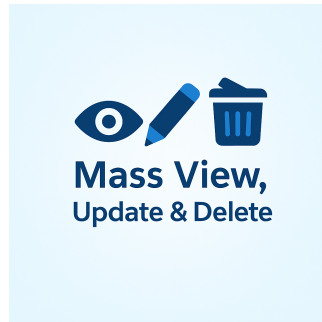


SmartBulk User Guide v2



CloudWithAbhi
Business Edition PDF

SmartBulk - User Guide

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1. Introduction

1.1 What is SmartBulk?

SmartBulk is a Salesforce application that allows you to perform bulk operations on records efficiently. With SmartBulk, you can view, update, and delete multiple records across any object without writing complex code or using Data Loader.

1.2 Key Features

Feature	Description
-----	-----
Mass View	Query and display records from any Salesforce object

- | **Mass Update** | Update multiple records at once with inline editing |
- | **Mass Delete** | Delete multiple records with confirmation |
- | **Metadata-Driven** | Pre-configured for common objects (Account, Contact, Case) |
- | **Error Tracking** | Comprehensive error logging for troubleshooting |
- | **Field Type Support** | Handles 19+ Salesforce field types automatically |
- | **Flexible Queries** | Use WHERE clauses and limits for targeted operations |

1.3 Who Should Use This App?

User Type	Use Case
System Administrators	Data cleanup, mass updates, record deletion
Data Stewards	Regular data maintenance, quality improvements
Power Users	Bulk operations without technical knowledge
Business Analysts	Data analysis with quick updates
Developers	Testing data setup, cleanup operations

1.4 What You Can Do

- View Records:** Query and display records with custom filters
- Edit Inline:** Edit values directly in the table
- Mass Update:** Update multiple records simultaneously
- Bulk Field Update:** Apply same value to multiple records
- Mass Delete:** Delete multiple records at once
- Track Errors:** View detailed error logs for failed operations

2. Getting Started

2.1 Accessing SmartBulk

2.1.1 Via App Launcher (Desktop)

- Step 1:** Click the App Launcher (icon with 9 dots) in the top-left corner
- Step 2:** In the search box, type "Mass"
- Step 3:** Click "Mass View Update and Delete" from the results

****Alternative Method:****

- Click "View All" in App Launcher
- Scroll to find "Mass View Update and Delete"
- Click to open

2.1.2 Via Mass Operation Page

****Step 1:**** Open "Mass View Update and Delete" app from App Launcher

****Step 2:**** The "Mass Operation Page" will automatically display

****Step 3:**** Start using SmartBulk interface

****Note:**** The Mass Operation Page is automatically included in the app after permission set assignment.

2.1.3 Via Utility Bar (Optional)

****Step 1:**** Look for SmartBulk icon in the utility bar (bottom of screen)

****Step 2:**** Click to open in sidebar

****Note:**** Utility bar access is optional and must be manually configured by your administrator. This is NOT configured by default. Use App Launcher to access the Mass Operation Page for standard access.

2.1.4 Via Salesforce Mobile App

****Step 1:**** Open Salesforce Mobile App

****Step 2:**** Tap the menu icon ()

****Step 3:**** Scroll to find "Mass View Update and Delete"

****Step 4:**** Tap to open

****Note:**** Mobile interface has limited functionality. Desktop recommended for best experience.

2.2 First-Time Setup

2.2.1 Check Your Permissions

****Required Permissions:****

- Feature Mass Operation Permissions (permission set)
- Modify All Data (or edit access on target objects)

- At least one activated metadata configuration (see section 2.2.3)

****To Check Your Permissions:****

1. Try opening SmartBulk - if it loads, you have basic access
2. Try fetching records - if successful, you have query permissions
3. Try updating - if successful, you have edit permissions

****If Access Denied:****

- Contact your Salesforce administrator
- Request "Feature Mass Operation Permissions" permission set

2.2.2 Understanding Access Levels

Permission Level	What You Can Do
----- -----	
Read Only	View records only (no update/delete)
Edit Access	View and update records
Delete Access	View, update, and delete records
Modify All Data	Full access to all operations (recommended)

2.2.3 Activate Metadata Records (Required)

****IMPORTANT:**** SmartBulk comes with 3 pre-configured metadata records (Account, Contact, Case), but they are ****inactive by default****. You must activate at least one to use the app.

