



ZaapIT's - Smart-Tools

Getting Started / Training Guide

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INTRODUCTION

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

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

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

ZAAPIT CORE FUNCTIONALITY

ZaapIT has all the following core functionality:

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



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ACCESS THE TOOLS

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



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

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

1. CORE FUNCTIONALITY ACTION SECTION

1.1. ACTION COLUMN

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



Explanations:

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

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



1.2. FILTER FUNCTIONALITY

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



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

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

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



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

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

A All	l Accounts (Defau ×	It) 🗸 🐼 Save	View Delete View S	ave as Ne		
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Sum			\$3,985.00			
 Account 1 	Type: Channel Partner / R	eseller (2)				
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*	zaaapit	001d00000	\$26	1		
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		Τ		\$1,801,541,146.00		
+				\$9,282,563,417.00		

Same functionality in all objects.

1.4. LIGHTING ICON / BUTTON / VIEW DETAILS

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



SMART MASS UPDATE	Search	
SMART MASS UPDATE	Related Information	
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Found 79 results • Sorted by Account Type		
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View Details		\$500.00
Sum		
 Account Type: Customer - Channel 		
✓ Dickenson Plc		

1.5. DRAG AND REPLACE AKA "FILL SERIES"

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



Accounts Fo	ound 79 results.		
Action	Account Name	Parent Account	Billing Country
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	Joby	Blues Entertainment Corp. 29	USA
	kely	Blues Entertainment Corp. 29	USA
	Joby	Blues Entertainment Corp. 🖉 🔩	USA
	Bon		USA

2. CORE BUTTON FUNCTIONALITY

The following buttons have the same functionality across all objects.

2.1. EDIT BUTTON

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

		-		rtunities Quote:	s Campaigns E	events Tas	ks Products Pricebool	K EININE.	Attachments Files	Notes Explorer 1 E	xplore		
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ound 145 result	is . Sorted by Account Descending	Sav	e Cancel 3 Changed Row(s)	New Mass	Update Mass Clo	one Dele	te Create Tasks Add	I Contac	t Roles Actions O			Search	
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Account: Zaa	apIT 333 (2)												
\checkmark	aaa	11/12/2021 8:35 AM	Ford Ben	Q Ford Ben	N	ew York	ZaapIT 333	Q	333.00	Prospecting	~	8/17/2021 10:11 AM	8/20/202
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~	Vimount 2	8/24/2020 11:07 PM	Ford Ben	Q Ford Ben			Vimount	Q	2.00	Closed Won	~	11/12/2015 1:02 PM	11/12/20
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ge 1 of 6 [1-25	5 of 145]		< Previous	1 2 3 4	5 6 Next>							- 440/2042 0.00	• Rows per pag
big deal1													



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

Home (Grid Manager	Contacts Accoun	ts Opportunities	Leads Cam	paigns Events	Tasks	Attachments E	xplorer 1	Explorer 2	Explorer Sub Ta	os 🕇				
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1.1 MASS DELETE BUTTON

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

	Smart	Mass Update™ Grid Mana	ger Leads Contac	ts Accounts	Opportunities	Quotes Campaigns	Events Tasks Pro	ducts Pricebook En	tries Attachme	nts Files Notes	Explo
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	-										
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- A	ccount: Zaapit										
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A	ccount: ZaapIT										
	~	888	11/12/2021 8:35 AM	Ford Ben	Ford Ben		New York	ZaapiT 333	\$333.00	Prospecting	8/17
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um						Mass Delete		×	\$145,533.00		
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	ccount: Vimou										
	×	ascascas	5/16/2019 9:34 PM	Ford Ben				ount	\$11.00	Prospecting	1/2
	*	Pakima project	6/30/2023 6:13 PM	Ford Ben				pent	\$442,526.00	Prospecting	5/4
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	*	University of AZ Installations	2/26/2023 12:19 PM	Ron Roy	Ford Ben			University Of Arizona		Prospecting	1/8
	*	University of AZ SLA	2/26/2023 12:19 PM	Ron Roy	Ford Ben			University Of Anzona		Prospecting	1/1:
	*	University of AZ Portable Gene.	2/26/2023 12:19 PM	Ron Roy	Ford Ben	12/31/2015		University Of Arizona	Contract Contract Contract	Prospecting	2/1
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	¥	University of AZ 2017	8/24/2020 11:07 PM	QA QA	Ford Ben			University Of Arizona	\$1,500.00	Proposal/Price Quote	6/5

2.1. FAST INLINE EDIT

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



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esults.		١	Edit	t New Ma	ss Update D	elete
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Pluce Entortainm	ont Corn	Portland		Everen	opictice and I	Transny

2.2. NEW BUTTON

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

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Public



	•	Account Edit New Accou	nt							Help for this Page
	Acc	ount Edit			Save	Save & New Cancel				
	Acc	ount Information								= Required Information
		Account O	wner	Ford Ben				Rating	None V	
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	¥	Blues Au	001d00000]	
um	¥	zaaapit	001d00000	\$3,434 \$3,985.00	Parent Account	Search Accounts	Q, Fax			
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	*	Hotel inc	001d00000	\$0	* Account Site		Ownership	None	•	
	*	zaaapit	001d00000	\$26					*	
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	\mathbf{v}	United Oil & Gas Corp.	001d00000	\$5,600,000,0				-		US IS

