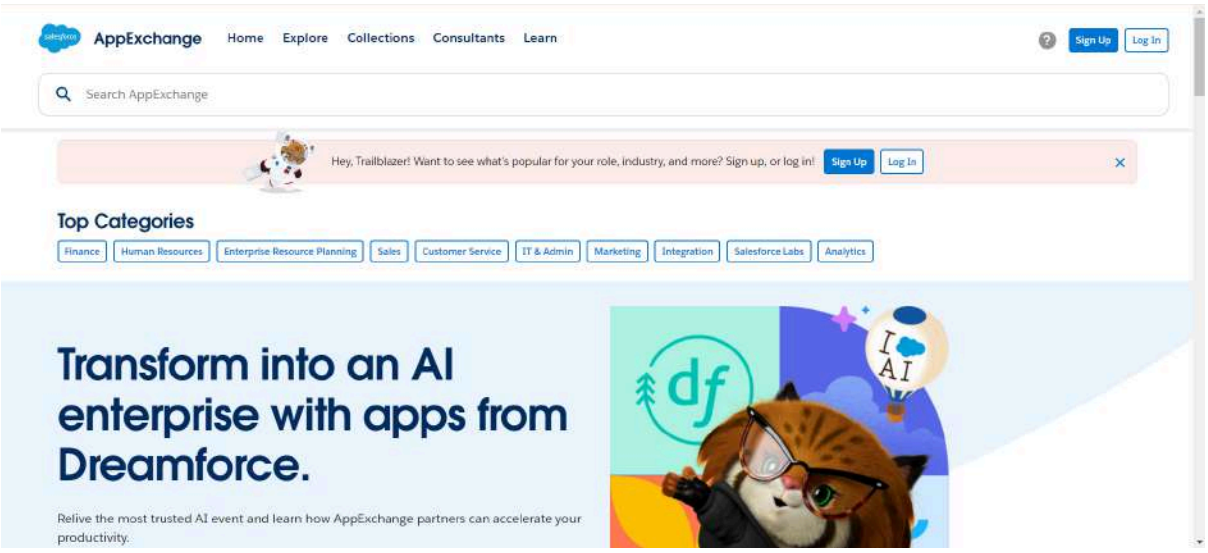
DataSyncX Documentation

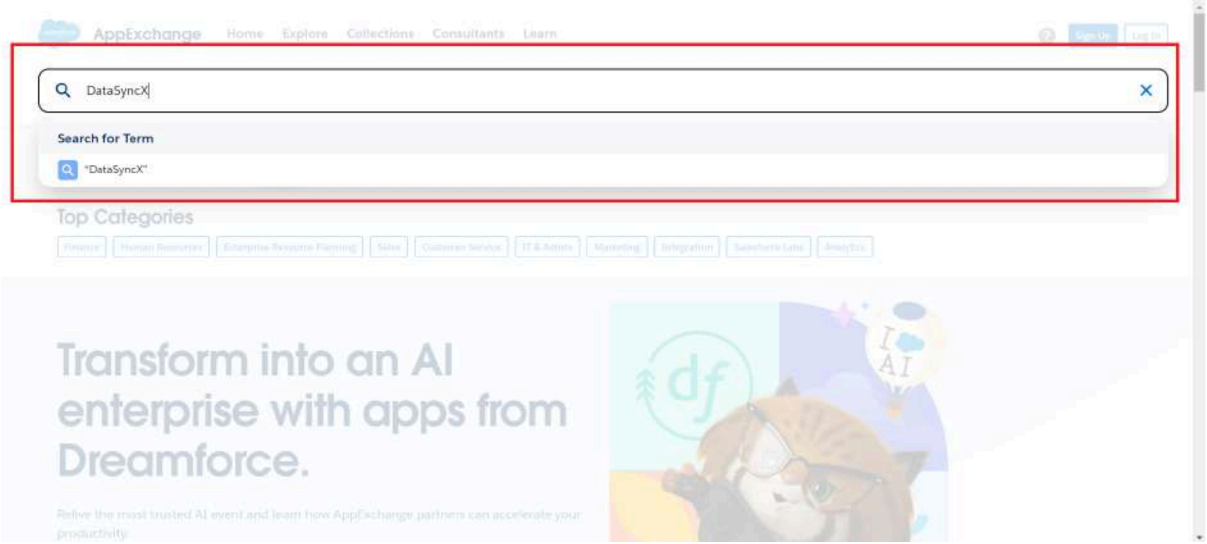
CloudMetic has introduced a new initiative to enrich the customer experience: the Record Manager App **(DataSyncX)**. This application is created to handle and perform DML, clone records, and numerous other tasks with your Excel records. Ready to dive in? To gain a deeper understanding of the application, we have outlined each step in Detail below for your convenience.

But before that! Let's understand this application (INSTALLATION) process

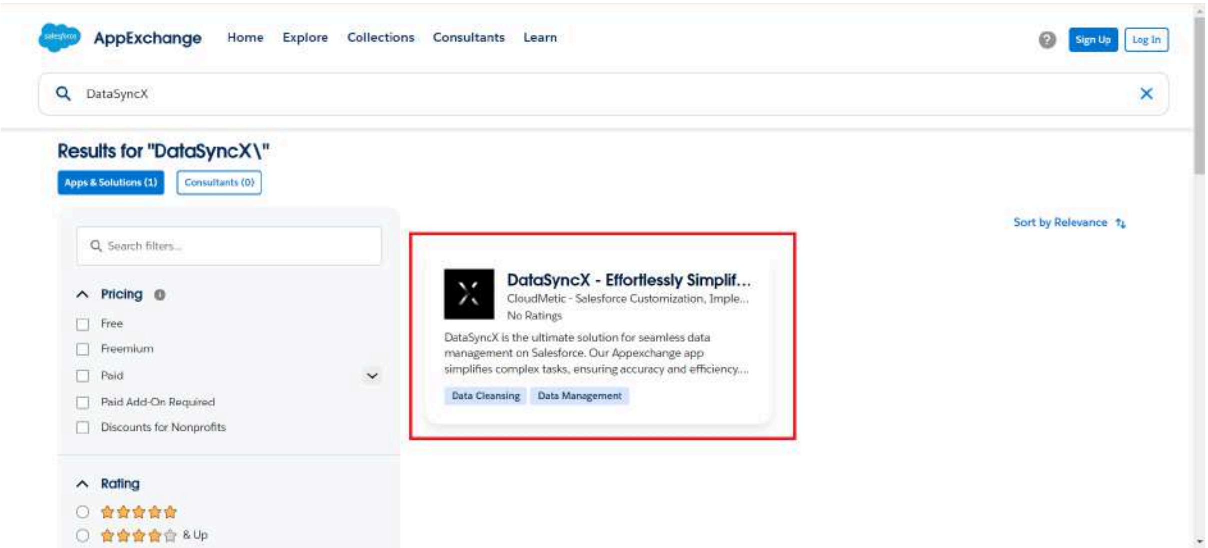
Step 1 - First thing first, open **Salesforce AppExchange** in your browser.
https://appexchange.salesforce.com/



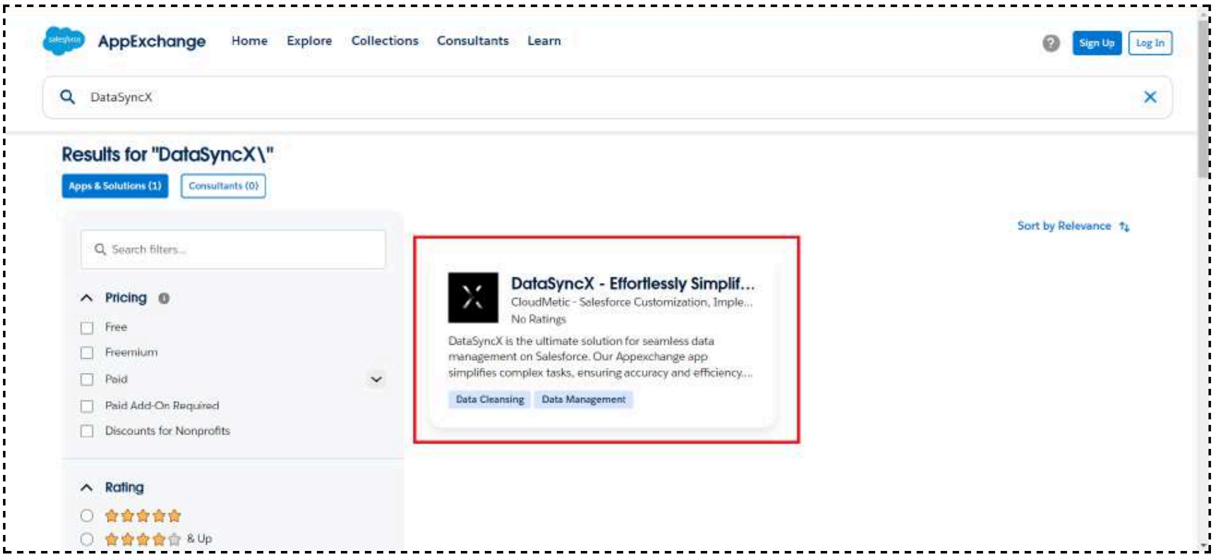
Step 2 - Once logged in, you'll see a **search ba**r at the top of the page. Simply type '**DataSyncX**' into the search bar to locate the application.

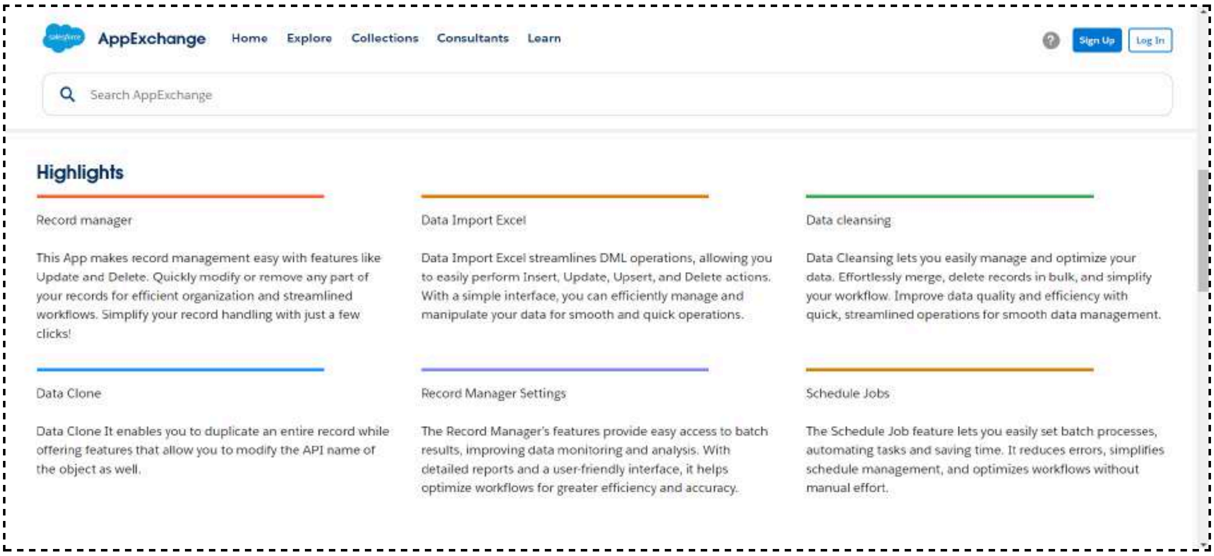


Step 3 - You will now see the application displayed.

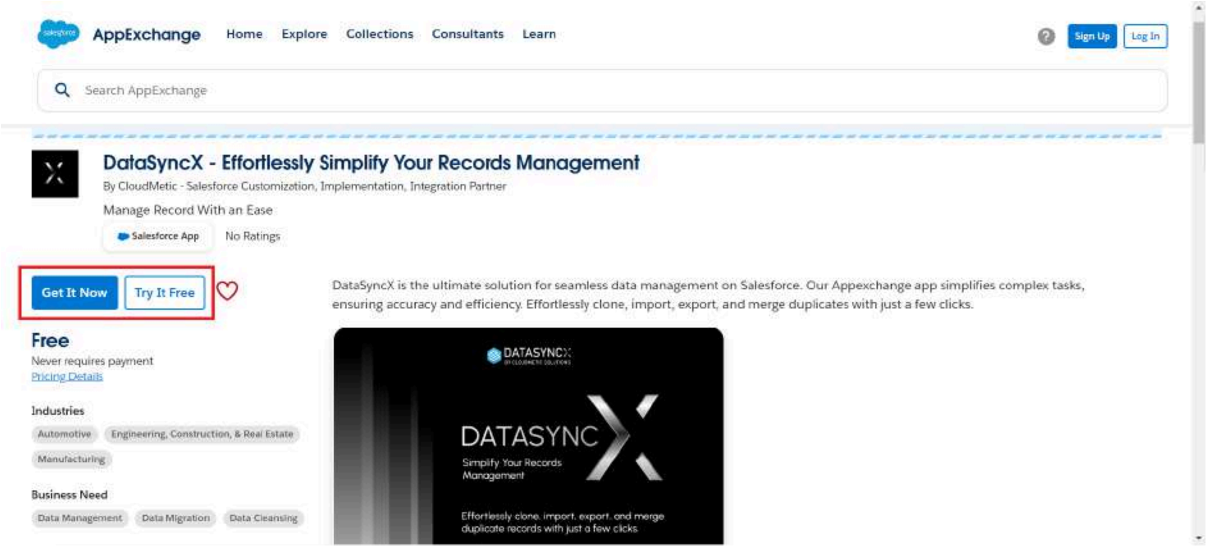


Step 4 - Upon clicking it, you'll be able to view the application's highlighted **features, functionality,** and **detailed** information.

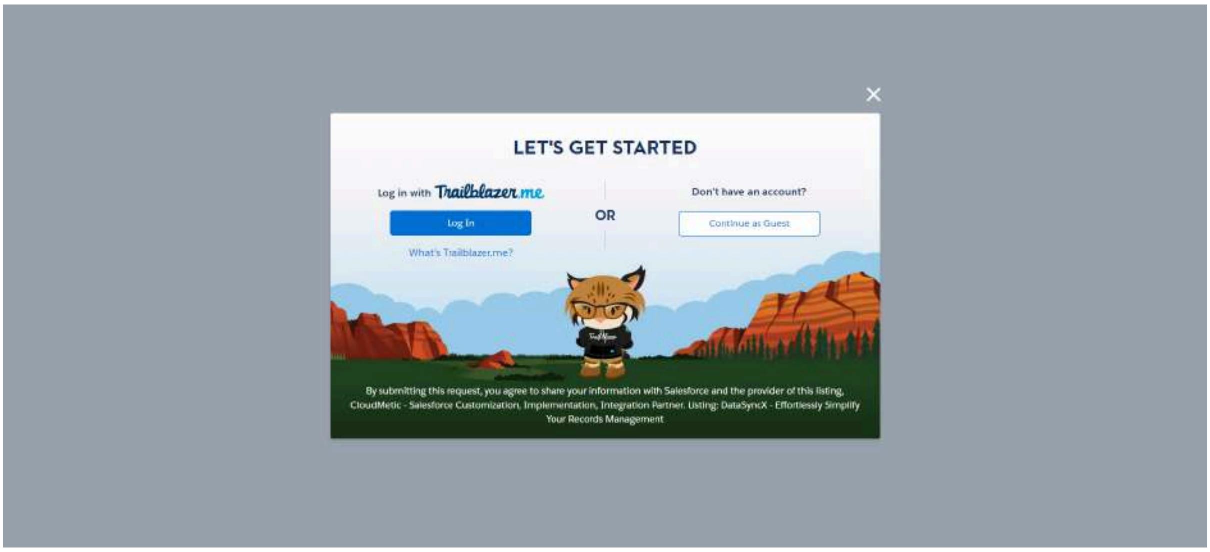




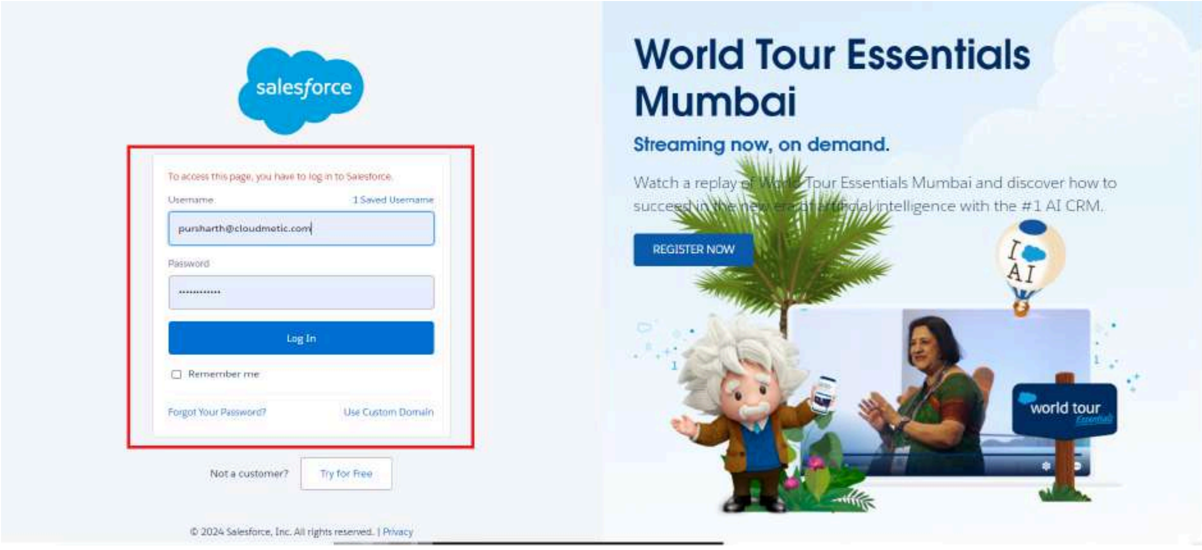
Step 5 - You will now see the '**Get It Now**' button at the top-right corner of your screen. Simply click on it to install the application.



Step 6- It will prompt for your existing login account details or provide an option to sign up for a new account.



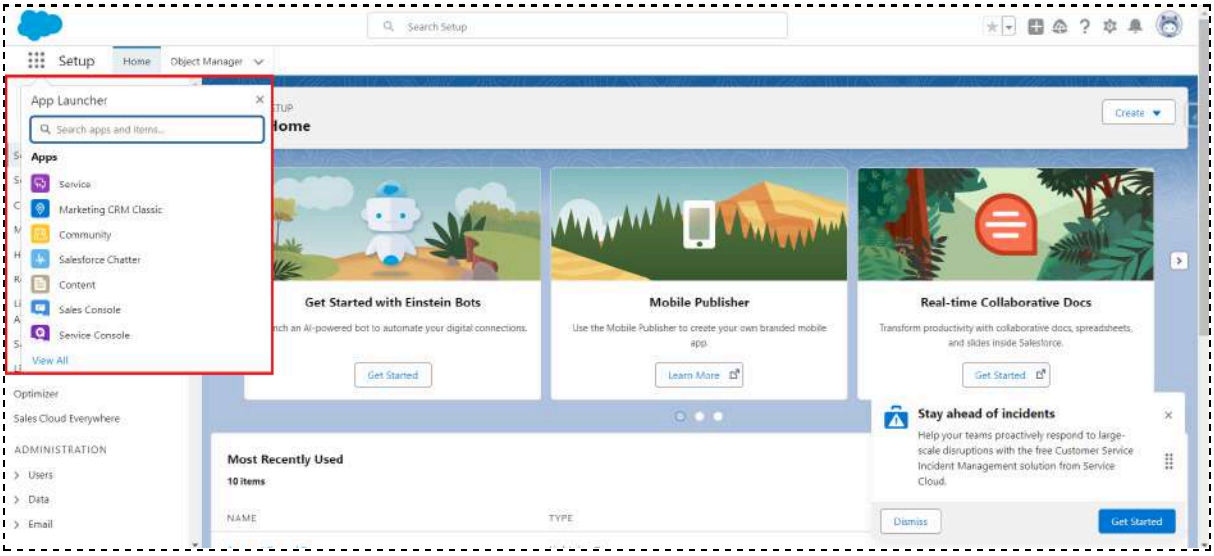
Step 7 - After that, you will be automatically redirected to the Salesforce login page.



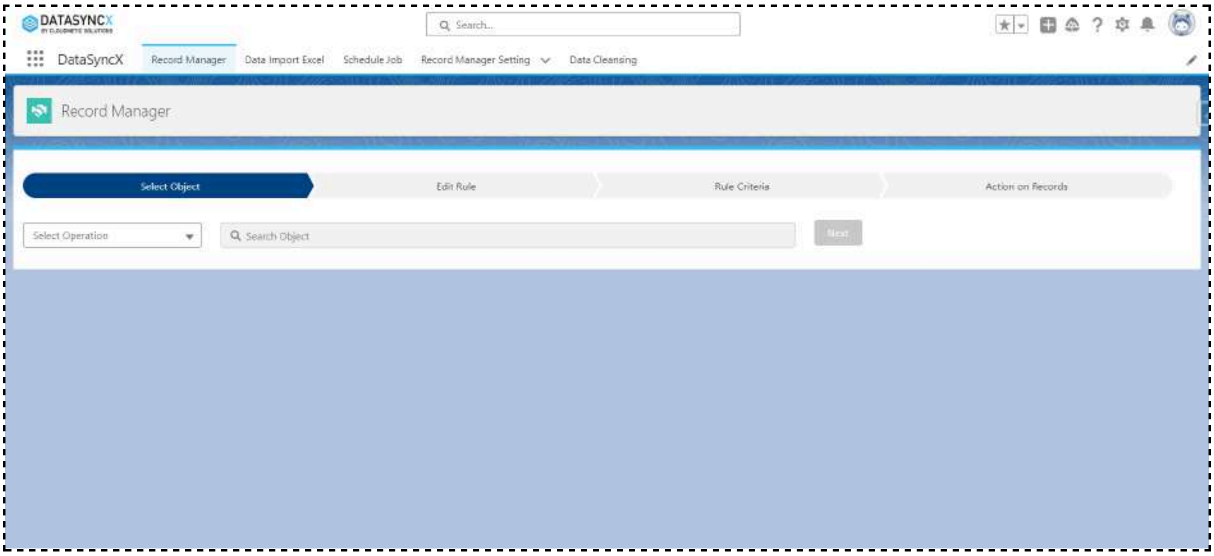
enter your Salesforce credential and hit the Log In button.

