



User Manual



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1. Introduction

1.1 Document Purpose

The purpose of this User Guide is to explain how to install and use the Export++ application. The document contains a table of contents, detailed information, images and a frequently asked questions section for better understanding.

1.2 Application Overview

Export++ helps the user to export the data globally in a very simple manner and can globally modify data according to the requirements.

Along with standard and custom objects are also available to fulfill business needs. The users can simply adjust the data formatting according to the list views, the user can customize the data formatting by creating custom list views.

By simply selecting the required object and list views here is customized data ready to export. With a single click, the user can have customized data in CSV format.

2. Administration

This section will help the user set up organization to start using Export++ application on the web and in Salesforce1. To set up Export++ application, users need to do these steps.

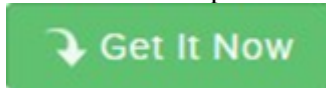
2.1 Install Export++ application

To install the Export++ application:

1. Go to AppExchange

<http://www.salesforce.com/appexchange>

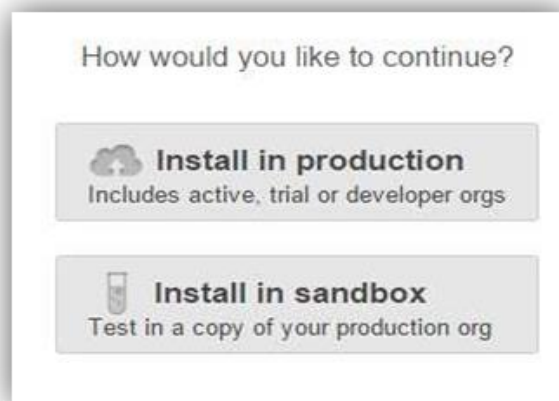
2. Search for Global List Export



3. Click the button.

4. Click the option Log in to the AppExchange.

5. Select to install Export++ in either Production or Sandbox.



6. Select check box to agree the terms and conditions.

Confirm and Install!

7. Click the button.

8. Enter Salesforce ORG credentials.

9. Select installation details (either for Admin Only, All Users, or Specific Profiles)

10. Click Install.

If the installation is successfully completed, User will see the confirmation message.

2.2. Steps for creating connected App and Name Cred.

1. Go to Set Up

2. Search 'App Manager' in Quick Find and select it.

3. Click on 'New Connected App' button on Top right of the page.

4. Fill all the fields same as the image below.

Manage Connected Apps

Connected App Name: **Export_Plus_Connected_App**

API Name: **Export_Plus_Connected_App**

Contact Email: **marketing@aimdek.com**

Contact Phone:

Logo Image URL: **Upload logo image or choose one of our sample logos**

Icon URL: **Choose one of our sample logos**

Info URL:

Description:

API (Enable OAuth Settings)

Enable OAuth Settings: ☒

Enable for Device Flow: ☐

Callback URL: **https://aimdek-6c.devt.../services/oauthcallback/Export_Plus_Auth_Provid...**

Use digital signatures: ☐

Selected OAuth Scopes: **Full access (full)**

Require Secret for Web: ☒

Require Secret for OAuth: ☒

Enable Client Credentials: ☐

Enable Authorization Code and Credentials Flow: ☐

Opt in to issue JSON Web Tokens (JWT)-based access tokens for named users (Beta): ☐

Introspect All Tokens: ☐

Configure ID Tokens: ☐

Enable Asset Tokens: ☐

Enable Single Logout: ☐

Web App Settings

Start URL:

Enable SAML: ☐

Custom Connected App Handler

Apex Plugin Class:

Run As:

Mobile App Settings

Mobile Start URL:

PIN Protect: ☐

App Platform:

Restrict to Device Type:

App Version:

Minimum OS Version:

Private App: ☐

App Binary URL:

Push Messaging Enabled: ☐

Enable subscription to notification types: ☐

Canvas App Settings

Canvas: ☐

Save **Cancel**

5. Click on the “Save” button.

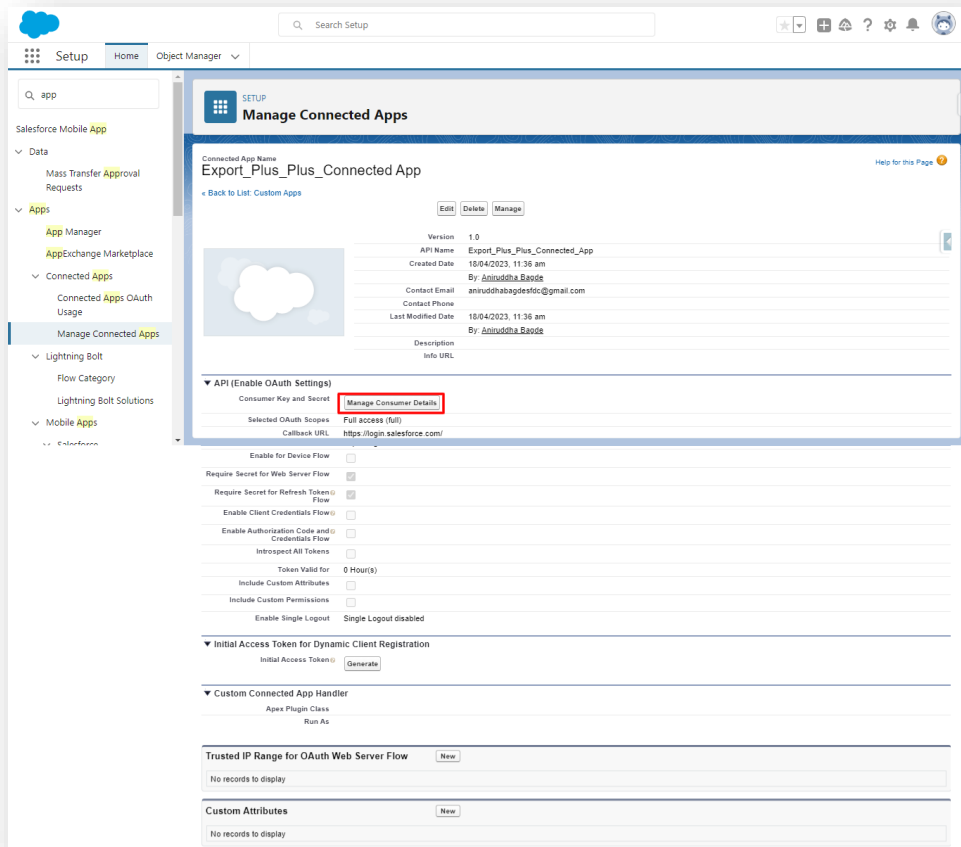
App Manager

New Connected App

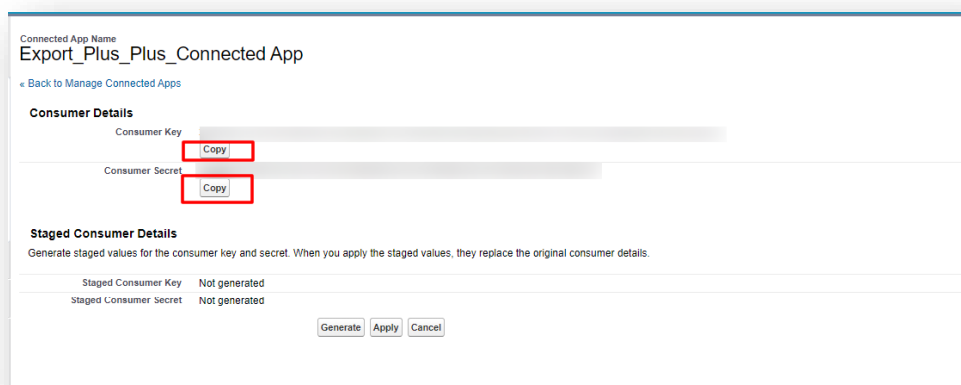
Changes can take up to 10 minutes to take effect. Deleting a parent app also deletes all connected apps with OAuth settings enabled.