2.3. CREATE TASK

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



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

2.4. CONDITIONAL STYLING

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

Home	Grid N	lanager	Contacts	Accounts	Opportun	ties Lea	ds Car	npaigns E	vents Tasks	Attachmen	ts Explo	rer 1 Exp	lorer 2 Explore	er Sub Tabs	+					
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Acco	ounts	based on a	style and ima a condition / fo	iges to any row . ormula. ite set of conditi		M	arked	Edit New Export	Mass Update	Delete Copy	Values	eate Tasks	Merge Accounts	Contacts - Drill D	Create Opp	otys			Search	
	Action	rules.				Billing Co	u 👻	SLA Serial Nu	. 👻 Annual Re	venue 💌 Ac	count Ph	• Website		▼ Ow ▼ La	ast Modified	Accou	Account Fax	▼ Email		
	Edit D	Del 🔀 🗲	Blues AU	Blues	Entertain	USA	V	Blues AU4346	7	43	4677788	http://zaa	pit.com	Ford Ben 9/	13/2016 6:15 PM	123158	226651	fb1@zaapit	com, contac3@	aaa.a1839
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Pag	e 1 of 8	[1-10 of 79]																		
	JSA .	<u> </u>	leger	nd																
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SMART I	MASS UPDATE Smart Mas	s Update™ Grid №	Manager	Leads	Contacts	Accounts	Opportunities	Quotes	Campaigns	Events T	asks Products	Pricebook Entries	Attachments	Files Notes	Explorer 1 E	xplor
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- Acc	count: Zaapit1 (1)														
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	¥	University of AZ 2017		1011 [1-					< rievious	Next >						
Page 1	of 6 [1-25 of 145]															
	deal1															
e big	uean															



2.1. MANUAL STYLING

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

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

Accounts F	Found 75 results.		Edit New Mas	ss Update Delete
ACTION	+ ACCOUNT NAME	▼ BILLING	CITY PARENT ACCOUN	IT 🚺 🔽 AC
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Edit Del	🕀 🥖 United Oil & Gas	s <u>, UK</u> Burlingt	ton <u>Burlington Textile</u>	es Corp of America
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Sum		
Parent Account: Blues AU (1)		Save Cancel
Edit Del 😝 🕖 <u>Blues FL</u>	B	
Parent Account: American Banking Corp. (2)		
Edit Del 🖶 🖌 <u>Blues FL3</u> BBB	A	



3. UNIQUE FUNCTIONALITY BY OBJECT

3.1. LEADS OBJECTS

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

3.1.1. MASS UPDATE BUTTON

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

A		Accounts (Default)	✓ ▲ Save	View Delete View Sa	ive as Ne	ew View Rel	resh				
ou	nd 79 result:	s • Sorted by Account Type Descen	iding		E	Edit New	Mass Update Delete C	Create Tasks Merge A	Accounts	Actions 🕤	
1	Action [+ Account Name t 💌	Account 💌	Annual Revenue	▼ Ac		Mass	Update			×
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m				\$3,985.00			Annual Revenue				
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	\checkmark	zaaapit	001d00000	\$26	1		Parent Account			Q	
m				\$26.00		×	Account Phone	IUS_PHONE		•	
P		be: Customer - Channel (5)				×	Account Phone	IIO3_PHONE		. <u>.</u>	
	~	Dickenson Plc	001d00000	\$50,000,000	XX	~	Billing Country	!!COUNTRY_LO	NG	•	
	*	Express Logistics And Trans	001d00000	\$950,000,000	Co		Shipping State/Province				
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m				\$1,030,980,000.00							
ł	Account Typ	be: Customer - Direct (11)					Industry	None		.owercase	
	\checkmark	Blues Us	001d00000		654		Account Rating	None 👻	L	Jppercase	
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	~	Constructions Ltd	001d00000				Account Type	None	Floperca	se Marine. Init Cap	
	۲	Ez Company	001d00000	\$31,111	Ed		Website		Propercas	e Names Init Caps	
	*	Grand Hotels & Resorts Ltd	001d00000	\$500,000,000	666						J
	*	Kely Ltd	001d00000	\$26	XC>	Deard	ew Update Selected Rows	Mass Update All Rows	0	Cancel Options	_
	~	Ron Limited	001d00000			Previ	ew opuate selected Rows	Mass opuate All Rows		Jancer Options	-
	*	United Oil & Gas Corp.	001d00000	\$5,600,000,000	Worl	ld's Third Larg	est Oil And Gas Company.			(212) 842-5500 ×111	Uni
	~	United Oil & Gas, Singapore	001d00000	\$3.331	Worl	Id's third large	st oil and das company.	Dickenson Plc		(650) 450-8810	Uni

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3.1.2. MERGE LEADS BUTTON (SIMPLE)

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

Hom	ne	Grid Mana	ger	Contacts	Accounts	Opportunities Lo	eads Campai	gns Events	Tasks	Attachments	Explorer 1	Explorer 2	Explorer Sub Ta	bs +		
	2	Leads (De	fault	▼ 🚳	Save View D	ielete ∨lew Save as Ne	w View								2	
-	_															
-	.ea	ds Found 52	results	1						Edit	New Mass	Jpdate Mass (Clone Delete Delet	e All M	erge Le	ads
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		Edit Del	1\$	Phyllis	Cotton	Merge Leads ~ Sales	force - Developer	Edition - Google	e Chrome	receiption lines	-	-		×	6/1/2	2016 4:
		Edit Del 🕂	≯	<u>Violet</u>	Maccleod	https://na14.sale	sforce.com/lead	l/leadmergew	izard.jsp?	currentStage=0	&goNext=Me	rge%20Leads	8id=00Qd000000	ZpQ3E	6/1/2	2016 4:
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		Edit Del 🖶	14	Patricia	Feager				Previou	s Merge Cano	E				8/22/	
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		Edit Del 🕀	14	Kathy	Snyder	Select the values that y retain read-only and hid	den field values. Th	e oldest Created	By date and	user will be retained	ds that contain co d in the merged r	nflicting data. Th ecord. Note: All r	e Master Record select elated records includin	ed will g any	8/22/	. •
		Edit Del 🕀	14	Tom	James	campaigns and activitie	s will be associated	I with the new me	rgea recora.						8/22/	Pages
		Edit Del 🖶	14	Shelly	Brownell		м	s Violet Maccleoc	d [Select All]		demo den	o2 [Select All]			8/22/	0
	0		17	<u>onony</u>	DIOWIICI	N	laster Record				0				0.22	0
	Pag	ge 1 of 6 [1-1) of 52	2]			Lead Owner	Ford Ben			🔍 Amir S	adeh				#1/6
								Ms Violet Maccl			🔍 demo d	emo2				
							Company 💿	Emerson Transp	port		🔘 zaaapi					