Note: Before proceeding to the next step, please note that you will be prompted to grant permission. You will be presented with three options: Single User, All Users, and Only Admin. Please select 'All Users.' This process will take approximately 5 minutes.

Step 2 - Now that the package is installed, go to the App Launcher, search for "**DataSyncX**," and click on it.



Step 3 - Now, welcome to **DataSyncX**! This is what its dashboard looks like.



Here, you'll find five key tabs: **Record Manager, Data Import from Excel, Scheduled Jobs**, **Record Manager Settings**, and **Data Cleansing**.

1. **Record Manager -** This feature allows you to manage your records efficiently with Update and Delete options. You can easily modify or remove any part of a specific record.

2. **Data Import Excel** - Performs DML operations Insert, Update, Upsert, and Delete.

3. **Clone Records** -It enables you to duplicate an entire record while offering features that allow you to modify the API name of the object as well.

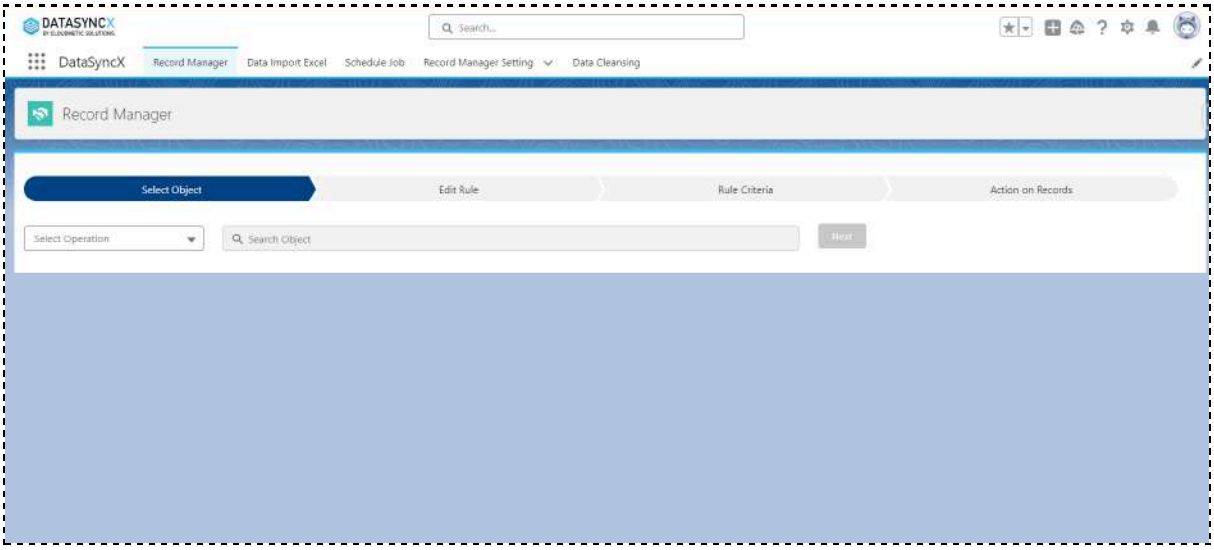
4. **Record Manager Settings** - This Custom Object tab lets you view records from the Record Manager, where you can track past operations, filters, and any new values you've applied.

5. **Data Cleansing** - Easily manage your data: effortlessly merge, delete records in bulk, and streamline your workflow.

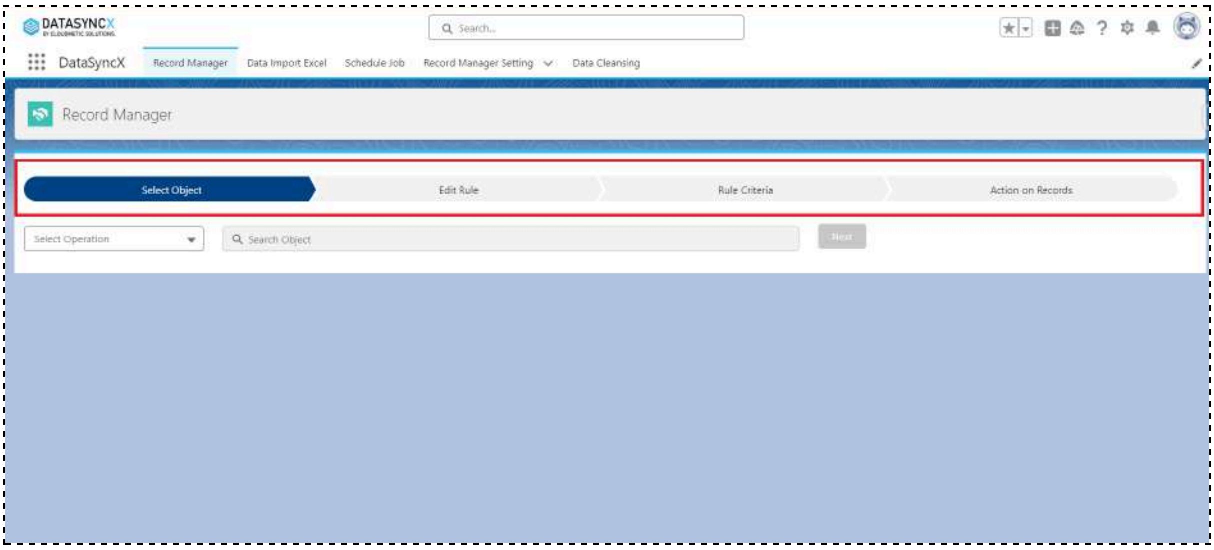
Now, we will review each of the above-mentioned tabs one by one for better understanding.

Record Manager

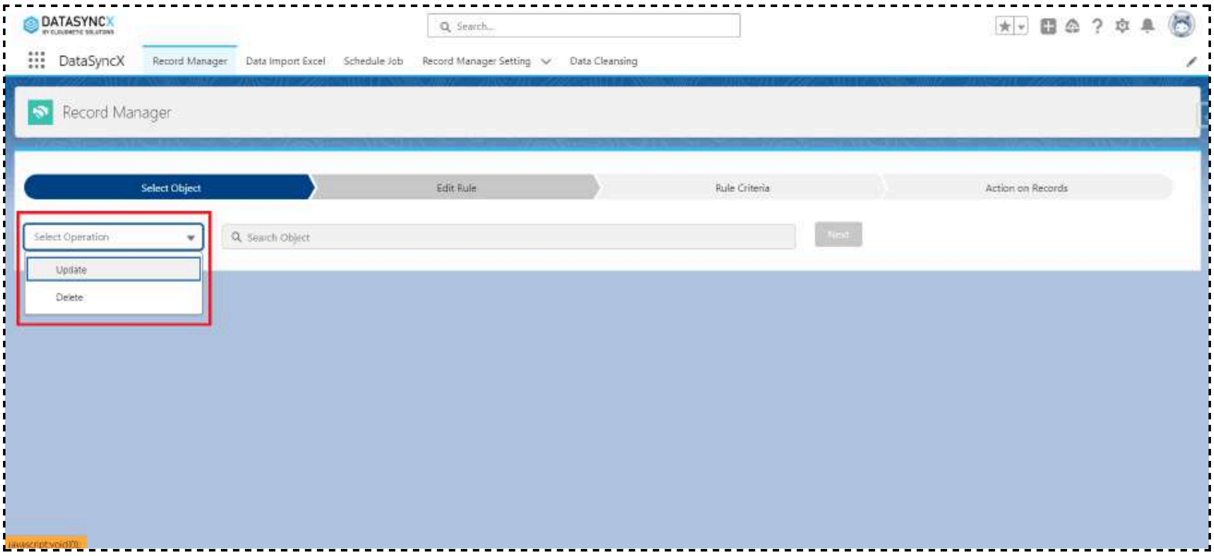
Perform updates or delete them using the record manager. The image mentioned below is the front interface of the Record manager.



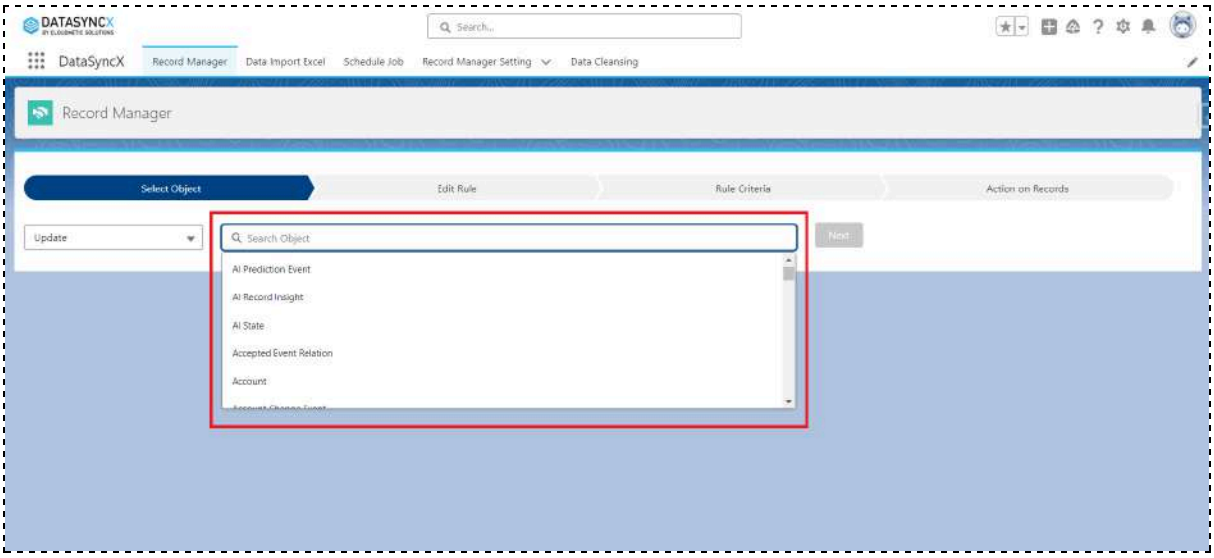
Step 1 - Now, you can see there 4 bars **Select object, Edit Rule, Edit Criteria, and Action on Records**.



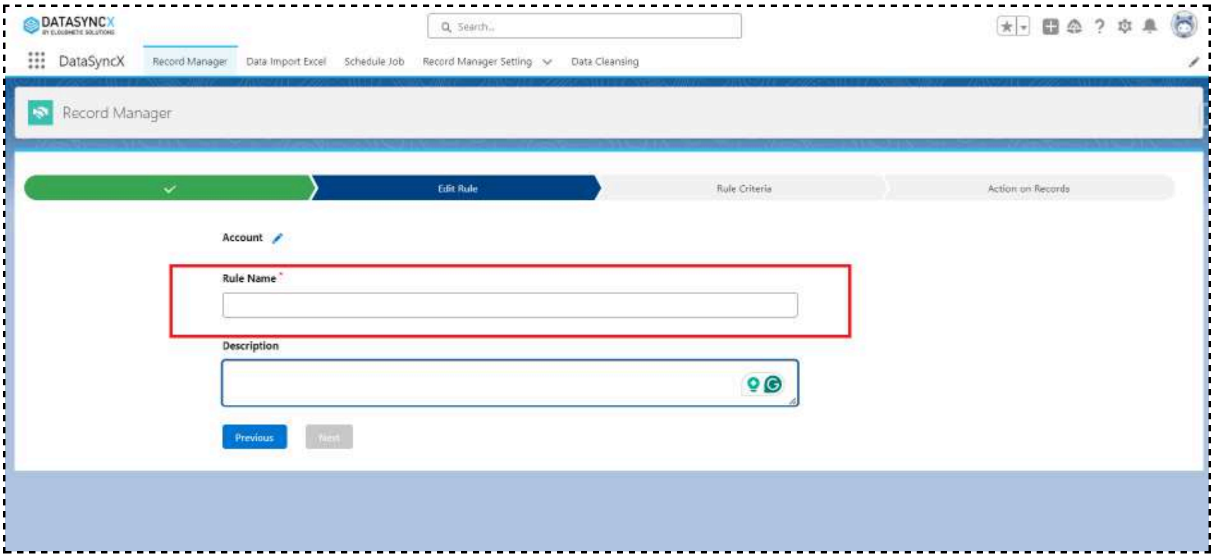
Step 2 - As you can see, in the 'Select Operation' field, there are two options: '**Update' and 'Delete**.



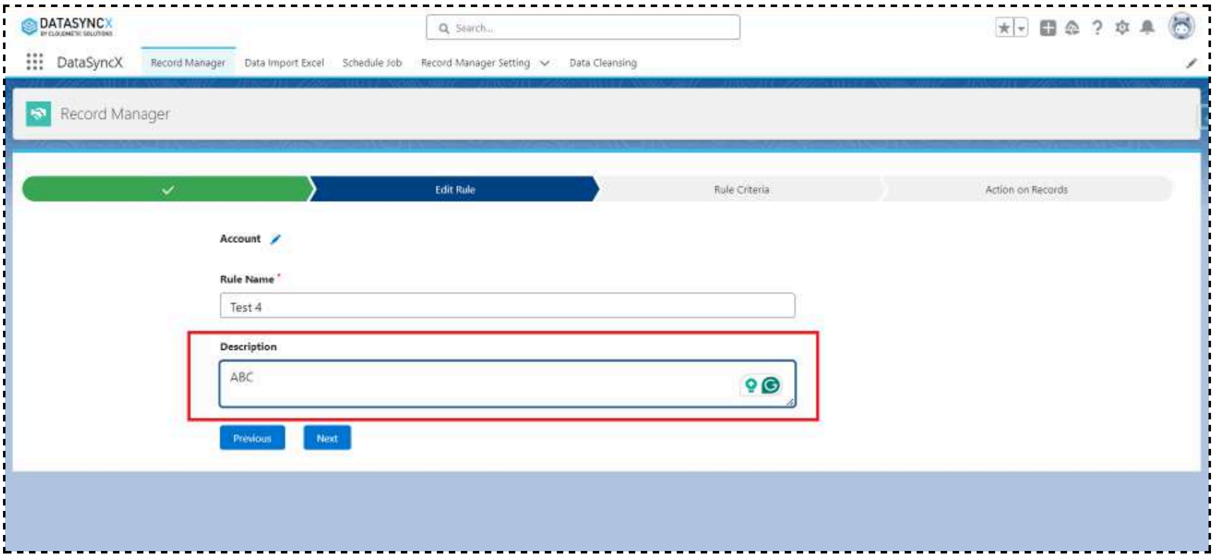
Step 3 - After selecting the operation, choose the object. There are multiple object options available, so you can select according to your requirements.



Step 4 -Now, you will move to the next loop **Edit Rule**, where you must add the **Rule Name** for that specific record.



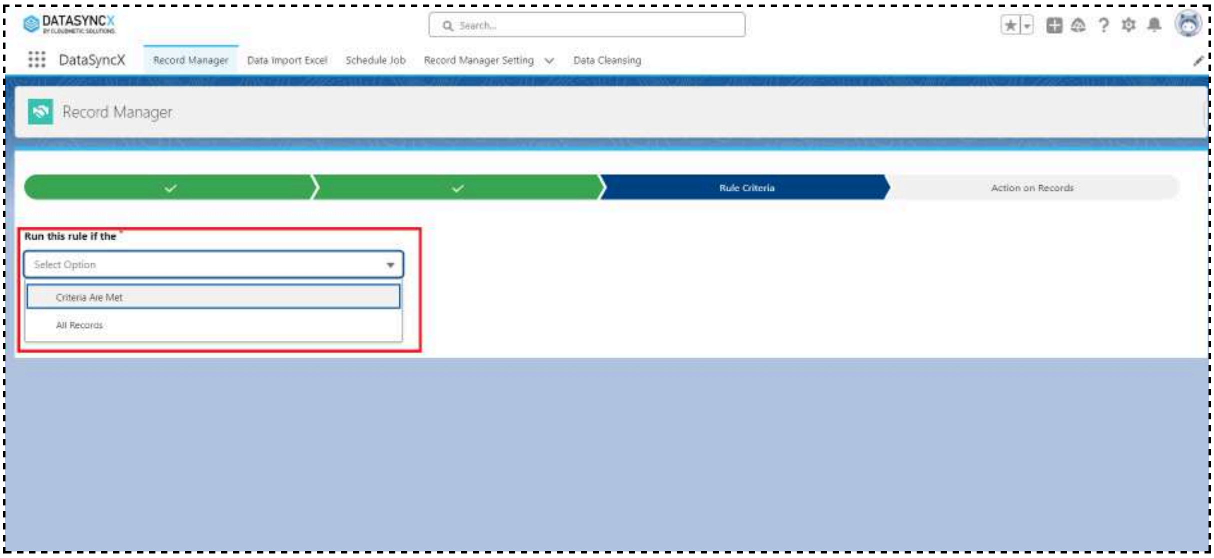
Step 5- After that, you will get the description option field, which is optional whether you want to put the description in the action or not, and hit the next button.



Step 6 - After this, Now in Rule Criteria you will see the 2 options **Criteria are Met and All Records**.

Criteria are Met - If you want to Update or delete some specific record then select this option.

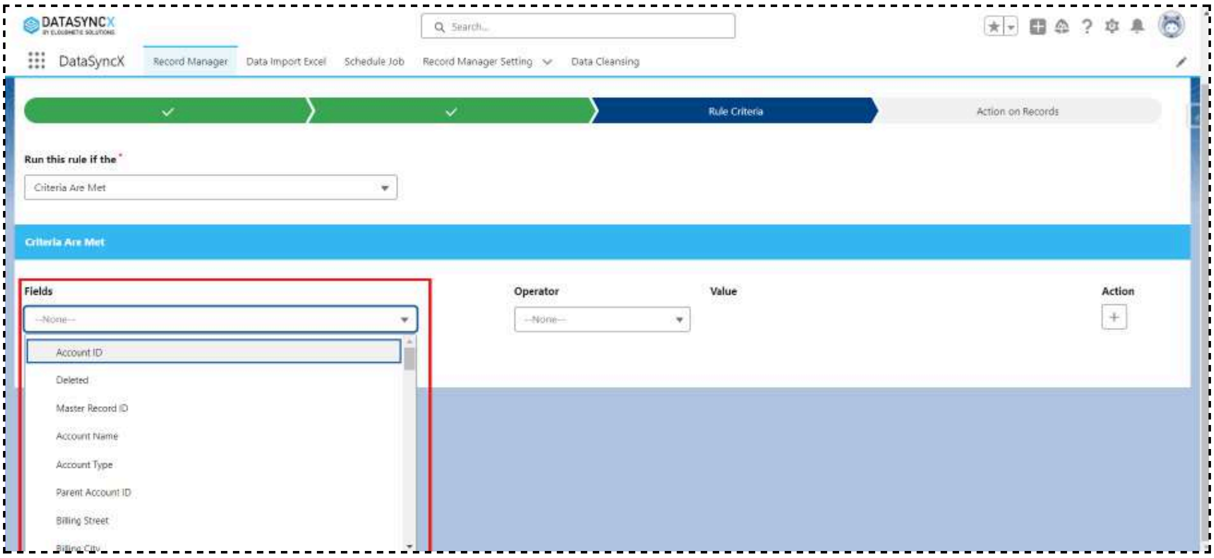
All Records - If you want to act on the entire records then select all records.



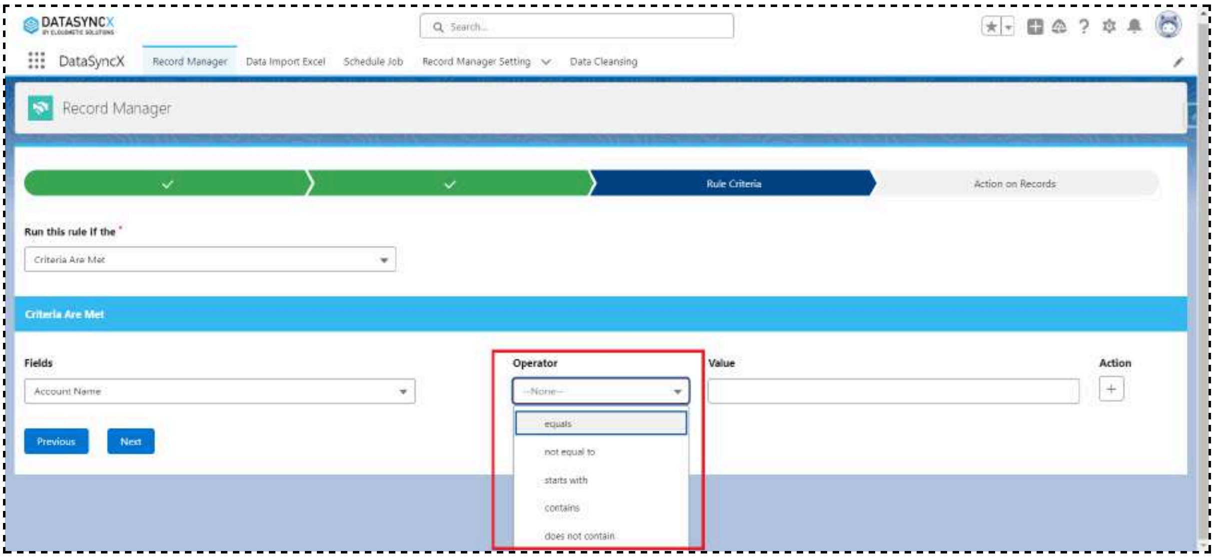
Criteria Are Met

In this section, you will get multiple options to select the particular fields you want to update or delete.