Continue **Cancel**

6. Click on the “Continue” button.



7. Click on the “Manage Consumer Details” button.

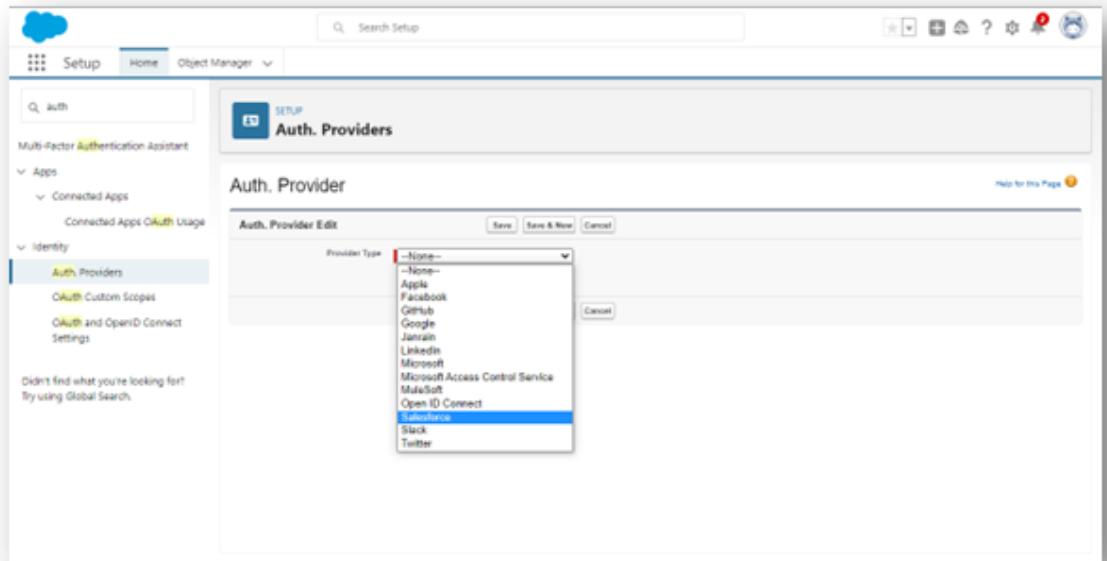


8. Copy the “Consumer Key” and “Consumer Secret”

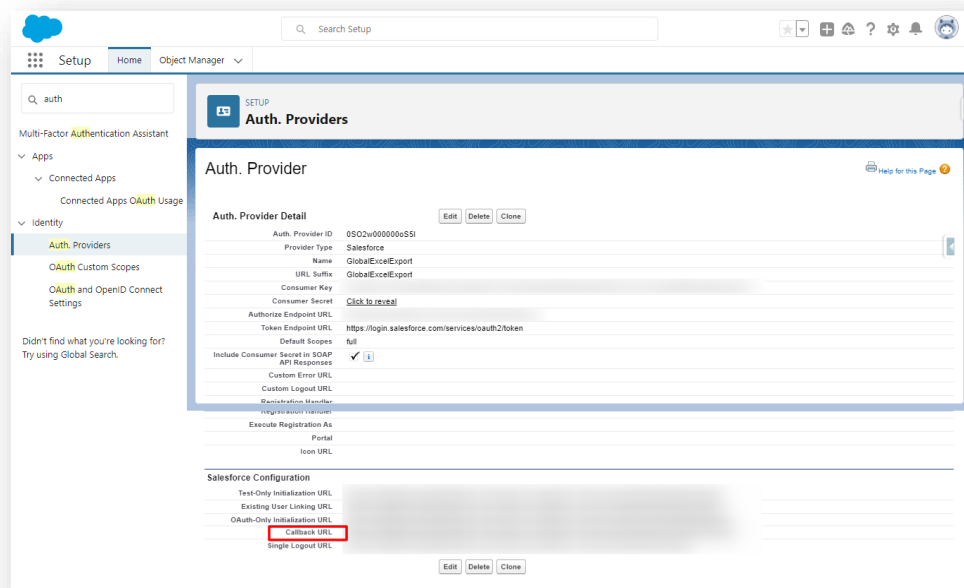
9. Go to Set Up

10. Search 'Auth providers' in Quick Find and select it.

11. Select 'Salesforce' from the Provider Type.



12. Fill all the fields same as the image below.

