

Kcloud Mass Actions App

Configuration Guide

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Introduction

1. Mass Edit, Mass Update, Mass Delete, Mass Merge Duplicate records from any list view or related list.
2. Works for both standard and custom object.
3. No hassle in using it for custom objects. Just change the object name and you are good to go.
4. No manual entering the fields is required to edit/update.
5. Select fields dynamically on the go.
6. Edit/Update any Standard or Custom fields.

This application supports all standard objects. With a few minutes of work, you can add it to any custom object in your organization (see customization guide) and it works on any filter/list view as well as a related list.

This application allows users to perform mass actions to the records in their Salesforce organization easily.

This app will target the audience who wants to clean their data faster, instead of going to every record, You can just select all of them at once.

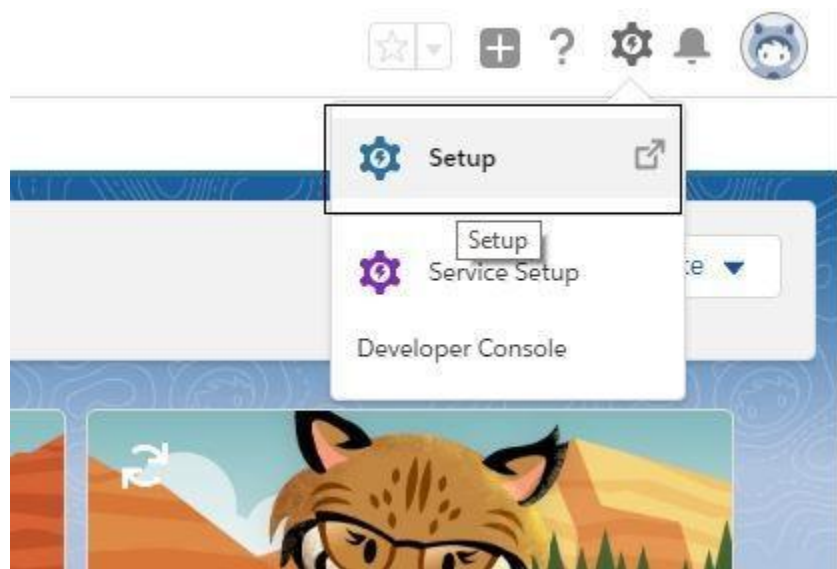
This will work for any custom or standard object and for any standard or custom field

The user-friendly interface will let users choose from all the custom or standard fields of an object.

Mass Edit/Update/Delete Button

- For Lead object mass edit/update/delete/Mass Merge Duplicate button is included in Kcloud mass actions manage package, only need to add on the list view button layout.
- To Create the mass edit/update/delete button for other standard objects and custom objects. Below are the steps need to follow:

1. Click on the **Gear Icon** in the right-top corner to open **Setup**.



On the **Setup** page, Click on **“Object Manager”**.

Setup Home **Object Manager** ▾



SETUP

Object Manager

51+ Items, Sorted by Label

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Account	Account	Standard Object			
Activity	Activity	Standard Object			
Alternative Payment Method	AlternativePaymentMethod	Standard Object			
API Anomaly Event Store	ApiAnomalyEventStore	Standard Object			

2. All the standard and custom objects are displayed here. Find the object that you created the VF page for and click on its name. Here you should see a screen like below screenshot. In the Button, Links and Actions tab, click or “New Button or Link” to create a new button.
3. All the standard and custom objects are displayed here. Find the object that you create and click on its name. Here you should see a screen like below screenshot. In the Button, Links and Actions tab, click or “New Button or Link” to create a new button.

SETUP > OBJECT MANAGER

Contact

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Buttons, Links, and Actions

20 Items, Sorted by Label

LABEL	NAME	DESCRIPTION	TYPE	CONTENT SOURCE	OVERRIDDEN
Add to Call List	CreateCallList			Standard page	▾
Add to Campaign	AddToCampaign			Standard page	▾
Add to Campaign	AddCampaign			Standard page	▾
Check for New Data	XClean			Standard page	▾

4.Fill in all the details on this screen as given below and hit save.

Account Custom Button or Link
New Button or Link

Custom Button or Link Edit

SaveQuick SavePreviewCancel

Label

Mass Edit

Name

Mass_Edit

Description

Display Type

☐ Detail Page Link [View example](#)

☐ Detail Page Button [View example](#)

☒ List Button [View example](#)

☒ Display Checkboxes (for Multi-Record Selection)

Behavior

Display in existing window with sidebar

View Behavior Options

Content Source

URL

Select Field Type

Account

Insert Field

-- Insert Merge Field --

Insert Operator

Functions

-- All Function Categories --

ABS

ACOS

ADDMONTHS

AGE

AGEON

AND

Insert Selected Function

/flow/Kcloud_Actions_MassEditLWC

Check Syntax

Link Encoding

Unicode (UTF-8)

SaveQuick SavePreviewCancel

For Mass Edit :-

/flow/Kcloud_Actions__MassEditLWC

For Mass Update:-

/flow/Kcloud_Actions__MassUpdateLwcFlow

For Mass Delete:-

/flow/Kcloud_Actions__MassDeleteLwc

Mass Merge Duplicate

- Mass Merge Duplicate works for only the lead object.
- For lead objects, the Mass Merge Duplicate button is included in the Kcloud mass actions manage package; you only need to add it to the list view button layout.
- This application allows users to perform mass merges and duplicates of records in their Salesforce organisation easily.
- This app will target the audience who wants to clean their data faster. Instead of going to every record, You can just select all of them at once.
- The user-friendly interface will let users choose from all the master records and duplicate records.

5. Our Mass action buttons are ready for use. Just add it to any list layout and start mass editing your records.

