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BE THE OFFICE SUPERHERO

OPPORTUNITIES - WON!

TASKS - DONE!

LEADS - CONVERTED!

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Smart-Tables – Guide

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

Version: 1.473 (Jan-2016)

Oppo	rtunities - Working List Found	17 results. Save Car	New Delete Mass Update Custo	mize		uni
	Name	Account	▼ Close Date ↓	¥	Stage	Amount
	Edge Emergency Generat	Edge Communications	04/09/2013 [13/09/2013]		Search	75,000.00
	Edge Emergency Generat	Edge Communications	04/09/2013 [13/09/2013]		2 Sort Ascending	35,000.00
	Edge Installation	Edge Communications	02/07/2011 [13/09/2013]		K Clear Filter	50,000.00
	Edge SLA	Edge Communications	02/07/2011 [13/09/2013]		📊 Instant Graph	60,000.00
	University of AZ Installatic	University of Arizona	02/07/2011 [13/09/2013]		(Select All) # Needs Analysis 1	100,000.00
	University of AZ Portable	University of Arizona	02/07/2011 [13/09/2013]		Id. Decision Makers 1	50,000.00
	University of AZ SLA	University of Arizona 🔍	02/07/2011 [13/09/2013]		Proposal/Price Quote 2	90,000.00
	Graph - Amount per Stage			×	Negotiation/Review 2 Closed Won 11	440,000.00
			Closed Won (11)	¢	Filter Cancel	270,000.00
	Negotiation/Review (2) 9,5% \$395,000.00 (10.1%)		Negotiation/Review (2)		Negotiation/Review	270,000.00
Sun	10.1%		Id. Decision Makers (1)			\$3,900,000.00
Pag					Items per page 10	

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



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Overview

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

Smart-Tables Tools:

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

Common Key Features:

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

ZaapIT Software Technologies

Smart-Tables

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

Main Features:

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

Mass Update

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

The mass update feature offers you three working modes:

- 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).
- Direct Update mode Upon clicking the "Update Selected Items" button the requested changes in the mass update window will take place immediately – i.e. the changes will be saved into the Salesforce database.
- 3. Selective Update Mode Select the relevant rows on your Smart-Table screen and then click on the mass update button. This action will update only the selected rows e.g. you can update only 5 rows out of the 25 rows that you see on your screen.

oppo	ortunities - Working List	Found 17 result	s. Save	Cancel Ne	w Delete Mass Update Custon	<u>tize</u>			uni
7	Name	× Accor	ant		Close Date 4	¥	Stage	Ψ	Amount
V	Edge Emergency Generat	Edge	Communications	۹.	04/09/2013 [13/09/2013]		Closed Won		75,000.00
V	Edge Emergency Generat	Edge	Communications	Q	04/09/2013 [13/09/2013]		ld. Decision Makers 💌		35,000.00
V	Edge installation	Edge	Communications	R	02/07/2011 [13/09/2013]		Closed Won		50,000.00
V	Edge SLA	Edge	Communications	S	02/07/2011 [13/09/2013]		Closed Won 💌		60,000.00
V	University of AZ Installatio	Unive	rsity of Arizona	C	02/07/2011 [13/09/2013]		Proposal/Price Quote 💌		100,000.00
J	University of AZ Portable	Mass Upd	ate			x	Closed Won		50,000.00
V	University of AZ SLA	Update	Field	New V	falue		Closed Won		90,000.00
V	United OI Emergency Gen	13	Name				Closed Won		440,000.00
V	United Oil Installations	8	Account		3		Closed Won 💌		270,000.00
V	United Oil Installations	V	Close Date	13/09	/2013 [13/09/2013]		iegotiation/Review		270,000.00
Sum			Stape	Nor					\$3,900,000.00
Page	1 of 2		Amount				Items per pag-	10	50 100 200 5

Figure 1 - Mass Update

po	rtunities - Working List	found 17 results. Save	Cancel 10 Cha	anged Row(S) New Delete	Mass Update Customize	uni	
1	Name	Account	T	Close Date 4	▼ Stage	* Amount	
8	Edge Emergency Generat	Edge Communications	9	13/09/2013 [13/09/2013]	Closed Won	. 75,000.00	
1	Edge Emergency Generat	Edge Communications	9	13/09/2013 [13/09/2013]	Id. Decision Makers	. 35,000.00	
2	Edge Installation	Edge Communications	9	13/09/2013 [13/09/2013]	Closed Won	. 50,000.00	
2	Edge SLA	Edge Communications	9	13/09/2013 [13/09/2013]	Closed Won	60,000.00	
1	University of AZ Installatic	University of Arizona	9	13/09/2013 [13/09/2013]	Proposal/Price Quote	. 100,000.00	
1	University of AZ Portable	University of Arizona	9	13/09/2013 [13/09/2013]	Closed Won	 50,000.00 	
2	University of AZ SLA	University of Arizona	9	13/09/2013 [13/09/2013]	Closed Won	90,000.00	
	United Oil Emergency Gen	United Oil & Gas Corp.	9	13/09/2013 [13/09/2013]	Closed Won	440,000.00	
2	United Oil Installations	United Oil & Gas Corp.	9	13/09/2013 [13/09/2013]	Closed Won	270,000.00	
1	United Oil Installations	United Oil & Gas Corp.	9	13/09/2013 [13/09/2013]	Negotiation/Review	. 270,000.00	
um						\$3,900,000.00	

Figure 2 - Mass Update preview mode

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



Mass Create

The mass create feature enables you to create related-object for multiple objects. For example you can create a task for the selected contacts in the below example (Figure 3).

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

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

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

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

Za imart	AP Mass U	IT Indate tacts Mer	(Se ge C	arch ontacts Acco	Mas Dunts Opportunit	s Cr es Li	reate Task	<mark>s (obj</mark> as camp	ects) for	r Contacts, Acc	counts, Lea	ds, etc	Ford Ben 🔻 Setup ustom Sub Tabs - Demo 🔶
á	Con	tacts - Wor	king	list (Default)		lete Vlev	<u>v Save as New View</u>						Ed
cur	ntacts	- Working	list	Found 1,949 result	S.		Mass Create Mass Create 1	asks	Create Cano	el	× Edit Layout	aign Create Tasks	Export
	Actio	n	+	Full Name 🛓 👻	First Name	La						ast Activity	▼ Mailing C
	Edit	Del Cin	14	Tom Ripley	Tom	Rip	Fill in the fie	lds to cre	ate 3 Tasks			4	USA2
	Edit	Del Cin 💙	14	Tim Barr	Tim	Bar	Subject		4	हे			USA2
	Edit	Del Cin 🔀	14	Stella Pavlova	Stella	Pay	Related To	Account	•	Q			USA
	Edit	Del Cln 🔀	14	Siddarthabn Ne	Siddarthabn	Ner	Assigned To	1		۲.			USA.
	Edit	Del Cin 🛟	14	Sean Forbes	Sean	For	Status	I Net Cleat		-			USA
	Edit	Del Cln 🜐	14	Sandra Eberhard	Sandra	Ebe	Comments	Not State	ed	-			USA
	Edit	Del Cln 🜐	14	Rose Gonzalez	Rose	Go	Comments						USA
	Edit	Del Cln 🗸	14	Pat Stumuller	Pat	Stu							USA
	Edit	Del Cin 🔀	14	Liz D'Cruz	Liz	D'C	Due Date		[2/1/2015]				USA
	Edit	Del Cln 🜐	14	Lauren Boyle	Lauren	Boy	Priority	Normal	•				USA.
	Edit	Del Cin 🜐	14	Josh Davis	Josh	Dav	Туре	None	•				USA
	Edit	Del Cln 🜐	14	John Bond	John	Boi							USA
	Edit	Del Cin	14	joex555 last2630	joex555	las			Create	el			USA
	Edit	Del Cln 🔀	14	joex555 last262	joex555	las							USA
	Edit	Del Cin 🛟	14	joex555 last2629	joex555	las							USA
	Edit	Del Cln 🕒	14	joex222 last2654	joex222	las							USA
	Edit	Del Cin	14	joex222 last2653	joex222	las							USA
	Edit	Del Cin	14	joex222 last2652	joex222	las							USA
	Edit	Del Cin 🔀	14	Joe zzz	Joe	zza							USA
	Edit	Del Cin 🔀	14	joe last975	joe	last975	5 Long Island	Ro	in Roy	contac3@aaa.a997			USA.
	Edit	Del Cin 🕒	14	joe last972	joe	last972	Long Island	Ro	n Roy	contac3@aaa.a994			USA
-	-		1. 1			1 1074		-	-				

Figure 3 - Mass Create



Mass Delete

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

oppo	ortunities - Working List	Found 17 results. Save Car	New Delete Mass Update Custo	mize	uni
V	Name	 Account 	▼ Close Date ↓	▼ Stage	▼ Amount
V	Edge Emergency Generat	Edge Communications	04/09/2013 [13/09/2013]	Closed Won 💌	75,000.00
V	Edge Emergency Generat	Edge Communications	04/09/2013 [13/09/2013]	ld. Decision Makers 💌	35,000.00
V	Edge Installation	Edge Communications	02/07/2011 [13/09/2013]	Closed Won	50,000.00
V	Edge SLA	Edas Communications		Closed Won	60,000.00
V	University of AZ Installatic	The page at https://20	apit.euz.visual.iorce.com says.	Proposal/Price Quote	100,000.00
V	University of AZ Portable	Are you sure you want	o delete the selected rows (10)?	Closed Won	50,000.00
V	University of AZ SLA	E.	OK Cancel	Closed Won	90,000.00
V	United Oil Emergency Gen	United Oil & Gas Corp.	02/07/2011 [13/08/2013]	Closed Won	440,000.00
V	United Oil Installations	United Oil & Gas Corp. 🔍	02/07/2011 [13/09/2013]	Closed Won	270,000.00
V	United Oil Installations	United Oil & Gas Corp.	02/07/2011 [13/09/2013]	Negotiation/Review 💌	270,000.00
Sum					\$3,900,000.00