3.1.3. ADD TO CAMPAIGN

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

amu		-				_												
:	Smar	rt Mass Up	date™	Grid Manager	Leads	Contacts	Accounts	Opportunities	Quotes	Campaigns	Events	Tasks	Products	Pricebook Entries	; At	ttachments	Files	Nc
L	Leads	s (Default)	✓ ▲ S	ave View Delete	e View S	ave as New \	∕iew Refresh											
Fou	nd 4 results •	Sorted by Last	Modified Date A	Ascending			Edit	New Mas	s Update	Mass Clone	Delete	Merge	Leads	Add to Campaign	Actio	ons 🗢		
•	Action +	Full Na 🔻	First Na 🔻	Last Na 🔻	c▼ C	onverted	Compa		Ac	ld Leads t	to Carr	npaign			×	Status		Ŀ
~	*	ben ford	ben	ford	UK		Blues A							Edit La		Working - C	ontacted	
•		ben ford	ben	ford	UK 🛛		zaapit o	Add Leads to Campaign)	Create Sel	ected (4)	Create All	(4) Cancel		your	Open - Not	Contacted	
~	\checkmark	ben ford	ben	ford	UK		zaapit	Campaign							_	Working - C	ontacted	
•	٧	m n	rrr	rr			zaapit	Fill in the f	fields to c	reate 4 / 4 Ca	mpaign l	Members	;			Open - Not	Contacted	
								Campaign	[)(a						
								Status	Nor	ie 🗸								
										Create Sel	ected (4)	Create All	(4) Cancel					
															_			

3.1.4. MASS CONVERT



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

ART MASS	up date mart Mass l	lpdate™	Grid Manac	per Lea	ds Contac	ts Accounts	Opport	unities Quotes	Campaigns	Events	Tasks Produ	cts Pricebook	Entries Attachment	s Files Not	es Explorer 1	ے Explorer
	eads (Defau						opport		company.						ar angeler i	Lipiere
und 4 res	ults • Sorted by Li	ast Modified Da	te Ascending			Edit	New	Mass Update	Mass Clone	Delete	Merge Leads	Add to Campa	ign Actions 오	K,		
Action	+ Full Na	✓ First Na…	▼ Last Na	▼ C▼	Converted	Company	y / Acco	▼ Coun▼ Le	ad Sou V Ca	mpaions	Email	T			ast Modified	t 👻 Owr
¥	ben ford	ben	ford	UK		Blues Au				Conver			Mass Emails	ted	1/5/2024 4:50 PM	
~	ben ford	1	ford	UK		zaapit qq	q						Create Tasks	cted	1/5/2024 4:50 PM	A For
*	ben ford	ben	ford	UK		zaapit		Mass convert					Convert	d	1/5/2024 4:50 PM	A For
۷	n m	m	n			zaapit		Try to find an ex create a new Co	cisting contact	by using le t)	ad's email (befo	ore you	Mass Convert	cted	3/14/2024 10:05 F	PM Fo
								Overwrite th	ne lead-source				Copy Values			
								Overwrite the co matching contac		urce with t	ne lead's source	e when a	Show on Map			
								Find Accour Try to find an ex		hoforo vou		coount by	Export			
								comparing the le Account's Acco	ead's Company	/		against the	Import			
								Opportunities: [Create an oppor				_				
									Lead Owner		✓					
								An owner for the	e new contacts	/ Accounts	/ Opportunitie	s				
								Send email				, .				
								Send email to ov	wher upon new	contact/ac	count creation,	conversion.				
								Lead Status: [Closed - Conve	rted 🗸			•			
								Mass Co	onvert - Selected	(4) Ma	ss Convert - ALL	(4) Cancel				
me	Grid Manag	jer Conta	acts Acco	ounts	Opportun				inte Taeke	Attach	nonte Evo		olorer 2 Explore	er Sub Tabs	+	
~	Leads (De	ault) ▼	💰 Save Vi	ew I. Del	ete View I. S		lass Co	nvert				×				2
	20000 (200	uarty					Mass co	onvert Option	ns:							
Lea	1S Found 3 re	sults.	1					Contact d existing cor	ntact by usin	a lood's e	mail (before	Add to C	ampaign Mass Em	ails Create Ta	asks Convert	Mass
								e a new Conta			intan (berore	-				_
	Action	+ First N	💌 Last	N 💌	Cou 💌	Email	Find /	Account				- E	mail Bounced Date	Last Modifie	d↓ ▼ Status	s
	🖾t Del 🕀	≯ <u>demo</u>	demo	02	USA	<u>sales@za</u> ⊤	ry to fin	d existing acc		ig lead's	company	3 9/	13/2016 3:51 PM	9/13/2016 4:0	4 PM Open -	- Not Cor
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Pag	e1of1 [1-3 (of 3]														
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				Co	pyright©2	000-2016						ment len	ms of Use <u>508 Com</u>	ipliance Go to	Salesionen	
									Start Mass	Convert	Cancel					