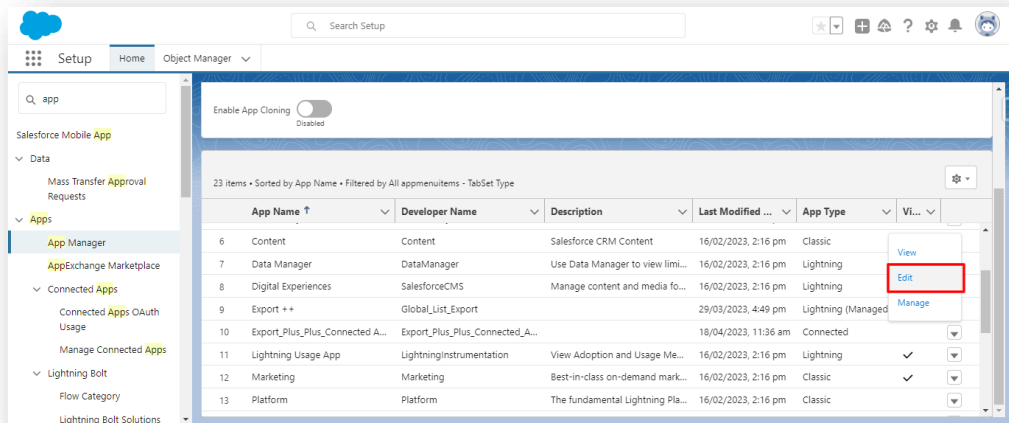


13. Paste the "Consumer Key" and "Consumer Secret" which were copied from the [Step-8] and Press "Save".

14. Select the Auth. Providers that user created and Copy the Callback URL as mentioned above.

15. Go to setup and Search 'App Manager' in Quick Find and select it.

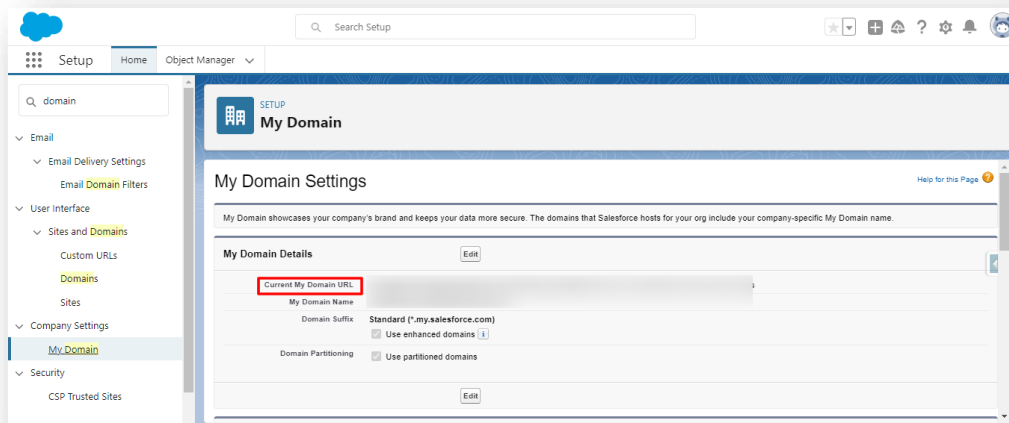
16. Select Connected App that you created earlier and click 'Edit'.