Figure 4 - Mass Delete

Mass Inline Edit

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

Opportur	iities Leads Campaigns E	vents Tasks Custom Object -	Demo 🕂			
Орро	ortunities - Working List Found 1	17 results. Save Cancel New	v Delete Mass Update Customi	<u>ze</u>	uni	Q
	Name	Account	▼ Close Date ↓	▼ Stage	 Amount 	-
	Edge Emergency Generat	Edge Communications	04/09/2013 [13/09/2013]	Closed Won	75,000.00	
	Edge Emergency Generat	Edge Communications	04/09/2013 [13/09/2013]	ld. Decision Makers 💌	35,000.00	
	Edge Installation	Edge Communications	02/07/2011 [13/09/2013]	Closed Won	50,000.00	
	Edge SLA	Edge Communications	02/07/2011 [13/09/2013]	Closed Won 💌	60,000.00	
	University of AZ Installatic	University of Arizona	02/07/2011 [13/09/2013]	Proposal/Price Quote 💌	100,000.00	
	University of AZ Portable	University of Arizona	02/07/2011 [13/09/2013]	Closed Won	50,000.00	
	University of AZ SLA	University of Arizona	02/07/2011 [13/09/2013]	Closed Won	90,000.00	
	United Oil Emergency Gen	United Oil & Gas Corp. 🔍	02/07/2011 [13/09/2013]	Closed Won	440,000.00	
	United Oil Installations	United Oil & Gas Corp. 🔍	02/07/2011 [13/09/2013]	Closed Won	270,000.00	
	United Oil Installations	United Oil & Gas Corp. 🔍	02/07/2011 [13/09/2013]	Negotiation/Review	270,000.00	
Sum					\$3,900,000.00	
Page	1 of 2	< Previo	us 1 2 Next>	ltems per page	10 50 100 200	500

Figure 5 - Mass Inline edit

Smart Search

The Smart Search feature (Figure 6) enables you to search the entire table's text fields and find the relevant rows.





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

		Amir DEV1 🔻 Setup	o Help Mass Update 🔹
no +			
<u>stomize</u>			uni © Q
	✓ Close Date ↓	▼ Stage	▼ Amount ▼
ations	04/09/2013	Closed Won	\$75,000.00
ations	04/09/2013	Id. Decision Makers	\$35,000.00
ations	02/07/2011	Closed Won	\$50,000.00

Figure 6 - Smart Search

A Smart Search Example:

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

Opportunitie	es Leads Campaigns Events 1	Tasks Custom Object - Demo	+		
Opportu	Inities - Working LISt Found 3 results.	Edit New Export Customize	2		edge close 😵
Action	Name	✓ Account	▼ Close Date ↓	▼ Stage	✓ Amount
Edit Del	Edge Emergency Generator	Edge Communications	04/09/2013	Closed Won	\$75,000.00
Edit Del	Edge Installation	Edge Communications	02/07/2011	Closed Won	\$50,000.00
Edit Del	Edge SLA	Edge Communications	02/07/2011	Closed Won	\$60,000.00
Sum					\$185,000.00
Page 1 of	f1	< Previous	1 Next >	Items per page 10	50 100 200 500





Smart Column Filters

The Smart Column Filters (Figure 8) enables you to filter a specific table column by choosing / typing the relevant data – "Microsoft Excel Style". For your convenience we also placed two sorting links on the Smart-Column-Filter menu so you will be able to control the sorting direction easily, i.e. in addition to the regular click-a-column header sorting. The Smart Column filters also include the optional Instant Graphs[™] feature. For more information, please read the next Instant Graphs[™] section.

		uni	8
▼ Close Date ↓	▼ Stage		Amount
04/09/2013	Search		\$75,000.00
04/09/2013	1 Sort Ascending		\$35,000.00
02/07/2011	Z Sort Descending	,	\$50,000.00
02/07/2011	🐨 Clear Filter		\$60,000.00
02/07/2011	🔢 Instant Graph		\$100,000.00
02/07/2011	📃 (Select All)	#	\$50,000.00
02/07/2011	Needs Analysis	s 1	\$90,000.00
02/07/2011	📃 Id. Decision Ma	akers 1	\$440,000.00
02/07/2011	Proposal/Price	Quote 2	\$270,000.00
02/07/2011	Negotiation/Re	view 2	\$270,000.00
	Closed Won	11	\$3,900,000.00
Next>	F	ilter Cance	1 100 200 500

Figure 8 – Smart Column Filter (Text)

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

Fiscal Year 💌	Unread By Owner 💌	Amount	Amount	Close Date J
Search	Search	Search	Search	2009-09-01 -
21 Sort Ascending	^L ≜† Sort Ascending	≜ ↑ Sort Ascending	2 Sort Ascending	21 Sort Ascending
¼↓ Sort Descending	X₄↓ Sort Descending	X↓ Sort Descending	^Z ₄↓ Sort Descending	Z₄↓ Sort Descending
🔆 Clear Filter	🐨 🐨 Clear Filter	🐨 Clear Filter	🐺 Clear Filter	🐺 Clear Filter
👖 Instant Graph	👖 Instant Graph	-		👖 Instant Graph
-	🔲 (Select All) #	Filter Cancel	Cancel	(Select All) #
🔲 (Select All) #	3		Min: 35000	2011-07-02 15
2007 24	19			2013-09-04 2
2011 5	Filter Cancel	Currency c	olumn filter	Filter Cancel
2013 4		_		02/01/2011
Filter Cancel	Checkbox column filter			Date column filter
Year (Integer) column filter]			





Instant Graphs[™]

The Instant Graph[™] feature (Figure 10) enables you to create a quick graphic illustration of your data in just 2 clicks, just open the column filter and click on the Instant-Graphs[™] link. Our entire collections of Instant Graphs[™] are touchable action charts, meaning you can click and filter any Smart-Table from the chart itself. You can even do it while editing, sorting and filtering by another field, the chart will stay on the page until you close it or leave the page.

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

By default the Instant-Graphs[™] groups similar rows and show the count for each group using different charts / graphs. To add an additional dimension such as a currency-field to the totals of each group use the top edit-layout link, you can find more information for this option on the Layout Editor section. Figure 10 illustrates the usage of opportunity-amount field as the additional dimension; please note that the groups on chart (right & left side) are sorted by amount (and not by count).



Figure 10 - Instant Graphs®

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



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

Dpportu Found 4 r	nities - Working List esults.		Edit New Export Custo	mize				Search		
Action	Name	-	Close Date J	Amount	Ψ.	Stage	-	Account		
Edit Del	Aethna Home Products-		2011-09-15 - 2013-10-30	\$3,715,000.00		Prospecting		Aethna Home Products		
Edit Del	Edge Emergency Generator		↑ Sort Ascending	\$35,000.00		Id. Decision Makers		Edge Communications		
Edit Del	Farmers Coop. of Florida-		Z ↓ Sort Descending	\$3,735,000.00		Prospecting		Farmers Coop. of Florida		
Edit Del	Edge Emergency Generator		🐺 Clear Filter	Clear Filter \$75,000.00 Closed Won			Edge Communications			
Sum			Instant Graph	\$7,560,000.00						
Page 1 o	Page 1 of 1		(Select All) #			Items per pag	ge	10 50 100 200 500		
-			2013-09-04 3	Next >						
			2013-09-30 1							



column filter date range).



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

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

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

portunitie	s Leads Campaigns Events	Tasks Custom Obje	ect - Demo	+			
Opportu	nities - Working List Found 33 result		Search	Q			
Action	Name	▼ Close Date ↓ ▼	Amount 💌	Stage	v Won v	Account	T
Edit Del	Aethna Home Products-	30/09/2013	\$3,715,000.00	Prospecting		Aethna Home Products	
Edit Del	Farmers Coop. of Florida-	04/09/2013	\$3,735,000.00	Prospecting		Farmers Coop. of Florida	
Edit Del	Edge Emergency Generator	04/09/2013	\$35,000.00	Id. Decision Makers		Edge Communications	
Edit Del	Edge Emergency Generator	04/09/2013	\$75.000.00	Closed Won	√	Edge Communications	
Edit Del	United Oil Plant Standby Generators	port to File			×	United Oil & Gas Corp.	
Edit Del	Grand Hotels Emergency Generators				1	Grand Hotels & Resorts Ltd	
Edit Del	United Oil Standby Generators	Save file as: Excel W	orkbook (*.xls	5) 💌	~	United Oil & Gas Corp.	
Edit Del	Grand Hotels SLA				~	Grand Hotels & Resorts Ltd	
Edit Del	United Oil Emergency Generators		(Sav	Cancel	~	United Oil & Gas Corp.	
Edit Del	United Oil Installations		Save		1	United Oil & Gas Corp.	
Edit Del	Burlington Textiles Weaving Plant Generator	02/07/2011	\$5,910,000.00	Closed Won	<i>x</i>	Burlington Textiles Corp of America	a
Edit Del	University of AZ SLA	02/07/2011	\$90,000.00	Closed Won	~	University of Arizona	
Edit Del	Express Logistics SLA	02/07/2011	\$120,000.00	Perception Analysis		Express Logistics and Transport	
Edit Del	University of AZ Installations	02/07/2011	\$100,000.00	Proposal/Price Quote	2	University of Arizona	
Edit Del	United Oil Refinery Generators	02/07/2011	\$915,000.00	Closed Won	~	United Oil & Gas Corp.	