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



Tab Mailles allu Labers		<u></u>		
Maps and Location	Edit Replace	Salutation	Picklist	
Home		First Name	Text(40)	
Activities		Last Name	Text(80)	
Campaigns	Edit N	lo. of Employees	NumberOfEmployees	Number(8, 0)
Leads	Edit P	hone	Phone	Phone
Fields	Replace Fdit R		Rating	Picklist
Related Lookup Filters		itle	Title	Text(128)
Validation Rules		Vebsite	Website	URL(255)
Triggers		vebsite	Website	URE(200)
Page Layouts				
Field Sets	Lead Custom F	ields & Relationships	New Map Leas	d Fields Field Dependencies
Compact Layouts	Action	Field Label	API Name	Installed Package
Search Layouts	Action	Field Label	API Name	Installed Package
Search Layouts Lead Assignment Rules	Edit	Correlation Data	SFGA_Correlation_Data_c	Salesforce for Google AdWords
Search Layouts				-
Search Layouts Lead Assignment Rules Lead Settings Buttons, Links, and	Edit	<u>Correlation Data</u> <u>CorrelationID</u>	SFGA_Correlation_Data_c	Salesforce for Google AdWords
Search Layouts Lead Assignment Rules Lead Settings Buttons, Links, and Actions	Edit Edit	Correlation Data CorrelationID Create Task	SFGA_Correlation_Data_c SFGA_CorrelationID_c	Salesforce for Google AdWords Salesforce for Google AdWords
Search Layouts Lead Assignment Rules Lead Settings Buttons, Links, and Actions Lead Processes	Edit Edit Edit Del Replac	Correlation Data CorrelationID Create Task	SFGA_Correlation_Data_c SFGA_CorrelationID_c zaapit_Create_Task2_c	Salesforce for Google AdWords Salesforce for Google AdWords ZaapIT Tools
Search Layouts Lead Assignment Rules Lead Settings Buttons, Links, and Actions	Edit Edit Edit Del Replac Edit Del Replac	Correlation Data CorrelationID Create Task Create Task (M)	SFGA_Correlation_Data_c SFGA_CorrelationID_c zaapit_Create_Task2_c zaapit_Create_Task_c	Salesforce for Google AdWords Salesforce for Google AdWords ZaapIT Tools
Search Layouts Lead Assignment Rules Lead Settings Buttons, Links, and Actions Lead Processes Record Types	Edit Edit Edit Del Replac Edit Del Replac Edit Del	Correlation Data CorrelationID Create Task Create Task dup	SFGA_Correlation_Data_c SFGA_CorrelationID_c zaapit_Create_Task2_c zaapit_Create_Task_c dup_c	Salesforce for Google AdWords Salesforce for Google AdWords ZaapIT Tools

3.2. ACCOUNTS OBJECT

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

3.2.1. MERGE ACCOUNTS

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



3.2.2. CONTACTS - DRILL DOWN

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

SMA	RT MASS UPDATE			_								
::	Smart	Mass Update™ G	rid Manager	Leads Contacts A	Accounts Opport	unities Quotes	Campaigns	Events	Tasks Pro	ducts Pricebook Entries	Attachments	Files No
A	All Acc	counts (Default)	✓ ▲ Save	View Delete View Save	as New View Refre	sh						
Four	nd 79 p suits • :	Sorted by Account Type Descen	ding		Edit New	Mass Update	Delete C	Create Task	s Merge Acco	unts Actions 🗢	× /	
, K	Action +	Account Name t 💌	Account 💌	Annual Revenue	Account Descriptio	n			Parent Account		ing Cou	Shipping S
• A	ccount Type:	Technology Partner (2)								Contacts - Drill Down		
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•	~	zaaapit	001d0000	\$3,434						Add Account Contact Role	ited States	
Sum				\$3,985.00								
• A	ccount Type:	Channel Partner / Reseller ((2)							Billing Map		
•	~	Hotel inc	001d00000	\$0	(781) 270-6511, *166	56				Import BZ1	ישו	
1	\checkmark	zaaapit	001d00000	\$26	1					Add Industry	ited States	
um				\$26.00						Add Industry		
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	¥	Express Logistics And Trans	001d00000	\$950,000,000	Commerical logistics	and transportation	company.			•	ited States	
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1	\checkmark	Pyramid Construction Inc.	001d00000	\$950,000					Express Logistics 7	And (014) 427-4427	France	WA
1	\checkmark	ZAAP1	001300000	\$30,000,000	222, (650) 867-3450	, zzzt555				111	United States	CA
Sum				\$1,030,980,000.00								
• A	ccount Type:	Customer - Direct (11)										
 	*	Blues Us	001d00000		6546				Blues Entertainme	nt C (456) 577-8888 x8	United States	
/		Burlington Textiles Corp Of	001d00000	\$350,000,000	XXX				Express Logistics /	And (336) 222-7000	United States	Louisiana
/	¥	Constructions Ltd	001d00000							22	United States	
1	\checkmark	Ez Company	001d00000	\$31,111	Edge, founded in 19	98, is a start-up base	ed in Austin, TX.	The c		(512) 757-6000 ×1	United States	Texas
1	\checkmark	Grand Hotels & Resorts Ltd	001d00000	\$500,000,000	666				Express Logistics /	And (312) 596-1000 x1	United States	IL.
1	\checkmark	Kely Ltd	001d00000	\$26	xcxcxcxc, kk					(386) 868-3525	Australia	
•	~	Ron Limited	001d00000							123	United States	
1	~	United Oil & Gas Corp.	001d00000	\$5,600,000,000	World's Third Larges	t Oil And Gas Comp	any.			(212) 842-5500 ×111	United States	Kansas
-	¥	United Oil & Gas. Sincapore	001d00000	\$3.331	World's third largest	oil and das company	<i>l</i> .		Dickenson Plc	(650) 450-8810	United States	
Page	1 of 4 [1-25 c	of 79]			< Previous 1	2 3 4	Next >					