****How to Activate:****

****Option 1: Ask Your Administrator****

- Contact your Salesforce administrator
- Request activation of needed configurations (Account, Contact, or Case)

****Option 2: If You Have Admin Access:****

1. Setup → Custom Metadata Types
2. Click "Manage Records" next to "Query Component"
3. Click "Edit" next to a configuration (e.g., Account)
4. Check the "Active" checkbox
5. Click "Save"
6. Verify: Open Mass Operation Page and check if the configuration appears in the dropdown

****Note:**** You can activate all three configurations or just the ones you need.

2.3 Understanding Pre-Configured Objects

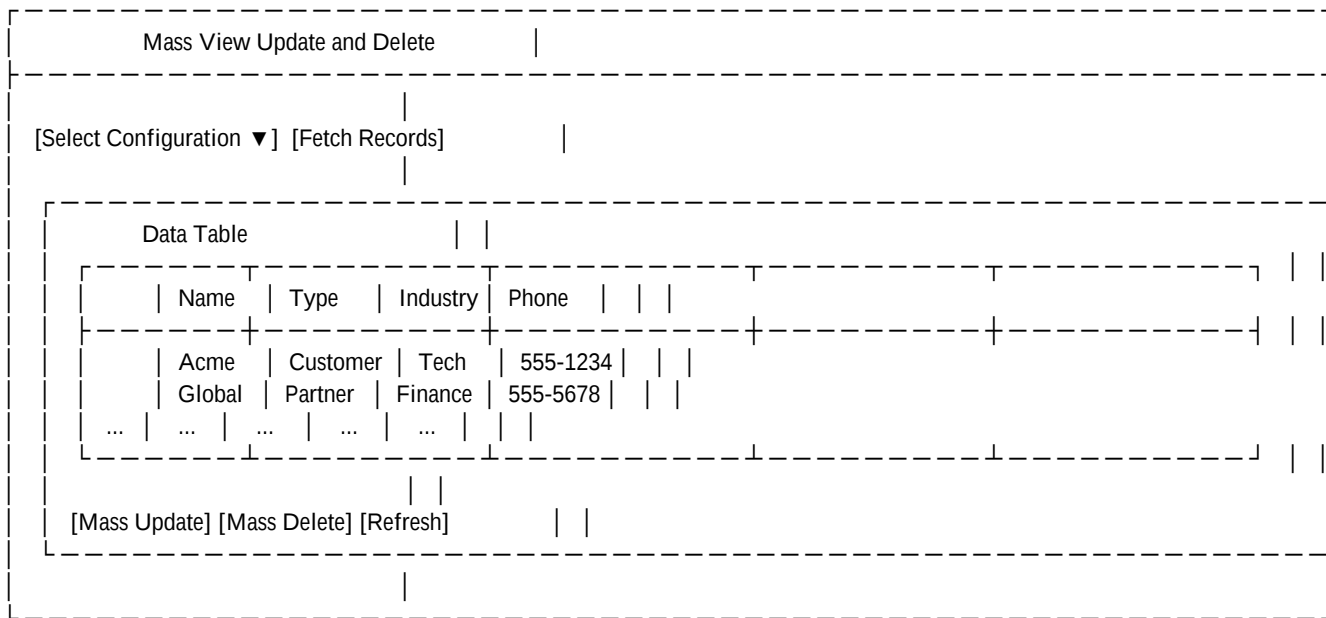
SmartBulk comes with 3 pre-configured objects ready to use:

	Configuration		Object		Pre-Selected Fields		Use Case	
	-----		-----		-----		-----	
	Account		Account		Name, Type, Industry, Phone		Account management	
	Contact		Contact		Name, Email, Phone, Account		Contact updates	
	Case		Case		Subject, Status, Priority, Account		Case management	

Note: These configurations must be activated before use (see section 2.2.3 above).

