

BATCH ME

Your Gateway To Effortless Batch Processing

BATCH ME

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Batch Me Overview

- BatchMe is a robust solution designed to streamline the scheduling and execution of batches for a diverse range of objects. With its powerful features, BatchMe simplifies complex processes, allowing users to efficiently manage and automate tasks.
- The entire operation is facilitated through an intuitive user interface, ensuring a user-friendly experience. Whether scheduling recurring tasks or executing one-time operations, BatchMe offers a seamless and efficient solution for optimizing workflow and enhancing productivity.

Key Features

- Scheduled batch processing.
- Object-based operations.
- Condition-based record manipulation.
- Scalability and Performance.
- Dynamic query and methods.
- No coding Required.

Advantages

- Simplified batch process scheduling.
- No coding knowledge required, reducing dependency on developers.
- Efficiently perform complex operations through point and click actions.
- Time saving.
- Efficient data management.

Stages in crafting a batch rule

Creating a Batch Rule: Initial View

Batch Me [Create Batch](#) [Apex Scheduler](#) [Batch Rules](#) [Batch Filters](#) [Batch Values](#) [Logs](#)

Search...

Batch Rules [New](#)

	Batch Name	Batch Size	Create Update Action	Create Update Object	Filter Expression	Source Object	Source Object API	Source Object API R...	
1	QueryCheck	2	Updatesamerecord		1 AND (2 OR 3)	Account	Account		
2	Create Contact	20	Create	Contact	1 OR 2	Account	Account	Contact	
3	Update Opportunity ...	200	Update	Opportunity	1 AND 2	Account	Account	Opportunity	
4	UpdatesameBatch	10	Updatesamerecord		1 AND 2	Candidate	BatchMe__Candidate...		
5	Batch0020	20	Updatesamerecord		1 AND 2	Account	Account		
6	CreateBatch	20	Create	project detail	1 AND 2	Candidate	BatchMe__Candidate...	BatchMe__project_de...	
7	AccountId Batch	2	Create	Contact	1	Account	Account	Contact	
8	Account Batch Rule	200	Updatesamerecord		1 AND 2	Account	Account		
9	NBR001	20	Updatesamerecord		1	Account	Account		
10	B0001	300	Create	Contact	1 AND 2	Account	Account	Contact	
11	batch new	20	Updatesamerecord		1	contact	Contact		
12	B0002	3	Updatesamerecord		1	Opportunity	Opportunity		
13	Batc0001	20	Create	Contact	1 AND 2	Account	Account	Contact	

Step 1: Setting Up Batch Rule Information

Defining Rule Attributes

Batch Me Create Batch Apex Scheduler Batch Rules Batch Filters Batch Values Logs

Batch Rules

Step 1 of 4: Configure the details of a Batch Rule

* Batch Name
BR00100

* Source Object
Account

* Batch Size
20

Source Object API
Account

Next

Batch Name	Batch Size	Action	Filter	Mapping	Source Object API	Source Object	Target Object
1 QueryCheck							
2 Create Contact							
3 Update Oppor							
4 UpdatesameB							
5 Batch0020							
6 CreateBatch							
7 AccountId Bat							
8 Account Batch							
9 NBR001							
10 B0001	300	Create	Contact	1 AND 2	Account	Account	Contact
11 batch new	20	Updatesamerecord		1	contact	Contact	
12 B0002	3	Updatesamerecord		1	Opportunity	Opportunity	
13 Batc0001	20	Create	Contact	1 AND 2	Account	Account	Contact

Step 2: Filter Expression and Conditions Setup

Condition Based Record Manipulation

Step 2 of 4: Define Criteria to narrow down the selection of records

* Filter Expression

1 AND 2

S.No	Field	Operator	Value	Action
1	Account Rating	Equals	Warm	
2	Active	Equals	Yes	

[Add Filter](#)

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Step 3: Setting Up Actions for Record management

Define Create/Update Operations

Batch Me Create Batch Apex Scheduler Batch Rules Batch Filters Batch Values Logs

Batch Rules

Step 3 of 4: Set up action to create/update records

* Action Name Create / Update Object

Create Contact

Source Object API Reference

Contact

Previous Next

Batch Name	Batch Size	Action	Source Object	Target Object	Mapping
1 QueryCheck					
2 Create Contact					
3 Update Oppor					
4 UpdatesameB					
5 Batch0020		Create	Contact	Contact	
6 CreateBatch					
7 AccountId Bat					
8 Account Batch					
9 NBR001					
10 B0001	300	Create	Contact	Account	Account
11 batch new	20	Updatesamerecord	1	contact	Contact
12 B0002	3	Updatesamerecord	1	Opportunity	Opportunity
13 Batc0001	20	Create	Contact	Account	Account