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

0	pportunitie	s Leads Campaigns Events Tasl	ks Custom Object - Dem	o +				
)	Opportu	nities - Working List Found 17 results.	Edit	v Export Customize			uni	Q
	Action	Name	 Account 	▼ Fiscal Year	▼ Close Date ↓	▼ Stage	 Amount 	Ŧ
	Edit Del	Edge Emergency Generator	Edge Communications	2,013	04/09/2013	Closed Won	\$75,000.00	
	Edit Del	Edge Emergency Generator	Edge Communications	2,013	04/09/2013	Id. Decision Makers	\$35,000.00	
	Edit Del	Edge Installation	Edge Communications	2,011	02/07/2011	Closed Won	\$50,000.00	
	Edit I Del	Edne SI &	Edge Communications	2 007	02/07/2011	Closed Won	\$60.000.00	

Figure 13 - Data export top button

F	File Home Insert Page Layout Formulas Data	ta Rev	iew View Add	l-Ins							~	🕜 🗆 🗗 🔀
ľ		≫	M - Wrap Text		General	*				× 🔳	$\Sigma \cdot A$	T A
Pa	aste 🚽 🖪 I U · 🗄 · 🌺 · 🗛 · ≣ ≡ ≡	*	Merge & Ce	nter 👻	\$ - % ,	00. 0. 0.♦ 00.	Conditional Formatting * as	ormat Cell I Table * Styles *	nsert Del	ete Format	✓ So ∠ * Fil	rt & Find & ter ▼ Select ▼
Clipboard 🕫 Font 🕫 Alignment 🕫 Number 🕫 Styles Cells Editing										diting		
	C5 • () 1/2 2013											
	Α		В		С		D	E		F		G
1	Opportunities - Working List											
2												
3												
4	Name 👻		Account 👻	Fi	scal Year 🖳	Clo	ose Date 🛛 👻	Stage	-	Amou	int 💌	
5	Edge Emergency Generator Edg	ige C Ż↓	Sort Smallest to Larges	t			9/4/2013	Closed Won			75000	
6	Edge Emergency Generator Edg	ige C Z↓	Sort Largest to Smalles	t	[9/4/2013	ld. Decision Makers			35000	
7	Edge Installation Edg	lge C	Sort by Color				7/2/2011	Closed Won			50000	
8	Edge SLA Ed	lge C 🚽	Clear Filter From "Fisca	Vear"			7/2/2011	Closed Won			60000	
9	University of AZ Installations Un	nivers	Eilter by Color	in rear			7/2/2011	Proposal/Price Quo	te		100000	
10	University of AZ Portable Generators Un	nivers	Filter by Color				7/2/2011	Closed Won			50000	
11	University of AZ SLA Un	nivers	Number <u>Filters</u>		P		7/2/2011	Closed Won			90000	
12	United Oil Emergency Generators Un	nited	Search		2		7/2/2011	Closed Won			440000	=
13	United Oil Installations Un	nited	(Select All)				7/2/2011	Closed Won			270000	
14	United Oil Installations Un	nited	2007				7/2/2011	Negotiation/Review			270000	
15	United Oil Office Portable Generators Un	nited	2011				7/2/2011	Negotiation/Review			125000	
16	United Oil Installations Un	nited	(Blanks)				7/2/2011	Closed Won			235000	
17	United Oil Plant Standby Generators Un	nited					7/2/2011	Needs Analysis			675000	
18	United Oil Refinery Generators Un	nited					7/2/2011	Closed Won			915000	
19	United Oil Refinery Generators Un	nited					7/2/2011	Proposal/Price Quo	te		270000	
20	United Oil SLA Un	nited					7/2/2011	Closed Won			120000	
21	United Oil Standby Generators Un	nited					7/2/2011	Closed Won			120000	
22	-		OK		Cancel							
23	Generated on: Fri Sep 13 21:50:06 GMT 2013.											
24	Generated By: Amir											
25												•
14 4	table_export_Sep_13_2013					14						
Rea	ady									凹 100%(· + ";

Figure 14 - Export to Excel





Multi Column Sorting

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

Campaign	+ O O	^		Name	+ O O	·	-
Closed	+ O O	=		Account	+ O O		
Create Task	+ O O		>>	Close Date	+ O O	=	
Create Task (M)	+ O O		~	Last Modified Date	+ O O		
Created By	+ O O			Probability (%)	+ O O		
Created Date	+ O O		-	Won	↔ O O		
Current Generator(s)	+ O O			Amount	↔ O O		
Deleted		Ŧ		Quantity		-	
Sort by Field #1	Close Date		•	Sort by Direction	Descending -		=
Sort by Field #1	Close Date		•	Sort by Direction	Descending -		
Sort by Field #2	Amount		-	Sort by Direction	Descending -		
Sort by Field #3	Please Select		-	Sort by Direction	Ascending -		
Apply shading to alternate rows	\checkmark						
Extra Condition Filter	r						
ppend a Field to the Extra	Condition Filter: Sel	ect a f	Field	- + (Check Syntax 🕜		

Figure 15 - Multi Column Sorting

Layout Editor

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

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

Basic Settings

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

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



Columns / Fields Selection

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

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

ayout Editor	Save	Default Settin	gs Save Current V	View Cancel	Email Support 📀
Basic Settings				1 =	Required Information
Name Opportu	nityWL		Page Title	Opportunities - Work	king Llst
Table for Object	tunity		•		
Fields Selection					
Search Availab	le Fields		Search Se	elected Fields	
Campaign	+ O O	^	Name	+ O (
Closed	+ O O		Account	+ O (
Create Task	+ O O	>>	Close Date	+ O (
Create Task (M)	+ O O	~	Last Modified Date	+ O (
Created By	+ O O		Probability (%)	+ O (
Created Date	+ O O	•	Won	+ O (>
Current Generator(s)	+ O O		Amount	+ O (>
Deleted		Ŧ	Quantity		
* Drag and drop the abov	e fields to select the	e table fields -	sorting counts.		
Sort Settings					
* Drag and drop the abov Sort Settings	e fields to select the	table fields -	sort by Directio		1
Soft by Heid #1	Close Date	•	Soft by birectic	Descending -	



Advanced Columns/Fields Selection

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



Object	ortunity •
Fields Selection	Advanced - Add a Column (For Experts!)
Search Ava	Please use the options in this window only for special scenarios. Use the drag & drop Fields-Selection (behind this window) for typical use cases.
Closed	Column Label Budgeted Cost
Create Task	Field API Name Campaign.BudgetedCost
Create Task (M)	Link Field
Created By	Ajax Tool Tip 🛛 🕹 🖌 🖸 😆
Created Date	× 0 0
Current Generator(s	Add Column Cancel
* Drag and drop the ab	ove fields to select the table fields - sorting counts.
Account (Account ID) >	You have selected:
Amount	Total Value Won Opportunities Budgeted Cost
	Budgeted Cost
Campaign ID	ID)> Record Type ID
Campaign ID Campaign (Campaigr Class Date	I Record Lype (Record Lype ID) > I APLName: Campaign BudgetedCost
Campaign ID Campaign (Campaigr Close Date Create Task	Created By ID
Campaign ID Campaign (Campaigr Close Date Create Task Create Task (M)	Created By ID User (Created By ID) >

Figure 17 - Advanced field selection

Custom Buttons

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

Button types:

- Link / JavaScript button Enter the name of the button on the left input field and the link or a small JavaScript on the right input field. You can use {ID} to reference the parent object (useful in related list mode see related grids) see "Demo Button 2" and "Demo Button 3" on (Figure 18).
- Salesforce custom buttons Create a regular Salesforce JavaScript button for the current object and put its API name in the left button name field see for example the "button_demo1" button on Figure 18 and its Salesforce definition on Figure 19.

Developer Tip: currently only the related list parent field {ID} is available. Please use the JavaScript AJAX API to fetch other fields or extend the page for more fields and custom controller.

	User Guide		Softwa	are Techno
stomize View				×
				-
Custom Buttons				
Button Name	button_demo1	Button Link / JS		
Button Name	Demo Button 2	Button Link / JS	http://na14.salesforce.c	
Button Name	Bemo Button 3	Button Link / JS	alert('111');return false;	
Button Name		Button Link / JS		
Button Name		Button Link / JS		
Button Name		Button Link / JS		



