



# Easy Grid Table

## **iTechCloud Solution**

210, Western Plaza,

Near Simada Naka,

Surat, Gujarat 395006

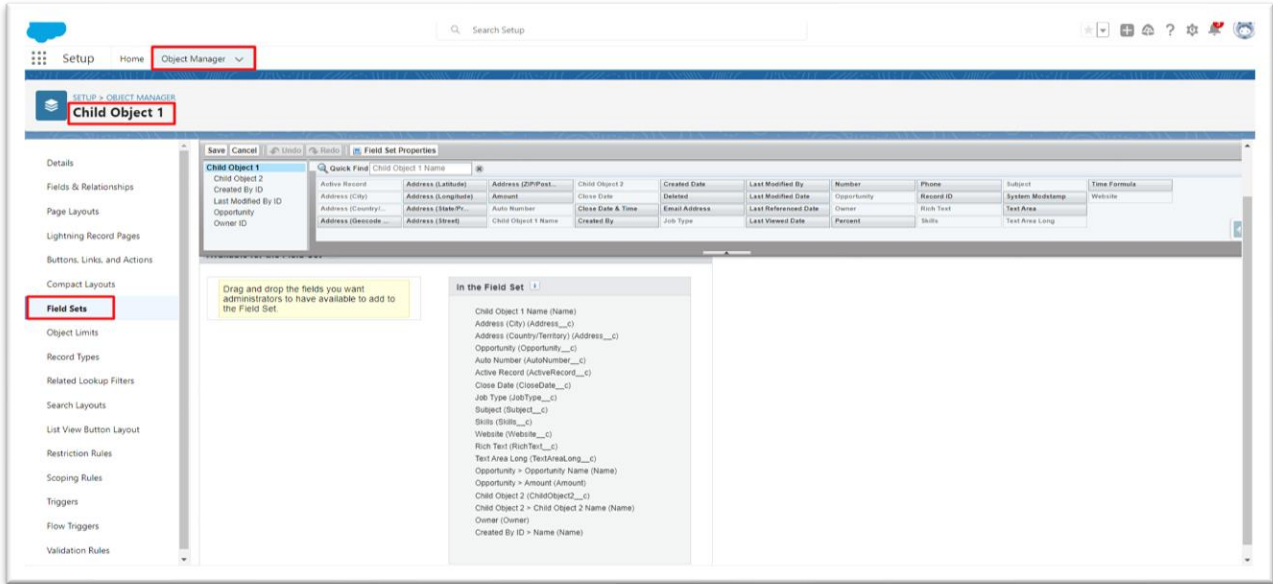
[www.itechcloudsolution.com](http://www.itechcloudsolution.com)

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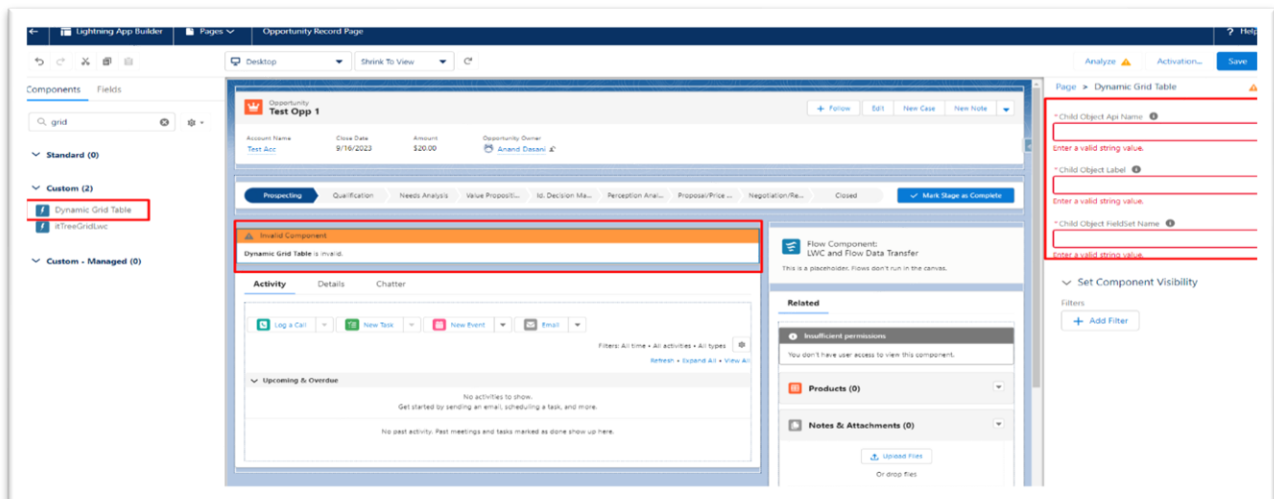
## Step 1: Create FieldSet (Of child object)