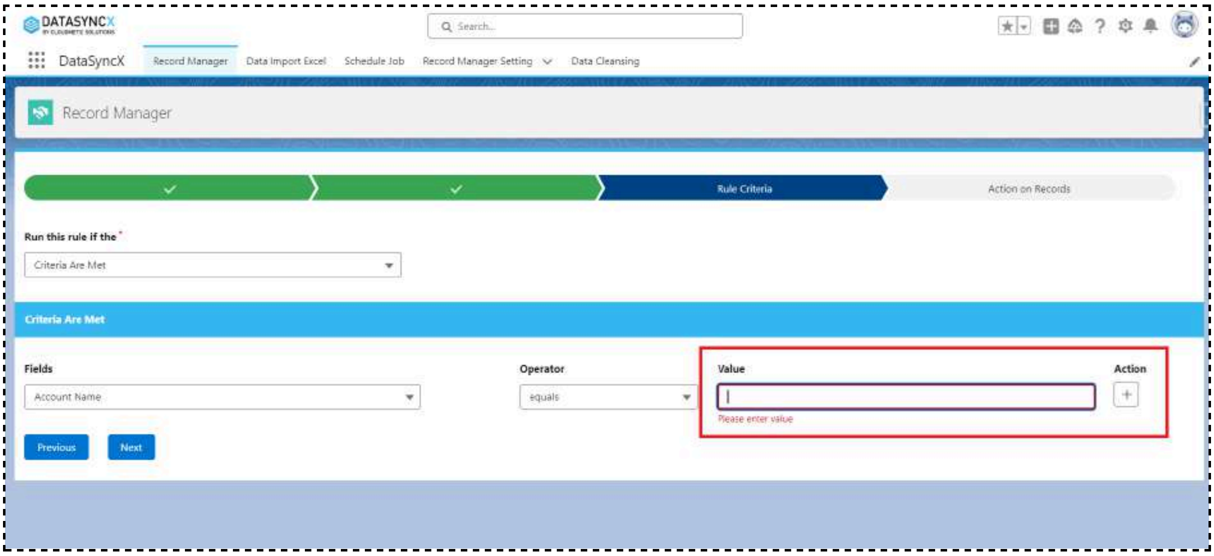
Step 7 - First, select the field, and then proceed to the next step.



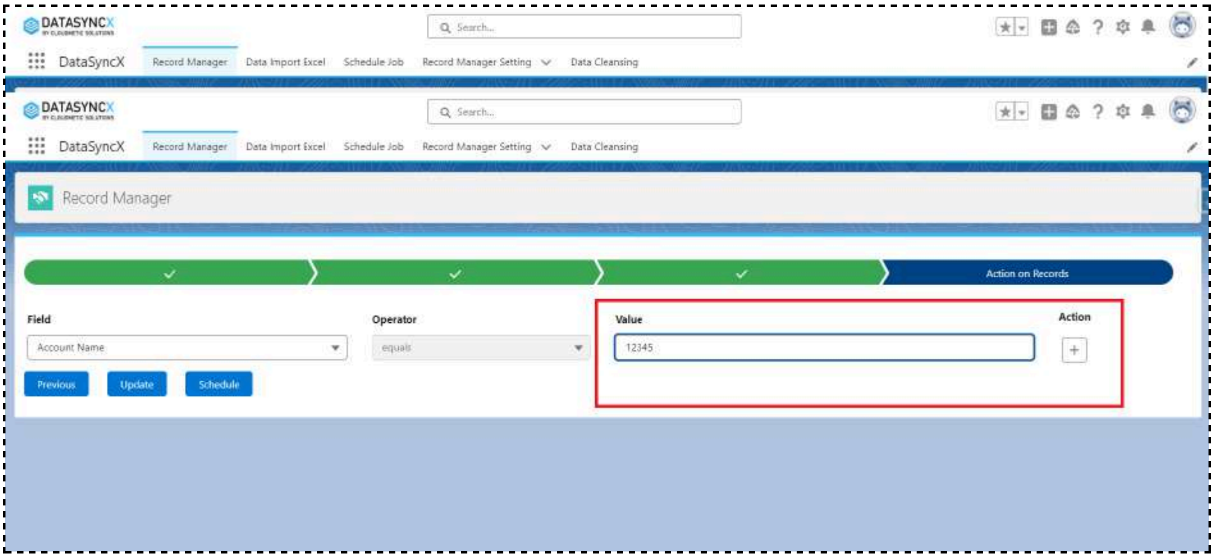
Step 8 - Next, in the Operator section, you can specify the value for the particular record using options such as '**Equal,' 'Not Equal,' 'Starts With,**' and more.



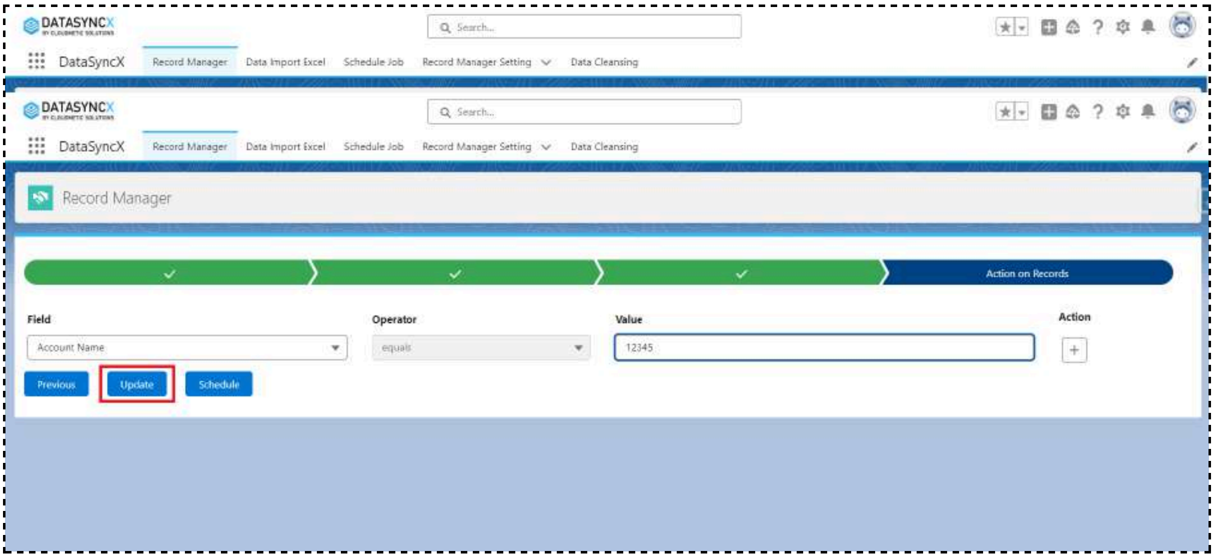
Step 9 - Now, add the value you want to change and hit the Next button.



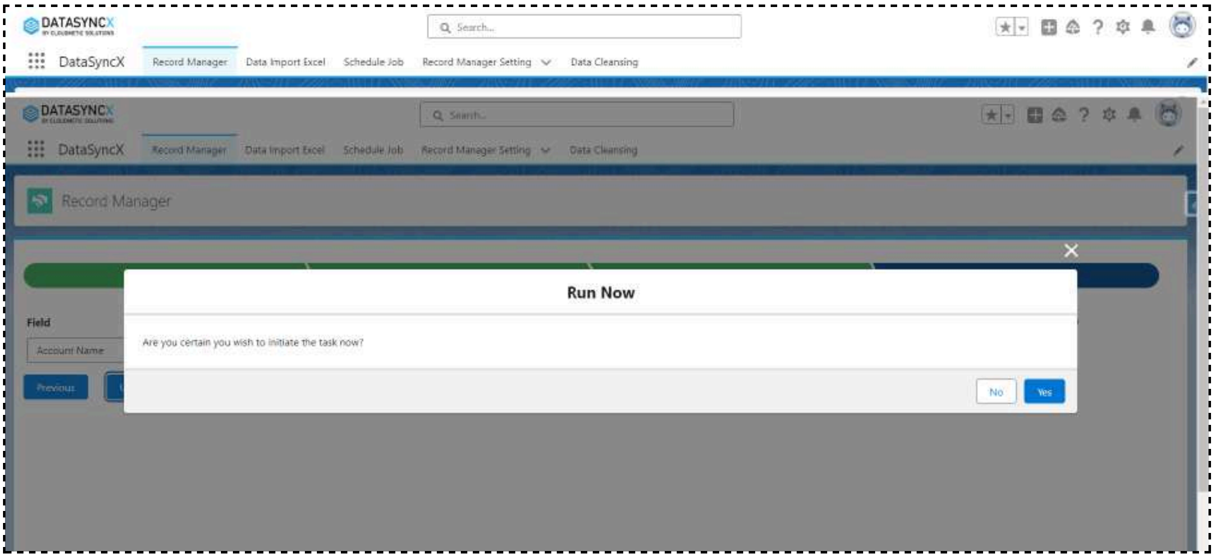
Step 10 - Now, you will move to the **Action on Records** section, where you can change the value of the selected record that you want.



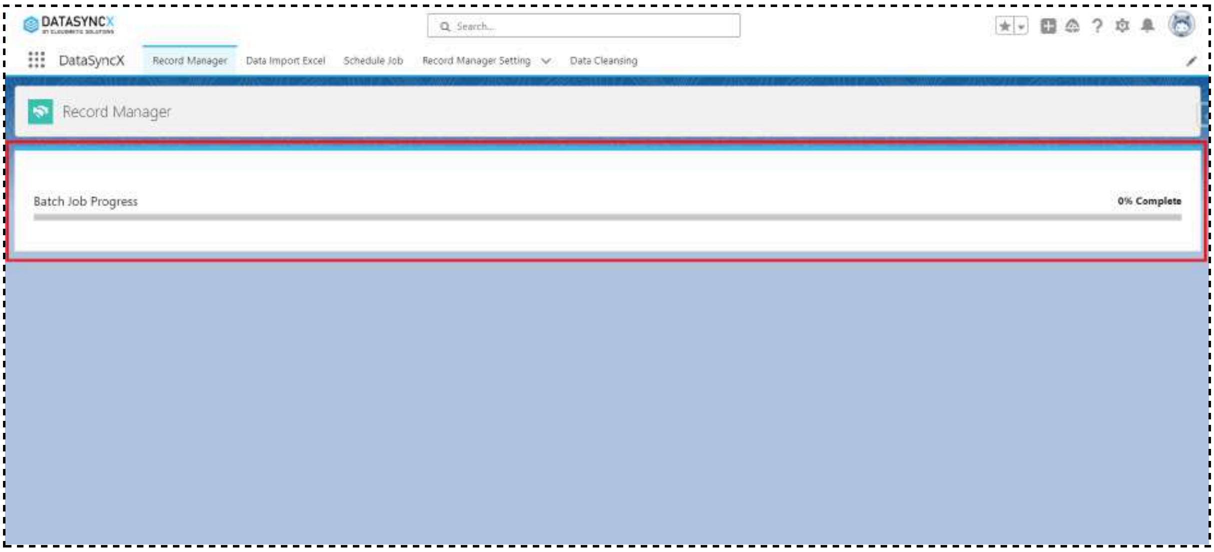
Step 11 - After that, simply hit the **Update** button.



You will also receive a pop-up message asking whether you want to run this batch.



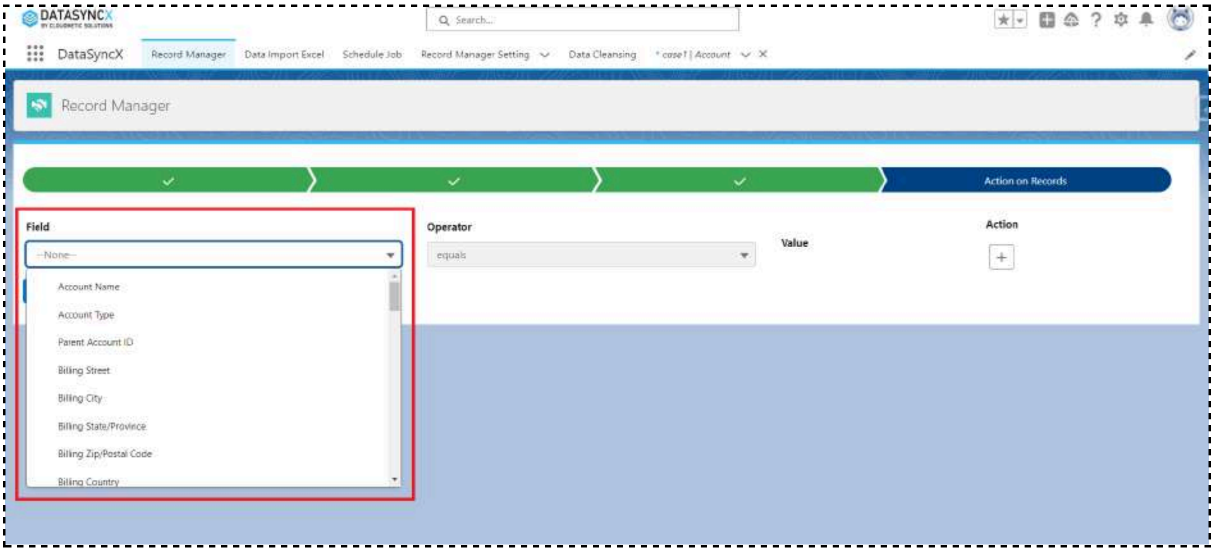
Step 12 - You will see the progress batch through which you can see the percentage of the process.



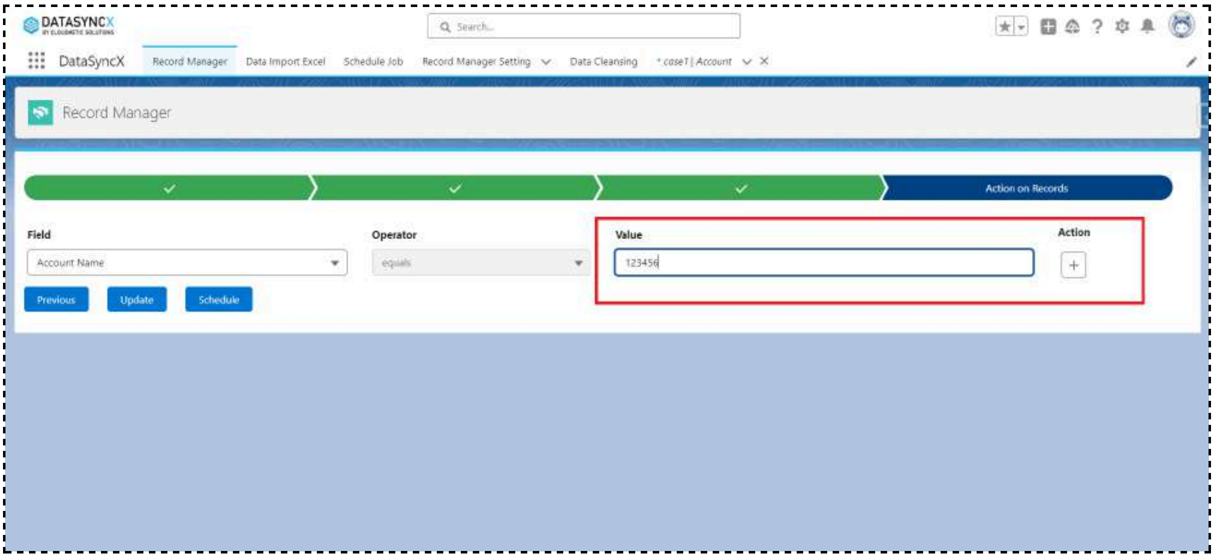
All Records

All records are simply functioning if you select this option your command will opt-in all the records.

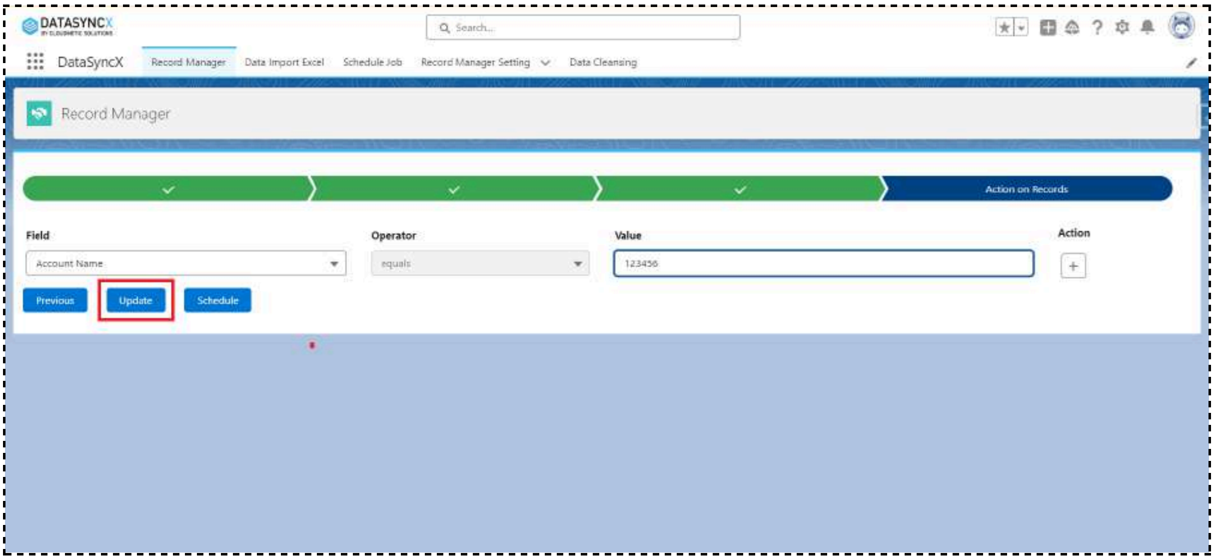
Step 13 - Simply select the **fields** that you want to change..



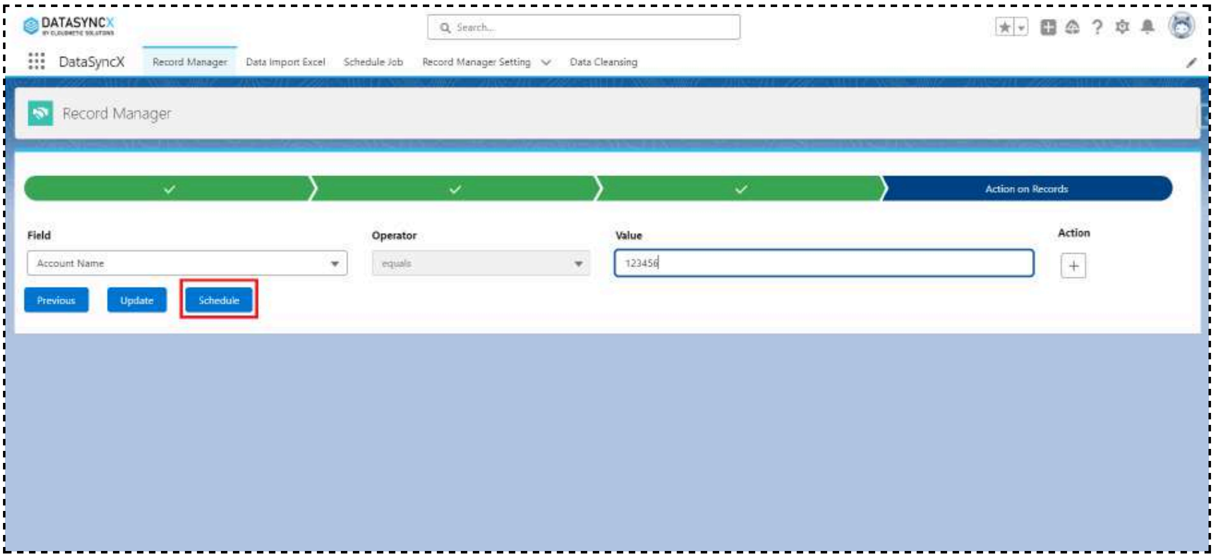
Step 14 - Add the **Value** for the Field and hit the **Update** button.