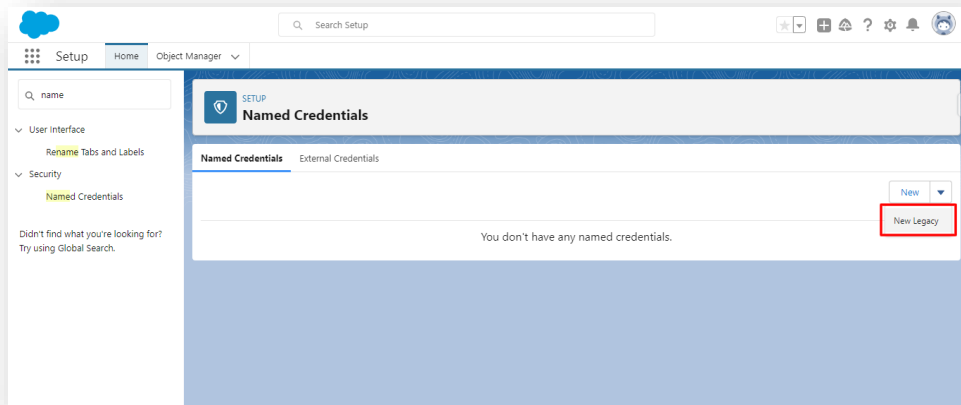
17. Paste the URL which was copied in [Step –14] and Press ‘Save’.

18 Go to setup and Search ‘My domain’ in Quick Find and select it.

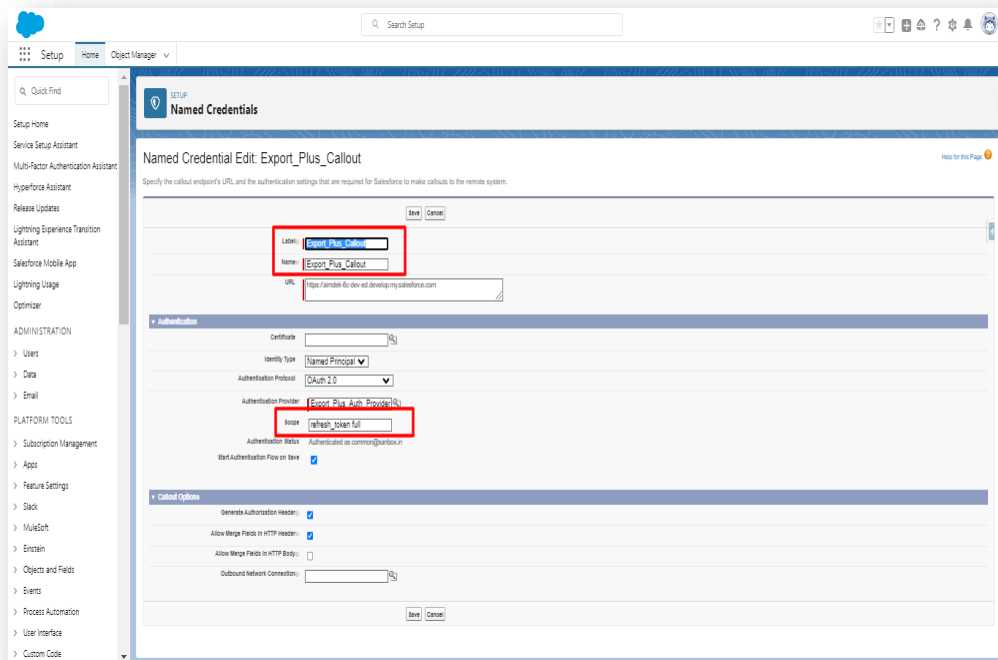
19. Copy ‘Current My domain URL’.