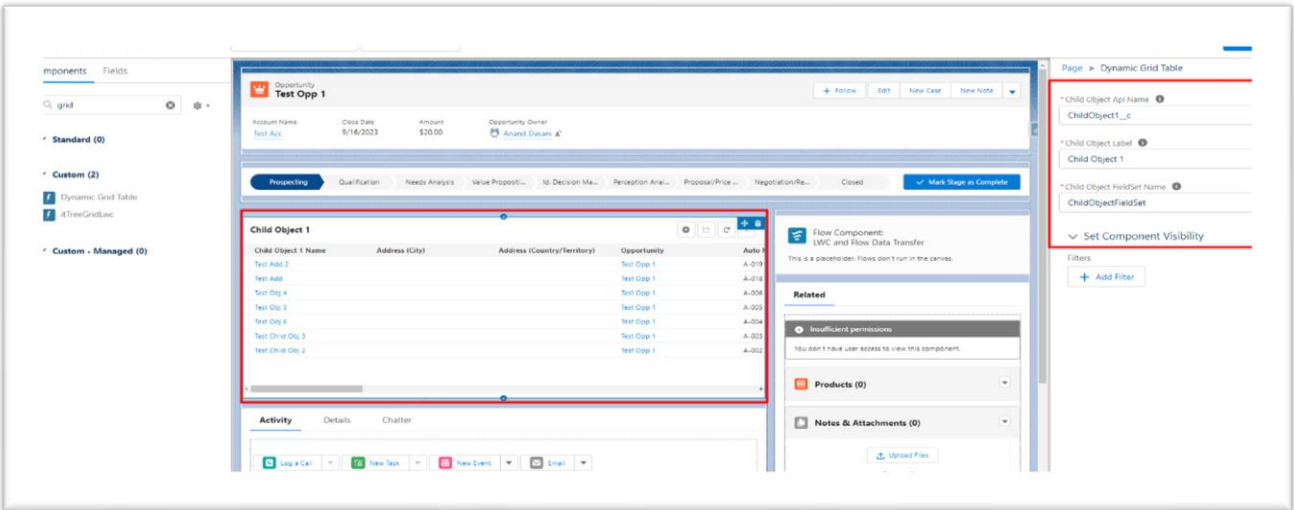
- Setup > Object Manager > 'Your Custom Object' > Field Sets > New
- Drag and Drop the fields you want to include in the table > Save
- Copy FieldSet API Name (Will be used in next step)



## Step 2: Add Easy Grid Table to Record Page

- Edit Page Layout (Parent), Drag and Drop **Easy Grid Table** on Page Layout
- Give Input
  - ObjectApiName: Name of child object
  - Child Object Label: Label you want in table header
  - FieldSet Name: Name of the fieldSet we created in Step 1



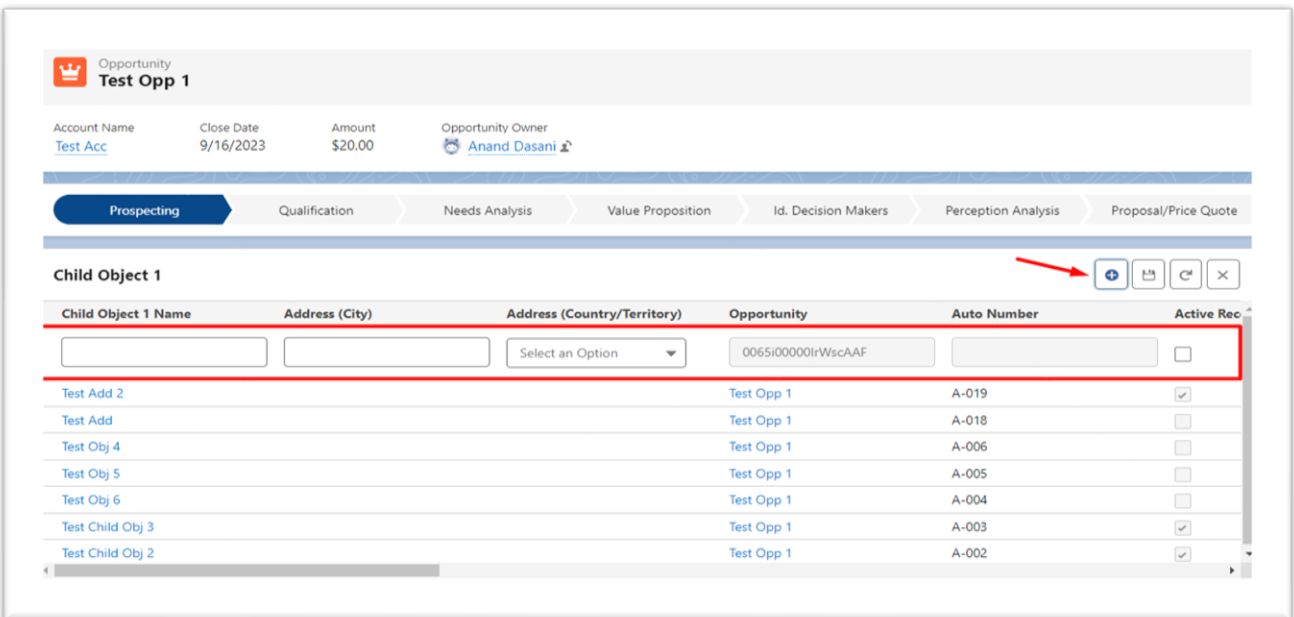


### Step 3: Perform CRUD (Create, Read, Update, Delete)

- Open Parent Record
- Here Easy Grid Table contains all the related (child) records to that particular parent record with all the fields you included in the fieldSet.
- Now you can Create, Update and delete the related records of the table in bulk

### Create

- Click the add button and input the required details of the record
- Hit save button, record will be created



**Opportunity Test Opp 1**

Account Name: [Test Acc](#)    Close Date: 9/16/2023    Amount: \$20.00    Opportunity Owner: [Anand Dasani](#)