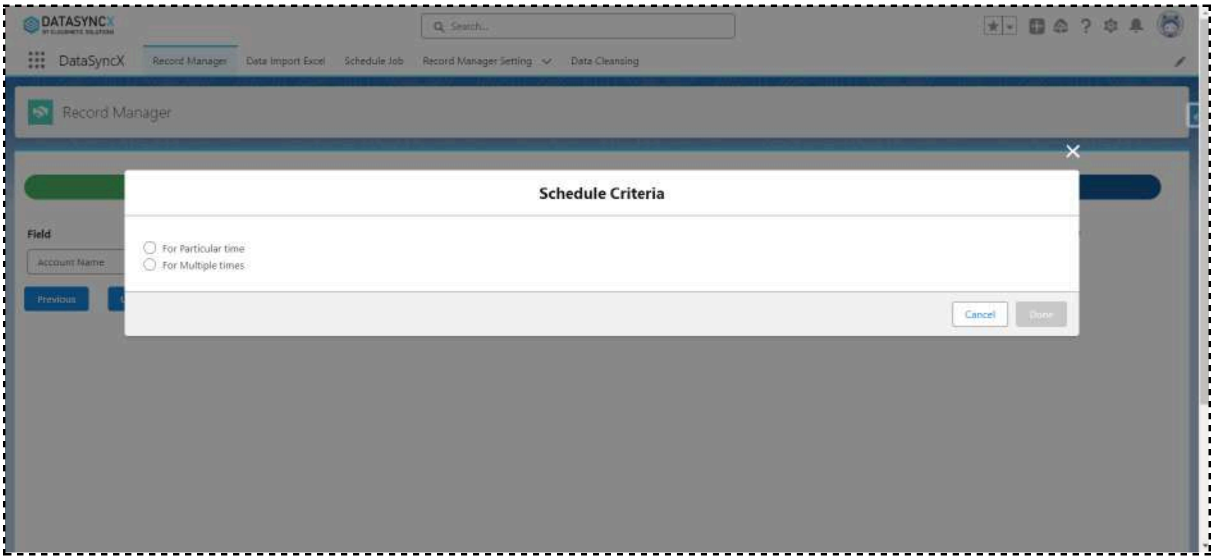
Step 15 - Now, simply click the '**Update' button**, and your process will be completed.



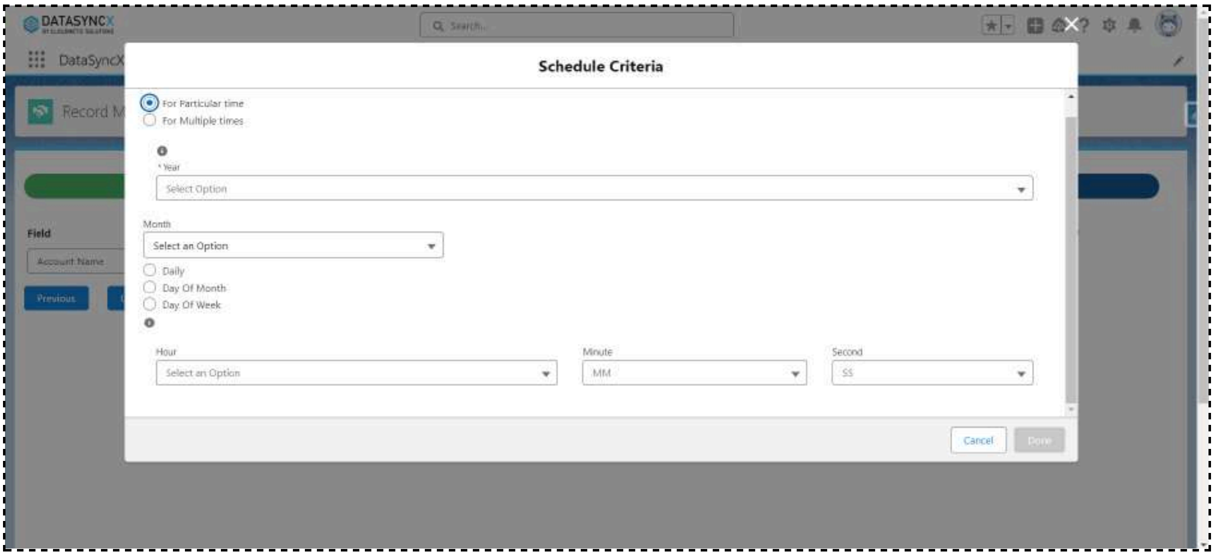
Note: The process described above is specifically for direct updates. However, there is also a scheduling option. Let's proceed with the scheduling option.



Step 15 – After hitting, the Schedule button, you will get the pop-up of Schedule criteria for particular times and for multiple times.



Step 16 - If you hit the for particular time option then, you'll get multiple options to select the particular time date, day, and year.

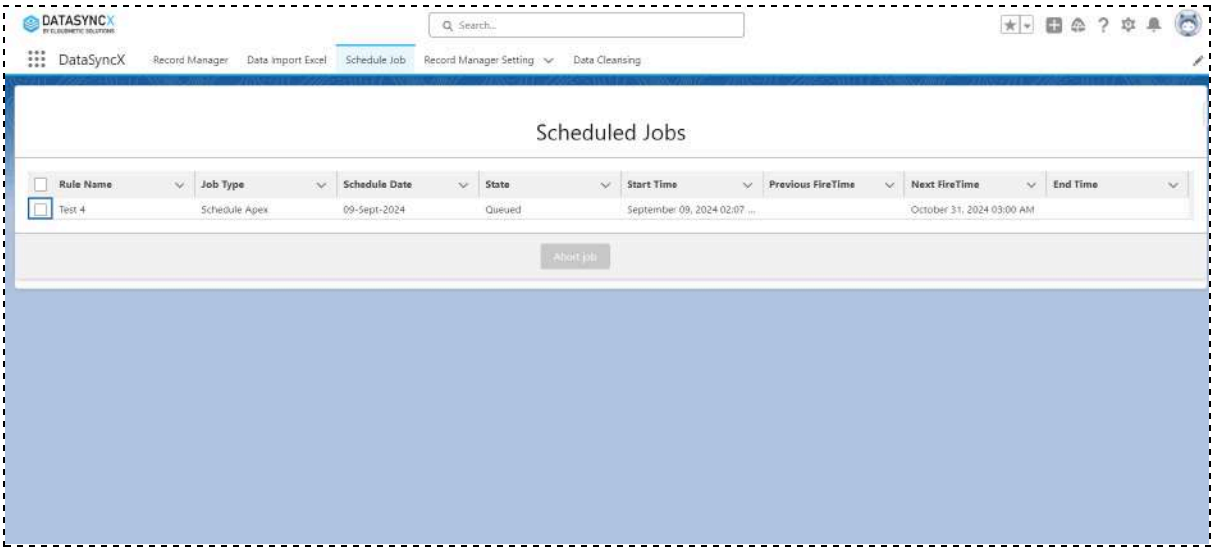


After filling in the selected date and time hit the done button on the right bottom of your screen and the process gets completed.

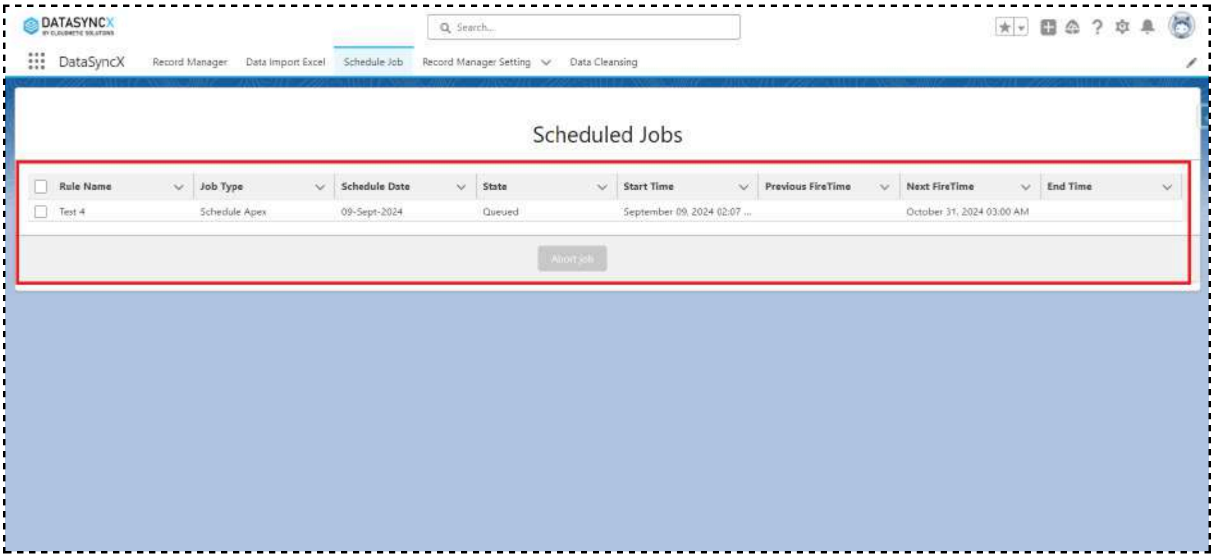
Schedule Jobs

Your scheduled batch is now complete. You can view your scheduled batches in the 'Scheduled Jobs' section, where you will find the selected time and date, as well as an option to abort if needed.

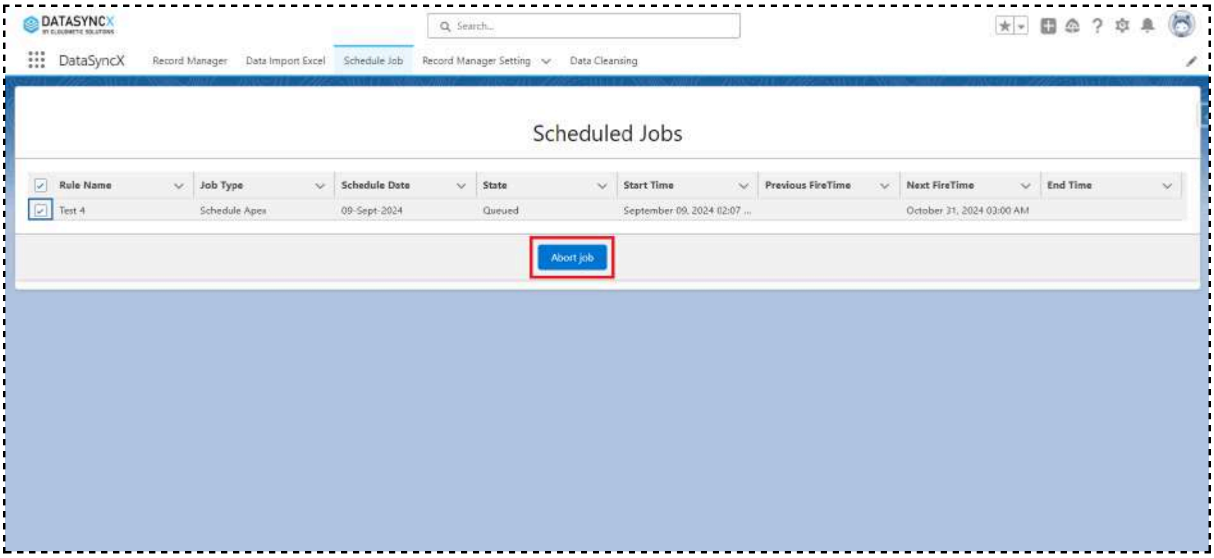
Step 1 - This is what the Schedule Job Interface looks like.



Step 2 - After this, you can see your records which you scheduled it for late with the selected Time, Date, and year.



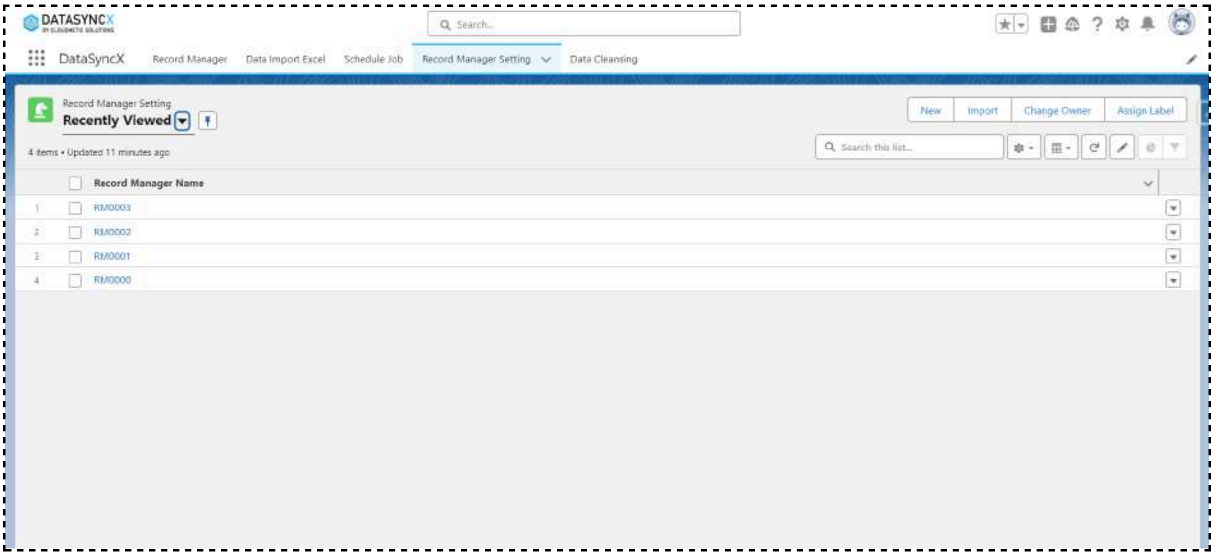
Step 3 - There is Abort option is also available if you want to stop the process, so you can easily click on that button for an instant stop.



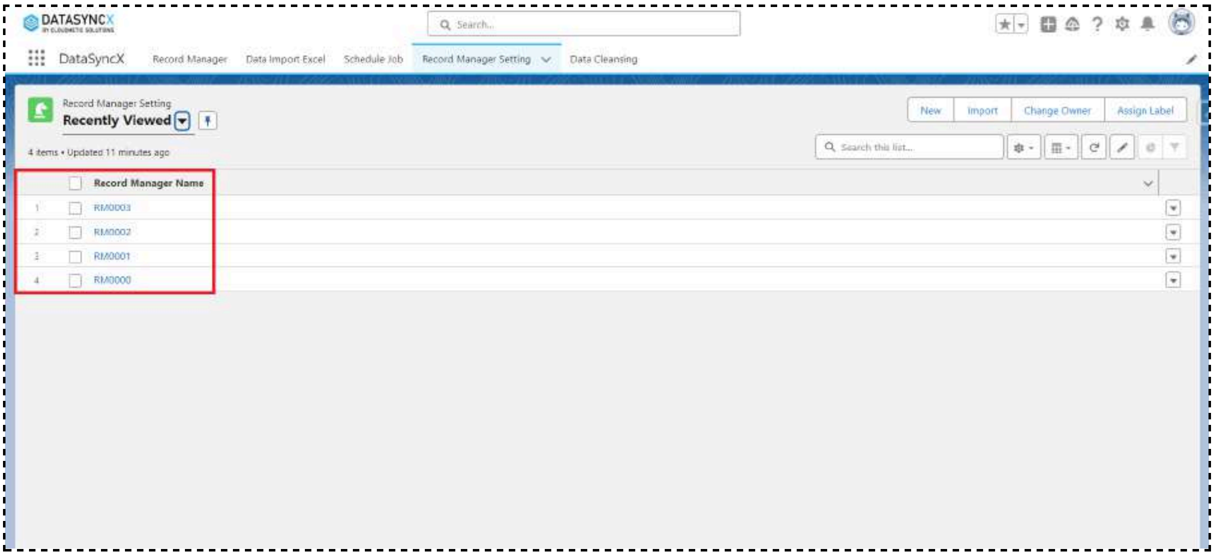
Record Manager Settings

All completed processes related to the Record Manager are now displayed in the Record Manager Settings.

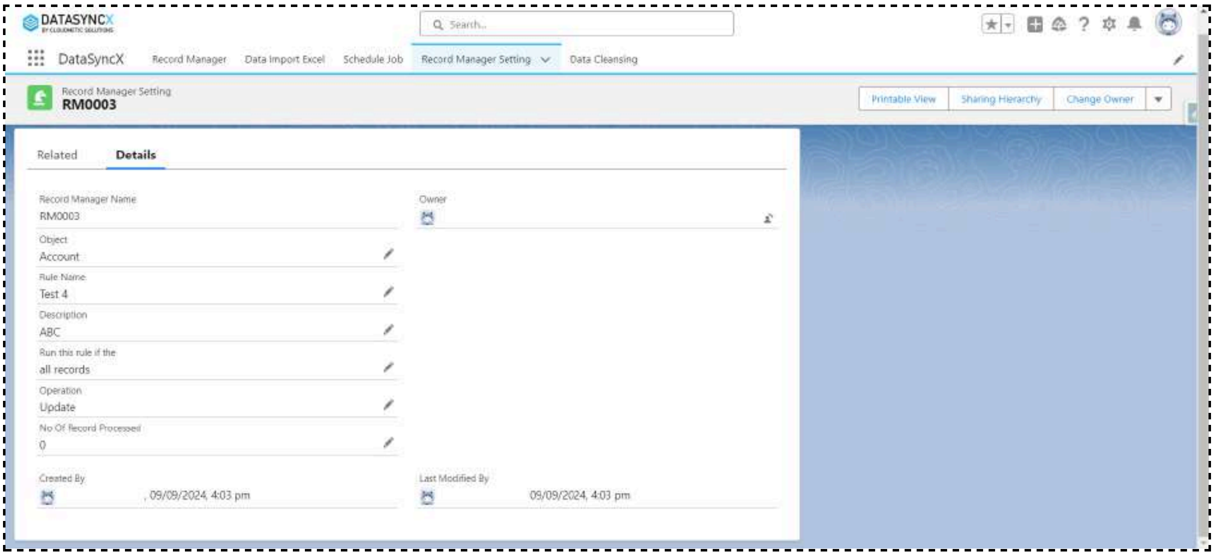
That is what the Record Manager Settings front interface looks like.



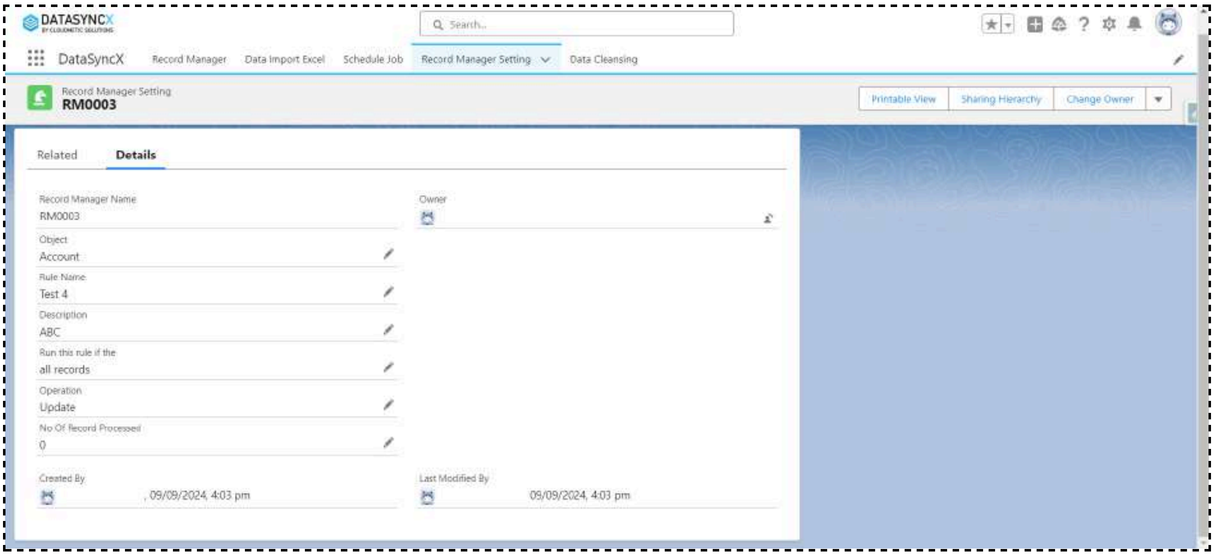
Step 1 - As you can see all the records performed in the record manager name section.



Step 2 - Once you click on any of the records you can see the details of the selected record like Account name, Object, Rule name, and many more.

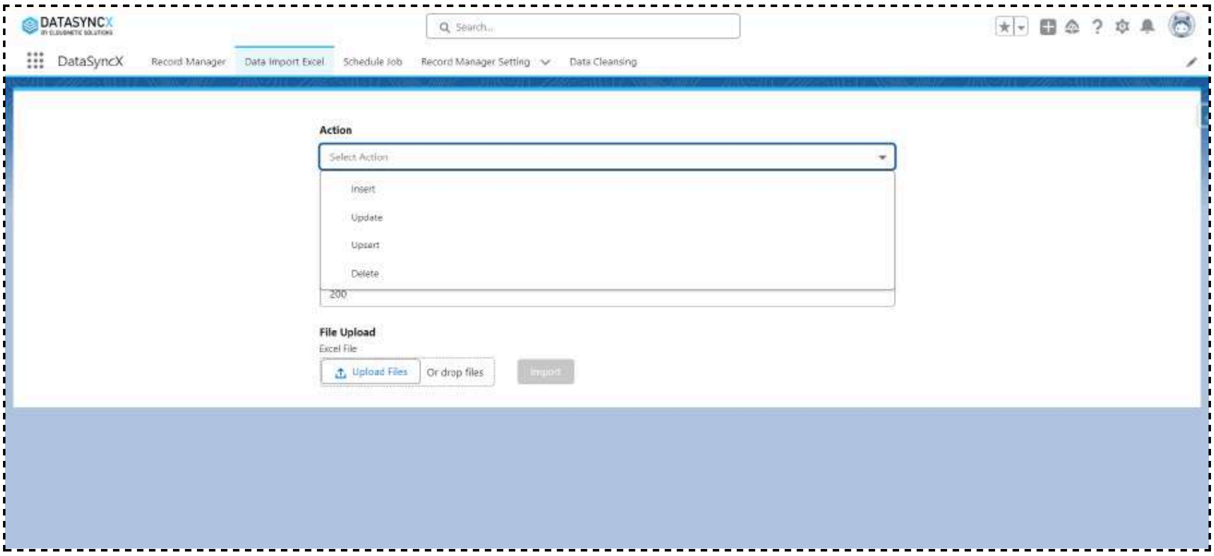


Step 3 - There is also a '**Related**' section where you can view filter criteria, field updates, and expectations.