d 40 results	Sorted by Account A	scending			Edit	New M	ass Update	Mass Clone	Delete	Merge Contacts	Add to Campaign	Actions 🗢			Search
Action	+ Full Name 💌	Email	Owner 💌	Campaign				Account	Mailin	g State/Province	Mailing Coun	try 💌 Acc.Billing Country	First Name	💌 Last Name	Created By
~	Carolyn Cren	carolync@acei	1	International Electrical E	ingineers As	sociatio		Ace Iron And S	e Alaba	ma	United States		Carolyn	Crenshaw	Ford Ben
~	Suzi Ford	rose@zaapit.com	Ford Ben	DM Campaign to Top Cr	ustomers - N	ov 12-2		Blues Au			United States	United States	Suzi	Ford	Ford Ben
~	Jack Rogers	sales_us33@za	Ford Ben	International Electrical E	ingineers As	sociatio		Burlington Text	e North	Carolina	United States	United States	Jack	Rogers	Ford Ben
~	Babara Levy	b.levy@express	Ford Ben	DM Campaign to Top Ci	ustomers - N	ov 12-2		Express Logist	cs zzz		United States	United States	Babara	Levy	Ford Ben
~	Josh Davis	j.davis@expres	Ford Ben	GC Product Webinar Ja	n 7 2017, DP	A Camp		Express Logisti	cs		United States	United States	Josh	Davis	Ford Ben
~	Ruth Jones	ruth@rjones.com	Ford Ben	DM Campaign to Top Ci	ustomers - N	ov 12-2		Express Logisti	cs		United States	United States	Ruth	Jones	Ford Ben
~	Benz Young	sales_xxx@zaa	Ford Ben	DM Campaign to Top Ci	ustomers - N	ov 12-2		Ez Company				United States	Benz	Young	Ford Ben
~	хоох ууу	sales_ron@zaa	Ford Ben	DM Campaign to Top Ci	ustomers - N	ov 12-2		Ez Company			USA	United States	XXXXX	ууу	Ford Ben
~	хох уууу	sales_us44@za	Ford Ben	DM Campaign to Top Ci	ustomers - N	ov 12-2		Ez Company	aaa		United States	United States	XXX	уууу	Ford Ben
~	Rose Gonzalez	rose@edge.com	Ford Ben	DM Campaign to Top Ci	ustomers - N	ov 12-2		Ez Company	А		United States	United States	Rose	Gonzalez	Ford Ben



3.3. CONTACTS

All functionalities under contacts have been previously discussed.

3.4. OPPORTUNITIES OBJECT

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

3.4.1. ACCOUNTS - DRILL DOWN

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

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3.5. CAMPAIGNS OBJECT

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

3.5.1. EVENTS & TASK OBJECT

Edit and New were previously discussed.

3.5.2. LIGHTNING ICON / BUTTON / VIEW DETAILS

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

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3.5.3. MASS CLONE

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

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

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4. APPS & FEATURES

4.1. SMART-ACTIVITY-MANAGER>OVERVIEW TAB

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







4.2. DEDUPE-MANAGER > OVERVIEW TAB

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







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

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



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

Useful videos:

-		ts by Email 🕘	Contacts by Name	Accounts by Name 🖸	Lead w Contact (Email) Mass Merge	Lead w. Contact (Name)	Lead w. Account	Contact w. Lea
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um				Custom advanced / SOOL filter	r.			
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				Run automatically on Day Batch Size: 50 🗸 🥝	of month 🖌 or Day of	week 💙 at time: Every hou	r 🕶 : 💿 💌 🥹	
				Total duplicates to merge:	17/305			
				Tip #1: If you want to see your				

Figure 2 - Merge Jobs / Auto Merge

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

4.4. CREATING A CUSTOM DEDUPE FORMULA FIELD

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

Creating the formula field: Start by creating a <u>custom salesforce formula field</u> and use that inside the custom dedupe (you can mix and match the following examples and then use formula as the main

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dedupe field: https://www.youtube.com/watch?v=SEBSFRIhNnw

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

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

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4.5. DEDUPE-MANAGER > SMILIAR OBJECT BY CRITIRIA TABS

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

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

https://www.youtube.com/watch?time_continue=14&v=GZ0AGNQGoXM

A Similar Accounts by Name - first 1200 (Default) Save View Dekte View 5 Save View Dekte View 5 Found 9 results - Sorted by Account Name Acconding Lett Mare Update Account Name + Created Date P Billing Str V Account Phone V Account Name: Acc fron And Steel Inc. (2) Search P Sort Account V Ace Iren And Steel Inc. (2) V Ace Iren And Steel Inc. (2) V Ace Iren And Steel Inc. (16/2024 5:11 PM V Createn Add Steel Inc. (16/2024 4:51 PM Combine non-master with des Search V Ace Iren And Steel Inc. (16/2024 4:51 PM Combine non-master with des Search Search Here Combine non-master with des 	Mass Clone	Delete Merge Acc		Actions O	▼ Website		Edit Layout	Links 🔞
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Combine non-master with billin Combine Destination (auto)	igstate		py phone numbers from all t field and copy the phone					
			e field if empty. This option					
			ues, emails & multi-picklist ni-colonm other fields are					
		combined by a commi						
			hest value: keep the lowest					
		/ highest value based	I on the sort order. Jest value: keep the newest					
			alue based on the created					
		date field, the created on the grid as a colum	d-date field must be present					

Figure 3 - dedup-manager Combine values!