Prospecting    Qualification    Needs Analysis    Value Proposition    Id. Decision Makers    Perception Analysis    Proposal/Price Quote

**Child Object 1** + 📄 ↻ ×

Child Object 1 Name	Address (City)	Address (Country/Territory)	Opportunity	Auto Number	Active Reco
<input type="text" value="Test Add 3"/>	<input type="text"/>	Select an Option	0065i00000lrWscAAF	<input type="text"/>	<input checked="" type="checkbox"/>
Test Add 2			Test Opp 1	A-019	<input checked="" type="checkbox"/>
Test Add			Test Opp 1	A-018	<input type="checkbox"/>
Test Obj 4			Test Opp 1	A-006	<input type="checkbox"/>
Test Obj 5			Test Opp 1	A-005	<input type="checkbox"/>
Test Obj 6			Test Opp 1	A-004	<input type="checkbox"/>
Test Child Obj 3			Test Opp 1	A-003	<input checked="" type="checkbox"/>
Test Child Obj 2			Test Opp 1	A-002	<input checked="" type="checkbox"/>

**Opportunity Test Opp 1** ✓ Success Record Update Successfully ×

Account Name: [Test Acc](#)    Close Date: 9/16/2023    Amount: \$20.00    Opportunity Owner: [Anand Dasani](#)

Prospecting    Qualification    Needs Analysis    Value Proposition    Id. Decision Makers    Perception Analysis    Proposal/Price Quote

**Child Object 1** + 📄 ↻ ×

Child Object 1 Name	Address (City)	Address (Country/Territory)	Opportunity	Auto Number	Active Reco
Test Add 3			Test Opp 1	A-027	<input checked="" type="checkbox"/>
Test Add 2			Test Opp 1	A-019	<input checked="" type="checkbox"/>
Test Add			Test Opp 1	A-018	<input type="checkbox"/>
Test Obj 4			Test Opp 1	A-006	<input type="checkbox"/>
Test Obj 5			Test Opp 1	A-005	<input type="checkbox"/>
Test Obj 6			Test Opp 1	A-004	<input type="checkbox"/>
Test Child Obj 3			Test Opp 1	A-003	<input checked="" type="checkbox"/>
Test Child Obj 2			Test Opp 1	A-002	<input checked="" type="checkbox"/>

## Update

- Double Click on any row to enter Edit Mode
- Update the rows you want to update the record
- Hit save button, record will be updated

**Opportunity**  
**Test Opp 1**

Account Name: [Test Acc](#)    Close Date: 9/16/2023    Amount: \$20.00    Opportunity Owner: [Anand Dasani](#)

Prospecting    Qualification    Needs Analysis    Value Proposition    Id. Decision Makers    Perception Analysis    Proposal/Price Quote

**Child Object 1** Edit Mode + 📄 ↶ ✕

Child Object 1 Name	Address (City)	Address (Country/Territory)	Opportunity	Auto Number	Active Rec
Test Add 3		Select an Option	Test Opp 1	A-027	<input checked="" type="checkbox"/>
Test Add 2		Select an Option	Test Opp 1	A-019	<input checked="" type="checkbox"/>
Test Add		Select an Option	Test Opp 1	A-018	<input type="checkbox"/>
Test Obj 4		Select an Option	Test Opp 1	A-006	<input type="checkbox"/>

**Child Object 1** + 📄 ↶ ✕

Child Object 1 Name	Address (City)	Address (Country/Territory)	Opportunity	Auto Number	Active Rec
Test Add 300		Select an Option	Test Opp 1	A-027	<input checked="" type="checkbox"/>
Test Add 2		Select an Option	Test Opp 1	A-019	<input checked="" type="checkbox"/>
Test Add		Select an Option	Test Opp 1	A-018	<input type="checkbox"/>
Test Obj 4		Select an Option	Test Opp 1	A-006	<input type="checkbox"/>

Opportunity **Test Opp 1** Success  
Record Update Successfully

Account Name: [Test Acc](#)    Close Date: 9/16/2023    Amount: \$20.00    Opportunity Owner: [Anand Dasani](#)

Prospecting    Qualification    Needs Analysis    Value Proposition    Id. Decision Makers    Perception Analysis    Proposal/Price Quote

**Child Object 1**

Child Object 1 Name	Address (City)	Address (Country/Territory)	Opportunity	Auto Number	Active Record
<a href="#">Test Add 300</a>			<a href="#">Test Opp 1</a>	A-027	<input type="checkbox"/>
<a href="#">Test Add 2</a>			<a href="#">Test Opp 1</a>	A-019	<input checked="" type="checkbox"/>
<a href="#">Test Add</a>			<a href="#">Test Opp 1</a>	A-018	<input type="checkbox"/>
<a href="#">Test Obj 4</a>			<a href="#">Test Opp 1</a>	A-006	<input type="checkbox"/>
<a href="#">Test Obj 5</a>			<a href="#">Test Opp 1</a>	A-005	<input type="checkbox"/>
<a href="#">Test Obj 6</a>			<a href="#">Test Opp 1</a>	A-004	<input type="checkbox"/>
<a href="#">Test Child Obj 3</a>			<a href="#">Test Opp 1</a>	A-003	<input checked="" type="checkbox"/>
<a href="#">Test Child Obj 2</a>			<a href="#">Test Opp 1</a>	A-002	<input checked="" type="checkbox"/>