20. Go to Setup and Search ‘Named Credentials’ in Quick Find and select it.



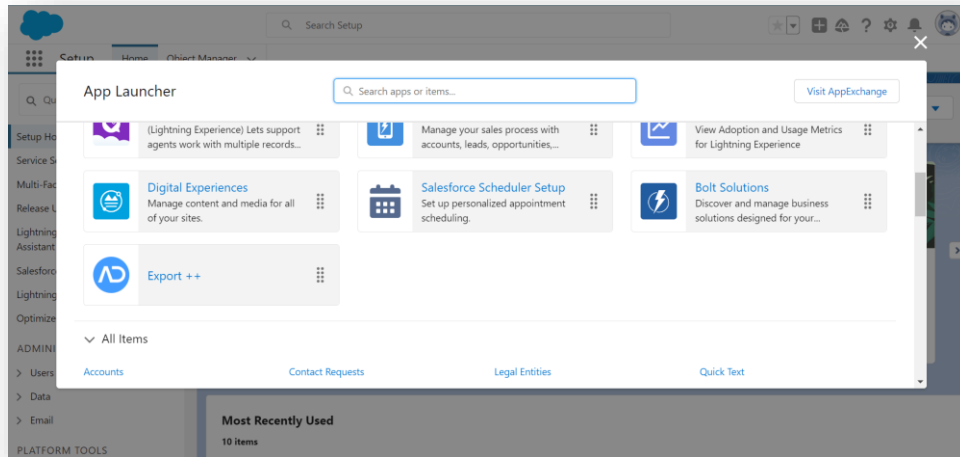
21. Go to 'New Legacy' as shown above.



22. Set the Label and Name values as 'Export_Plus_Callout', Paste the URL which was copied in [Step-19] with prefix 'https://' and. press 'Save'.

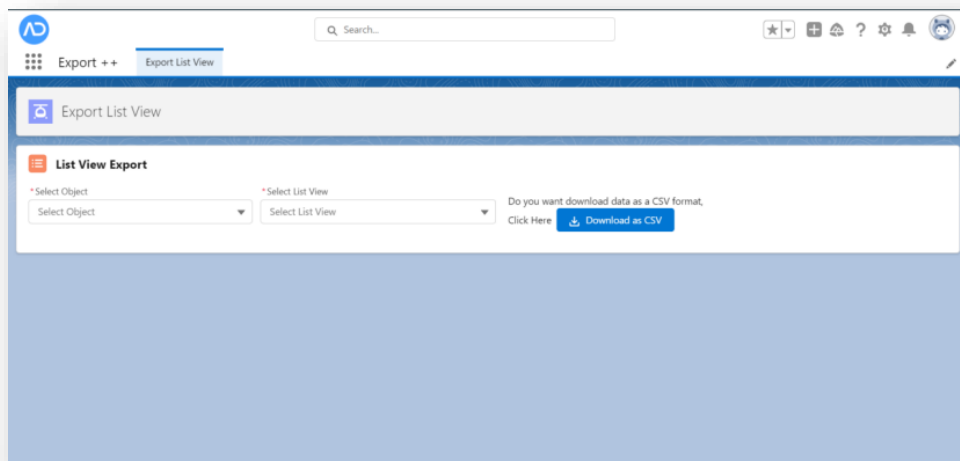
2.3 Web Application

After Installation Search Export++ App from the App Launcher, then click on the App and select Export++.



