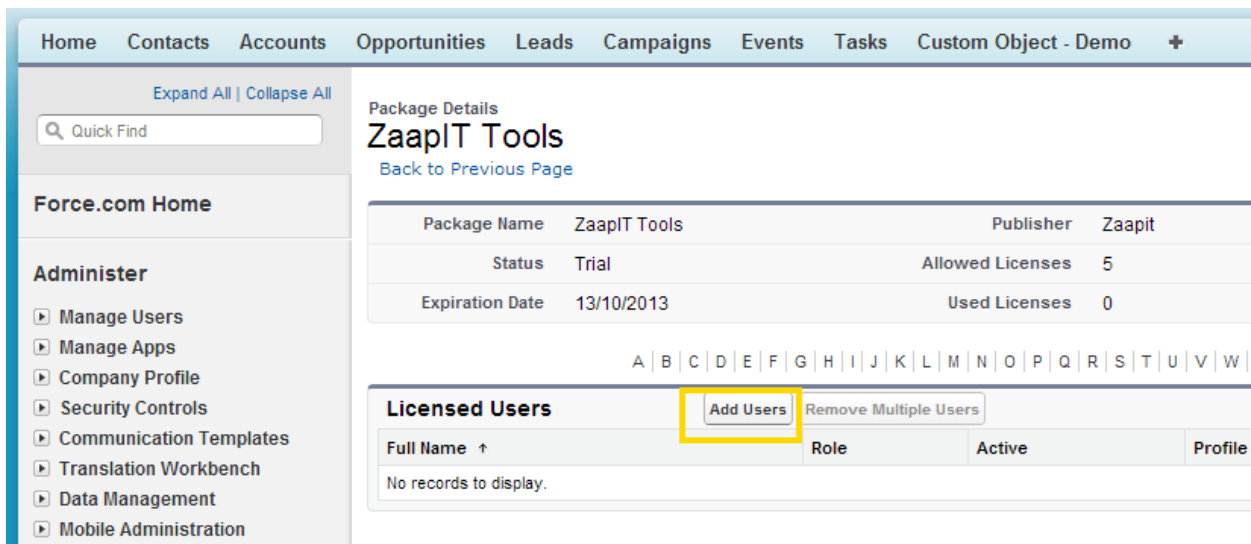


Figure 66 - Add Users

### Sharing a view / restricting access to a view

By default all the app’s views are publicly shared with all the app’s licensed users.

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

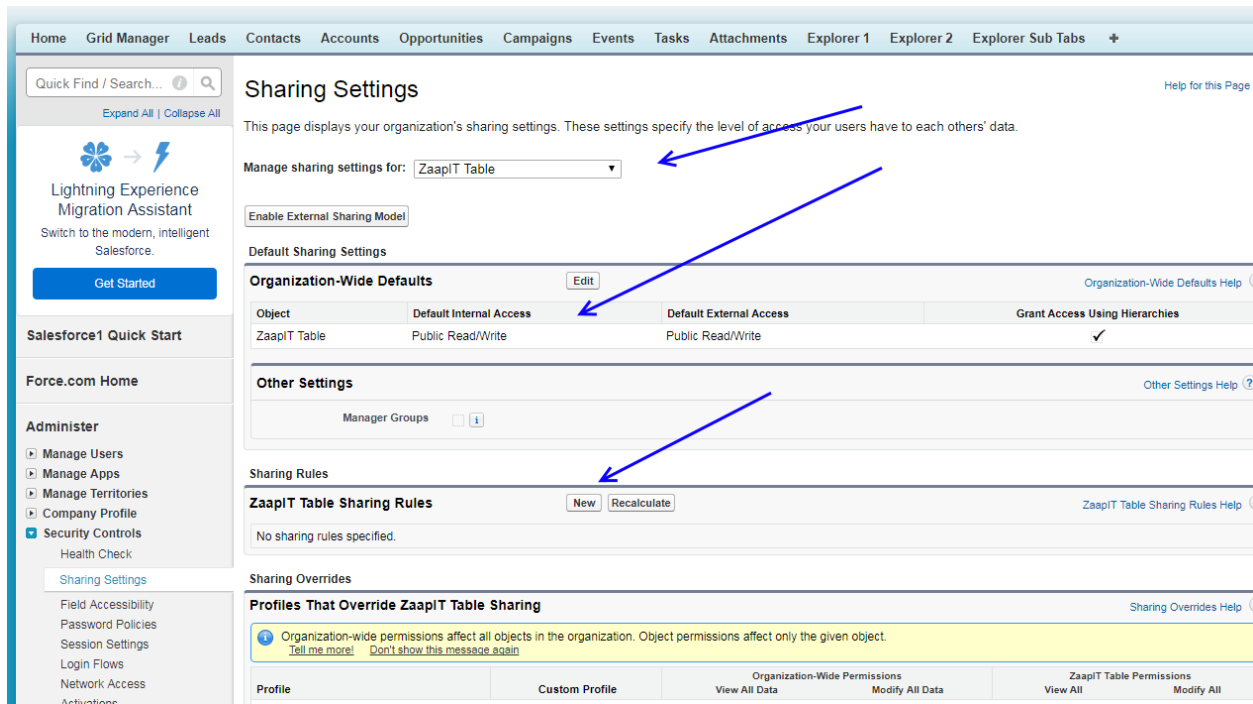


Figure 67 - Sharing a view / restricting access to a view