## Delete

- Click the delete icon of respective row you want to delete record (last column)
- Give confirmation when you prompt to confirm the record
- Hitting delete button in the prompt will delete the record

Opportunity **Test Opp 1**

Account Name: [Test Acc](#)    Close Date: 9/16/2023    Amount: \$20.00    Opportunity Owner: [Anand Dasani](#)

Prospecting    Qualification    Needs Analysis    Value Proposition    Id. Decision Makers    Perception Analysis    Proposal/Price Quote

**Child Object 1**

Amount	Child Object 2	Child Object 2 Name	Owner ID	Full Name	Delete
20	<a href="#">Test Child 23</a>	Test Child 23	<a href="#">0055i000006F68kAAC</a>	Anand Dasani	<input checked="" type="checkbox"/>
20	<a href="#">Test Child 23</a>	Test Child 23	<a href="#">0055i000006F68kAAC</a>	Anand Dasani	<input type="checkbox"/>
20	<a href="#">Test Child 23</a>	Test Child 23	<a href="#">0055i000006F68kAAC</a>	Anand Dasani	<input type="checkbox"/>
20	<a href="#">Test Child 22</a>	Test Child 22	<a href="#">0055i000006F68kAAC</a>	Anand Dasani	<input type="checkbox"/>
20	<a href="#">Test Child 21</a>	Test Child 21	<a href="#">0055i000006F68kAAC</a>	Anand Dasani	<input type="checkbox"/>
20	<a href="#">Test Child 21</a>	Test Child 21	<a href="#">0055i000006F68kAAC</a>	Anand Dasani	<input type="checkbox"/>
20			<a href="#">0055i000006F68kAAC</a>	Anand Dasani	<input type="checkbox"/>
20			<a href="#">0055i000006F68kAAC</a>	Anand Dasani	<input type="checkbox"/>

Opportunity **Test Opp 1** + Follow Edit New Case New Note

Account Name: [Test Acc](#) | Close Date: 9/16/2023 | Amount: \$20.00 | Opportunity Owner: [Anand Dasani](#)

Prospecting | Qualification | Needs Analysis | Value Proposition | Id. Decision Makers | Perception Analysis | Proposal/Price Quote | Negotiation/Review | Closed Mark Stage as Complete

**Delete Record**

Are you sure you want to delete this?

Cancel Delete

Amount	Child Object 2	Child Object 2	Child Object 2	Opportunity	Auto Number	Active Record
20	<a href="#">Test Child 23</a>	<a href="#">Test Child 23</a>	<a href="#">Test Child 23</a>	<a href="#">Test Opp 1</a>	A-019	<input checked="" type="checkbox"/>
20	<a href="#">Test Child 23</a>	<a href="#">Test Child 23</a>	<a href="#">Test Child 23</a>	<a href="#">Test Opp 1</a>	A-018	<input type="checkbox"/>
20	<a href="#">Test Child 22</a>	<a href="#">Test Child 22</a>	<a href="#">Test Child 22</a>	<a href="#">Test Opp 1</a>	A-006	<input type="checkbox"/>
20	<a href="#">Test Child 21</a>	<a href="#">Test Child 21</a>	<a href="#">Test Child 21</a>	<a href="#">Test Opp 1</a>	A-005	<input type="checkbox"/>
20	<a href="#">Test Child 21</a>	<a href="#">Test Child 21</a>	<a href="#">Test Child 21</a>	<a href="#">Test Opp 1</a>	A-004	<input type="checkbox"/>
20	<a href="#">Test Child 21</a>	<a href="#">Test Child 21</a>	<a href="#">Test Child 21</a>	<a href="#">Test Opp 1</a>	A-003	<input checked="" type="checkbox"/>

**Child Object 1**

**Activity** | Details | Chatter

Log a Call New Task New Event Email

**LWC and Flow Data Transfer**

Available Opportunities To Update

Showing 10 of 10 items

Name	Stage	Close Date	Account ID
<input type="checkbox"/> Test Opp 1	Prospecting	Sep 15, 2023	00150000076hGAAQ
<input type="checkbox"/> Testing Opp Nav	Prospecting	Sep 15, 2023	00150000004klhAAB
<input type="checkbox"/> Test Refresh	Prospecting	Aug 31, 2023	00150000004klhAAB
<input type="checkbox"/> Possible deal	Prospecting	Apr 13, 2023	
<input type="checkbox"/> Dickenson Mobile Generators	Qualification	Jul 24, 2020	00150000004klhAAB
<input type="checkbox"/> United Oil Office Portable Generators	Negotiation/Review	Jul 24, 2020	00150000004klhAAB
<input type="checkbox"/> Express Logistics	Closed Won	Jul 24, 2020	00150000004klhAAB

Opportunity **Test Opp 1** Success Record deleted successfully

Account Name: [Test Acc](#) | Close Date: 9/16/2023 | Amount: \$20.00 | Opportunity Owner: [Anand Dasani](#)