3. Understanding the Interface

3.1 Interface Overview



3.2 Component Breakdown

3.2.1 Top Section: Configuration Selection

Configuration Dropdown:

- Shows available object configurations
- Default options: Account, Contact, Case
- Click dropdown to see all active configurations

****Fetch Records Button:****

- Click to query and display records
- Uses selected configuration settings
- Shows loading spinner while fetching

3.2.2 Middle Section: Data Table

****Column Headers:****

- Display field names (from configuration)
- Click to sort (if enabled)
- Shows field type icons

****Data Rows:****

- One row per record
- Click cell to view full value
- Double-click cell to edit (if editable)

****Checkboxes:****

- First column: Row selection
- Select multiple rows for bulk operations
- Select all checkbox in header

****Inline Editing:****

- Double-click editable cell
- Enter new value
- Tab or click away to save
- Changed cells highlighted

3.2.3 Bottom Section: Action Buttons

Button	Purpose	When Enabled
----- ----- -----		
Mass Update Update all changed records After editing cells		

| **Mass Delete** | Delete selected records | When rows selected |
| **Refresh** | Reload data from Salesforce | Anytime |

3.2.4 Loading States

Spinner Displayed:

- While fetching records
- During update operations
- During delete operations

Message Examples:

- "Loading records..."
- "Updating records..."
- "Deleting records..."

3.3 Data Table Features

3.3.1 Sortable Columns (If Enabled)

How to Sort:

- Click column header
- First click: Ascending (A → Z, 0 → 9)
- Second click: Descending (Z → A, 9 → 0)
- Third click: Clear sort

Visual Indicator:

- ▲ icon: Ascending
- ▼ icon: Descending
- No icon: No sort

3.3.2 Editable Cells

How to Edit:

1. Double-click cell
2. Cell becomes input field
3. Type new value
4. Press Enter or Tab to confirm

5. Cell returns to display mode

****Visual Indicators:****

- Editable cells: Different background color
- Changed cells: Orange/yellow highlight
- Non-editable cells: Grayed out

3.3.3 Row Selection

****Select Single Row:****

- Click checkbox in first column

****Select Multiple Rows:****

- Click multiple checkboxes
- Shift+Click for range selection (if enabled)

****Select All Rows:****

- Click checkbox in header row
- Selects all visible rows

****Deselect:****

- Click checked checkbox again
- Click "Select All" checkbox to deselect all

4. Using SmartBulk

4.1 Basic Workflow

4.1.1 View Records (Most Common)

****Scenario:**** You want to see Account records

****Steps:****

| Step | Action | What You See |

|-----|-----|-----|

| 1 | Open SmartBulk | Interface loads |

| 2 | Select "Account" from dropdown | Dropdown shows Account |

| 3 | Click "Fetch Records" | Loading spinner |

| 4 | Wait for data | Records display in table |

****Result:**** Account records displayed with Name, Type, Industry, Phone columns

4.1.2 Update Single Record

****Scenario:**** You want to change one account's industry

****Steps:****

| Step | Action | What You See |

|-----|-----|-----|

| 1 | Fetch Account records | Records displayed |

| 2 | Find target account row | Locate in table |

| 3 | Double-click Industry cell | Cell becomes editable |

| 4 | Type "Technology" | New value entered |

| 5 | Press Enter or Tab | Cell saves, turns orange |

| 6 | Click "Mass Update" | Update processes |

| 7 | Success message displays | Green toast notification |

****Result:**** Account's Industry field updated to "Technology"

4.1.3 Update Multiple Records

****Scenario:**** You want to update industries for 5 accounts

****Steps:****

1. Fetch Account records
2. Edit Industry cell for first account
3. Edit Industry cell for second account
4. Continue for remaining accounts
5. Click "Mass Update"
6. All changes saved at once

****Benefit:**** Single operation updates all changed records

4.1.4 Delete Records

****Scenario:**** You want to delete test accounts

****Steps:****

Step	Action	What You See
1	Fetch Account records	Records displayed
2	Check boxes for test accounts	Rows selected
3	Click "Mass Delete"	Confirmation popup
4	Confirm deletion	"Are you sure?"
5	Click "Yes"	Delete processes
6	Success message	Records removed from table

****Warning:** Deleted records moved to Recycle Bin (recoverable for 15 days)**

4.2 Common Use Cases

4.2.1 Use Case 1: Data Cleanup

****Goal:** Update blank phone numbers for contacts**

****Steps:****

1. Select "Contact" configuration
2. Click "Fetch Records"
3. Scroll to find contacts with blank phones
4. Double-click Phone cells
5. Enter phone numbers
6. Click "Mass Update"
7. Verify success message

****What You Accomplish:****

- Multiple contacts updated at once
- Data quality improved
- No manual record-by-record editing needed