Data Import Excel

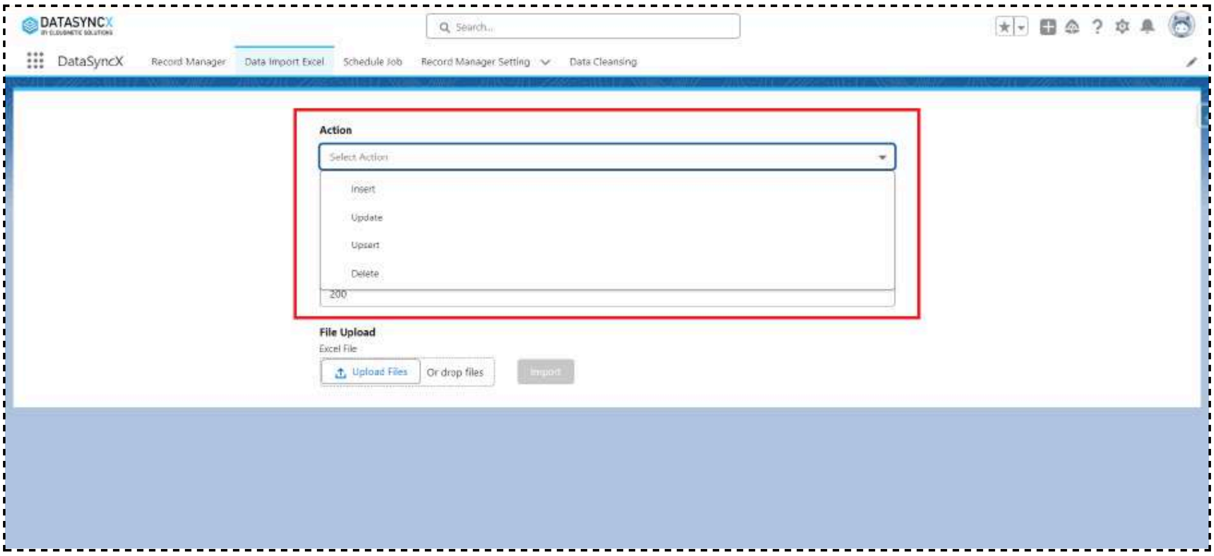
Step 1 - This is what the Import Excel Data interface looks like. It allows you to upload the entire file in a single operation.



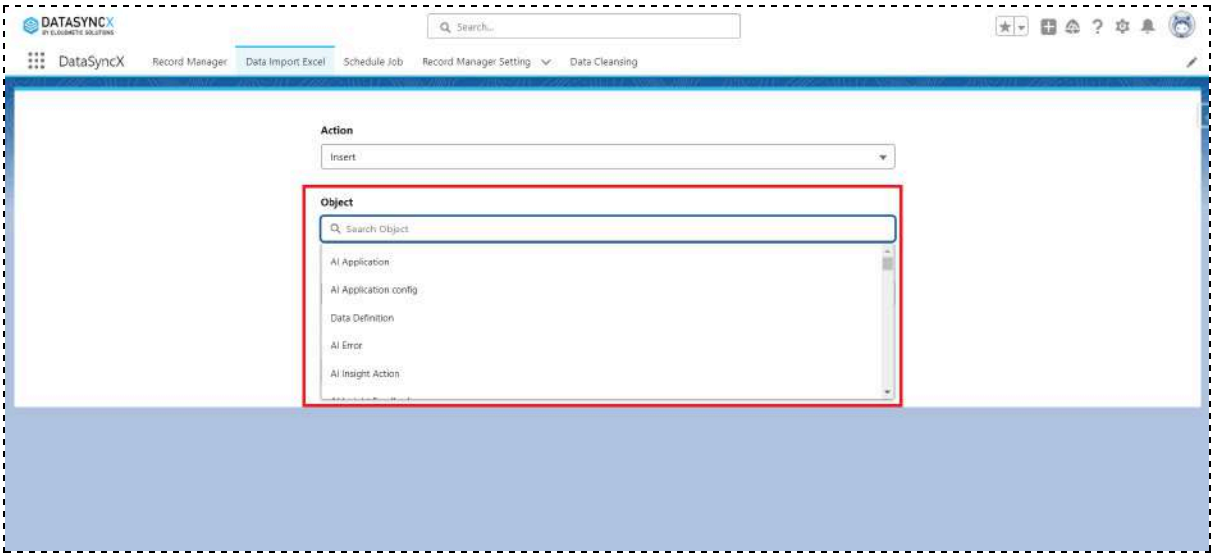
Step 2 - **Step 2** - First, you'll get the action option, where you see there are 4 options available.

- Insert
- Update
- Upsert

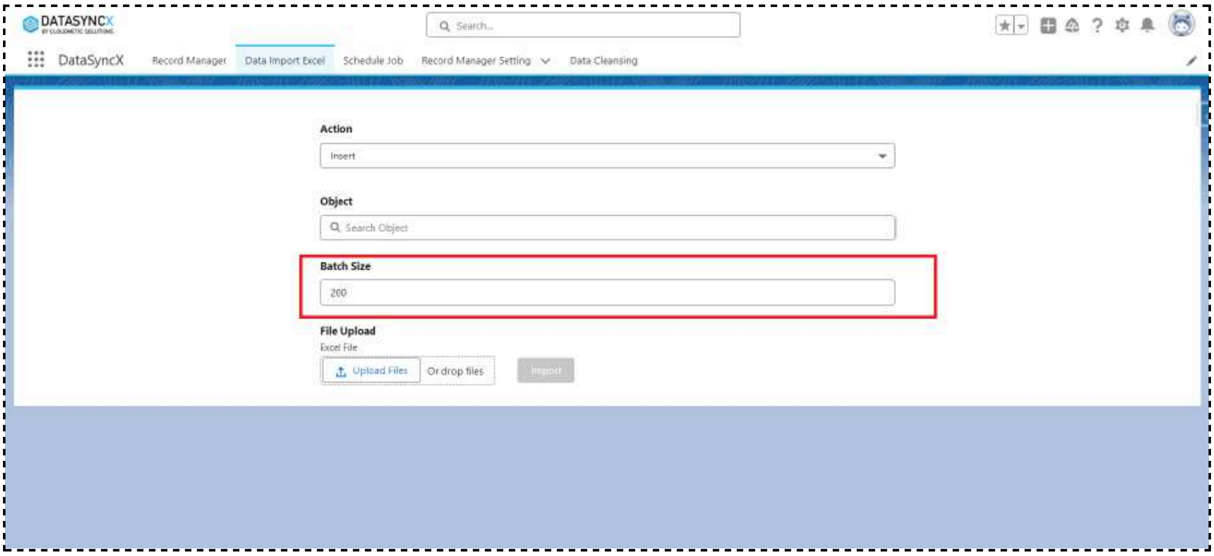
- Delete



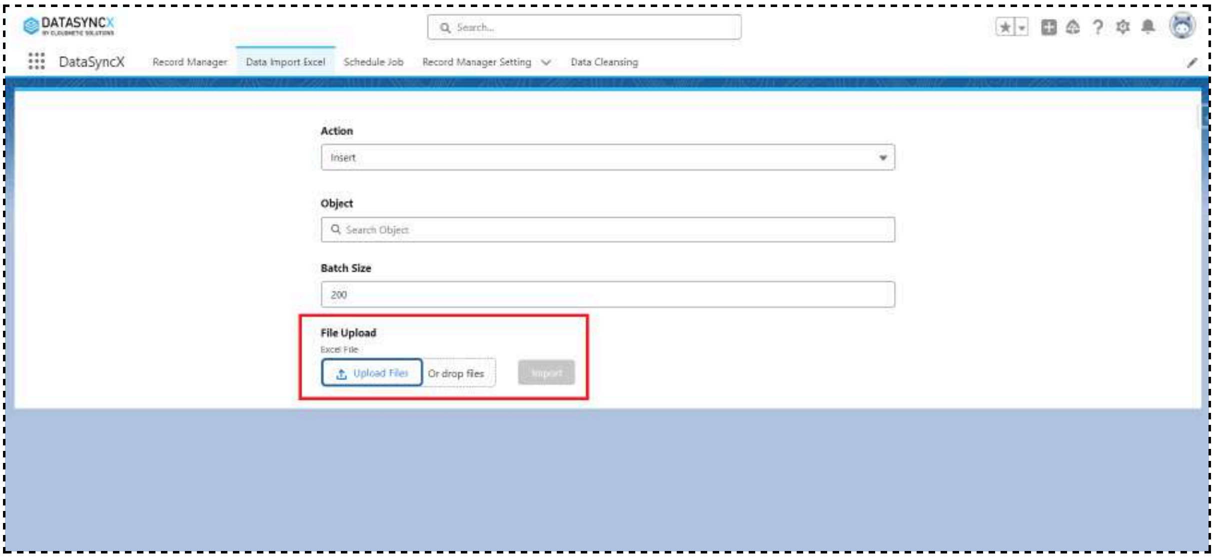
Step 3 - Select the Object on which you want to perform DML operations.



Step 4 - After this, select the Batch Size, here you can change up to **2000 Batch Size** is The number of Records to process in a single transaction.



Step 5 - In the end, after completing the above process you can simply upload your selected Excel file by just clicking on the **Upload File** option.



Excel format for Data Import Excel

1. **Columns in Excel:** Columns should be the same as the field API Name in Standard/Custom Object below is the example of Excel for

inserting Account Records using the Data Import Excel tab

	A	B	C	D	E
1	Name	Rating	TempDateDateField	DataSync_X__SLAExpirationDate__c	
2	Test 1	Hot	19-06-2024	2024-06-19	
3	Test 2	Hot	20-06-2024	2024-06-20	
4	Test 3	Hot	21-06-2024	2024-06-21	
5	Test 4	Hot	22-06-2024	2024-06-22	
6	Test 5	Hot	23-06-2024	2024-06-23	
7	Test 6	Hot	24-06-2024	2024-06-24	
8	Test 7	Hot	25-06-2024	2024-06-25	
9	Test 8	Hot	26-06-2024	2024-06-26	
10	Test 9	Hot	27-06-2024	2024-06-27	
11	Test 10	Hot	28-06-2024	2024-06-28	

Here Name, Rating, DataSync_X__SLAExpirationDate__c is the ApiName of fields in Account Object for the date field we need to convert Excel date format into a string by using Excel formula i.e =TEXT(value, format_text)
For example:

- Date: TEXT(2024-04-19,"yyyy-mm-dd").
- DateTime: TEXT(2024-04-19,"yyyy-mm-dd hh:mm:ss").
- Time: TEXT(15:10:10 , "hh:mm:ss").

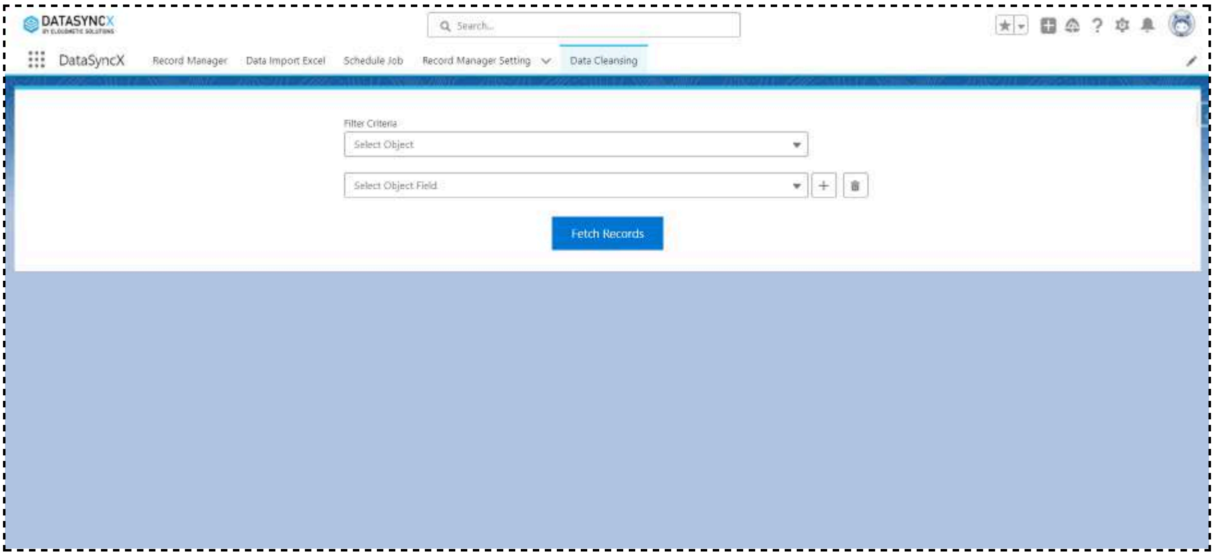
2. **Rows:** Rows are justified as Field Values. The number of records depends on the number of rows, for performing multiple operations like, Insert, Delete, Update, and Upsert.

"**Note:** For Update or Delete ID Column is mandatory. We also mentioned below for user reference".

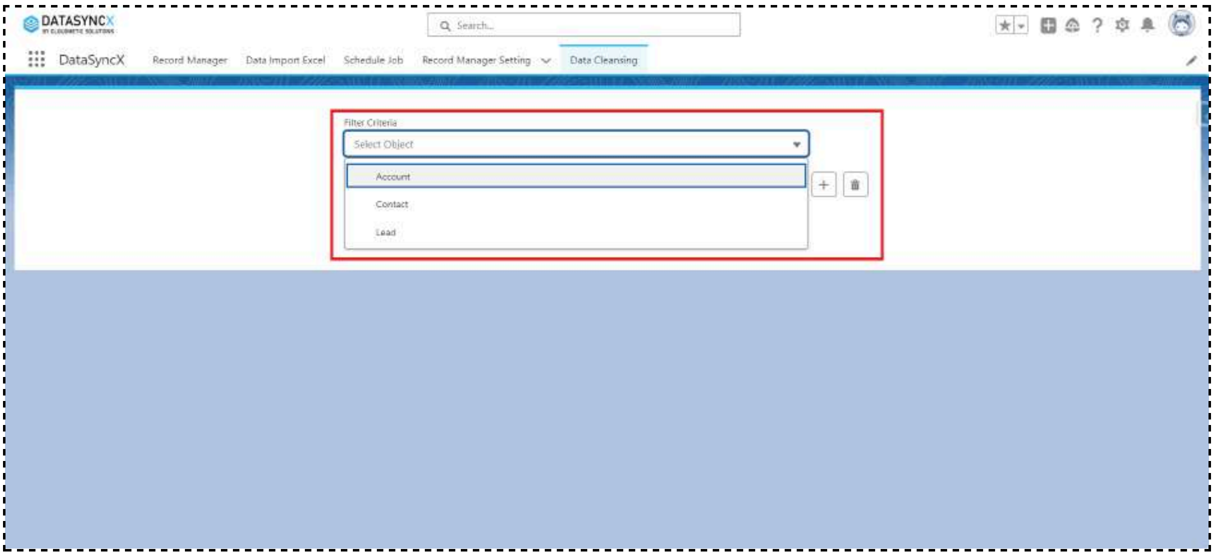
	A	B	C	D
1	Id	Name	Rating	
2	001Ho000012DRMGIA4	Test 1	Hot	
3	001Ho000012DRMHIA4	Test 2	Hot	
4	001Ho000012DRMIIA4	Test 3	Hot	
5	001Ho000012DRMJIA4	Test 4	Hot	
6	001Ho000012DRMKIA4	Test 5	Hot	
7	001Ho000012DRMLIA4	Test 6	Hot	
8	001Ho000012DRMMIA4	Test 7	Hot	
9	001Ho000012DRMNIA4	Test 8	Hot	
10	001Ho000012DRMOIA4	Test 9	Hot	
11	001Ho000012DRMPIA4	Test 10	Hot	

Data Cleansing

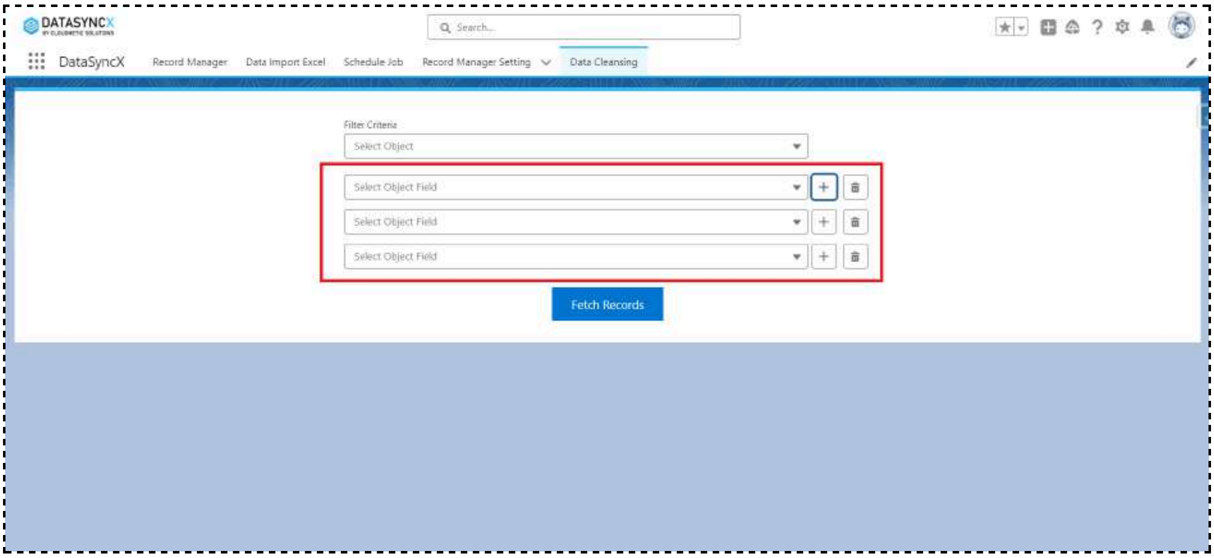
Through this feature, you can Delete records, Merge, and Duplicate.



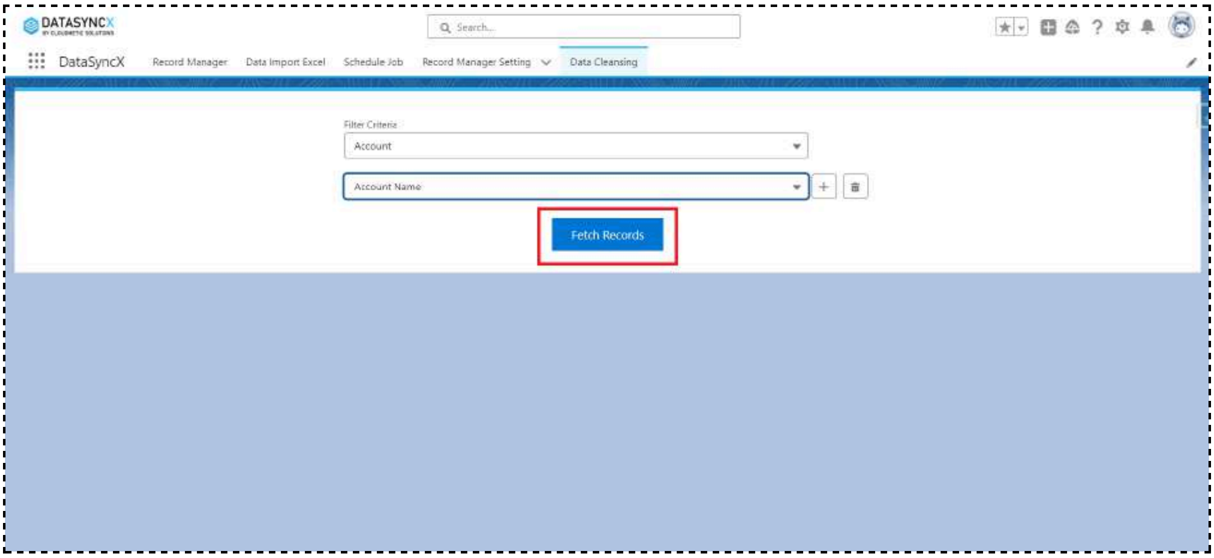
Step 1 - Select the Filter Criteria With 3 objects A**ccount, Contact,** and **Lead**.