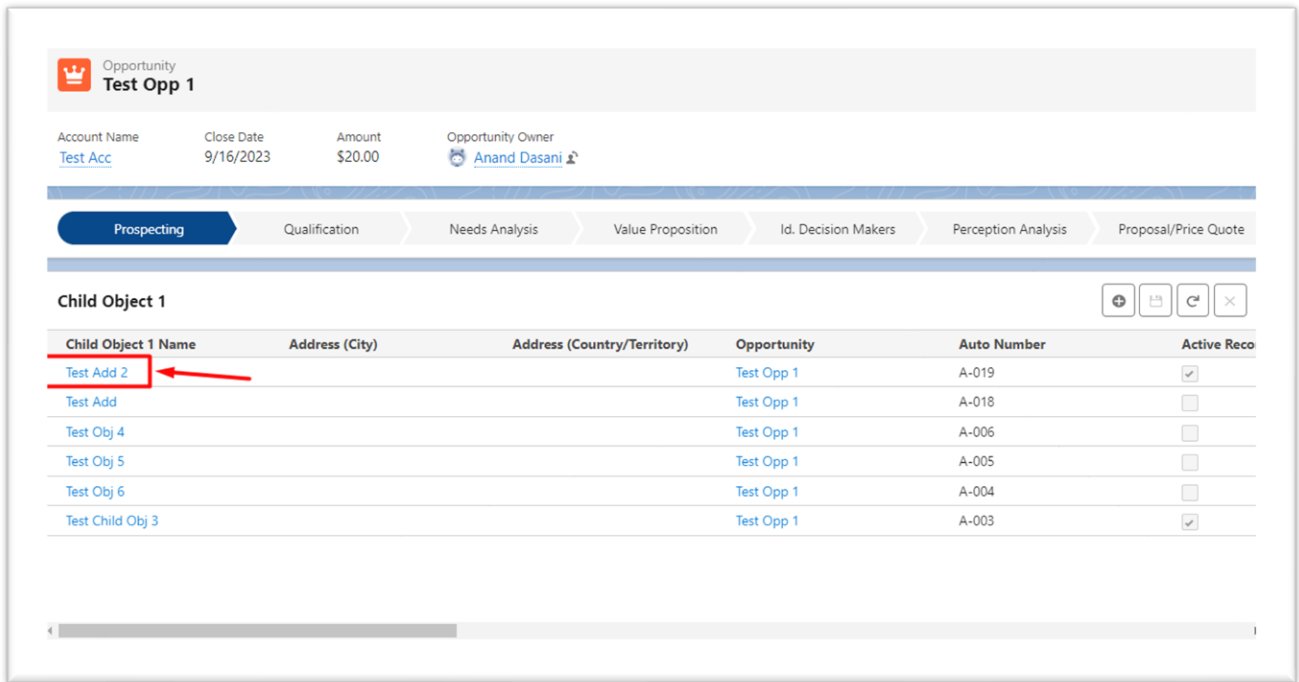
Prospecting | Qualification | Needs Analysis | Value Proposition | Id. Decision Makers | Perception Analysis | Proposal/Price Quote

**Child Object 1**

Child Object 1 Name	Address (City)	Address (Country/Territory)	Opportunity	Auto Number	Active Record
<a href="#">Test Add 2</a>			<a href="#">Test Opp 1</a>	A-019	<input checked="" type="checkbox"/>
<a href="#">Test Add</a>			<a href="#">Test Opp 1</a>	A-018	<input type="checkbox"/>
<a href="#">Test Obj 4</a>			<a href="#">Test Opp 1</a>	A-006	<input type="checkbox"/>
<a href="#">Test Obj 5</a>			<a href="#">Test Opp 1</a>	A-005	<input type="checkbox"/>
<a href="#">Test Obj 6</a>			<a href="#">Test Opp 1</a>	A-004	<input type="checkbox"/>
<a href="#">Test Child Obj 3</a>			<a href="#">Test Opp 1</a>	A-003	<input checked="" type="checkbox"/>