	ER			Q. Search						× -	1?¤4	۱ (©
Overview	Jup Manager™ Jobs 💿 🛛 Leads by	Email 2 Leads by Name 2 Co	ontacts by Email 💿 🚺 C	Contacts by Name 🛛	Accounts by Na	me 🖸 🛛 Lead w Conta	uct (Email) Lead y	v. Contact (Name)	Lead w. Account	Contact w. Lead (Ema		10
		Name - first 1200 (Default) 🗸									Edit Layout	Links 🕜
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Mast	ter record										Powered by Za	apiT.com

Figure 4 - Mass Merge

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

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

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

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



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

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

rview Jobs (72)	Leads by Email 🔀 Lead	ds by Name 🛄 Contacts by Email	Contacts by Name	Accounts by Name	Lead w. Contact (Email) 🔟 Lea	ad w. Contact (Name) Lead w. Account	Attachments 🔘	
			Find matching and	non matching r	ecords as CSV Files				
				non-matching i	ecolds as CSV files				
		file or paste the file content direct	y from your spreadsheet:						
oose / Drag file:	hoose File_dup_test_file_tab	b_del.txt							
e Content / Preview :									Tab-delimited / Unicode / Copy-Past
ist Name First Na ord Benny sales_u	ime Email s@zaapit.com								
	s@zaapit.com								
nd.Danaslan	And Ane								
Fields Mapping & M									Acronyms/ Synonyms/ Prefixes/ Suffixes
Fields	Expected Value	Select content Column	Selected Value	Matching Criter		Matching Criteri		Matching Cr	
ist Name	STRING	Last Name 🔹			▼ Clean Name & Pl ▼	Please Select			t * Please Select *
rst Name	STRING	First Name 🔹	Column:1	Use all words	Clean Name & Pl	Please Select	Please Select *	Please Selec	
nail	EMAIL	Email	Column:2	Please Select	v Search	Use all words	Exact Match	Please Selec	t * Please Select *
nnual Revenue	CURRENCY	Please Select / Custom Value *	Map / Actual Value	Please Select	Please Select Exact Match	Please Select	Please Select +	Please Selec	t 🔻 Please Select 🔻
ay	STRING	Please Select / Custom Value *	Map / Actual Value	Please Select	Clean Name: Acronyms/ Synonyms/	Please Select	Please Select 🔻	Please Selec	t * Please Select *
ompany	STRING	Please Select / Custom Value *	Map / Actual Value	Please Select	Prefixes/ Suffixes/ Ignore Order	Please Select	Please Select *	Please Selec	r. * Please Select *
onverted Account ID	ID • RO	Please Select / Custom Value *	Map / Actual Value	Please Select	Clean Name & Phonetic Match	Please Select	Please Select *	Please Selec	t * Please Select *
onverted Contact ID	ID TRO	Please Select / Custom Value •	Map / Actual Value	Please Select	* Please Select *	[Please Select	Please Select *	Please Selec	r 🔻 Please Select 🔻
): Read-only fields.									
Custom advanced /	SOQL filter:								
sconverted=false									
OOL Filter Wizard Ch	ieck Syntax & Recalculate total	6							



4.8. DEDUP-MANAGER > JOBS > IMPORT JOB:

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

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

	Leads by Email 2 Leads by Nan	ne 3 Contacts by Email 0	Contacts by Name O Accounts by Name	Lead w Contact (Email) Lead w. Cont	act (Name) Lead w. Account	Contact w. Lead (Email)
Jobs (Defaul	r —					
nd 65 results			Advanced Import			×
ind op results	1) Choose a CSV / Tab-delimite	d / Unicode Text File or paste	the file content directly from your spread	sheet:		
Action	Choose / Drag file: Choose File	No file chosen				3.1
~	File Content / Preview :				Tab-delimited / Unicode /	Copy-Paste 🗸
¥	email					
¥	aaa@aAA.A					
*						
*	2) Fields Mapping:				Load / Save Fi	eld Mappings
¥	SF Fields	Expected Value	Select content Column	Selected Value	Unique / Dupe 🔞 <	Use this field to detect D
¥	Email	EMAIL	email 🗸	Column:0		
*	Annual Revenue	CURRENCY	Please Select / Custom Value 🗸	Map / Actual Value		đ
~	City	STRING	Please Select / Custom Value 🗸	Map / Actual Value		
¥	Company	STRING	Please Select / Custom Value 🗸	Map / Actual Value		
	Country	STRING	Please Select / Custom Value 🗸	Map / Actual Value		
	Description	TEXTAREA	Please Select / Custom Value 🗸	Map / Actual Value		
	Fax	PHONE	Please Select / Custom Value 🗸	Map / Actual Value		
	First Name	STRING	Please Select / Custom Value 🗸	Map / Actual Value		
	Geocode Accuracy	PICKLIST	Please Select / Custom Value 🗸	Map / Actual Value		
	Individual ID	ID ¥	Please Select / Custom Value 🗸	Map / Actual Value		
	Industry	PICKLIST	Please Select / Custom Value 🗸	Map / Actual Value		
	a	BOOLENN	las at the total	Takan / Annual Malue		•
	Decimal / Currency value cleanup		es 🗸	~		
	Empty cells strategy:	Skip / Ignore empty valu	es 🗸			-