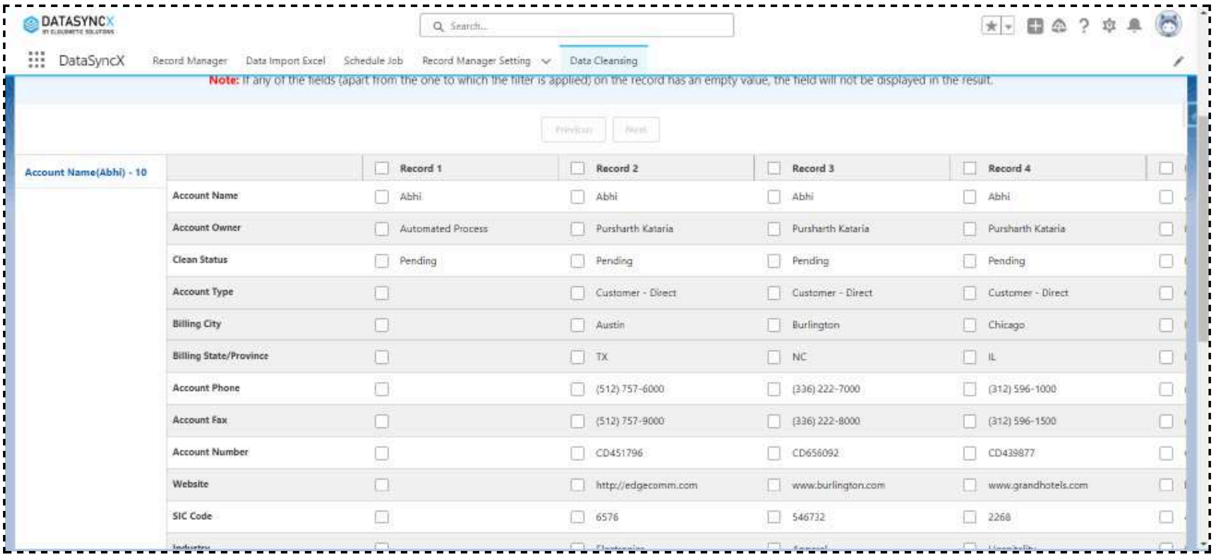
Step 2 - You can also add multiple object fields by just clicking on the + option.



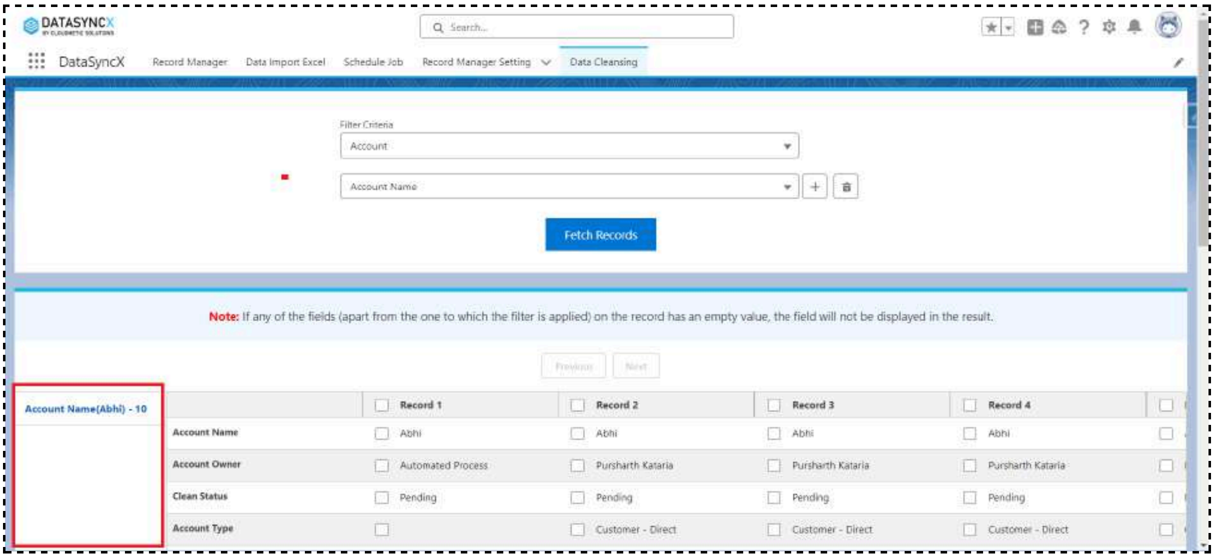
Step 3 - After selecting the objects, hit the **fetch** button to see the complete records of the selected objects.



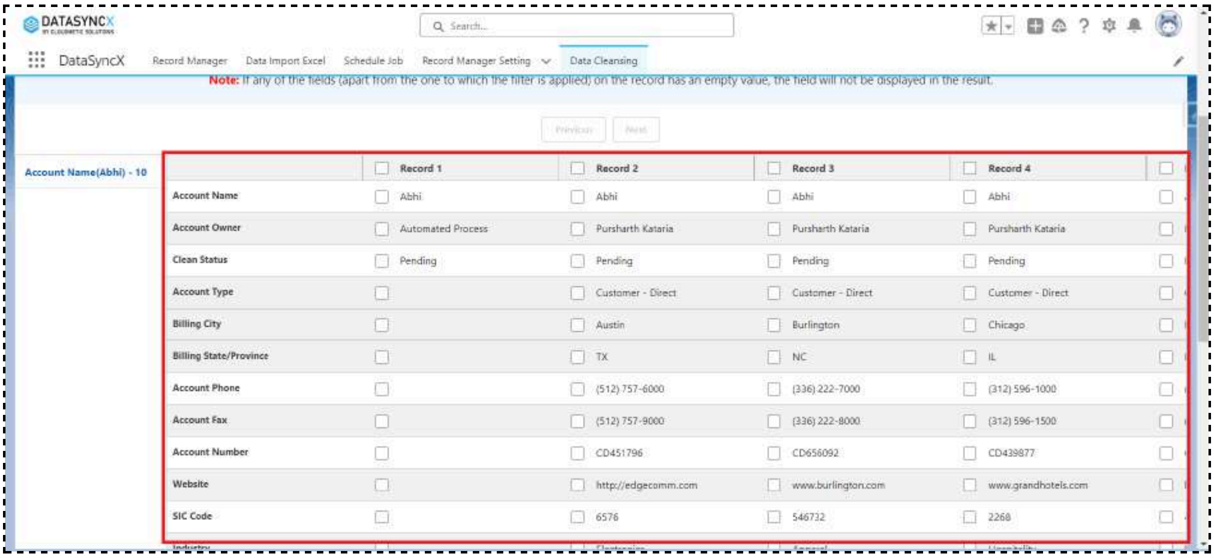
Step 4 - After this, you will be able to see the complete records appearing on your screen right below.



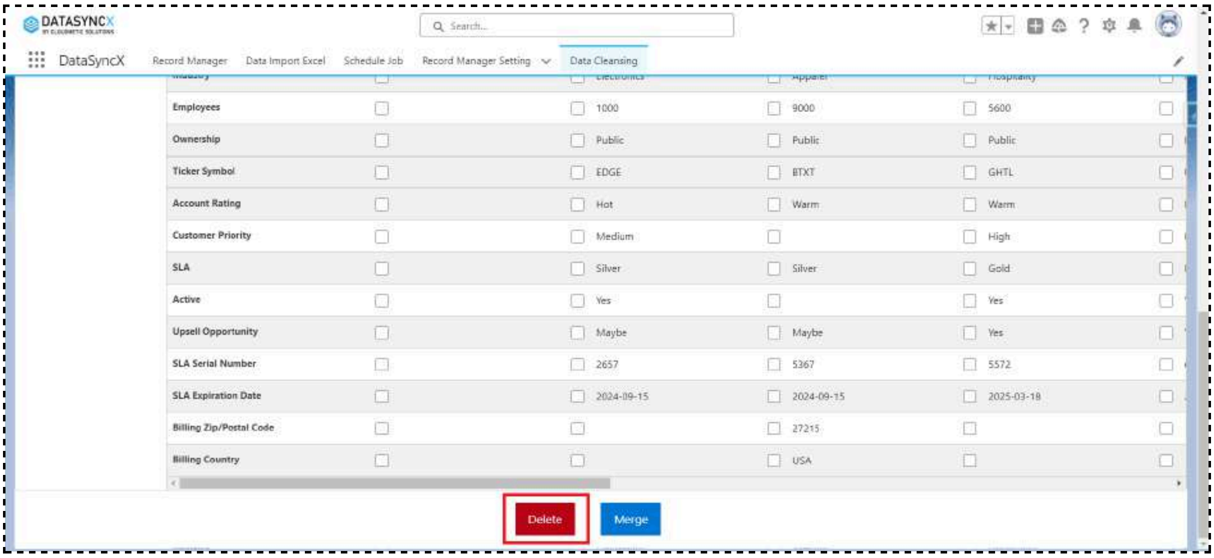
Step 5 - On the left of your screen you will see the number of duplicates these objects contain.



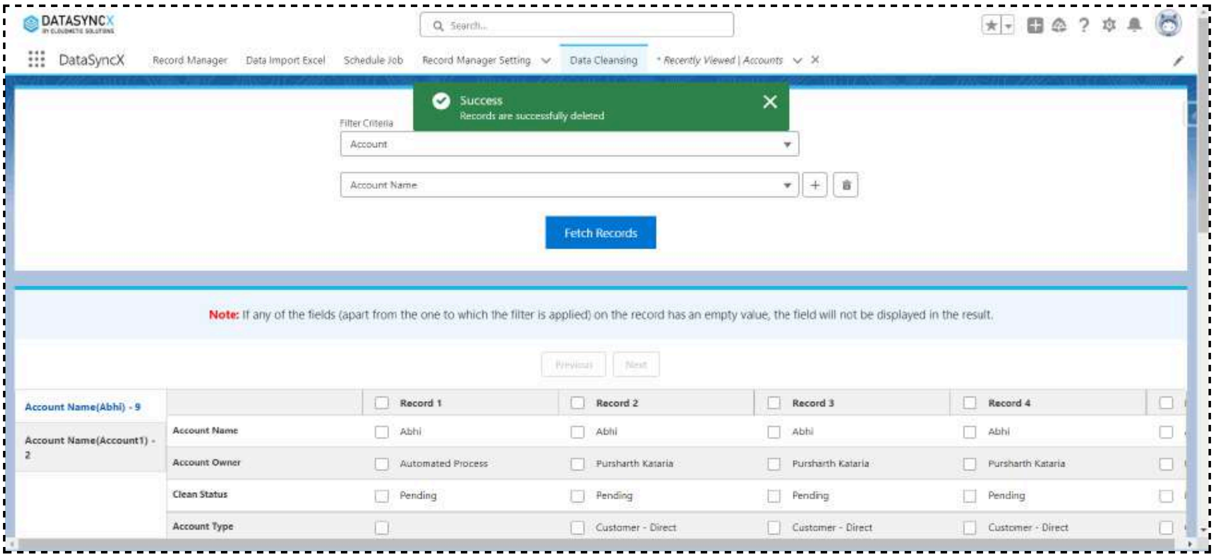
Step 6 - Now, you can also see the number of records, containing duplicate account names.



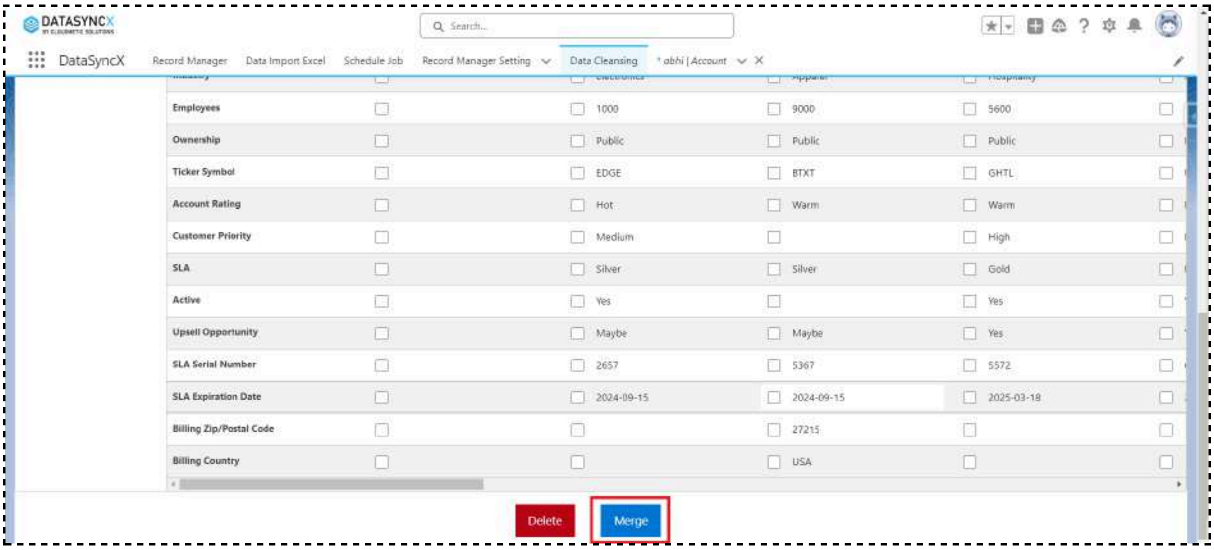
Step 7 - If you want to Delete your selected duplicate records, you can simply delete them by selecting the records and hitting the Delete option.



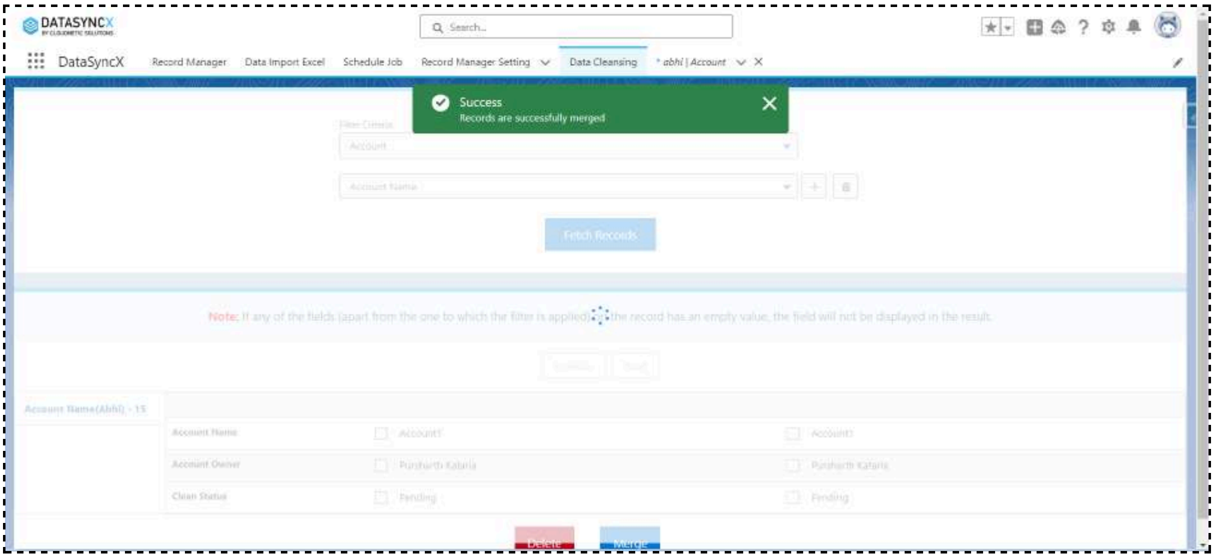
Step 8 - Finally, you will get the pop-up (Records are successfully Deleted). And you can also see below, that records are deleted.



Step 9 - If in case you want to merge the duplicate records into one, you can simply choose the records and hit the Merge option.

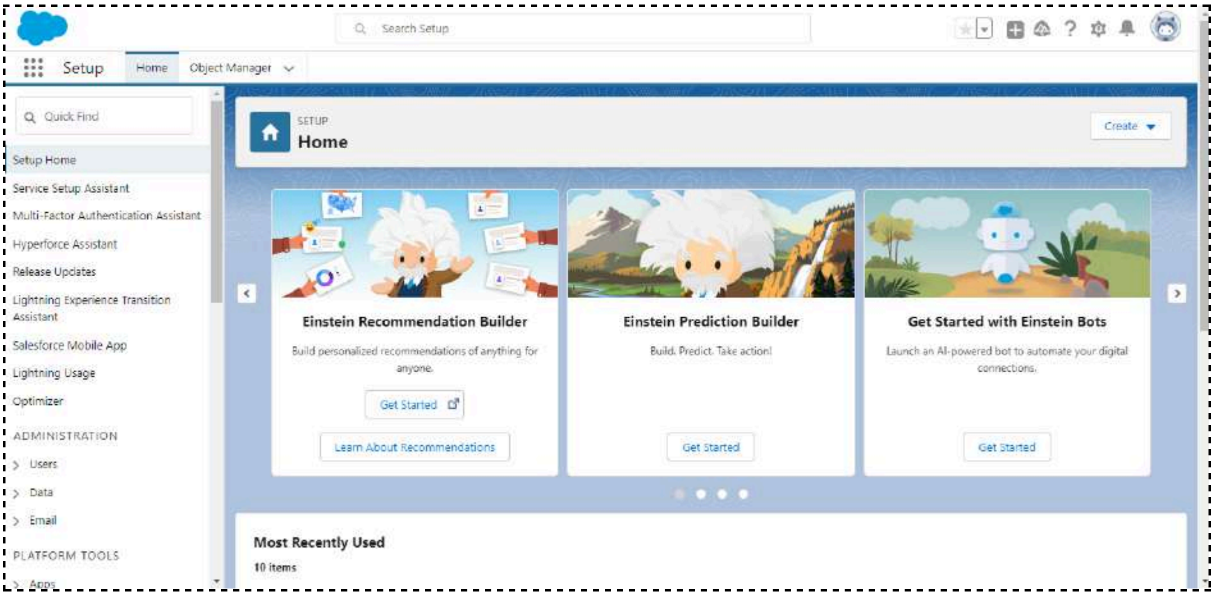


Step 10 - After selecting the merge option, you will get a pop-up (Records are successfully merged).

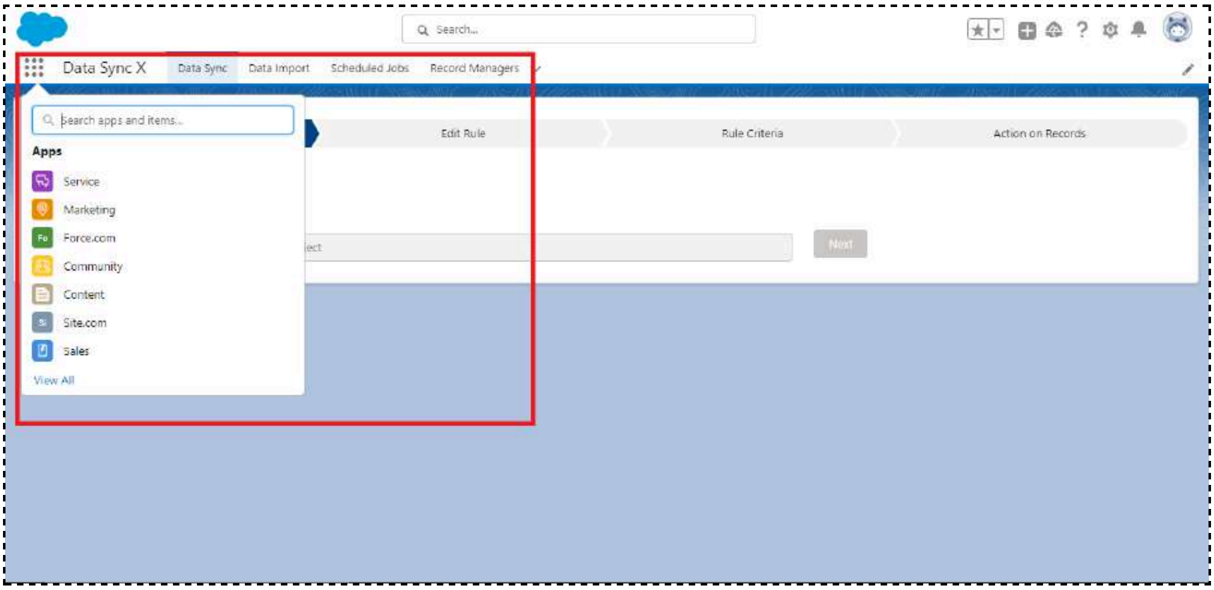


Clone Records

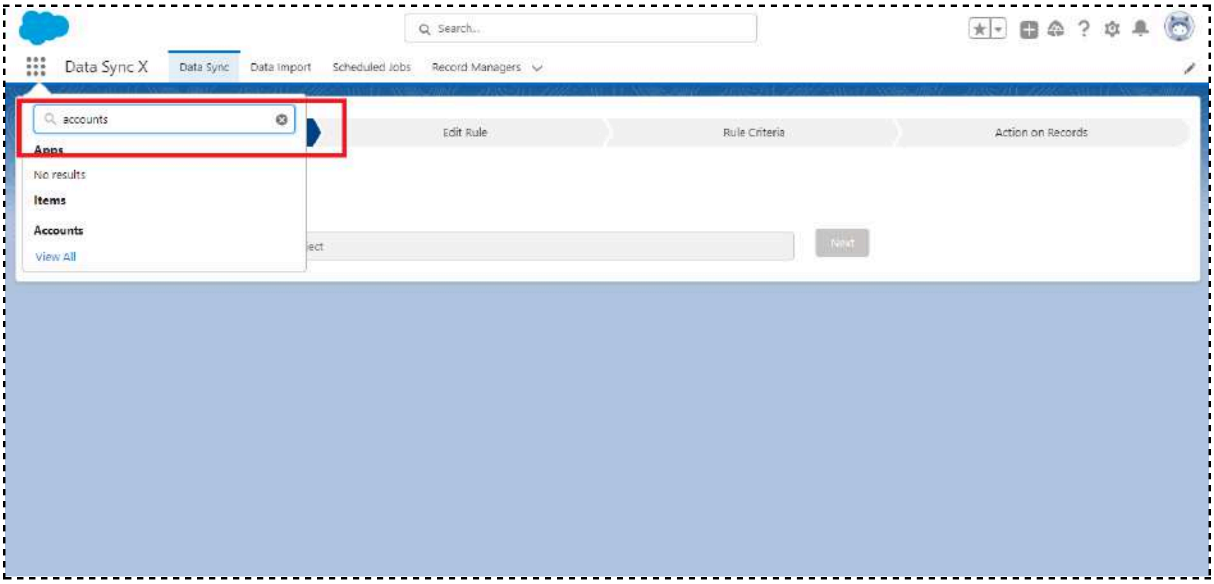
Step 1 - First you see the interface of the application.