# Default Features

1. Clicking the name of the record will redirect you to that record page in a new tab



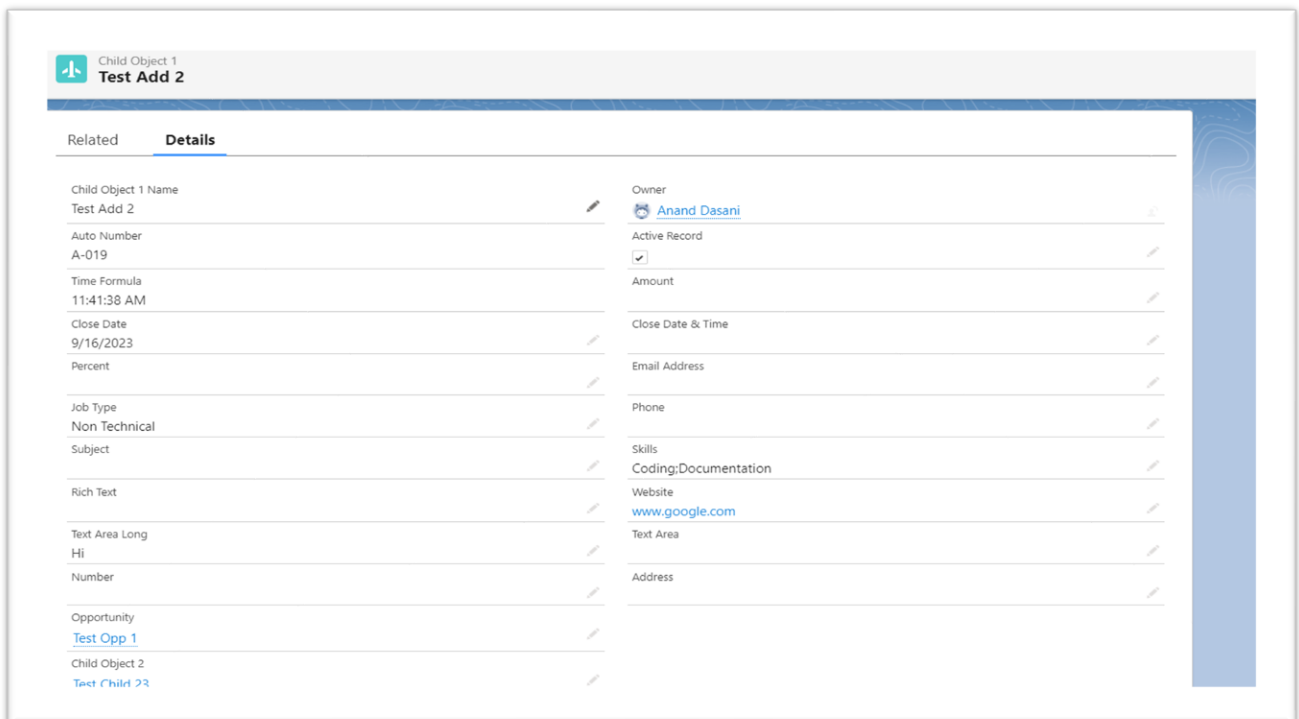
**Opportunity Test Opp 1**

Account Name: [Test Acc](#) | Close Date: 9/16/2023 | Amount: \$20.00 | Opportunity Owner: [Anand Dasani](#)

Progress: **Prospecting** | Qualification | Needs Analysis | Value Proposition | Id. Decision Makers | Perception Analysis | Proposal/Price Quote

**Child Object 1**

Child Object 1 Name	Address (City)	Address (Country/Territory)	Opportunity	Auto Number	Active Reco
<b>Test Add 2</b>			<a href="#">Test Opp 1</a>	A-019	<input checked="" type="checkbox"/>
<a href="#">Test Add</a>			<a href="#">Test Opp 1</a>	A-018	<input type="checkbox"/>
<a href="#">Test Obj 4</a>			<a href="#">Test Opp 1</a>	A-006	<input type="checkbox"/>
<a href="#">Test Obj 5</a>			<a href="#">Test Opp 1</a>	A-005	<input type="checkbox"/>
<a href="#">Test Obj 6</a>			<a href="#">Test Opp 1</a>	A-004	<input type="checkbox"/>
<a href="#">Test Child Obj 3</a>			<a href="#">Test Opp 1</a>	A-003	<input checked="" type="checkbox"/>



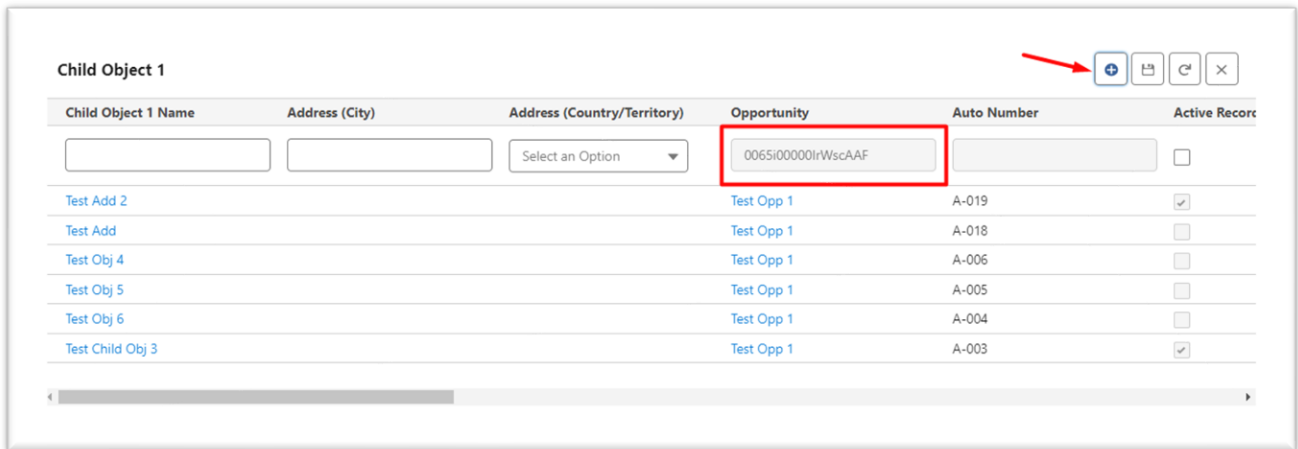
**Child Object 1 Test Add 2**

Related | **Details**

Child Object 1 Name	<a href="#">Test Add 2</a>	Owner	<a href="#">Anand Dasani</a>
Auto Number	A-019	Active Record	<input checked="" type="checkbox"/>
Time Formula	11:41:38 AM	Amount	
Close Date	9/16/2023	Close Date & Time	
Percent		Email Address	
Job Type	Non Technical	Phone	
Subject		Skills	Coding;Documentation
Rich Text		Website	<a href="http://www.google.com">www.google.com</a>
Text Area Long	Hi	Text Area	
Number		Address	
Opportunity	<a href="#">Test Opp 1</a>		
Child Object 2	<a href="#">Test Child 2</a>		