Step 4: Field Mapping for Data Transformation

Setting Up Field Mapping for Transformation

Step 4 of 4: Map fields to determine how data should be transformed

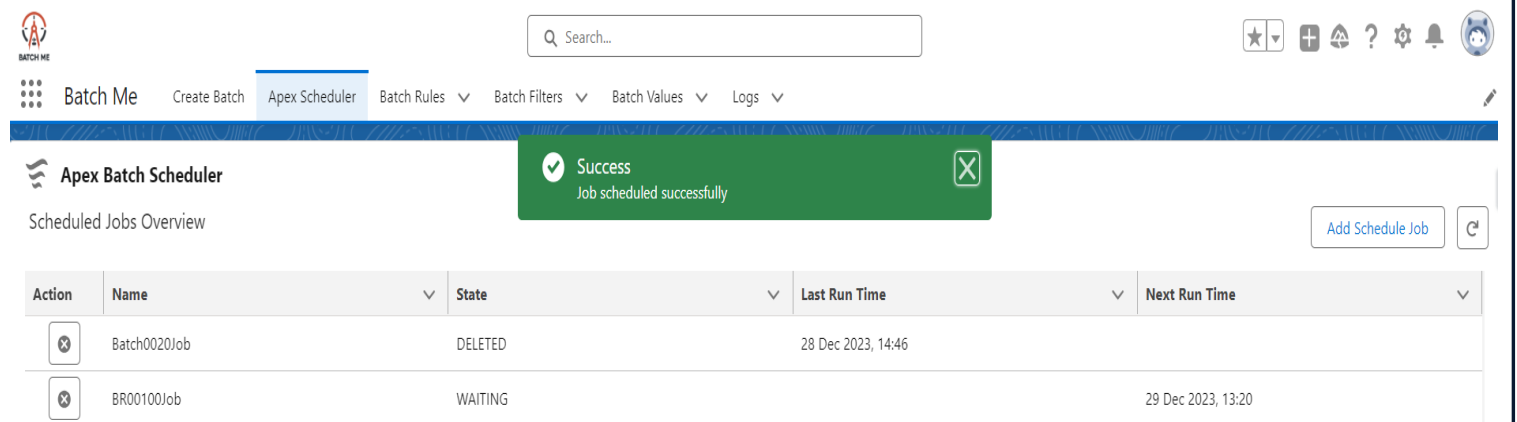
S.No	Field	Mapping Type	Value	Action
1	Account ID	Field	Account ID	
2	Last Name	Value	Srikrishna	
3	Contact Description	Value	Created using BatchMe	

[Add Fields](#)

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Apex Scheduler: Job Scheduling

- The Apex Scheduler serves as a centralized hub for scheduling and managing jobs based on the batch rules defined in earlier stages.
- Intuitive interface to effortlessly schedule and manage jobs.