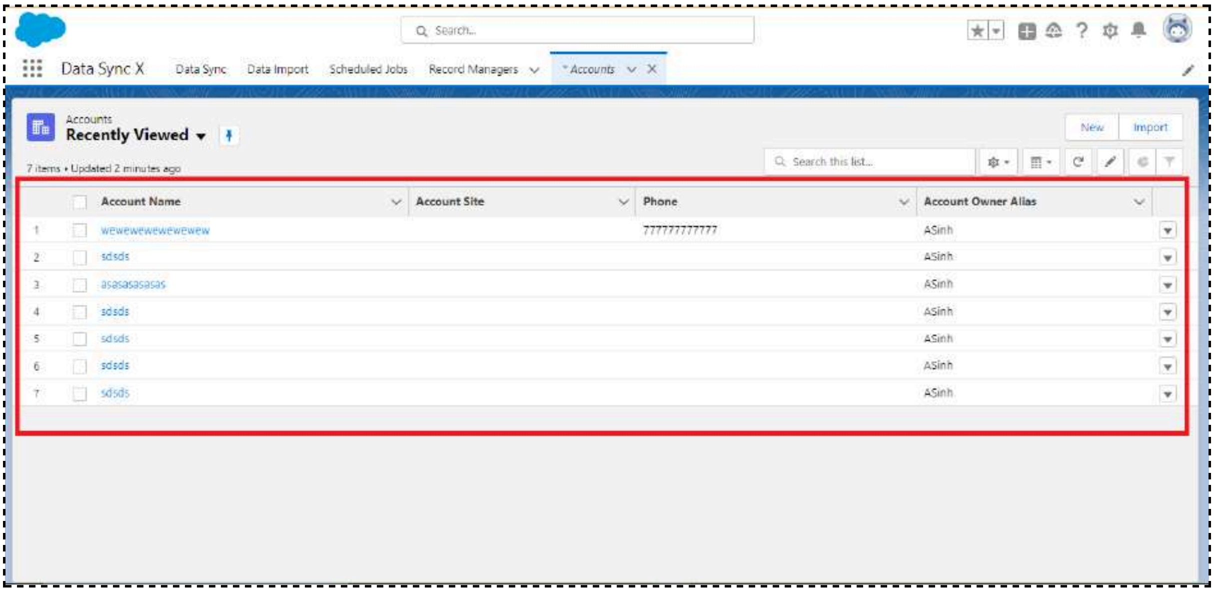
Step 2 - Open the **App launcher** on your left top.



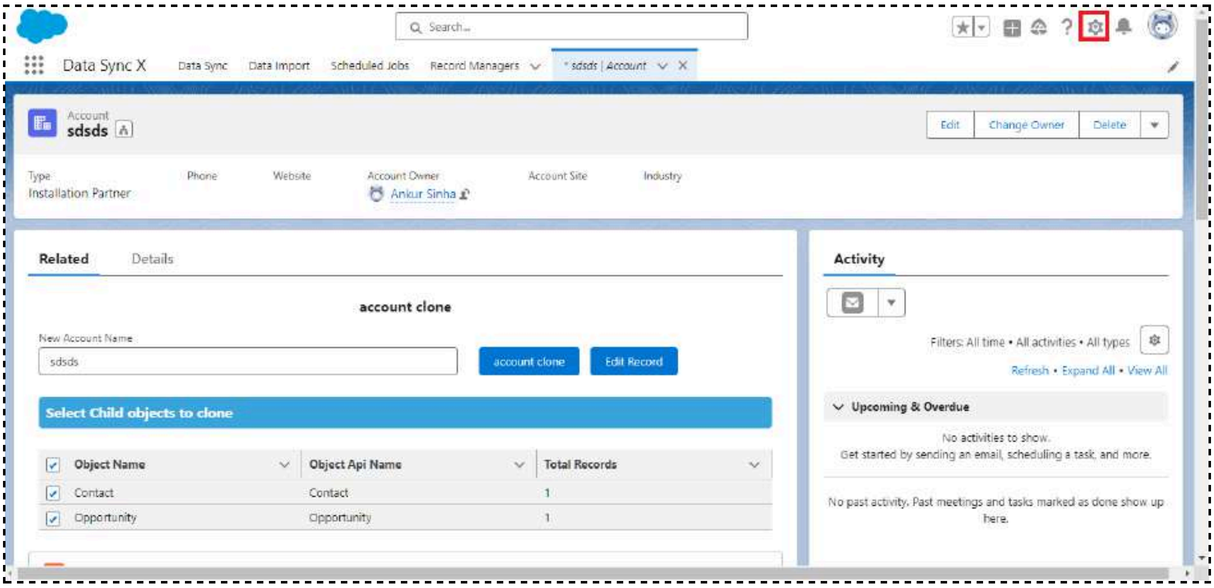
Step 3 - Go to any **Object Record Page** that you want to clone here
We are taking it into Account.



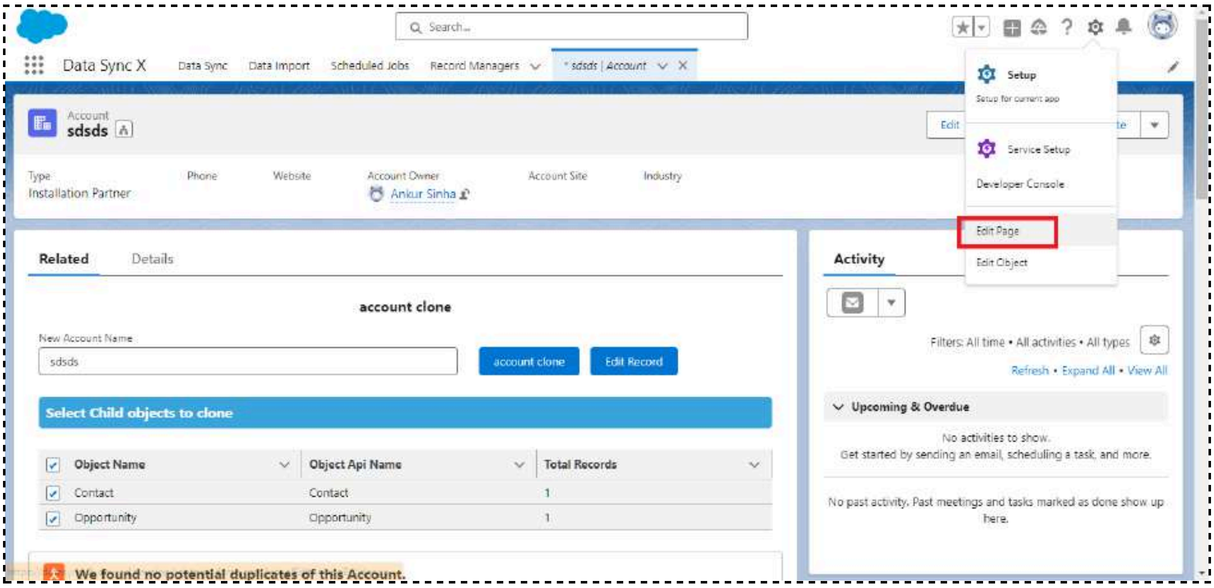
Step 4 - Afterward, select any Record on the **Account List** view page.



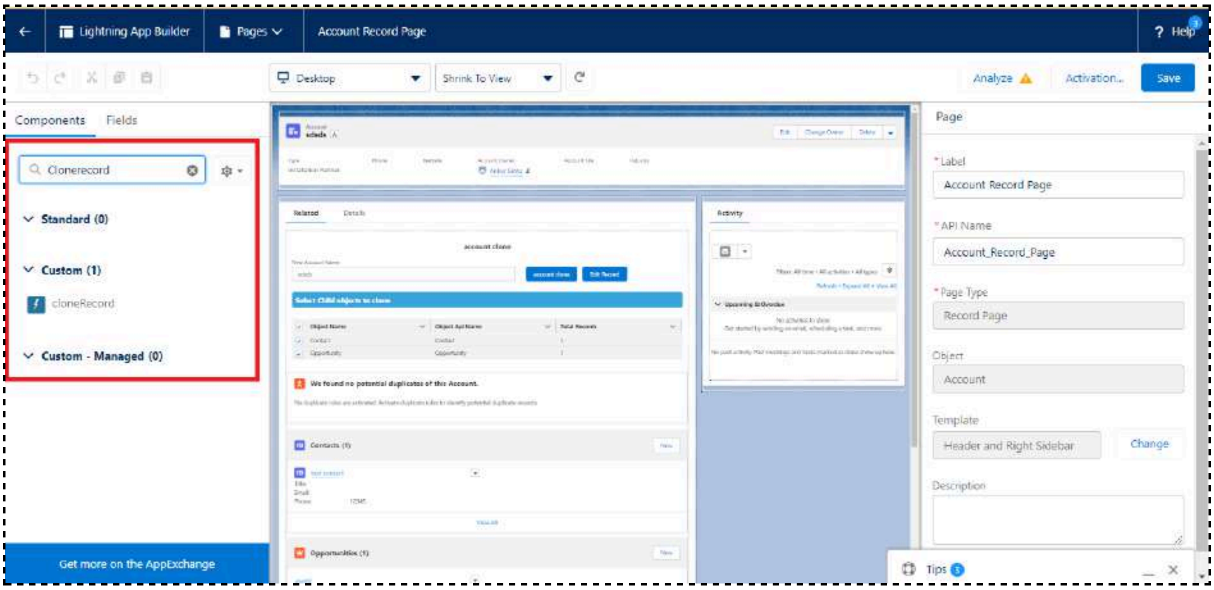
Step 5 - Now after selecting the account, click on the **setting gear icon** on your top right.



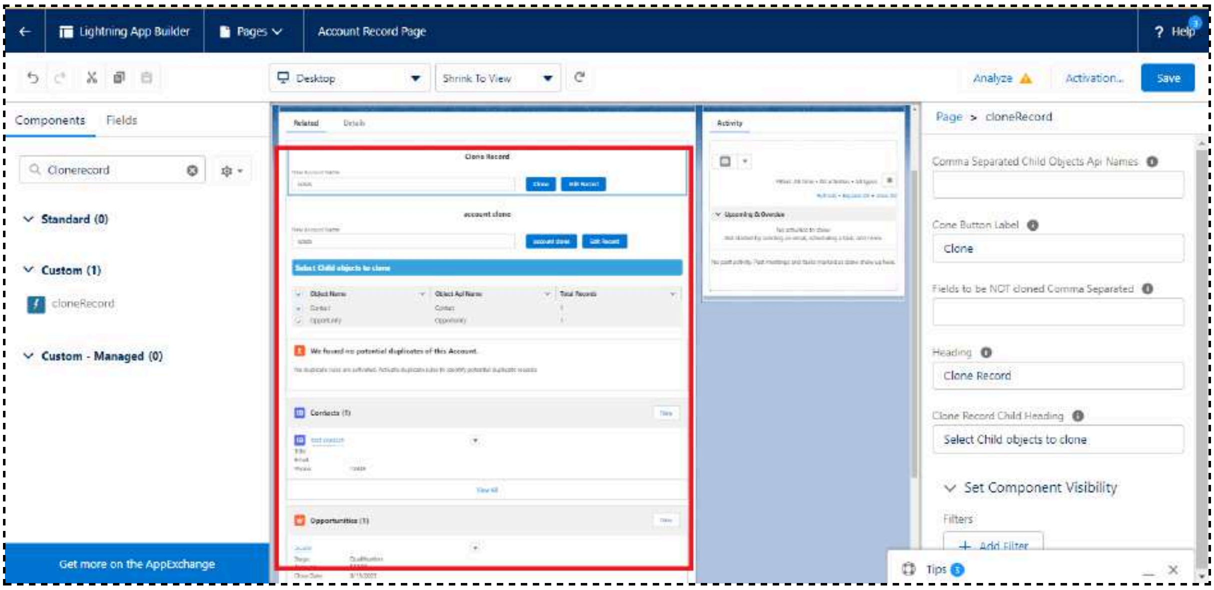
Step 6 - Now Select the **Edit page option** and move to the next step.



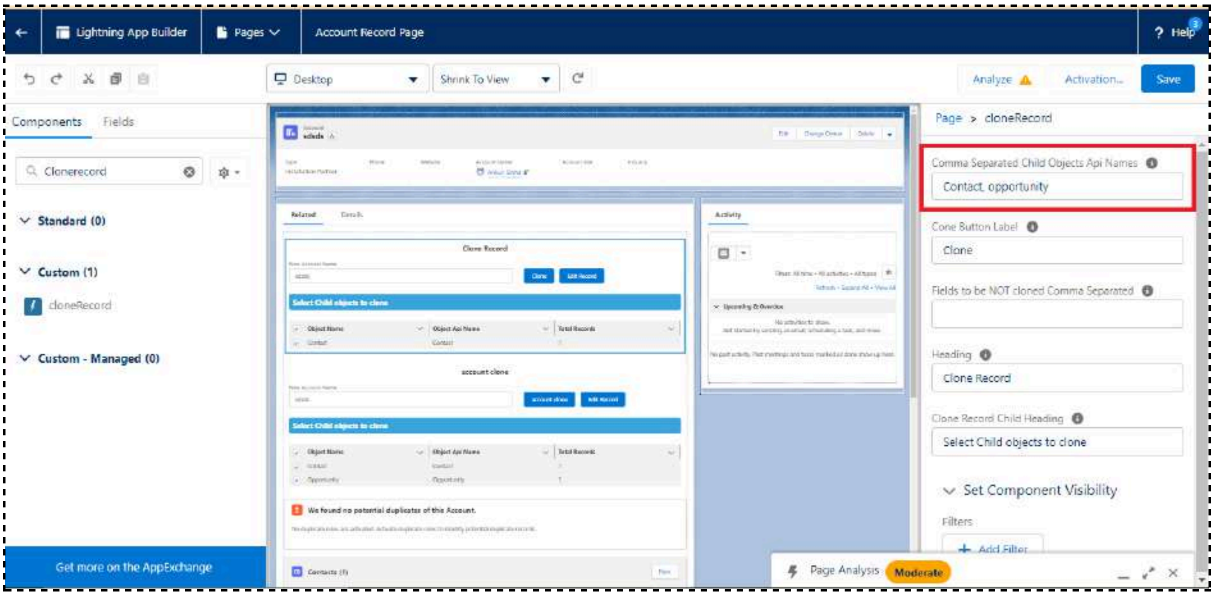
Step 7 - Then, search **CloneRecorder** in the **component search bar** on your left.



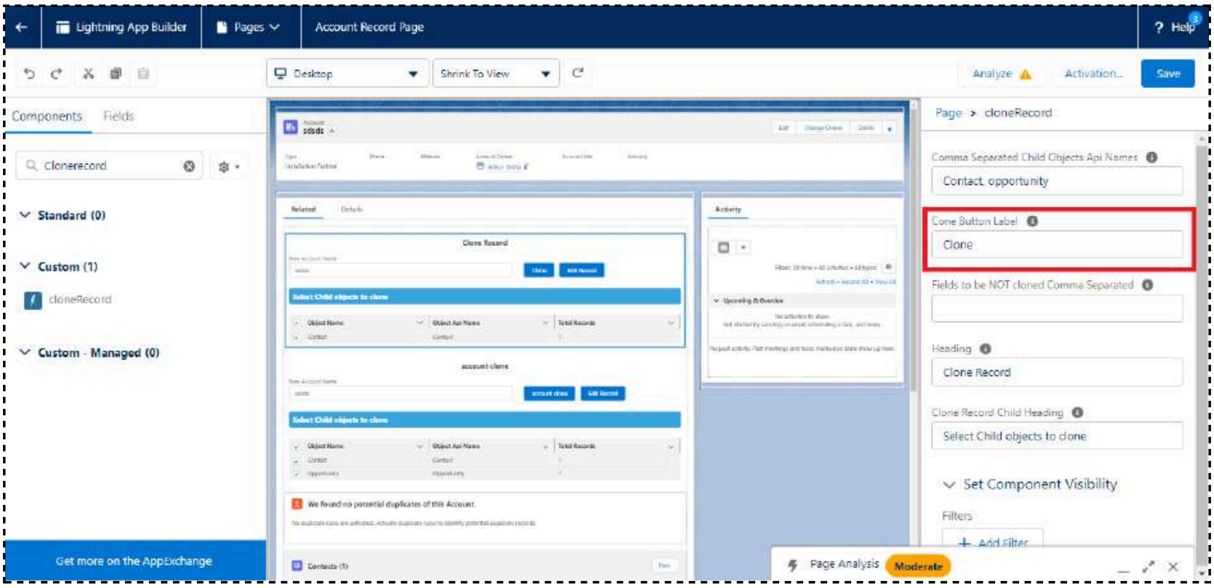
Step 8 - **Drag** and **Drop** the CloneRecorder option into the **account record page** where you want to add the clone record Component in your record Detail Page.



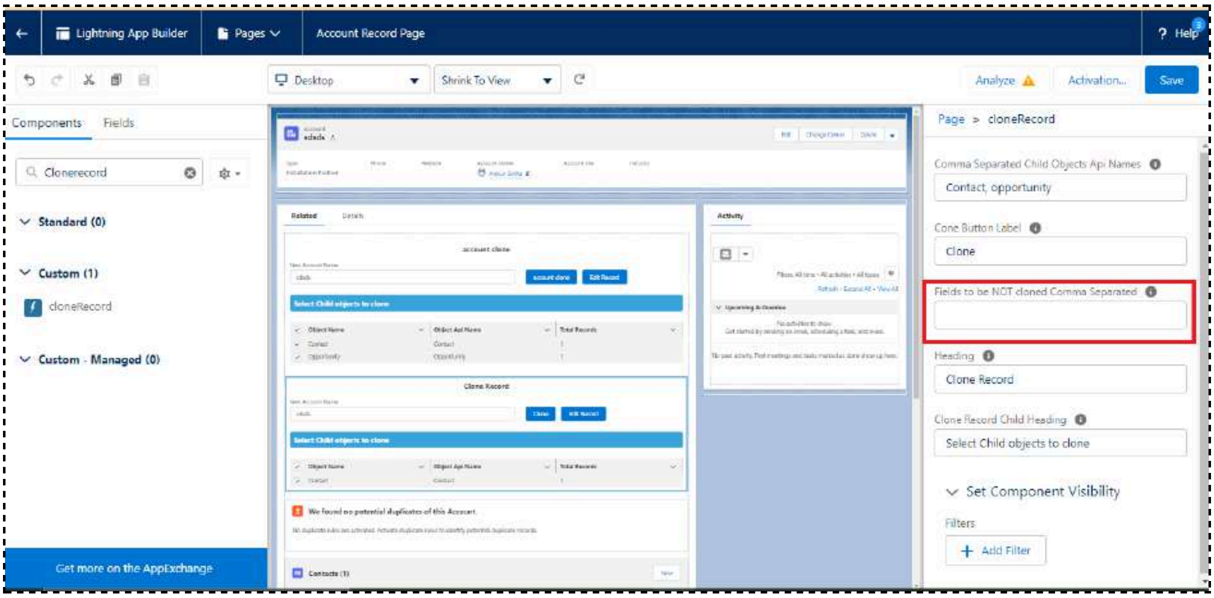
Step 9 - After completing this, fill in all the details on your right, first **(comma-separated child object API names)**. Enter Contact or opportunity.