4.9. DEDUP-MANAGER > MERGING CROSS OBJECT DUPLICATES:

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

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

overview 🚺 Jobs 🚥	Leads by Email 🔟	Leads by Name 🔟	Contacts by Email 💿	Contacts by Name 🖸	Accounts by Name 🔯	Lead w. C	ontact (Email) 🔟	Lead w.	Contact (Name) 🚺	Lead w. Account
Lead w. Contac	t - Same Email (De	fault) ▼ 🐻 Save View	/ Delete View Save as New	/ View						
.ead w. Contact - San	ne Email Found 15 result	5.	Edit	New Mass Update M	ass Clone Delete Merge L	eads Conv	vert Actions	×		
ACTION	EMAIL	FIRST NAME		Mass Convert		×			COUNTRY T	ZIP/POSTAL CODE
 Email: sales_us@zaapi 	it.com (6)			Mass convert		_	Add to Campaign			
🖌 Edit Del 🌐 🥖	sales us@zaapit.com	Amir	Mass convert Optic	ons:			Mass Convert	d1	USA	
🖌 Edit Del 🔂 🥖	sales us@zaapit.com	Benny	💽 Find Contact				Mass Merge	d1	USA	
🖌 Edit Del 🛟 🥖	sales_us@zaapit.com	Benny	Try to find an existing new Contact & Accourt		email (before you create	a		d1	USA	
🖌 Edit Del 😗 🗲	sales us@zaapit.com	Benjamin	Overwrite the lead				Export	d1	USA	
🖌 Edit Del 🜐 🥖	sales us@zaapit.com	Benjamin		source 's lead-source with the le	ad's source when a		Open - Not	Contacted1	USA	
🖌 Edit Del 🔀 🥖	sales us@zaapit.com	Caty	matching contact is fo				Open - Not	Contacted1	USA	
 Email: sales_us5@zaap 	pit.com (4)		Find Account							
Edit Del 🜐 🗲	sales_us5@zaapit.com	Caty		account before you cre			Open - Not	Contacted1	USA	
- Edit Del 😝 🗲	sales us5@zaapit.com	Ben	comparing the lead's Account's Account N		 field against the 		Open - Not	Contacted1		
Edit Del 🔂 🗲	sales us5@zaapit.com	Amir					Open - Not	Contacted1		
🖌 Edit Del 🛟 🥖	sales us5@zaapit.com	Benny		create any opportunitie for each/first converted			Open - Not	Contacted 1		
				Owner 🔻						
				contacts / Accounts / O	pportunities					
			Send email to own	1er						
				ipon new contact/accou	nt creation/conversion.					
			Lead Status: Close	d - Converted 🔻						
			Mass Convert - 5	elected (10) Mass Cor	vert - ALL (15) Cancel					
ross object det	ection and elir	nination								
/ith Mass-merge,	mass-convert	mass-undate etc								
interge,	,									

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

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

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

Creating a custom formula to de-duplicate your data:

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

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create a custom field named "SLA Serial number".

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



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

ontacts	Acco	ounts Oppor	rtun	ities Leads Ca	mpaigns Events Tasks /	Attachments E	xplorer 1 Explore	r 2 Explorer Sub Tal
	0	Accounts (D	efau	ilt) ▼ \land Sav	e View Delete View Save as Ner	w View Refresh		
	Acco	unts Found 79	res	ults.		Edit Nev	Wass Update Dele	te Copy Values Crea
		Action	+	Account Name	Parent Account	Billing Con 💌	SLA Serial Nu 💌	Website
		Edit Del 🜐	\$	Blues AU	Blues Entertainment Corp.	USA	22	http://zaapit.com
		Edit Del 🕀	4	Joby		USA		http://aaa
		Edit Del 🔀	+	<u>kely</u>		USA		
		Edit Del 🜐	4	Joby		USA		
		Edit Del 🜐	\$	Bon		USA		
		Edit Del 🜐	4	GenePoint66	Express Logistics and Transport	USA	7324	http://www.genepoint.co
		Edit Del 🜐	+	GenePoint2	Express Logistics and Transport	USA	7324	http://genepoint.com
		Edit Del 🜐	4	Express Logistics		USA	4724	http://expressl&t.net
		Edit Del 🜐	+	Dickenson plc	Express Logistics and Transport	USA	3213255	http://dickenson-consul
		Edit Del 🜐	4	Pyramid Construct	Express Logistics and Transport	France	9840	http://pyramid.com
		Edit Del 🜐	+	GenePoint5	Express Logistics and Transport	USA	7324	http://www.genepoint.co
		Edit Del 🜐	4	Ron		USA		
		Edit Del 🜐	+	Blues US	Blues Entertainment Corp.	USA		http://zaapit.com
		Edit Del 🕀	4	test11				
		Edit Del 🜐	+	Constructions Ltd		USA		
		Edit Del 🜐	4	United Oil & Gas C	Dickenson plc	USA	6654	http://www.uos.com
		Edit Del 😝	1	Liniversity of Arizona	Express Logistics and Transport	USA	8350	http://universitvofarizona

Before the update:

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F

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

	· · · · · · · · · · · · · · · · · · ·	ilt) ▼ 🚳 Sav	e View Delete Vie	w Save as New View Refre	isn			
Acco	ounts Found 79 res	uits.		Edit	New Mass Update	Delete Copy Values Create	Tasks Merge A	ccounts
	Action +	Account Name	Parent Account	💌 Billing Cou	. 💌 SLA Serial Nu	website	▼ Ow ▼	Last Modified
	Edit Del 🕕 🗲	Blues AU	Blues Entertainme	nt Corp. USA		http://zaapit.com	Ford Ben	7/31/2016 11:
	Edit Del 🜐 🗲	Joby		USA		http://aaa	Ford Ben	8/8/2016 10:3
	Edit Del 🜐 🗲	kely	Mass Upd	ate			× Ben	7/31/2016 11:
	Edit Del 🕕 🗲	Joby	-					7/31/2016 11:5
	Edit Del 🜐 🗲	Bon	Update	Field Account Name	New Value		Ben	7/31/2016 11:
•	Edit Del 🜐 🗲	GenePoint66	Exc				Ben	7/31/2016 11:
	Edit Del 🕕 🗲	GenePoint2	Ext	Parent Account		G	Ben	7/31/2016 11:
•	Edit Del 🕕 🗲	Express Logistics		Billing Country			Roy	3/13/2016 9:22
	Edit Del 🔁 🗲	Dickenson plc	Ext	SLA Serial Number			Roy	4/19/2016 11:4
	Edit Del 🕕 🗲	Pyramid Construct	Exe 🔍 🔪	Website			Roy	2/24/2016 2:1
	Edit Del 🕕 🗲	GenePoint5	Exp	Owner		9	Ben	7/31/2016 11:
	Edit Del 🕕 🗲	Ron		Account Number			Ben	7/31/2016 11:5
	Edit Del 🕕 🗲	Blues US	Blu	Account Fax			Ben	7/31/2016 11:
	Edit Del 🕕 🗲	test11		Industry	Available	Chosen 🔺	Roy	5/18/2016 8:1
	Edit Del 🜐 🗲	Constructions Ltd			HR	•	Ben	7/31/2016 11:5
•	Edit Del 🕕 🗲	United Oil & Gas C	Dic		Research	•	Roy	7/3/2016 10:4
	Edit Del 🕕 🗲	University of Arizona	Ext	Active	Yes		Roy	7/3/2016 10:4
	Edit Del 🜐 🗲	Grand Hotels & Re	Exp		4		Roy	7/3/2016 10:4
	Edit Del 🖌 🗲	Burlington Textiles	Ext	Preview Update Sele	cted Rows Mass U	pdate All Rows 🥑 Ca	ncel Roy	6/28/2016 7:3
•	Edit Del 🕕 🗲	Edge Communicat	Express US	USA	2657	http://edgecomm.com	Ron Roy	11/26/2015 6:
	Edit Del 🜐 🗲	United Oil & Gas	Dickenson plc	USA	2457	http://uos.com	Ron Roy	7/3/2016 10:4