2. Creating a new record will automatically link to the parent record where this table exists

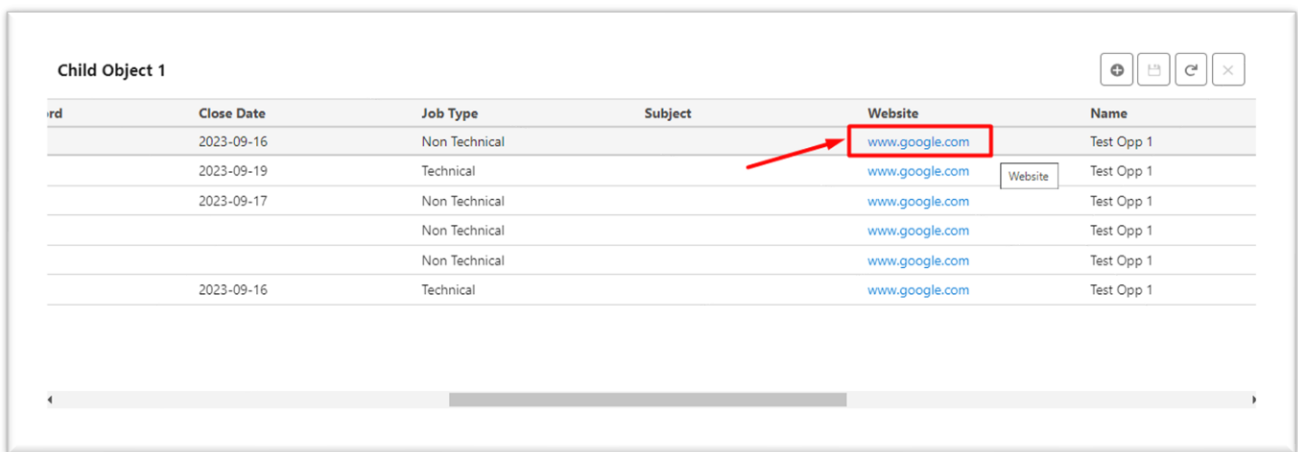
Child Object 1



Child Object 1 Name	Address (City)	Address (Country/Territory)	Opportunity	Auto Number	Active Record
		Select an Option	0065i00000lrWscAAF		<input type="checkbox"/>
Test Add 2			Test Opp 1	A-019	<input checked="" type="checkbox"/>
Test Add			Test Opp 1	A-018	<input type="checkbox"/>
Test Obj 4			Test Opp 1	A-006	<input type="checkbox"/>
Test Obj 5			Test Opp 1	A-005	<input type="checkbox"/>
Test Obj 6			Test Opp 1	A-004	<input type="checkbox"/>
Test Child Obj 3			Test Opp 1	A-003	<input checked="" type="checkbox"/>

3. Clicking on the link will open that link in a new tab

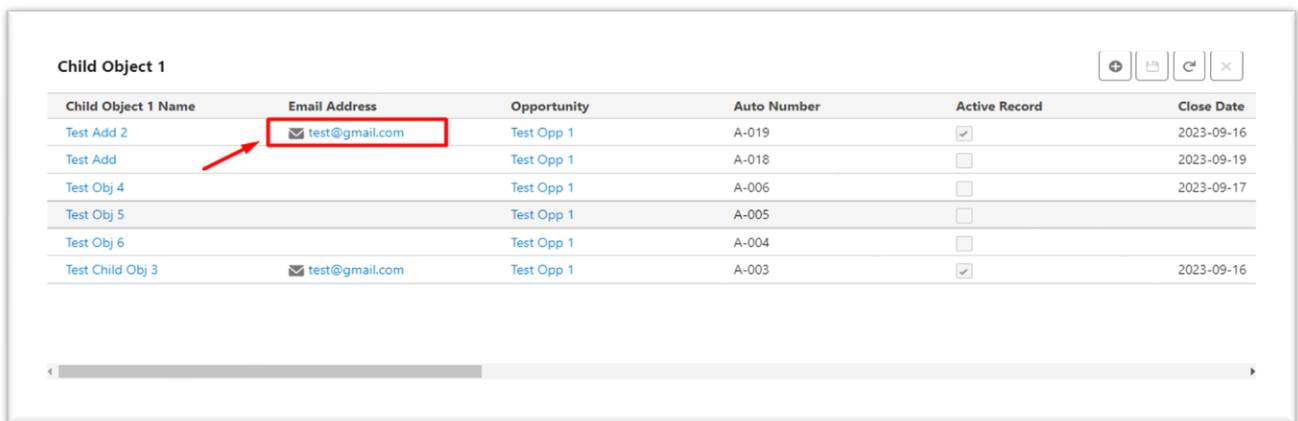
Child Object 1



Id	Close Date	Job Type	Subject	Website	Name
	2023-09-16	Non Technical		<a href="http://www.google.com">www.google.com</a>	Test Opp 1
	2023-09-19	Technical		<a href="http://www.google.com">www.google.com</a>	Test Opp 1
	2023-09-17	Non Technical		<a href="http://www.google.com">www.google.com</a>	Test Opp 1
		Non Technical		<a href="http://www.google.com">www.google.com</a>	Test Opp 1
		Non Technical		<a href="http://www.google.com">www.google.com</a>	Test Opp 1
	2023-09-16	Technical		<a href="http://www.google.com">www.google.com</a>	Test Opp 1