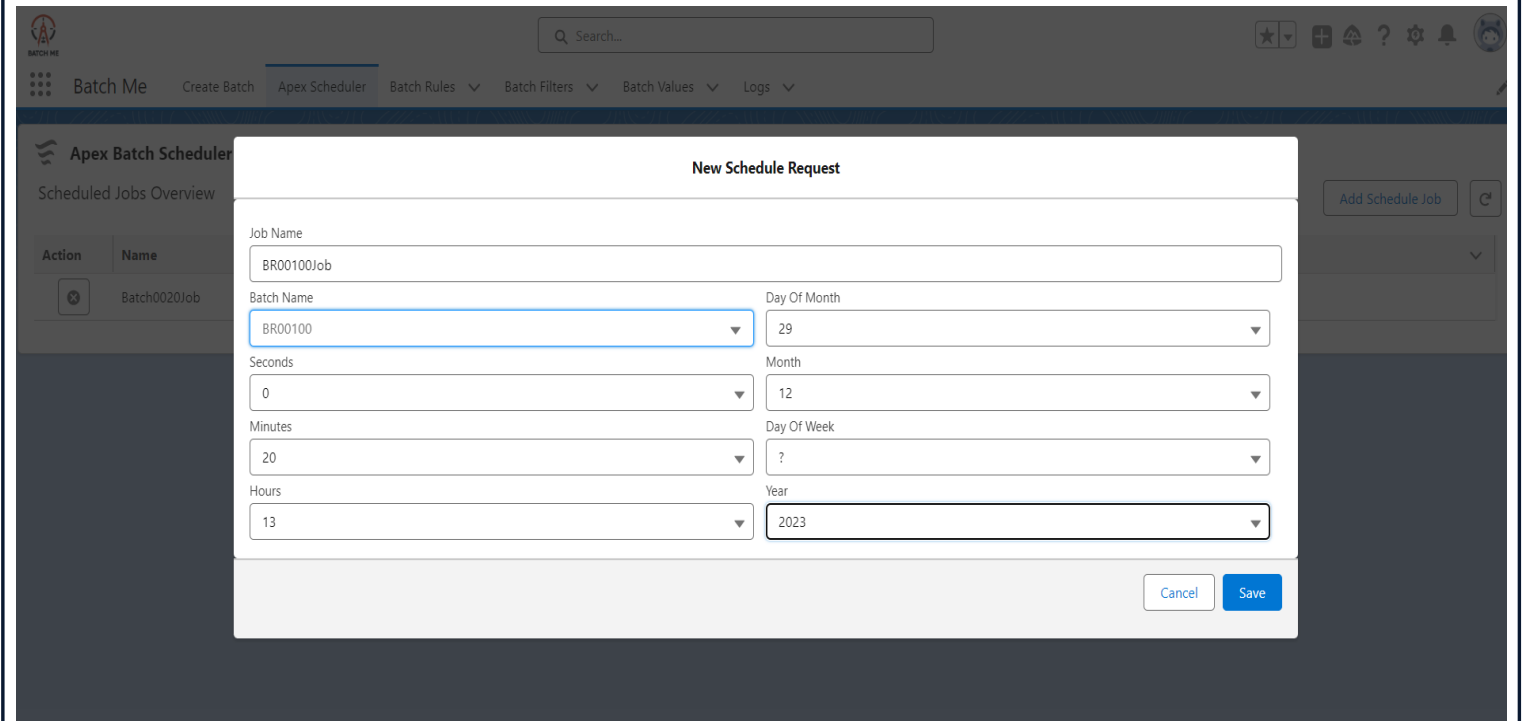


The screenshot displays the Apex Batch Scheduler web interface. At the top, there is a navigation bar with a search bar and various utility icons. Below this, a menu bar includes 'Batch Me', 'Create Batch', 'Apex Scheduler' (which is the active tab), 'Batch Rules', 'Batch Filters', 'Batch Values', and 'Logs'. The main content area is titled 'Apex Batch Scheduler' and 'Scheduled Jobs Overview'. A green success message banner at the top right of the main area states 'Success: Job scheduled successfully'. Below this, there is a table with columns for 'Action', 'Name', 'State', 'Last Run Time', and 'Next Run Time'. The table contains two entries: 'Batch0020Job' with a state of 'DELETED' and 'BR00100Job' with a state of 'WAITING'. An 'Add Schedule Job' button is located in the top right corner of the table area.

Action	Name	State	Last Run Time	Next Run Time
	Batch0020Job	DELETED	28 Dec 2023, 14:46	
	BR00100Job	WAITING		29 Dec 2023, 13:20

Job Schedule Setup: New Job Request

Schedule jobs using the New Schedule Request form for customized and efficient automation.



The screenshot displays the 'New Schedule Request' form within the Apex Batch Scheduler application. The form is overlaid on a dashboard that includes a search bar, navigation tabs (Batch Me, Create Batch, Apex Scheduler, Batch Rules, Batch Filters, Batch Values, Logs), and a table of scheduled jobs. The form fields are as follows:

New Schedule Request	
Job Name	BR00100Job
Batch Name	BR00100
Day Of Month	29
Seconds	0
Month	12
Minutes	20
Day Of Week	?
Hours	13
Year	2023

At the bottom right of the form are 'Cancel' and 'Save' buttons. The background dashboard also features an 'Add Schedule Job' button and a table with columns 'Action' and 'Name'.

THANK YOU