4.2.2 Use Case 2: Bulk Field Update

****Goal:** Set all open cases to "In Progress" status**

****Steps:****

1. Select "Case" configuration

2. Click "Fetch Records"
3. Select all rows with Status = "New"
4. Click "Mass Update Field" (if available)
5. Choose Field: Status
6. Enter Value: In Progress
7. Click "Apply"
8. All selected cases updated

****What You Accomplish:****

- Bulk status change
- Faster than individual updates
- Consistent data across records

4.2.3 Use Case 3: Test Data Cleanup

****Goal:**** Delete all accounts with "Test" in name

****Steps:****

1. Select "Account" configuration
2. Click "Fetch Records"
3. Manually select test accounts (or use filter if available)
4. Click "Mass Delete"
5. Confirm deletion
6. Verify success

****What You Accomplish:****

- Quick test data removal
- No Data Loader needed
- Recycle Bin protection (can undo)

4.2.4 Use Case 4: Data Migration Preparation

****Goal:**** Verify and clean data before migration

****Steps:****

1. Select target object configuration
2. Fetch records

3. Review data quality
4. Fix issues inline (edit cells)
5. Mass update all changes
6. Export clean data (via other tool)

****What You Accomplish:****

- Data quality assessment
- Quick fixes
- Migration-ready data

4.3 Advanced Features

4.3.1 Using Filters (Via Configuration)

****Scenario:**** You only want to see specific records

****How It Works:****

- Filters defined in configuration metadata
- Contact admin to modify WHERE clauses
- Examples:
 - Account: `Type = 'Customer'`
 - Contact: `Email != null`
 - Case: `Status = 'Open'`

****Example:****

- Configuration: Account
- WHERE Clause: `Industry = 'Technology'`
- Result: Only technology accounts displayed

4.3.2 Record Limits

****Why Limits Matter:****

- Prevent performance issues
- Reduce load times
- Avoid governor limits

****How It Works:****

- Limits defined in configuration metadata
- Typical values: 50-200 records
- Contact admin to adjust

****Example:****

- Configuration: Account
- Limit: 100
- Result: Maximum 100 accounts displayed

4.3.3 Error Tracking

****What Gets Logged:****

- Failed updates (validation rules, permissions)
- Failed deletes (related records, permissions)
- System errors (exceptions)

****How to View Errors:****

1. Go to App Launcher
2. Search "Error Log"
3. Click "Error Log" tab
4. View error records

****Error Record Fields:****

- Class Name: Where error occurred
- Method Name: Which operation failed
- Record ID: Which record caused error
- Detailed Error Message: Full error details
- Governor Limits: System resource usage

****What to Do:****

- Read error message
- Fix underlying issue (validation rule, permission)
- Retry operation

5. Working with Configurations

5.1 Understanding Configurations

****What is a Configuration?****

A configuration is a metadata record that tells SmartBulk:

- Which object to query (Account, Contact, etc.)
- Which fields to display (Name, Email, Phone, etc.)
- Which filters to apply (WHERE clause)
- How many records to fetch (Limit)
- Which fields are editable (Mass Change Fields)

****Who Creates Configurations?****

- System administrators
- SmartBulk comes with 3 pre-built configurations

5.2 Available Configurations

5.2.1 Account Configuration

Setting Value
----- -----
Object Account
Fields Name, Type, Industry, Phone
Filter Type != null
Limit 100
Editable Fields Industry, Type, Phone

****When to Use:****

- Account data cleanup
- Industry standardization
- Phone number updates

5.2.2 Contact Configuration

Setting Value
----- -----
Object Contact
Fields Name, Email, Phone, Account

```
| **Filter** | Email != null |
| **Limit** | 100 |
| **Editable Fields** | Email, Phone |
```

****When to Use:****

- Contact information updates
- Email corrections
- Phone number maintenance

5.2.3 Case Configuration

```
| Setting | Value |
|-----|-----|
| **Object** | Case |
| **Fields** | Subject, Status, Priority, Account |
| **Filter** | IsClosed = false |
| **Limit** | 100 |
| **Editable Fields** | Status, Priority |
```

****When to Use:****

- Bulk case status changes
- Priority adjustments
- Open case management

5.3 Requesting New Configurations

****What You Need:****

- Object name (e.g., Opportunity)
- Fields to display (e.g., Name, Stage, Amount)
- Filter criteria (optional, e.g., Stage != 'Closed Won')
- Maximum records (e.g., 100)
- Editable fields (e.g., Stage, Amount)

****How to Request:****

1. Contact your Salesforce administrator
2. Provide above details
3. Admin creates configuration metadata record

4. Configuration appears in dropdown

****Example Request Email:****

Hi [Admin Name],

Can you create a SmartBulk configuration for Opportunities?