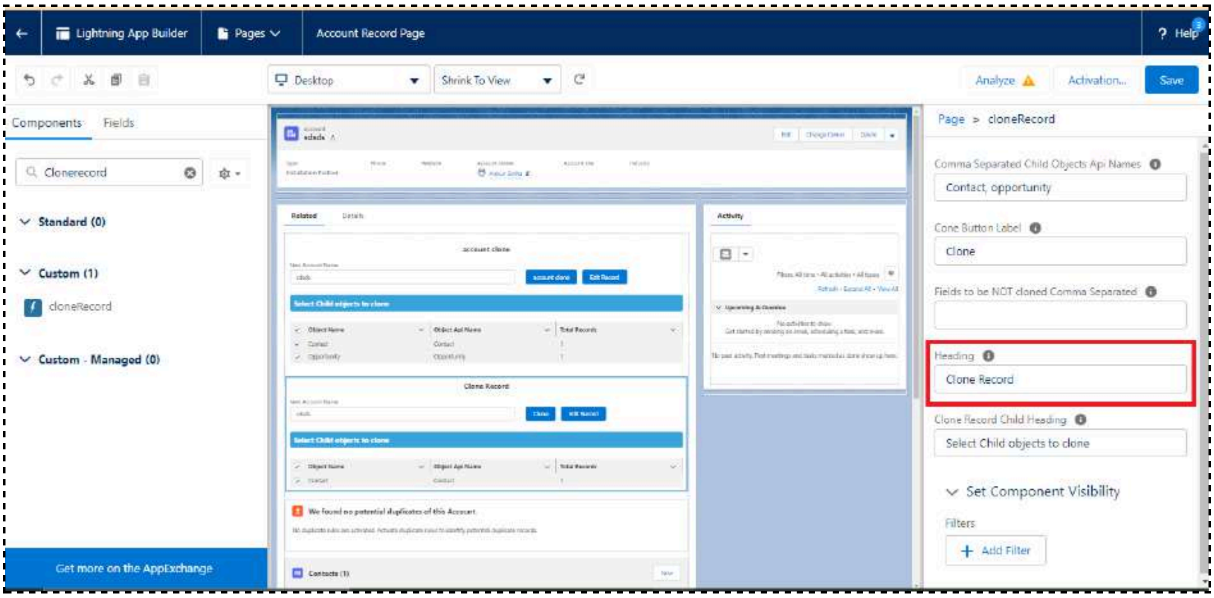
Step 10 - Enter the **Clone button label** which will be the name of the clone button.



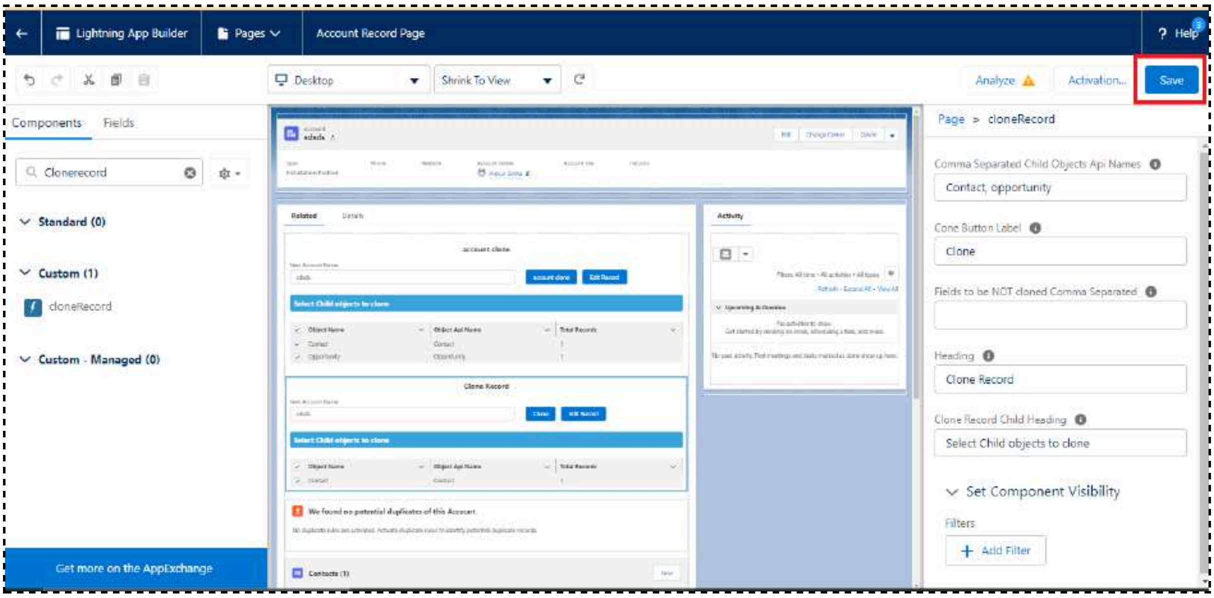
Step 11 - Enter the fields, which you don't want to be cloned.



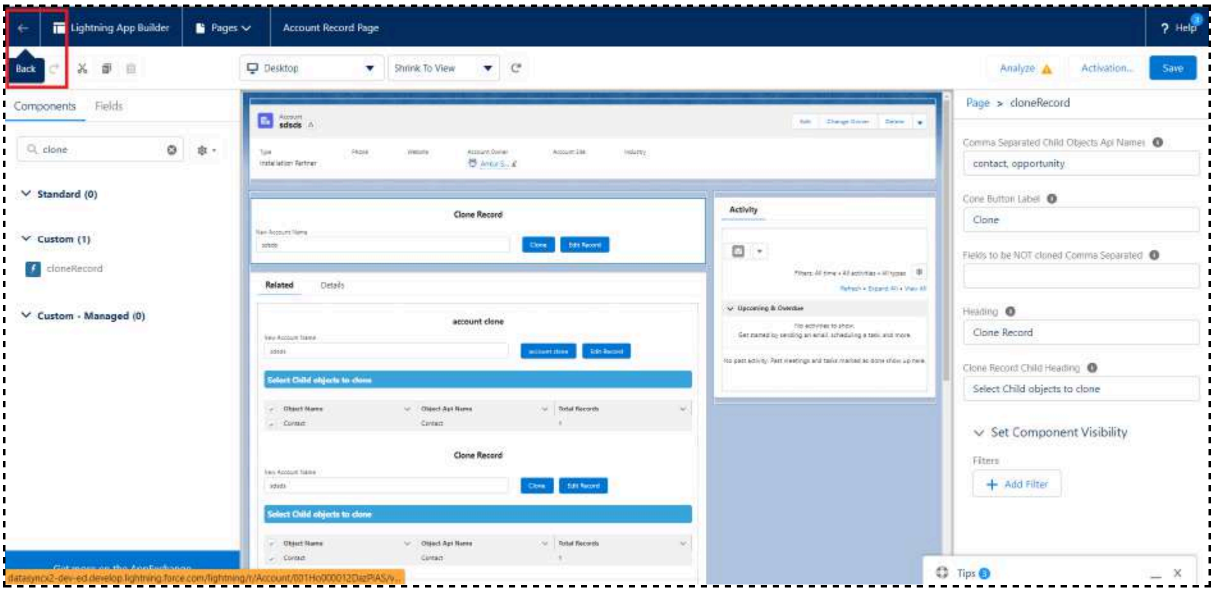
Step 12 - Add a **Heading** as you need.



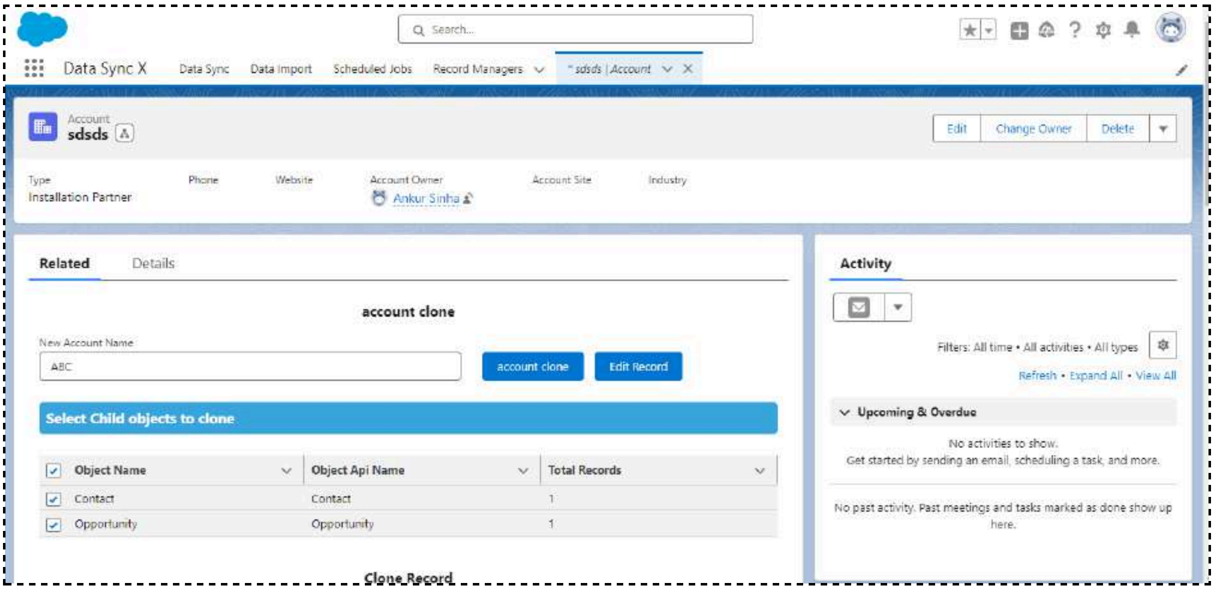
Step 13 - Now you have to save the updated actions, by clicking the **Save** button on your top right.



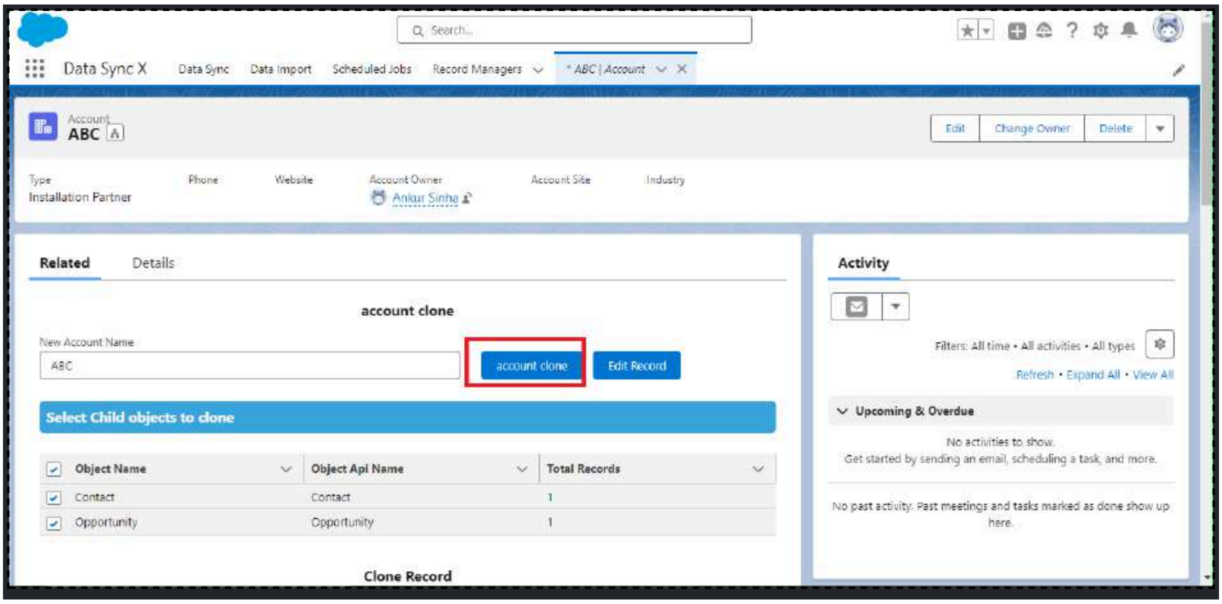
Step 14 - Now after saving this component, hit the **back** button for the view of the object record detail page.



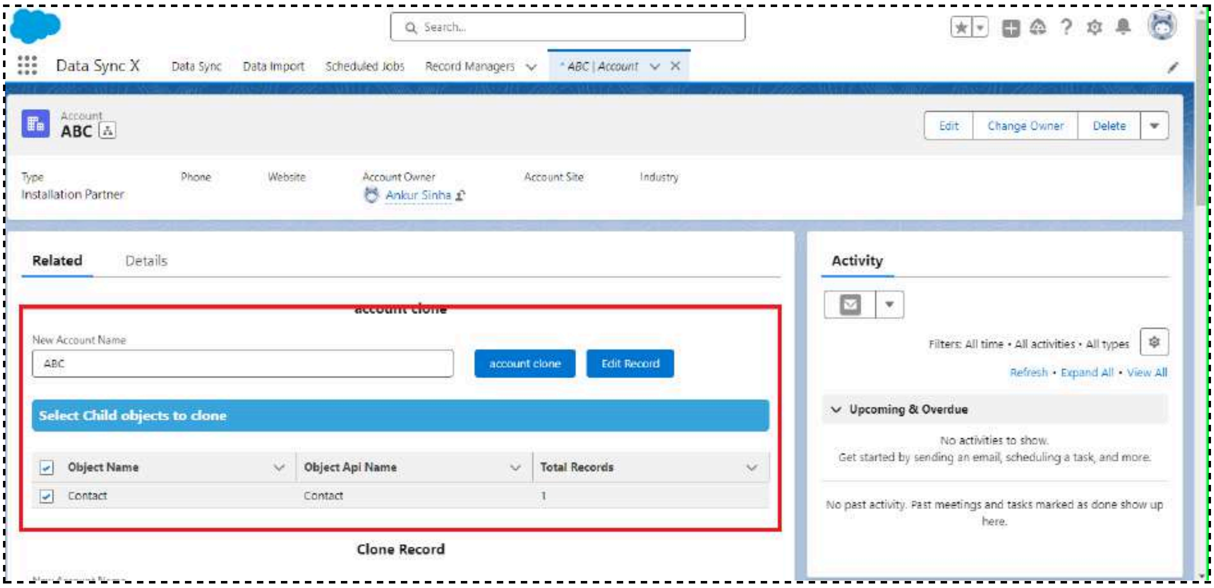
Step 15 - After **saving** and **activation** this component will be visible on the object record page.



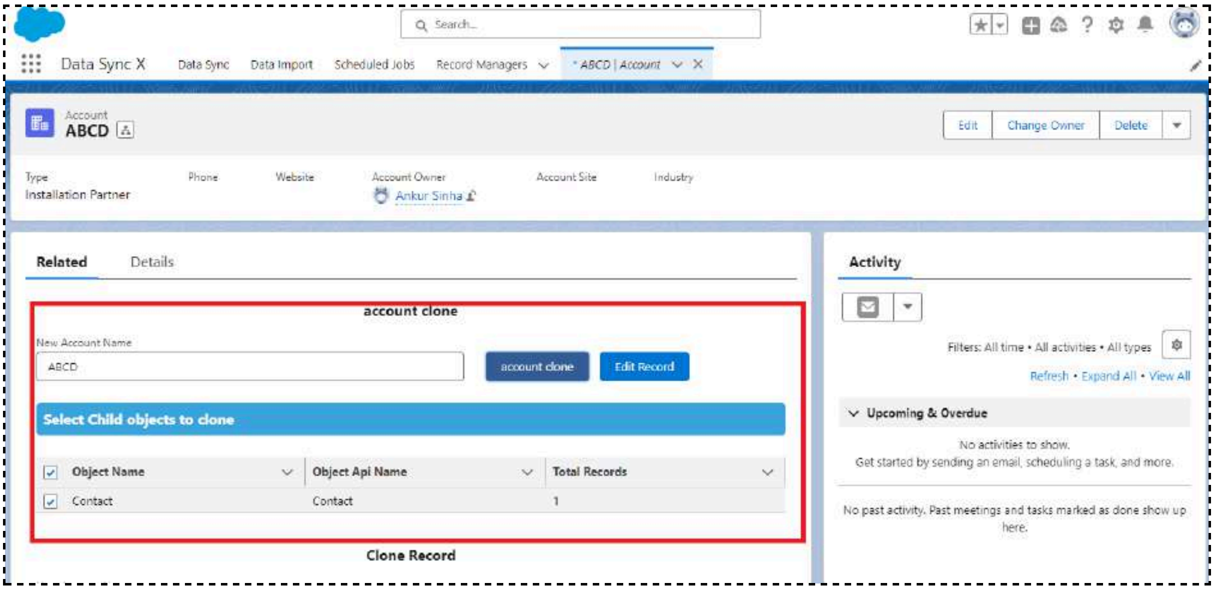
Step 16 - To clone this account click, you have To clone this account, Give a new account name(if you want to rename the cloned record) in the Column select the child record to clone, and then click on clone.



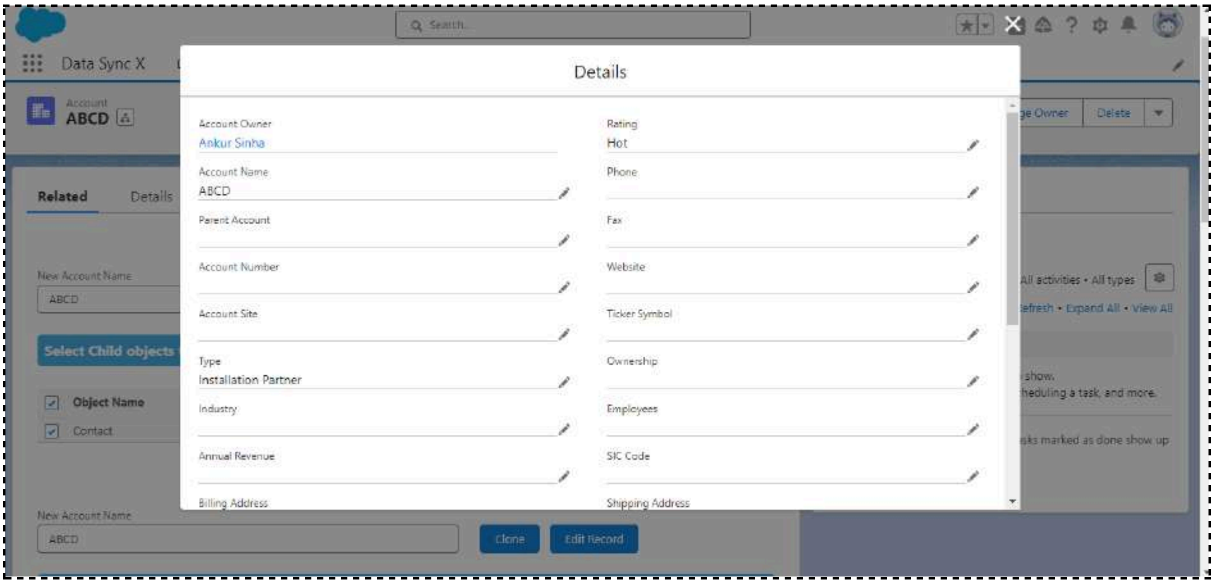
Step 17 - If you want to clone only a single child record with the same account name then select which record to clone and give the same account name then click on the clone.



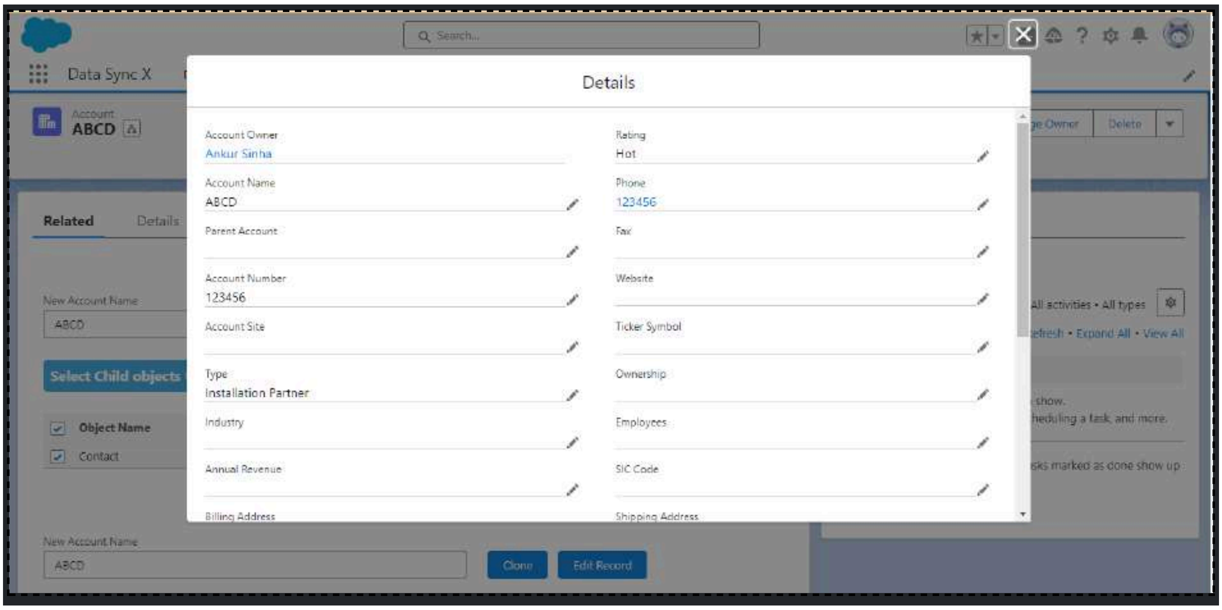
Step 18 - If you want to clone only a child Object record with a different account name then select which record to clone and give the different account name then click on the clone.



Step 19 - If you want to edit the details/other fields of the record that you are going to clone then go to edit record and a modal will open then fill in all details that you want to Replace in the new cloned record.



Step 20 - After cloning the previous record, details would be updated in the new account with the details that you filled in the previous step.


Data Sync X
Account
ABCD
Related
Details
New Account Name
ABCD
Select Child objects
Object Name
Contact
Details
Account Owner
Ankur Sinha
Rating
Hot
Account Name
ABCD
Phone
123456
Parent Account
Fax
Account Number
123456
Website
Account Site
Ticker Symbol
Type
Installation Partner
Ownership
Industry
Employees
Annual Revenue
SIC Code
Billing Address
Shipping Address
Delete
All activities • All types
Expand All • View All
Clone
Edit Record

Thank You