4. Clicking on email ID will open the respective mail software of your system

Child Object 1



Child Object 1 Name	Email Address	Opportunity	Auto Number	Active Record	Close Date
Test Add 2	<a href="mailto:test@gmail.com">test@gmail.com</a>	Test Opp 1	A-019	<input checked="" type="checkbox"/>	2023-09-16
Test Add		Test Opp 1	A-018	<input type="checkbox"/>	2023-09-19
Test Obj 4		Test Opp 1	A-006	<input type="checkbox"/>	2023-09-17
Test Obj 5		Test Opp 1	A-005	<input type="checkbox"/>	
Test Obj 6		Test Opp 1	A-004	<input type="checkbox"/>	
Test Child Obj 3	<a href="mailto:test@gmail.com">test@gmail.com</a>	Test Opp 1	A-003	<input checked="" type="checkbox"/>	2023-09-16

5. Any column whose data type is lookup is clickable and opens that record in a new tab

**Child Object 1**

Amount	Child Object 2	Child Object 2 Name	Owner ID	Profile ID	Delete
20	<a href="#">Test Child 23</a>	Test Child 23	0055i000006F68kAAC	<a href="#">00e5i000002x83NAAQ</a>	
20	<a href="#">Test Child 23</a>	Test Child 23	0055i000006F68kAAC	<a href="#">00e5i000002x83NAAQ</a>	
20	<a href="#">Test Child 22</a>	Test Child 22	0055i000006F68kAAC	<a href="#">00e5i000002x83NAAQ</a>	
20	<a href="#">Test Child 21</a>	Test Child 21	0055i000006F68kAAC	<a href="#">00e5i000002x83NAAQ</a>	
20	<a href="#">Test Child 21</a>	Test Child 21	0055i000006F68kAAC	<a href="#">00e5i000002x83NAAQ</a>	
20	<a href="#">Test Child 21</a>	Test Child 21	0055i000006F68kAAC	<a href="#">00e5i000002x83NAAQ</a>	

The screenshot shows the Salesforce profile page for a user named "System Administrator". The page includes a navigation bar at the top with "Salesforce" logo, a search bar, and utility links like "Switch to Lightning Experience", "Anand Dasani", "Setup", and "Help". Below the navigation bar is a breadcrumb trail: "Home Chatter Contacts Accounts Ideas Reports Dashboards My Notes Portfolios Work Experiences Educations Child Object 1 Child Object 2".

The main content area is titled "Profile System Administrator" and contains the following sections:

- Profile Detail:** Shows user information such as Name (System Administrator), User License (Salesforce), Created By (Anand Dasani), and Modified By (Anand Dasani).
- Page Layouts:** A table listing various layouts for different object types. For example, "Global" layout is assigned to "Global" objects, "Individual" layout to "Individual" objects, and "Invoice" layout to "Invoice" objects.

On the left side, there is a sidebar with navigation options like "Select Metadata", "Advanced Search", "Lightning Experience Transition Assistant", and "Manage Users".

6. All the possible data type of salesforce (except dependent picklist) is supported by this table

- Lookup

The screenshot shows a table titled "Child Object 1" with columns: Website, Name, Amount, Child Object 2, Child Object 2 Name, and Owner ID. The "Child Object 2" column contains a lookup field with a search bar and a dropdown menu showing options: Test Child 23, Test Child 22, and Test Child 21. The table contains four rows of data, each with "www.google.com" in the Website column, "Test Opp 1" in the Name column, and "\$20.00" in the Amount column.

- Rich Text

The screenshot shows a form titled "Child Object 1" with fields: b Type, Subject, Website, Rich Text, and Name. The "Rich Text" field is highlighted with a blue border and shows a rich text editor toolbar with options for font (Salesforce Sans), size (12), bold (B), italic (I), underline (U), strikethrough (ABC), bulleted list, numbered list, indent, and link. The text "Hello World" is entered in the rich text field. Other fields include "Non Technical" for b Type, "Dependent PickList" for Subject, "www.google.com" for Website, and "Test Opp 1" for Name.

- Text Area Long

The screenshot shows a form titled "Child Object 1" with fields: Email Address, Text Area Long, Opportunity, Auto Number, and Skills. The "Text Area Long" field is highlighted with a blue border and contains the text "Hello World". Other fields include "test@gmail.com" for Email Address, "Test Opp 1" for Opportunity, "A-019" for Auto Number, and a list of skills (Teaching, Development) for Skills.

- MultiSelect Pcklist

Child Object 1

Opportunity	Auto Number	Skills	Active Record	Close Date						
Test Opp 1	A-019	<table border="1"><thead><tr><th>Available</th><th>Selected</th></tr></thead><tbody><tr><td>Teaching</td><td>Coding</td></tr><tr><td>Development</td><td>Documentat...</td></tr></tbody></table>	Available	Selected	Teaching	Coding	Development	Documentat...	<input checked="" type="checkbox"/>	Sep 16, 2023
Available	Selected									
Teaching	Coding									
Development	Documentat...									

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## **VISION**

Become a topnotch technology consulting organization with innovative solutions.

## **MISSION**

Contribute to the digital transformation by helping customers to be more efficient & profitable.

Make sure the growth of people associated with the organization.

## **CORE VALUES**

Quality delivery  
Commitment for growth  
Creating trust

*Thank you!*