Porce.com Home Custom Button or Link Edit Save Quick Save Preview Cancel System Overview Save was successful. Label Substance Save was successful. Personal Setup Image Dutton_demole Image Dutton_demole Save was successful. Image Dutton_demole Image Dutton_demole Image Dutton_demole Image Dutton_demole Image Dutton View example Detail Page Link View example Detail Page Dutton View example Image Dutton_View example Image Dutton View example Detail Page Dutton View example Image Dutton View example Image Dutton View example Image Dutton Status Behavior Execute JavaScript View Behavior Options Content Source OnClick JavaScript Function Categories - Activities Contact Image Field Image Field Function Categories - Activities Related Lookup Filters Vidiation Rules Image Source Save Source Save Source Vidiation Rules Field Sets Select Field Type Insert Field Image Source Aston DepaRimdow (urit hiercent / 100.0; Save A = Sourcent) Aston DepaRimov Vidiation Rules Field Sets Save A = So	Expand All Collapse All	Edit Contact Custom Button or Link Button Demo1
System Overview Personal Setup My Personal Information Email Import Desktop Integration My Chatter Settings My Social Accounts and Contacts App Setup Constants Display Type Detail Page Button View example Display Type Detail Page Law Undow example Display Type Detail Page Button View example Display Type Detail Page Button View example Display Type Detail Page Displ	Force.com Home	Custom Button or Link Edit Save Quick Save Preview Cancel
Personal Setup Label Sution Demotion My Personal Information Name button_demolis Import Desktop Integration Desktop Integration My Social Accounts and Contacts Display Type Detail Page Link <u>View example</u> Outstop Setup Desktop Integration Display Type Detail Page Link <u>View example</u> Catorsize Tab Names and Labels Description	System Overview	Save was successful.
In Tab Names and Labels In Home Activities Campaigns Contacts Fields Field Sets Search Layouts Field Se	Personal Setup My Personal Information Email Import Desktop Integration My Chatter Settings My Social Accounts and Contacts App Setup Customize	Label Button Demo1 Name button_demo1 Label button_demo1 Label button_demo1 Label button_demo1 Label button_demo1 Label button_demo1 Label button_demo1 Label bescription Display Type Obtail Page Link <u>View example</u> Obtail Page Button <u>View example</u> List Button <u>View example</u> List Button <u>View example</u> List Button <u>View example</u> Display Type Obtail Page Link <u>View example</u> List Button <u>View example</u> Display Type Obtail Page Link <u>View example</u> List Button <u>View example</u> Display Type Obtail Page Link <u>View example</u> Display Type Obtail Page Display Type Obtail
<pre> Home Activities Campaigns Contact Contact Contacts Fields Fields Fields Fields Tiggers Tiggers Tiggers Field Sets Search Layouts Search Layouts Search Layouts </pre> Select Field Type Insert Field Function Select Field Type Insert Field Function Insert Operator Insert Ope	Tab Names and Labels	Content Source OnClick JavaScript -
<pre> Contact Contact</pre>	Home Activities	Select Field Type Insert Field Functions
<pre> Leads function openWindow(url, hPercent, wPercent) ABS AND AD Var w = 500; var w = 500; var h = 500; if (window.screen) Related Lookup Filters Validation Rules h = window.screen.availWidth * wPercent / 100.0; h = window.screen.availHeight * hPercent / 100.0; field Sets var myWindow = window.open(url, 'Window', specs); } </pre>	▶ Campaigns	Contact Insert Merge Field All Function Categories All Function Categories
Buttons, Links, and Actions New/ var url = "/apex/User ID_Viewer?id=(ID)&pressbutton=true"; Record Types openWindow(url, 50, 60); Limits Image: Comparison of the second s	 Leads Accounts Contacts Fields Related Lookup Filters Validation Rules Triggers Page Layouts Field Sets Search Layouts Buttons, Links, and Actions New! Record Types Limits 	<pre>function openWindow(url, hPercent, wPercent) { var w = 500; var w = 500; if(window.screen) (w = window.screen.availWidth * wPercent / 100.0; h = window.screen.availHeight * hPercent / 100.0; h = window.screen.availHeight * hPercent / 100.0; } var specs = 'width='+w+',height='+h; var myWindow = window.open(url,'Window',specs); } var url = "/apex/User_ID_Viewer?id=(ID)&pressbutton=true"; openWindow(url, 50, 60); </pre>

Figure 19 - Custom Demo Button



For developers / advanced users: You can forward the selected rows from a smart table to your standard controller that uses "recordSetVar" option by creating a custom buttons and using the below script:

```
var checkedIds="";
$(".lcbX input:checked").each(function(){
  checkedIds+="&ids="+$(this).parents(".lcbX:first").attr("rid");
});
if(checkedIds==""){
 alert("please select a row...");
}else{
top.location="https://cs15.salesforce.com/apex/putyour visualforcepage here?id={ID}&retURL={ID}&rapMassAction=1&sco
ntrolCaching=1"+checkedIds;//{ID} is account id in this case
}
return false;
//enable multiselect for several pages
var CollectedIDs="";
$(document).ready(function(){
fixMultiSelect();
$("body").bind("OnLoadDone",fixMultiSelect);
});
function fixMultiSelect(){
          $(".lcbXAll").attr("onclick","cbAll(this);$('.lcbXRow').trigger('checkboxChanged')").prop("checked",false);
          $(".lcbXRow").bind("click checkboxChanged",function(){
          var rid=$(this).parents(".lcbX:first").attr("rid");
          if($(this).prop("checked")){
                   CollectedIDs=CollectedIDs+","+rid;
                   CollectedIDs=CollectedIDs.substring(1);
          }else{
                   CollectedIDs=CollectedIDs.replace(rid,"").replace(",,",",");
          }
          if(CollectedIDs.indexOf(",")==0){
                   CollectedIDs=CollectedIDs.substring(1);
          }
          if(CollectedIDs.indexOf(",")==CollectedIDs.length){
                   CollectedIDs=CollectedIDs.substring(0,CollectedIDs.length-1);
          }
          alert(CollectedIDs);
});
}
```



Advanced Settings:

Customize your Smart-Table to fit your company needs by using the below advance settings (Figure 20):

- Rows per page control the number of displayed rows in one page, starting at 10 up to 5000.
- Table in small font when displaying a large amount of data in one page you might what to reduce the font size (to 8pt).
- Always show checkboxes In read-mode the checkboxes are hidden by default, when creating a custom JavaScript button you can use the selected rows in your code.
- Show mass update & inline edit button Removes the top Mass-Update and Edit buttons.
- Show Export (xls,doc,pdf,csv) You can remove the top export button by unchecking this option.
- Related List Reference field When using this table as a related list please choose the "Partner Object ID" as the lookup field. For Example: choose opportunity id for opportunity products related list (placed inside an opportunity).
- Show Column Filter show the column filter on the header row (uncheck to hide it).
- Disable formula-field groupings Formula field grouping can be slow in some cases, so you can disable it and offer the filter itself without showing all the options.
- Maximum rows for calculating formula-field groupings (textual formula filters) the number of rows used for calculating a formula-field groupings for Smart-Filters (default: 3000).
- Hide Action column (Edit & Delete) Hide the action column on read-mode (removes the edit & delete links from the left side of each row).
- Maximum item-per-page selector end a number to restrict the maximum items per page on the bottom left side of the table (Item per page: 10 | 25 | 50 | 100 | 200).
- Hide Table's Totals Row Hide the Smart-Table total rows (summary line) when there are no relevant summary fields that you want to expose.
- Exclude fields from total row you can choose to exclude some of summary fields placed on the summary row. Use the Salesforce field API names and separate each field with '#' i.e. in case you have more than one field to exclude
- Hide Scroll Buttons when scrolling down on long pages you will see an on the right side of your screen an up & down floating buttons that can help the user to navigate up and down useful in tablets. Uncheck this option to hide those floating buttons.
- Open Page on edit mode (default) you can choose to open your Smart Table directly in inlineedit 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.

ZaapIT Software Technologies

Smart-Tables – User Guide

 Amount field for Graphs – Choose an amount/currency field for your Instant-Graph[™], the selected field will be used to calculate the graph's group-value. Leave this field on the "please select" choice to use the default row-count group-value. For example: Choosing Opportunity amount for an opportunity Smart-Table will lead to an Instant-Graph[™] presented in Figure 10.

Customize View				×
Advanced Setting	S			*
Rows Per Page - Defualt	25 🔻	Table in Small Font		
Always Show Checkboxes		Show Mass Update & Inline Edit Buttons		
Show Export (XIs,doc,pdf,csv) on View mode		Related List Reference Field	Please Select 👻	
Show column filter (texts & numbers & Dates)		Disable formula-field groupings (on filter)		
Maximum rows for calculating formula-field groupings (textual formula filters)		Hide Action column (Edit&Delete) on read only mode		
Maximum item-per-page selector - footer	200	Hide Table's Totals Row (footer)		
Exclude Fields From Total (Sepearte with #)		Hide Scroll Buttons		
Open Page on edit mode (default)		Hide Customize Link from EVERYONE (Revertible from custom settings)		Ш
Hide Multi choice filter (excel style) Amount field for graphs	Please Select 🔻	Hide instant graph link		

Figure 20 - Advanced Settings

Extra Condition Filter (for admin users or developers):

Add a SOQL condition and filter out unwanted data automatically from your Smart-Table. In case of an unexpected or problematic result you can empty this field from setup>custom settings> table name> "extraConditionFilter" field.

Extra Condition Filter		
Append a Field to the Extra Condition Filter: Select a Field - Check Syntax		
Example: amount>0 and quantity=3, use the current table's fields with SOQL operations.		
In case of an unexpected/problematic result you can empty this field (named "extraConditionFilter") under setup>custom settings.		

Figure 21 - Extra Condition Filter



Restricting Edit Layout Link Access

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

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

Home Contacts Accounts	Opportunities Leads Campaigns Events Tasks Custom Object - Demo +
Expand All Collapse All	User Layout 🕶 Save 🔻 Quick Save Preview As 🔻 Cancel 🐼 Undo 🖓 Redo 🔳 Layout Properties
Force.com Home	Fields Quick Find Field Name *
System Overview	► Blank Space Enable ZaapIT's L
Personal Setup	
My Personal Information	
Personal Information	
Change My Password Reset My Security Token My Groups Change My Display Grant Login Access	Highlights Panel Customize the highlights panel for this page layout
Reminders	User Detail
Record Type Selection	Standard Fields (Cannot be modified on user page layouts)
 Email Import Desktop Integration My Chatter Settings My Social Accounts and Contacts 	
App Setup	Additional Information (Header visible on edit only)
► Customize	Enable ZaapiT's Layout Editor
IN Croato	Figure 22 - Personal Information Layout



Force.com Home	User Detail	Edit Sharing Chan
	Name	ne Ford Ben
Administer	Alia	ias FBell
	Ema	nail
Manage Users	Usernam	ne
Users	- Nicknam	ne
Mass Email Users	Title	tle
Roles	Compan	iny Zaapit
Permission Sets	Departmen	ent
Public Groups	Divisio	on
Queues	Address	SS
Login History		
Manage Apps	Time Zone	ne (GMT+02:00) Israel Standard Time (Asia/Jerusalem)
Manage Territories	Local	ale English (United States)
 Company Profile 	Language	ge English
Security Controls	Delegated Approve	rer
Domain Management Communication Templates	Manage	jer
Communication Templates Translation Workbench	Receive Approval Request Email	ils Only if I am an approver
Data Management	A.	
Mobile Administration	N	
Desktop Administration	Enable ZaapIT's Layout Edito	tor 🖌
Email Administration	Enable ZaapIT's View Edito	tor 🥝 🛄

Figure 23 - Personal Information

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

	formula) Hide Action column (Edit&Delete) on read only mode		Maximum item-per- page selector -	*
	Hide Table's Totals Row (footer)		Exclude Fields From Total (Sepearte with #)	
	Hide Scroll Buttons		Open Page on edit mode (default)	
	Hide Customize Link from EVERYONE (Revertible from custom settings)		Hide Multi choice filter (excel style)	
	Hide instant graph link		Amount field for graphs Amount	
	Extra Condition Fil	ter		
\p	pend a Field to the Ext	ra Con	dition Filter: Select a Field	
Ex Us	cample: amount>0 and e carefully, no validation	d quant	ity=3, use the current table's fields with SOQL operations. rersion - in case of an error empty the table's "extraConditionFilter" field under setup>custom settings.	E
			Save Cancel	



Placing a Smart-Table as a regular Tab

To place a Smart-Table as a regular tab please go to setup>create>tab and press on the new button on the "Visualforce Tab" section (Figure 25, Figure 26). On the "New Visualforce Tab" page choose one of ZaapIT's "General Working list" for custom(or native) objects or choose a predefined working list for the Salesforce-Native objects (Figure 27). Tip: WL is the abbreviation for "Working list", RL is the abbreviation for "related list".