Object: Opportunity
Display Fields: Name, StageName, Amount, CloseDate
Filter: IsClosed = false
Limit: 100
Editable Fields: StageName, Amount, CloseDate

Thanks!

6. Tips & Best Practices

6.1 Performance Tips

6.1.1 Optimize Data Volume

Tip	Why It Helps	How
Use filters	Reduces records fetched	Request WHERE clause in config
Lower limits	Faster load times	Request limit reduction (50-100)
Select fewer fields	Less data transferred	Request fewer fields in config
Avoid large objects	Reduces query time	Focus on smaller datasets

6.1.2 Optimize Updates

Tip	Why It Helps
Update in batches	Avoids governor limits
Save frequently	Prevents data loss
Review before saving	Reduces errors
Use Mass Update	Single operation for all changes

6.2 Best Practices

6.2.1 Regular Data Maintenance

****Weekly Tasks:****

- Review and clean duplicate data
- Update missing information
- Standardize field values

****Monthly Tasks:****

- Bulk data quality review
- Archive old records (via delete)
- Verify critical data accuracy

****Example Routine:****

Monday: Review Accounts (update industries)

Wednesday: Review Contacts (update emails)

Friday: Review Cases (close resolved cases)

6.2.2 Data Quality Standards

****Before Updating:****

- Verify new values are correct
- Check for required fields
- Ensure data format matches (dates, phones)
- Review validation rules

****During Updates:****

- Update small batches first
- Check error logs after each batch
- Fix errors before proceeding

****After Updates:****

- Verify records in Salesforce UI
- Check related records (if any)
- Document changes made

6.2.3 Security & Compliance

****Data Protection:****

- Only update data you're authorized to change

- Don't share sensitive data via SmartBulk
- Log out when away from desk

****Audit Trail:****

- SmartBulk logs errors only (not all changes)
- Salesforce tracks all field changes via Field History
- Enable Field History Tracking for audit purposes

6.3 Collaboration Tips

6.3.1 Team Coordination

****Before Bulk Operations:****

- Notify team members
- Schedule during low-usage times
- Document planned changes

****During Operations:****

- Communicate progress
- Report issues immediately
- Avoid conflicting updates

****After Operations:****

- Share completion status
- Document lessons learned
- Update team procedures

6.3.2 Working with Admins

****Request Configurations:****

- Provide clear requirements
- Explain business need
- Test in sandbox first

****Report Issues:****

- Include error messages

- Provide steps to reproduce
- Share screenshots

****Suggest Improvements:****

- Share use cases
- Request new features
- Provide feedback

7. Frequently Asked Questions (FAQ)

7.1 General Questions

Q1: What objects can I use with SmartBulk?

****A:**** SmartBulk works with any standard or custom object that your administrator configures. By default, Account, Contact, and Case are pre-configured. Request additional objects from your admin.

Q2: Can I export data to Excel?

****A:**** No, SmartBulk is for viewing and editing within Salesforce only. Use Salesforce's standard Export or Reports for Excel exports.

Q3: Will this work in Salesforce Classic?

****A:**** No. SmartBulk requires Lightning Experience. Contact your admin to enable Lightning.

Q4: Do I need special permissions?

****A:**** Yes. You need the "Feature Mass Operation Permissions" permission set and edit/delete access on target objects. Contact your Salesforce administrator.

Q5: Is my data secure?

****A:**** Yes. SmartBulk:

- Uses Salesforce standard security
- Respects your permissions and sharing rules
- Logs errors for troubleshooting
- Does not send data outside Salesforce

7.2 Functional Questions

Q6: Why don't I see any records?

****A:**** Three possible reasons:

1. ****No records match filter:**** Configuration's WHERE clause is too restrictive
2. ****No permission:**** You don't have read access to the object
3. ****Limit too low:**** Increase limit in configuration

****Solution:**** Contact admin to adjust configuration or grant permissions.

Q7: Why can't I edit certain fields?

****A:**** Only fields listed in "Mass Change Fields" are editable. This is configured per object to prevent accidental changes to critical fields.