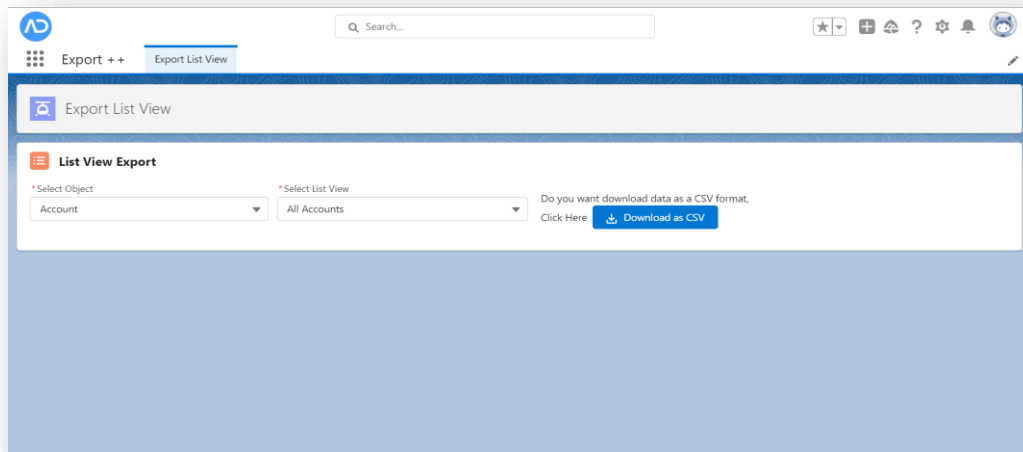
App Launcher

The home page is displayed using the steps below which are shown in below image.



Home Page

The system will display a drop-down list where the user can select related Names from the drop-down, like Accounts, Contacts, Opportunities, etc. If user want to download data, just need to select list view and click on the "**Download as CSV**" button to download the records as shown in.



List view Export CSV

After downloading the csv file, the User can see that file in Excel as shows in below image.

	A	B	C	D	E	F	G	H
	Name	BillingState	Phone	Type	OwnerId	Id	Owner	
1	Burlington Textiles Corp of America	NC	(336) 222-7000	Customer - Direct	0052w00000CkZX5AAN	0012w00001GfglsAAB	CSand	
2	Dickenson plc	KS	(785) 241-6200	Customer - Channel	0052w00000CkZX5AAN	0012w00001GfgluAAB	CSand	
3	Edge Communications	TX	(512) 757-6000	Customer - Direct	0052w00000CkZX5AAN	0012w00001GfglrAAB	CSand	
4	Express Logistics and Transport	OR	(503) 421-7800	Customer - Channel	0052w00000CkZX5AAN	0012w00001GfglkAAB	CSand	
5	GenePoint	CA	(650) 867-3450	Customer - Channel	0052w00000CkZX5AAN	0012w00001Gfglm1AAB	CSand	
6	Grand Hotels & Resorts Ltd	IL	(312) 596-1000	Customer - Direct	0052w00000CkZX5AAN	0012w00001GfglvAAB	CSand	
7	Pyramid Construction Inc.		(014) 427-4427	Customer - Channel	0052w00000CkZX5AAN	0012w00001GfgltAAB	CSand	
8	Sample Account for Entitlements				0052w00000CiUWAAZ	0012w00001G0dboAAB	autoproc	
9	Force	CA	(415) 901-7000		0052w00000CkZX5AAN	0012w00001Gfgm2AAB	CSand	
10	est				0052w00000CkZX5AAN	0012w00001LGGZRAA5	CSand	
11	United Oil & Gas Corp.	NY	(212) 842-5500	Customer - Direct	0052w00000CkZX5AAN	0012w00001GfglwAAB	CSand	
12	United Oil & Gas, Singapore	Singapore	(650) 450-8810	Customer - Direct	0052w00000CkZX5AAN	0012w00001Gfglw0AAB	CSand	
13	United Oil & Gas, UK	UK	+44 191 4956203	Customer - Direct	0052w00000CkZX5AAN	0012w00001GfgltzAAB	CSand	
14	University of Arizona	AZ	(520) 773-9050	Customer - Direct	0052w00000CkZX5AAN	0012w00001GfglyAAB	CSand	
15								
16								
17								
18								
19								
20								
21								

List View in Excel

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