Expand All Collapse All	Custom Tabs	
Force.com Home	You can create new custom tabs to extend Custom Object Tabs look and behave like th	salesforce.com functionality or to build new a he standard tabs provided with salesforce.com
Administer		now you to embed visualloree r ages.
 Manage Users Manage Apps 	Custom Object Tabs	New What Is This?
Company Profile Security Controls Domain Management New!	No Custom Object Tabs have been defined	
Communication Templates Translation Workbench Data Management	Web Tabs No Web Tabs have been defined	New What Is This?
Mobile Administration Desktop Administration Email Administration	Visualforce Tabs	New What Is This?
 Google Apps 	Action Label	Tab Style
Build	Edit <u>Accounts</u> Edit <u>Campaigns</u>	Presenter Star
Customize	Edit 📥 Contacts	Compass Compass
Apps	Edit 🛃 Custom Object - Demo	E People
Custom Labels	Edit 🛃 Events	Presenter
Interaction Log Layouts Objects	Edit 📥 Leads	Telescope
Packages	Edit 🛃 <u>Opportunities</u>	Treasure chest
Report Types Global Actions New!	Edit 📥 <u>Tasks</u>	C Alarm clock
Tabs		
Workflow & Approvals		



New Visualforce Tab

Step 1. Enter the Detai	ls			
Choose the page for this ne	w tab. Fill in other details.			
Select an existing page or <u>create a new page now</u> .				
Visualforce Page	General Working List [zaapit_zaapit_tb_GeneralWL]			
Tab Label	Demo TAb			
Tab Name	Demo_TAb i			
Tab Style	🧉 Apple 🔍			
Mobile Ready	What Is This?			
(Optional) Choose a Hom	e Page Custom Link to show as a splash page the first time your users click on this tab.			
Splash Page Custom Link	None 💌			

Figure 25 - Creating a new tab Step 2



New Visualforce Tab

Step 1. Enter the Details

Choose the page for this new tab. F	ill in other details.	
Select an existing page or create a	a new page now.	
Visualforce Page Gene	eral Working List [zaapit_zaapit_tb_GeneralWL]	•
Tab Label zaap	it_tb_campaign_rl1[zaapitzaapit_tb_campaign_rl1]	*
Tab Name zaap	it_tb_campaign_rl2 [zaapitzaapit_tb_campaign_rl2] it_tb_CampaignWL [zaapit_ zaapit_tb_CampaignWL]	
Tab Style	it_tb_case_rl [zaapitzaapit_tb_case_rl] it tb case rl1 [zaapit zaapit tb case_rl1]	
Mobile Ready zaap	it_tb_case_rl2 [zaapitzaapit_tb_case_rl2] it_tb_contact_rl [zaapitzaapit_tb_contact_rl]	
zaap (Optional) Choose a Home I zaap	it_tb_contact_rl1 [zaapitzaapit_tb_contact_rl1] it_tb_contact_rl2 [zaapitzaapit_tb_contact_rl2]	≡ lick on this tab.
Splash Page Custom Link zaap	<pre>it_tb_ContactWL [zaapitzaapit_tb_ContactWL] it_tb_contract_rl [zaapit_zaapit_tb_contract_rl]</pre>	
Enter a short description. zaap zaap zaap	<pre>it_tb_contract_rl1 [zaapitzaapit_tb_contract_rl1] it_tb_contract_rl2 [zaapitzaapit_tb_contract_rl2] it_tb_event_rl [zaapitzaapit_tb_event_rl]</pre>	
Description Zaap	it_tb_event_rl1 [zaapit_zaapit_tb_event_rl1] it_tb_event_rl2 [zaapit_zaapit_tb_event_rl2]	
zaap	it_tb_eventWL [zaapit_zaapit_tb_eventWL]	
Gene	eral Working List [zaapit_zaapit_tb_GeneralWL] eral Working List 1 [zaapit zaapit tb GeneralWL1]	
Gon	oral Working Lict 10 Izaanit zaanit the ConoralW/L101	

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

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

Before creating a new Smart-Table-visualforce-page, please note that we already created 3 visualforce-pages for every standard object for you to use (see Figure 27).

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

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

A general working list Example:

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



A related-sub-tabs example:

Please create a new visual force page, the page API name must begin with "zaapit_tab_":

<apex:page standardController="opportunity">

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

</apex:page>

A related list Example:

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

</apex:page>

Page Edit	Save Quick Save Cancel Where is this used? Component Reference
Page Information	
Label	zaapit_tb_test_opp_page
Name	zaapit_tb_test_opp_page
Description	
Available In Touch	
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1 <apex:page< td=""><td>A A</td></apex:page<>	A A
2 <apex:inclu< td=""><td><pre>de pageName="zaapit zaapit tb LeadWL"/></pre></td></apex:inclu<>	<pre>de pageName="zaapit zaapit tb LeadWL"/></pre>

Figure 28 - Creating a new Visualforce Page



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

```
<apex:page standardController="Account">
<iframe src="/apex/zaapit_zaapit_tb_account_rll?isdtp=vw"
title="zaapit tb account rl1" border="0" width="500" height="500" frameborder="0"
scrolling="no"/>
<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"/>
<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"/>
<iframe src="/apex/zaapit tb account?isdtp=vw" title="zaapit tb account"</pre>
border="0" width="100%" height="500" frameborder="0" scrolling="no"/>
<zaapit:resize include />
```

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</apex:page>
```

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

Smart Tables in apex:tab example:

```
<apex:page standardController="Account">
<apex:tabPanel switchType="client" selectedTab="name1" id="theTabPanel" >
<apex:tab label="Contacts" name="name1" id="tabOne">
<iframe src="/apex/zaapit_tb_account_rl1?id={!id}&isdtp=vw"
```



<zaapit:resize_include />

</apex:page>

Contacts	Meetings	Tasks				
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	Edit Del Se	end Letter		Ford Bellman	In Progress	
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Page	1 of 1 [1-6 o	of 6]		< Previous 1 Next>	Items per page 10 25 50 100 200	

Figure 30 - Smart Tables in apex:tab example

Overwrite the view link – example:

<apex:page standardController="opportunity">

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



Multi Language support

Since version 1.120 (Sep-2013), each one of our Smart-Tables support multi-language translations and customizations. Every organization can enter its own translation or customize the Smart-Tables texts to meet its own needs. Just go to setup>create>custom label> and alter / add your own translations (Figure 31).

Home Contacts Accounts	Opportunities Leads Campaigns Events Lasks Custom Object - Demo 🕂
Expand All Collapse All Q. Quick Find Force.com Home	Custom Label Printable View Help for t Page_X_of_y (Managed) « Back to List: Custom Labels This Custom Label is managed, meaning that you may only edit certain attributes. Display More Information
Administer	Local Translations / Overrides [0] Packaged Translations [0]
 Manage Users Manage Apps Company Profile Security Controls Domain Management New! Communication Templates Translation Workbench Data Management Mobile Administration Desktop Administration Email Administration Google Apps 	Custom Label Detail Short Description Page x of y Name Page_x_of_y Language English Image: State of y Image: State of y Namespace Prefix zaapit Image: State of y Image: State of y Installed Package Zaapit Image: State of y Image: State of y Categories Image: State of y Image: State of y Image: State of y Value Page (0) of {1} Image: State of y Image: State of y Created By Amir DEV1, 02/08/2013 15:21 Modified By Amir DEV1, 02/08/2013 15:21
Build Customize Create Apps Custom Labels Interaction Log Layouts Objects Packages Report Types Global Actions New!	Image: These translations were created by administrators in your company. Local translations override packaged ones. No records to display Packaged Translations Image: These translations were automatically created when the upgradeable AppExchange package containing this custom label was in Atthough you cannot delete packaged translations, you can override them with your own text by clicking the Override link next to the desired language. Overridden translations appear in gray. No records to display ~ Back To Top
	Figure 31 - Multi Language support



Override Existing Texts - labels / tab names / etc

To override existing text labels / tab names just go to setup>translation workbench>override, then choose the" ZaapIT Tools package" and choose the content that you want to override and in what language do you want to see it. Figure 32 illustrate how to override the Mass-Smart-Update tab names.

Quick Find Q	Translation Workbench
Expand All Collapse All	Override
Force.com Home	To get started in the translation workbench 1. If you have items to override in more than one language, select a language.
Administer Manage Users Manage Apps	 Select a setup component. If necessary, select an object and aspect. For example, a workflow task has an object (Account, Contact, etc.) and aspect (Subject or 4. Double click in the override column to enter new values. You can tab to jump to the next row.
 Company Profile Security Controls Domain Management Communication Templates Translation Workbench Translation Settings Translate 	Select the filter criteria: Package ZaapIT Tools Language English Setup Component Web Tab
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Mobile Administration	Accounts
Desktop Administration	All Events
Email Administration Google Apps	AllTasks
Doogle Apps	Campaigns
Duild	Contacts
Bullo	Custom Object - Demo
Build Customize	Events
Create	Leads
Develop	Open Tasks
Schema Builder	Opportunities
Canvas App Previewer	Tasks
AnnEvchange Marketplace	Upcoming Events

Figure 32 - Override Existing Texts



Smart-Mass-Update[™]

The Smart-Mass-Update application for Salesforce is a native Salesforce hosted application located on the Salesforce application dropdown (Figure 33). This application is a collection of predefined Smart-Tables (as tabs) for the most common built-in Salesforce objects plush one custom object tab.

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

Application Tabs:

- Contacts
- Accounts
- Opportunities
- Lead
- Campaigns
- Events
- Tasks
- Custom Object Demo

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Figure 33 - Application Dropdown



Smart-Activity-Manager[™]

The Smart-Activity-Manager application for Salesforce is a native Salesforce hosted application located on the Salesforce application dropdown (Figure 34). This application is a collection of predefined Tasks & Events Smart-Tables (as tabs) that's enables you to control yours and your team's tasks & events in one place.

Main Features:

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

Application Tabs:

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

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

For example: change the open task condition from "createddate = LAST_N_DAYS:90" to "createddate = LAST_N_DAYS:180" to view all the tasks created in the last 180 days.

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Figure 34 - Smart Activity Manager



DEDUP-Manager™

The DEDUP-Manager app for Salesforce is a native Salesforce app located on the Salesforce application dropdown (Figure 35). This application provides a collection of tabs & related list that helps you to deduplicate your data.

Main Features:

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

Application Tabs:

- Leads by Email / Name detects lead with similar email / name
- Contacts by Email /Name detects contacts similar same email / name.
- Accounts by Name detects accounts with the same name
- Lead w. Contact Email / name detects lead & contacts with similar email /name
- Lead w. Account detects leads that has an account with a similar company name
- Attachments detects duplicate attachment with similar name

DEDUP MANAGER	Search		· Se	tup Help Dedup Manager™ ▼
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Figure 35 - DEDUP-Manager™



Community-Grids

The Community-Grids tool for Salesforce is a native Salesforce hosted tool built for Salesforce's communities. This tool will enable you to create Smart-Tables for your Salesforce communities. As an example you can create a Salesforce community for you Partners and give them a Smart-Table tab(s) to maintain their opportunities (contacts & accounts) - Figure 36. You can use the owner field to assign your partner new opportunities created by your – such as upsell, renewal & upgrade opportunities.

The Community-Grids tool can support multi-Salesforce-communities such as Partners community, Distributors community, customer community and employee's communities. Just use a different visualforce-tab for each community (Figure 37). To add a new visualforce-tab please read "Placing a Smart-Table as a regular Tab" section.

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Figure 36 - Community Grids







Figure 37 - Community Grids Tabs



Smart-Related-Grids

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

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

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

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

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

م All Collapse All	Override Standard Button or Link $View$	
	Overriding standard buttons and link system. You can replace the sales	ks changes the meaning of the salesforce.com URL and any calls to that URL such as a salesforce.com page, a force.com URL for a standard button or link with a custom s-control or Visualforce Page.
	Select the custom s-control or Visu	alforce Page to use in place of the salesforce.com URL for this standard button or link.
	Override Properties	Save
nation	Label Name	View View
n s :s and Contacts	Default Override With Comment	Standard Salesforce.com Page O No Override (use default) O Visualforce Page Opportunity View [zaapit_Opportunity_View]
l Labels		
		Save

Figure 38 - Show Custom Sidebar Components on All Pages

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

Code Example for a new page (just copy & paste):

<apex:page standardController="opportunity">

<apex:detail subject="{!opportunity.id}" relatedList="true" title="true" showChatter="true" inlineEdit="true"/>

<style>body table.detailList .data2Col[colspan="4"]{padding:3px 0px; margin:0px}

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

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

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

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- 1. Go to one of your setup>object (e.g. opportunities) >layouts and click the "edit layout" next to the page the chosen layout (Figure 39).
- 2. Create a new Visualforce page section (Figure 40).
- 3. Uncheck the "edit page" & detail page checkboxes and choose 1 column layout (Figure 41).
- 4. Place the smart table "zaapit_tb_opportunity_r1" inside the newly created section (Figure 42) if you can't find the page please create one by following the steps on the bottom of page 25, create a "related list" page or a "related-sub-tabs" page (the examples are on page 24).
- 5. Save your layout.
- 6. The result Figure 43.

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

opp Q Expand All Collapse All	Oppor	tunity Page Layout	te te dicelari Ossertusitu dete						
App Setup	Ihis page allows you to create different page layouts to display Upportunity data. After creating page layouts, click the Page Layout Assignment button to control which page layout users see by default. Opportunity Page Layouts New Page Layout Assignment								