****Solution:**** Request admin to add field to Mass Change Fields if appropriate.

Q8: What happens to deleted records?

****A:**** Deleted records move to Recycle Bin and can be restored within 15 days. After 15 days, they're permanently deleted.

****Recovery:**** Setup → Recycle Bin → Select records → Restore

Q9: Can I undo an update?

****A:**** No automatic undo. However:

- If error occurs, record not updated
- Check Error Log for failed records
- Manually revert changes if needed
- Use Field History Tracking to see old values

Q10: How many records can I update at once?

****A:**** Technical limit: 10,000 records. Recommended limit: 100-200 records per batch for best performance.

7.3 Technical Questions

Q11: What field types are supported?

****A:**** SmartBulk supports 19+ Salesforce field types:

- Text: Text, Email, Phone, URL, Picklist, Text Area
- Number: Number, Currency, Percent
- Date: Date, Date/Time, Time
- Other: Checkbox, Lookup, ID

Q12: Will this count against my API limits?

A: Yes, minimally. Each fetch operation uses 1 SOQL query. Typical daily API limit is 15,000-100,000+, so impact is negligible.

Q13: Can I use this on mobile?

A: Yes, but desktop is recommended. Mobile interface has limited functionality and smaller screen makes editing difficult.

Q14: What if I get an error?

- **A:**
1. Check Error Log (App Launcher → Error Log)
 2. Read error message
 3. Fix underlying issue (validation rule, permission, required field)
 4. Retry operation

Q15: Can I schedule automatic operations?

A: No. SmartBulk requires manual interaction. For automated bulk operations, use Process Builder, Flow, or Apex scheduled jobs.

8. Troubleshooting

8.1 Access Issues

Issue 1: Can't Find SmartBulk

Symptom: App doesn't appear in App Launcher

Solutions:

Solution	Steps
Search App Launcher	Click App Launcher → Type "Mass" → Click app

-----|-----|

| **Search App Launcher** | Click App Launcher → Type "Mass" → Click app |

| ****Check "View All"**** | Click App Launcher → "View All" → Scroll to find it |
 | ****Contact Admin**** | Ask admin to add to your navigation |

Issue 2: "Access Denied" Error

****Symptom:**** Error message when opening app

****Solutions:****

Solution	Steps
----- -----	
Check Permission Set	Ask admin if you have "Feature Mass Operation Permissions"
Verify Profile	Ensure your profile has app access
Wait & Retry	If just installed, wait 5 minutes and try again

8.2 Data Issues

Issue 3: No Records Displayed

****Symptom:**** Click "Fetch Records" but table is empty

****Solutions:****

Cause	Solution
----- -----	
No matching records	Adjust filter in configuration or check different object
Permission issue	Request read access on object
Limit = 0	Ask admin to increase limit

Issue 4: Can't Edit Cells

****Symptom:**** Double-click cell but it doesn't become editable

****Solutions:****

Cause	Solution
----- -----	
Field not in Mass Change Fields	Request admin to add field
No edit permission	Request edit access on object/field
Cell is ID or Name	Some fields are read-only by design

Issue 5: Update Fails

****Symptom:**** Click "Mass Update" but records not updated

****Solutions:****

Cause	Solution
----- -----	
Validation rule	Fix data to pass validation
Required field missing	Fill in required fields
Permission issue	Request edit access
Record locked	Wait and retry, or contact record owner

****How to Check:****

1. Go to Error Log tab
2. Find your error record
3. Read Detailed Error Message field
4. Fix issue described

8.3 Performance Issues

Issue 6: Slow Loading

****Symptom:**** "Fetch Records" takes longer than 10 seconds

****Solutions:****

Solution	Benefit
----- -----	
Reduce limit	Fewer records = faster load
Add filter	WHERE clause reduces data
Select fewer fields	Less data transferred
Check internet	Slow connection affects speed
Try different time	Off-peak hours may be faster

Issue 7: Update Takes Too Long

****Symptom:**** "Mass Update" processes for longer than expected

****Causes:****

- Updating many records (100+)

- Complex validation rules
- Workflow rules/triggers firing
- Network latency

****Solutions:****

- Update smaller batches (50-100 records)
- Disable non-critical validation rules during bulk operations (ask admin)
- Be patient - bulk operations take time