The mass update result:

cts Acco	ounts Opportu	nities Leads Campaigns Events Tasks A	ttachments Ex	plorer 1 Explorer	2 Explorer Su	bTabs 🕂
- 🧑	Accounts (Defa	ult) • Save View Delete View Save as New	v View Refresh			
Acco	unts Found 79 re	suits.	Edit	New Mass Update	Delete Copy Valu	ues Create Tasks Me
	Action -	+ Account Name v Parent Account	Billing Cou	SLA Serial Nu 👻	Account Ph 👻	Website
	Edit Del 🌐 🤊	Blues AU Blues Entertainment Corp.	USA	Blues AU43467	434677788	http://zaapit.com
	Edit Del 🜐 🤊	Joby	USA	Joby111	111	http://aaa
	Edit Del 😗 🥬	✓ kely	USA	kely11	11	
	Edit Del 🜐 🤉	4 Joby	USA	Joby		
	Edit Del 🜐 🥬	Bon	USA	Bon		
	Edit Del 🜐 🤊	GenePoint66 Express Logistics and Transport	USA	GenePoint6(650)	(650) 867-3450	http://www.genepoint.co
	Edit Del 🜐 🤊	GenePoint2 Express Logistics and Transport	USA	GenePoint2(650)	(650) 867-3450	http://genepoint.com
	Edit Del 🜐 🤊	Express Logistics	USA	Express Lo(503)	(503) 421-7800	http://expressi&t.net
	Edit Del 🜐 🥬	Dickenson plc Express Logistics and Transport	USA	Dickenson i8i8i	181818mm9	http://dickenson-consul
	Edit Del 🕕 🥬	Pyramid Construct Express Logistics and Transport	France	Pyramid Co(014) 🥖	(014) 427-4427	http://pyramid.com
	Edit Del 🌐 🤊	GenePoint5 Express Logistics and Transport	USA	GenePoint5(650)	(650) 867-3450	http://www.genepoint.co
	Edit Del 🜐 🤉	Ron	USA	Ron123	123	
	Edit Del 🌐 🤊	Blues US Blues Entertainment Corp.	USA	Blues US45657	45657788888	http://zaapit.com
	Edit Del 🜐 🤊	test11		test11		
	Edit Del 🜐 🕫	Constructions Ltd	USA.	Constructi22	22	
	Edit Del 🜐 🤊	United Oil & Gas C Dickenson plc	USA	United Oil(212)	(212) 842-55001	http://www.uos.com
	Edit Del 🜐 🤊	University of Arizona Express Logistics and Transport	USA	University(520)	(520) 773-9050	http://universityofarizon
	Edit Del 🔀 🤊	Grand Hotels & Re Express Logistics and Transport	USA	Grand Hote(312)	(312) 596-1000	http://grandhotels.com
	Edit Del 🗸 🤊	Burlington Textiles Express Logistics and Transport	USA	Burlington(336)	(336) 222-7000	http://burlington.com
	Edit Del 😗 🤊	Edge Communicat Express US	USA	Edge Commu(512)	(512) 757-60001	http://edgecomm.com
	Edit Del 🌐 🥬	United Oil & Gas. Dickenson plc	USA	United Oil(650)	(650) 450-8810	http://uos.com
				4		



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

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

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

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

4.11. ADDING A SMART RELATED LIST / CUSTOMER VIEW

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

Adding a related list in lightning: <u>https://www.youtube.com/watch?v=-ly2C_aI7PA</u> Adding a related list in Classic: <u>https://www.youtube.com/watch?v=fxaLcHxePbI</u> Adding a customer view: <u>https://www.youtube.com/watch?v=9jJw9RRydW8</u>



Setting the Related List Reference Field:



Using the Advanced filter to set the connection:

Table without sub-tabs		
▼ Customer View		
Overview Account Hierarchy Related Accounts 💿	Related Contacts 💯 Related Opportunities 💯 Related Tasks 💯 Related Events 🕕 Campgins 🕽	 Image: A second s
Campigns (Defaul	Layout Editor	.ayout Links 🤣
Campigns Found 0 results.	Sort by Field #3 Please Select Sort by Direction Ascending Apply shading Group G	Q
Action + Name t Active	rows by sort d Leads 🔍 Created By	
Sum	Advanced Filter (SOQL style)	
Page 1 of 1	Add Condition: - Select a Field Rows per	er page 10 🔻
	(d in (select <u>Campagnia</u> from <u>Campagnidember</u> where <u>Contactin</u> =(ID))	ered by ZaapIT.com
	Check Syntax	
	Examples: amount-0 and quantity=3 and ownerid=[Userinfo Userinfo and CreatedDate > TODAY. You can use the current table's fields with SOQL operations.	
	Ure (Userin Userin) for the logad-in Useria Example contended-(-Userin). Use (ID) for the current parenti) for the VIII. (How): Example: contended(-ID) Use (-ID) is the current <u>Hierarchy (ID</u> (of the current id=xxxx), Example: accountid=(HID).	
	In case of an unexpected/problematic result you can empty this field (named "extraConditionFilter") under setup-custom settings.	