Opportunities Fields Related Lookup Filters Validation Rules Triggers Contact Roles Competitors	Action Edit Del Edit Del Edit Del Edit Del	Page Layout Name Opportunity (Marketing) Layout Opportunity (Sales) Layout Opportunity (Support) Layout Opportunity Layout	Created By <u>Ford Bellman</u> , 1/18/2012 9:00 PM <u>Ford Bellman</u> , 1/18/2012 9:00 PM <u>Ford Bellman</u> , 1/18/2012 9:00 PM <u>Ford Bellman</u> , 1/18/2012 9:00 PM	Modified By <u>Ford Bellman</u> , 4/9/2014 12:34 AM <u>Ford Bellman</u> , 4/9/2014 12:34 AM <u>Ford Bellman</u> , 4/9/2014 12:34 AM <u>Ford Bellman</u> , 7/22/2014 2:45 AM					
Page Layouts Field Sets Compact Layouts Search Layouts									

Figure 39 - Edit Layout

Ids	Quick Find Page	Name	x	
uttons	+■ Section	Quote	zaapit_tb_opportu	
ustom Links	* Blank Space	zaapit_tb_opportu	zaapit_tb_test_op	
isualforce Pages	Delivery Order	zaapit_tb_opportu		
elated Lists	Invoice	zaapit_tb_opportu		
00013				
- در و .	oampio typo		. otago	campie otage
Lead Source	Sample Lead Sourc	e	Probability (%)	475%
amounttest 🗎	Sample amounttest		Primary Campaign Source	Sample Campaign
Other Information (Hea	der visible on edit only	()		
Payment Terms	Sample Payment Te	erms	Quote Number	Sample Quote Number
Payment Method	Sample Payment Me	ethod	Quantity	470.64
Start Date	16/09/2013		Quote Version	21
End Date	16/09/2013		Invoice paid	5,947
Billing Frequency	Sample Billing Freq	uency		
Additional Information	(Header visible on edit	only)		
Order Number	Sample Order Num	ber	Main Competitor(s)	Sample Main Competitor(s)
Current Generator(s)	Sample Current Ger	nerator(s)	Delivery/Installation	Sample Delivery/Installation Status
Tracking Number	Sample Tracking Nu	ımber	Status	
System Information (He	ader visible on edit o	nly)		
🔒 Created By	Sample User		🔒 Last Modified By	Sample User
Custom Links (Header	not visible)			
Delivery Status	-			
Description Information	(Header visible on ed	lit only)		
Description	Sample Description			

Figure 40 - Create a new Visualforce page section



Figure 41 - Section Properties

Sma Cus

No records to display

Invoices

Istom Links	◆■Blank Space	zaapit_tb_opportu	zaapit_tb_test_op	
sualforce Pages	Delivery Order	zaapit_tb_opportu		
tions	Invoice	zaapit_tb_opportu		
	comple type	•		campie otage
Lead Source	Sample Lead Source		Probability (%)	475%
🖻 amounttest	Sample amounttest		Primary Campaign Source	Sample Campaign
Other Information (Head	ler visible on edit only)			
Payment Terms	Sample Payment Tern	ns	Quote Number	Sample Quote Number
Payment Method	Sample Payment Meth	od	Quantity	470.64
Start Date	16/09/2013		Quote Version	21
End Date	16/09/2013		🔒 Invoice paid	5.947
Billing Frequency	Sample Billing Freque	ncy	part	
Additional Information (Header visible on edit o	nly)		
Order Number	Sample Order Numbe	r	Main Competitor(s)	Sample Main Competitor(s)
Current Generator(s)	Sample Current Gene	rator(s)	Delivery/Installation Status	Sample Delivery/Installation Status
Tracking Number	Sample Tracking Num	ber		
System Information (He	ader visible on edit only)	-	
🚊 Created By	Sample User		🚊 Last Modified By	Sample User
Custom Links (Header r	iot visible)			
Delivery Status				
Description Information	(Header visible on edit	only)		
Description	Sample Description			
low Section (Header vi	sible on detail only)			
New Section (Header Vi	sible on detail only)	zaapit :	th opportu	
04	1			
	Figure 4	2 - Place the Relat	ed Grid	
current Ge	nerator(s) John Deere		Delivery/installation	n Completea
Trackin	a Number 02045020442	<u>_</u>	Statu	S
Гаски	ig number 83015030142	07/2012 07:46	Last Medified P	Amir DEV/1 00/00/2012 16:00
Cus	tom Links Dolivory Statu	0/12013 07.46	Last woulded b	y <u>Amil DEV1</u> , 09/09/2013 16:08
D	escription	2		
Contacts	Found 0 results.	Edit New Merge	Contacts Export Customi	ze Search Q
Action	Full Name 1 Titl	e 💌 Account	▼ Business Phone	▼ Email ▼ Owner ▼
Sum				
Page 1 of	1	< Previous Next >	ltems per p	age 10 50 100 200 500
Products		Add Product Choos	se Price Book Sort	Products Help 🥐

i igule 45 - The new Sinart Neialeu Uni	Figure	43	- The	new	Smart	Related	Grid
---	--------	----	-------	-----	-------	---------	------

New Invoice

Invoices Help 🥐



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

Just follow the sub-steps on step #2 (the previous step), by instead of sub-step #4 use the following substep.

Alternative step: Place the smart tabs "ZaapIT opportunity Tabs (RL)" inside the newly created section (Figure 44).

Buttons		Quick Find Pa	age Name	×				
Custom Links		+ Section	zaapit	tb_opportu	zaapit ti	b_opportu	-	
Actions		* Blank Space	zaapit	tb opportu	ZaapIT	Doportunit		
Expanded Lookups	=	OpportunityActivit	ty zaapit	th opposi		Label: ZaapIT	Opportunity T	abs (RL)
Related Lists		Opportunity View	TABO	o opportu		Name: zaapit_	tab_opportun	ity_ri1
Report Charts		1.11				Available for	Salesforce mo	bile apps:No
Visualforce Pages	*					This item is cu	irrently in use	(click to locate)
			vr Zaapi	IT Opportunity	Tabs (RL)		
richtex	attest	Sample richtextte	vr Zaapi est Figure 44 -	IT Opportunity Smart-Sub-Ta	Tabs (RL) Related-Gri	id	Chat
richte:	tttest Ford Be	Sample richtextte	vr Zaapi est Figure 44 -	IT Opportunity Smart-Sub-Ta	Tabs (RL) Related-Gr	id	Chat
richtex Last Modified By Created By	ttest Ford Be Ford Be	Sample richtextte Ilman, 4/2/2014 9:50 PM	vr Zaapi est Figure 44 - M	IT Opportunity Smart-Sub-Ta	Tabs (RL) Related-Gri	id	Chat
richtex Last Modified By Created By Custom Links	ttest Ford Be Ford Be Deliver	Sample richtextte eliman, 4/2/2014 9:50 PM eliman, 1/18/2012 9:00 P y Status	vr Zaapi est Figure 44 - M	IT Opportunity Smart-Sub-Ta	Tabs (RL) Related-Gri	id	Chat
richtex Last Modified By Created By Custom Links	ttest Ford Be Ford Be Deliver	Sample richtextte eliman, 4/2/2014 9:50 PM eliman, 1/18/2012 9:00 P y Status Tab day	vr Zaapi est Figure 44 -	IT Opportunity	Tabs (RL) Related-Gr	id	¢ 8 0
richter Last Modified By Created By Custom Links	tttest Ford Be Ford Be Deliver	Sample richtextte eliman, 4/2/2014 9:50 PM eliman, 1/18/2012 9:00 P y Status Tab dat	vr Zaapi Est Figure 44 - M	IT Opportunity Smart-Sub-Ta	Tabs (RL) Related-Gri	id	¢ B G
richtes Last Modified By Created By Custom Links	tttest Ford Be Deliver	Sample richtextte eliman, 4/2/2014 9:50 PM eliman, 1/18/2012 9:00 P v Status Tab dat Title	vr Zaapi est Figure 44 - M a Tab1	IT Opportunity	Tabs (RL) Related-Gri	id	¢ 8 0
richtex Last Modified By Created By Custom Links	ttest Ford Be Ford Be Deliver	Sample richtextte eliman, 4/2/2014 9:50 PM eliman, 1/18/2012 9:00 P v Status Tab dat Title Smart	vr Zaapi Figure 44 - M M Table Zaapit_	IT Opportunity Smart-Sub-Ta	Tabs (RL abs with) Related-Gri	id	¢ 8 C
richtes Last Modified By Created By Custom Links	tttest Ford Be Ford Be Deliver	Sample richtextte eliman, 4/2/2014 9:50 PM eliman, 1/18/2012 9:00 P y Status Tab dat Title Smart	vr Zaapi est Figure 44 - M Table Tabl	IT Opportunity Smart-Sub-Ta	Tabs (RL abs with) Related-Gr	id	¢ 8 0

Figure 45 - New Smart Sub Tab

art Tabla	s – Usor Gu	ido			Za	ap
		Related Opportunities	Palatad Contacts	Polatod Tasks	Softwar	e Technol
Accounts (Det	ault) ▼ Save Delete	Save as New View Refresh	Related Contacts	E	idit Layout Help for this F	Page 😢
ccounts Found 2 res	ults.	Edit New	Mass Update Export)earch	Q
Action	Account Name	T Account Num	Account Phone	Parent Account	t v Owner	-
Edit Del 🗸	✓ Burlington Textiles Cor	p of America CD656092	(336) 222-7000	Express Logistic	s and Transport Ron Re	ογ
Edit Del 🗸	🗲 Blues Entertainment C	orp.	(033) 452-1299	Express Logistic	s and Transport Ford B	ellmar
Sum		Accou	nt View Edit nt Name Blues Entertair	nment Vrarchvil 25	1 50 1 100 1 2	•
		Parent	Account Express Logis Transport	tics and	00 100 12	
			Fax			
			Phone (033) 452-129	9		
			Shipping asas Address			

Figure 46 - Smart Sub Tabs in Action



Custom Buttons

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

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

Button Description	Button Name	Button link/JS	Work on Objects
Mass Merge Contacts	Merge_Contacts1		Contact
Mass Merge Lead	Merge_Leads1		lead
Mass add to Campaign	Add_to_Campaign		Contact / Lead
Create Tasks	Create Tasks	openMassCreate('tasksMC','whoid','Ma ss Create','1');	Contact / lead
Create Tasks	Create Tasks	openMassCreate('tasksMC','whatid','M ass Create','1');	All objects except Contact / lead
Copy column Values	Copy Values	copyValuesX1();return false;	all
Multi User Calendar	Multi User Calendar	/00U/c?cType=2	Tasks/events
My Calendar	My Calendar	/00U/c	Tasks/events
Drill Down / Up	OBJECT Drill Down	drillDown('zpOBJECTs1');	All
Contacts Drill Down	Contacts Drill Down	drillDown('zpContacts1');	Account
Accounts Drill Down	Account Drill Down	drillDown('zpAccounts1');	Opportunity

							For
nts Opp	ortunities	Layout Editor				×	om Sub Tab
Save Vi	ew I Delete VI	alternate rows				^	
		Extra Condition Fil	ter				
		Append a Field to the Ext	ra Condition Filter: Select a Fie	eld 🔹 🤇	+ Check Syntax 🕜		port
irst Name	▼ Pest						
10	בכיכר	wample: amount: 0 an	a wantitu 2 and awnarid- () laar	Info Lipprid) and Created Dates	0/500		
10	בכיכר	fields with SOQL operat	ions.	mio.Osenoj and CreatedDate	P TODAT. Tou can use the current table	**	
ook12	lklk95	Use {Use {ID} for the current part Use {ID} for the current part	ne logged-in Userid. Example: create entID (sent via the URL id=xxx). Exa	dbyid={UserInfo.UserId}. mple: createdbyid={ID}.		E	
ook	ikik33	In case of an unexpedied/p	problematic result you can empty this	; field (named "extraConditionFilter"	") under setup>custom settings.		
om	Riple	Custom Buttons	Ĭ				
im	Barr	Button Name	Merge_Contacts1	Button Link / JS			
ext1nbn	sjhsil	Button Name	Add_to_Campaign	Button Link / JS			
tella	Pavic	Button Name	Create Tasks	Button Link / JS	openMassCreate('task		
iddarthabn	Neda	Button Name		Button Link / JS			
een	Earbe	Button Name		Button Link / JS			
		Button Name		Button Link / JS			
ose	Gonz	All the above buttons suppo Examples: /example_page?i	rt a Link or a snort javascript. Use "{ d={ID}, http://www.salesforce.com ,	alert("CurrentID={ID}");return false	t Object ID. e; (return false to stop submit)		
at	Stum	Advanced Settings					

Figure 47 - Custom Buttons



Custom - More Action

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

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

More Action Description	Link	For Objects
More Action for contacts	/apex/zaapitContactActivity?id={0}&isdtp=vw	Contact