8.4 Mobile Issues

Issue 8: Can't Access on Mobile

****Symptom:**** SmartBulk not visible in Salesforce Mobile App

****Solutions:****

1. Contact admin to add to Mobile Navigation
2. Update Salesforce Mobile App to latest version
3. Use mobile browser instead (not ideal)

Issue 9: Can't Edit on Mobile

****Symptom:**** Double-tap cells but can't edit

****Solution:**** Mobile editing is limited. Use desktop/laptop for updates. Mobile is best for viewing only.

8.5 Getting Help

When to Contact Admin

Contact your Salesforce administrator if:

- You need new configuration for different object
- You need permission changes
- You need filter/limit adjustments
- App completely broken

When to Contact Support

Contact CloudWithAbhi support if:

- Error persists after trying all solutions
- App functionality broken (buttons don't work)
- Data appears incorrect (records missing that should be visible)

How to Get Help

****Email Support:****

- Email: contact@cloudwithabhi.com
- Include:
 - Your org name/ID
 - Screenshot of error
 - Steps to reproduce
 - Configuration you're using

****GitHub Issues:****

- <https://github.com/UnicefAbhiSharma009/smartbulk/issues>
- Search existing issues first
- Create new issue with details

****Documentation:****

- <https://github.com/UnicefAbhiSharma009/smartbulk>
- Check README and Technical Guide

9. Appendices

Appendix A: Keyboard Shortcuts

Action	Windows/Linux	Mac
Refresh Page	F5 or Ctrl+R	Cmd+R
Open App Launcher	Click icon	Click icon
Tab to Next Cell	Tab	Tab
Save Cell Edit	Enter or Tab	Return or Tab
Cancel Cell Edit	Esc	Esc

Appendix B: Field Type Quick Reference

Field Type	Examples	How to Enter
----- ----- -----		
Text	Name, Description	Type any text
Email	Email	Type email address
Phone	Phone	Type phone number
URL	Website	Type full URL (https://...)
Picklist	Industry, Status	Type exact picklist value
Number	Amount, Quantity	Type number (no commas)
Currency	Amount	Type number (no \$ symbol)
Percent	Discount	Type number (no % symbol)
Date	Close Date	Type YYYY-MM-DD format
Date/Time	Last Modified	Type YYYY-MM-DDTHH:MM:SS
Checkbox	Active	Type true or false
Lookup	Account, Owner	Type Record ID

Appendix C: Common Error Messages

Error Message	Meaning	Solution
----- ----- -----		
"You don't have access"	Permission issue	Request permission set
"Required field missing"	Field is required	Fill in required field
"Validation rule failed"	Data doesn't meet rule	Fix data to pass validation
"Record locked"	Someone else editing	Wait and retry
"Unable to lock row"	High contention	Retry later
"ENTITY_IS_DELETED"	Record already deleted	Refresh data

Appendix D: Best Practice Checklist

Before Using SmartBulk:

- [] Have necessary permissions
- [] Know which object to update

- [] Understand filter criteria
- [] Plan what changes to make
- [] Test in sandbox first (if available)

****During Updates:****

- [] Edit small batches
- [] Review changes before saving
- [] Check for required fields
- [] Verify data format
- [] Save frequently

****After Updates:****

- [] Verify changes in Salesforce UI
- [] Check Error Log for issues
- [] Fix any failed records
- [] Document changes made
- [] Notify team if needed

Appendix E: Glossary

Term	Definition
Configuration	Metadata record that defines SmartBulk behavior
Mass Update	Updating multiple records at once
Mass Delete	Deleting multiple records at once
WHERE Clause	Filter criteria for queries (e.g., Status = 'Open')
Limit	Maximum number of records to fetch
Mass Change Fields	Fields that can be edited inline
Error Log	Custom object that stores error details
Inline Editing	Editing cells directly in the table
Bulk Operation	Operation affecting multiple records
SOQL	Salesforce Object Query Language (behind-the-scenes queries)

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****Next Review Date:**** Q2 2026

****End of User Guide****

Quick Start Card (Print This!)

SmartBulk - Quick Start	
1. Open App Launcher (icon)	
2. Search "Mass View Update and Delete"	
3. Click to open	
4. Select configuration (Account/Contact/Case)	
5. Click "Fetch Records"	
6. Double-click cells to edit	
7. Click "Mass Update" to save	
8. Or select rows and "Mass Delete"	
Support: contact@cloudwithabhi.com	
Docs: github.com/UnicefAbhiSharma009/smartbulk	