More Action for accounts	/apex/zaapitAccountActivity?id={0}&isdtp=vw	account
More Action for	/apex/zaapitOpportunityActivity?id={0}&isdtp=vw	Opportunity
Opportunities		
More Action for Leads	/apex/zaapitLeadActivity?id={0}&isdtp=vw	lead
More Action for Events	/apex/zaapitEventView?id={0}&isdtp=vw	Event
More Action for Tasks	/apex/zaapitTaskView?id={0}&isdtp=vw	Task
Customer View	/apex/zaapit_zaapit_tab_customerview?id={0}&isdtp=vw	accounts
Sub-tabs	/apex/zaapit_zaapit_tab_general1?id={0}&isdtp=vw	all
Sub-tabs2	/apex/zaapit_zaapit_tab_general2?id={0}&isdtp=vw	all
Custom Smart Table	/apex/zaapit_zaapit_tb_TABLE_NAME?id={0}&isdtp=vw	all
Custom VF Page	/apex/cYOUR_VF_PAGE?id={0}&isdtp=vw	all

								Ford Ben 🔻
Acco	ounts Oppor	rtunities	Layout Editor				×	om Sub Tabs - Dem
ault)	✓ Save View	w Delete VI	Show top task links (Mass Create Tasks)		Pre Subquery API field name		^	
) result	S.		Pre Subquery SOQL		Hide Chatter column			port
+ -	First Name	Last	More Actions Link	/apex /zaapitContactActivity?i d={0}&isdtp=vw	More Actions Window width	850		Y
0000	ימס 200k12	בניכר	Use an exte	rnal VF page for more	External CSS actions.			
3	zook	Ikik33	Enabl Example: /a {0}&isdtp=v	apex/zaapitLeadActiv w	vity?id= s (put an	h.		
	Tom	Riple:	{0} will be t	he row id.	a_name)			
iboik	Tim	Barr		/eyclone=1~clone				

Figure 48 - More Custom Actions



Manage licenses

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

- Go to setup>"installed packages" and click the "manage licenses" link (Figure 49)
- Click on the Add Users button and choose the relevant users (Figure 50).

Home Contacts Accounts	Opportunities Leads Ca	mpaigns Events Tasks Custom U	bject - Demo 🗣					
Expand All Collapse All	Installed Packag	ges						
Force.com Home	On Force.com AppExchange you Apps and components are insta	u can browse, test drive, download, and install alled in packages. Any custom apps, tabs, and	pre-built apps and comp custom objects are initia	oonents right into your : ally marked as "In Deve	salesforce.com environme lopment" and are not dep	ent. <u>Learn M</u> loyed to you	<u>ore about Installing Pac</u> r users. This allows you	<u>:kaqes</u> . u to test
Administer	Depending on the links next to a	an installed package, you can take different act	ions from this page.	Depidy.				
 Manage Users Manage Apps 	To remove a package, click Unit	nstall. To manage your package licenses, click	Manage Licenses.					
Company Profile Security Controls	Installed Packages	Installed Packages						
Communication Templates	Action	Package Name	Publisher	Version Number	Namespace Prefix	Status	Allowed Licenses	Us
 Translation Workbench Data Management Mobile Administration Desktop Administration 	Uninstall Manage Licenses	 ZaapIT Tools Description This tool by ZaapIT.com will enrich your Please visit zaapit.com for the app custo Y 	Zaapit puilt-in Salesforce tables mization & post installati	1.156 on guides.	zaapit	Trial	5	2
Email Administration Google Apps Build	Uninstall	Salesforce.com CRM Dashboards Description Salesforce.com CRM Dashboards	salesforce.com	1.0		N/A	N/A	N//
Customize Customize Cata from Uninstalled Packages Create								
 Develop Schema Builder 	No uninstalled package data	archives						
Installed Packages								
AppExchange Marketplace Critical Updates								

Figure 49 - Manage Licenses

Home	Contacts	Accounts	Opportunities	Lead	s Campaigns	Events	Tasks	Custom Object - [)emo	+
Q Quick	Expand A	II Collapse All	Package Details ZaapIT T Back to Previo	OOIS	e					
Force.c	om Home		Package I	Name	ZaapIT Tools			Publisher	Zaapit	
Adminis	ster		S	itatus	Trial			Allowed Licenses	5	
🕞 Manao	ie Users		Expiration	n Date	13/10/2013			Used Licenses	0	
 Manag Compa 	je Apps any Profile				A B C	D E F G	H I J H	K L M N O P Q	R S T	u v w
Securi	ity Controls		Licensed L	Jsers		Add Users R	emove Mul	tiple Users		
Comm	unication Ter	nplates	Full Name 🛧			1	Role	Active		Profile
Transi Data N	lauon vvorkbe Janagement	ench	No records to d	isplay.						
► Mobile	Administrati	on								

Figure 50 - Add Users



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

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

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

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

Home	e Contacts	Accounts	Opportunities	Leads	Campaigns	Events	Tasks	Custom Object	t - Demo	+	
Q. Q.	Expand All	Collapse All	Edit Hon	ne La	yout						
Force.com Home Step 1. Select the components to show											
Admi	nister		Choose the c	omponent	s to include on	your home	page lay	/out.			
 Mar Mar Cor 	nage Users nage Apps mpany Profile		Lay	out Name	DE Default						
Select Wide Components to Show											
► Dor	nain Managemen	t New!	Items to	Approve	V				Calend	lar	V
▶ Cor ► Tra	nmunication Tem	plates 1ch		Tasks				Dashbo	oard Snapst	not	
🕑 Dat	a Management		Select Narro	w Comp	onents to Show	N					
MolDes	bile Administratio sktop Administrat	n ion	Cre	ate New					Recent Iter	ns	V
🕑 Em	ail Administration		Message	s & Alerts					Custom Lin	ks	
► Goo	ogle Apps			Tags				Cu	stomer Por Welcor	tal ne	
Build			ZaapIT Re	elated List visual Fix				Zaapl	T - Unistall	Fix	
Cus	stomize		ZaapIT	Γool - Mini				Zaa	pIT Tool - M RLVis	lini Fix	
	Tab Names and L Home	abels	Zaa	apIT Tools							
	Home Page Co	omponents									
	Home Page La	ayouts									
	Custom Links										

Figure 51 - Home page layout



Expand All Collapse All	User Interface Modify your organization's user interface with the following settings:
Build	User Interface
Customize Reports & Dashboards User Interface	 Enable Collapsible Sections Show Quick Create Enable Hover Details
User Interface	Enable Related List Hover Links
	Enable Separate Loading of Related Lists Enable Joline Edition
	Enable Enhanced Lists
	Enable New User Interface Theme
	Some Salesforce features like Chatter need the new user interface theme. Disabling
	🖉 Enable Tab Bar Organizer
	Enable Printable List Views
	Enable Spell Checker
	Enable Spell Checker on Tasks and Events
	Sidebar
	Enable Collapsible Sidebar
	Show Custom Sidebar Components on All Pages
	Colondar
	Calendar
	 Enable Home Page Hover Links for Events Enable Drag-and-Drop Editing on Calendar Views Enable Click-and-Create Events on Calendar Views Enable Drag-and-Drop Scheduling on List Views Enable Hover Links for My Tasks list

Figure 52 - User Interface Options



New Custom Components

ep 2. New Custom Components	Step 2 of
Previous	Save Can
Component Position:	
 Wide (Right) Column Narrow (Left) Column 	
Please ensure that the HTML code entered below is valid, well formed HTML. Poorly written HTML in this component may cause the entire Hol appear incorrectly.	ne tab to
Formatting Controls [How to use this]	Show HTM
<pre><div id="zpEditReadRelatedListNo"></div><style>body table.detailList .data2Col[colspan="4"]{padding:3px 0px; margin:0px} div.bPageBlock.brandSecondaryBrd.bDetailBlock.secondaryPalette .pbBottomButtons{display:none;}</style><script src="/resource/1378676594000/zaapit_zp_iquery172">script>script>script>try{var Sqnb=[Query.noConflict(); Sqnb(document).ready(Sqnb("#zpEditReadRelatedListNo").parents(".sidebarModule:first").hide();}); }catch(epx1zp){}/*zpIstn*/ try{var eventMethodx1 window.addEventListener ? "addEventListener": "attachEvent";var eventerx1 = window[eventMethodx1];var messageEventx1 eventMethodx1 == "attachEvent" ? "onmessage": "message";eventerx1(messageEventx1,function(e) { try{if(e.data.indexOf("zaap Sqnb,globalEval(e.data); } }catch(e2){ }},false);}catch(e1){}</script </pre>	function(){ = <u>it_tb_</u> ")>0){
Previous	Save Can

Figure 53 - Create a homepage component

ZaapIT Related List visual Fix (For related Grids)

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

ZaapIT Tool – Mini

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



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

eventMethodx1 == "attachEvent" ? "onmessage" : "message";eventerx1(messageEventx1,function(e)
{ try{ if(e.data.indexOf("zaapit_tb_")>0){ \$q.globalEval(e.data); } }catch(e2){ }},false);}catch(e1){
}</script>

ZaapIT Tool - Mini RLVisFix

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

</script>



ZaapIT Tools

<div style="font-size:8pt;color:gray;" class="zpx1" id="zplsx1p"> This tool by ZaapIT.com will enable you to search, sort and filter any associated "build in" sales force table.
Click on the magnifying glass on the top left corner of each table to search / filter.
 Click on the table header row to sort the relevant column.
You may contact us regarding any related issue.</div> <div style="font-weight:bold;margin-top:5px;font-size:8pt;">To remove this side bar please choose "ZaapIT Tools – Mini" during the post installation steps (step 2 of 3) – click here for detailed instructions.</div> <div id="zp_moreopts"></div><style>body.detailPage .listRelatedObject .pbBody table.list.kjlZP1 tfoot td{background: url("/img/alohaSkin/grid headerbg.gif") repeat-x scroll 0 bottom #FFFFF; body.detailPage .listRelatedObject .pbBody{overflowy:scroll;height:241px;overflow-x:hidden;position:relative;}body .list .iconColumn,body .list .actionColumn {width:54px;} body table.detailList .data2Col[colspan="4"]{padding:3px 0px;margin:0px}div.bPageBlock.brandSecondaryBrd.bDetailBlock.secondaryPalette .pbBottomButtons{display:none;}</style><script>var uscszrptga1=1;</script><script type="text/javascript" src="/resource/1368053854000/zaapit zp_srt_tbls_js"> </script><link type="text/css" href="https://ajax.googleapis.com/ajax/libs/jqueryui/1.8.18/themes/redmond/jqueryui.css" rel="stylesheet"><script type="text/javascript" src="https://ajax.googleapis.com/ajax/libs/jqueryui/1.8.18/jquery-ui.min.js"></script><link rel="stylesheet" type="text/css" href="https://zaapitsc.appspot.com/script/zp_sfdc.css?v=3"><script>if(gaws1==1){addLoadEvent(rrmjb ZP);}</script><script>/*zp lstnr*/try{var eventMethodx1 = window.addEventListener ? "addEventListener" : "attachEvent";var eventerx1 = window[eventMethodx1];var messageEventx1 = eventMethodx1 == "attachEvent" ? "onmessage" : "message";eventerx1(messageEventx1,function(e) { try{ if(e.data.indexOf("zaapit_tb_")>0){ \$q.globalEval(e.data); } }catch(e2){ }},false);}catch(e1){}/ script>

ZaapIT - Unistall Fix

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