

Kcloud Mass Actions App

Configuration Guide

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Mass Action Installation and SetUp

1. Mass action app in AppExchange.
2. Users have to install this package in the org by visiting AppExchange.
3. Link: <https://appexchange.salesforce.com/appxListingDetail?listingId=a0N3A00000EFo6iUAD>
4. Click on the Get it Now button.

 Search AppExchange



Kcloud Mass Action - Mass Edit | Mass Delete | Mass Update | Merge Duplicate

By Kcloud Technologies LLC

Edit, Delete, Update, and Merge with Ease!

 Salesforce App

 4.68 Average Rating ([98 Reviews](#))

Business Need

Admin & Developer Tools

Requires

Sales Cloud Service Cloud

[More Details](#)

Free

Never requires payment

[Pricing Details](#)

Kcloud Mass Actions is a powerful and user-friendly tool that empowers you to perform complex data management tasks with ease, ensuring data accuracy, time efficiency, and increased production.

Contact us at appexchange@kcloudtechnologies.com

Get It Now

More ▼

Then User have to select where they want to install in Sandbox/Production

(Install for all users)

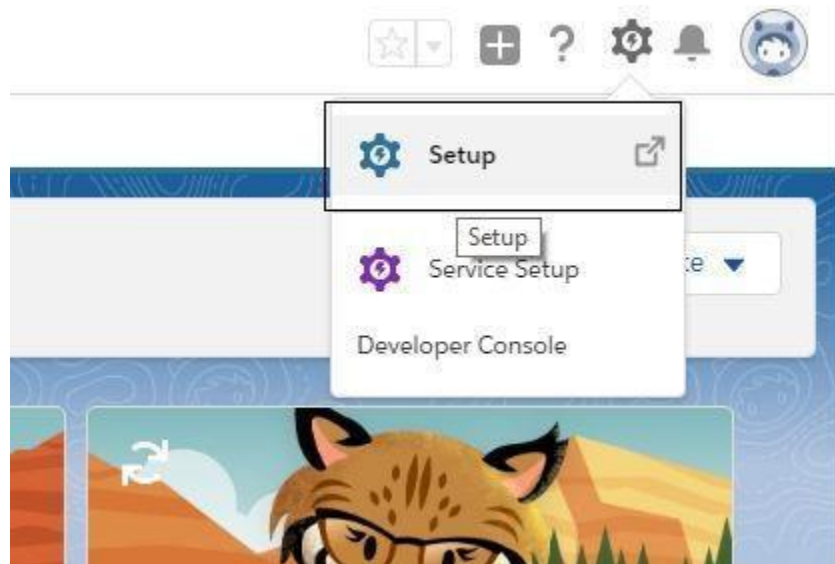
Introduction

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.
 7. **Mass Merge Duplicate Button** is used if we have phone and email same, then those records will come in duplicate records then with the help of Mass merge duplicate button we delete those records by selecting one.
-
- 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 fields.
 - The user-friendly interface will let users choose from all the custom or standard fields of an object.

Mass Edit/Update/Delete /Mass Merge Duplicate Button

- For Contact object mass edit/update/delete/Merge Duplicate button is included in Kcloud mass actions manage package, only need to add on the list view.
- 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			

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

Save Quick Save Preview Cancel

Label

Name

Description

Display Type

☐ Detail Page Link [View example](#)

☐ Detail Page Button [View example](#)

☒ List Button [View example](#)

☒ Display Checkboxes (for Multi-Record Selection)

Behavior [View Behavior Options](#)

Content Source

Select Field Type

Insert Field

Insert Operator

Functions

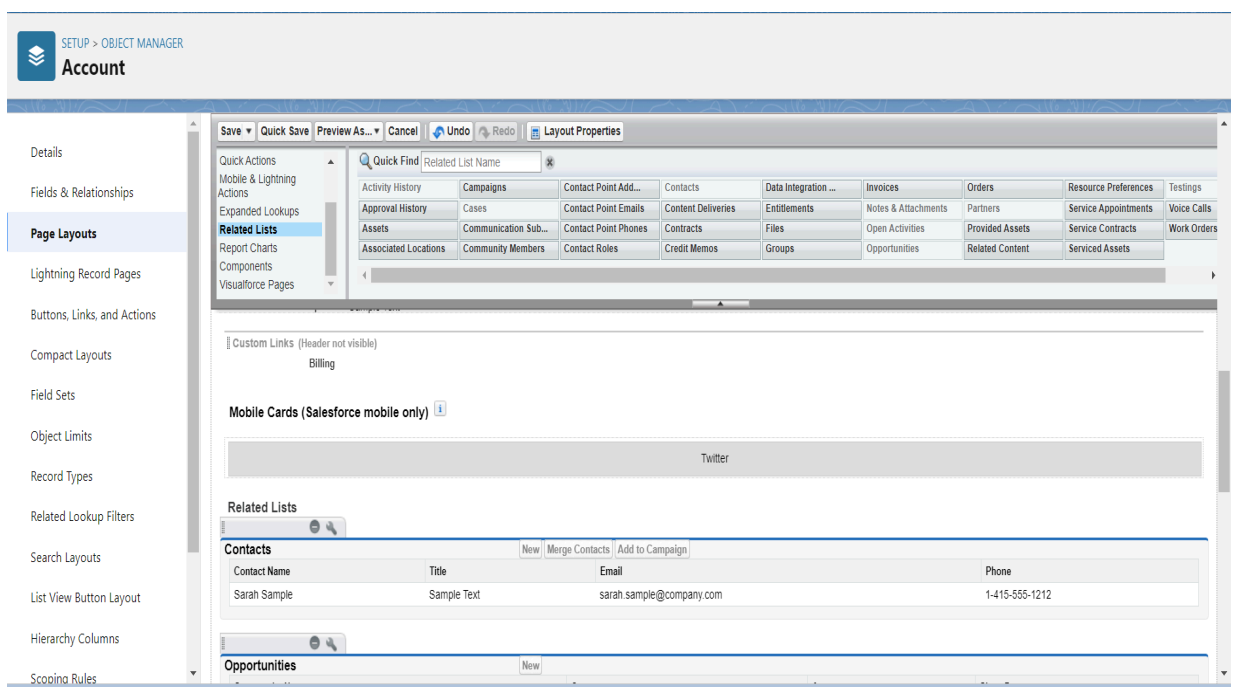
Link Encoding

Save Quick Save Preview Cancel

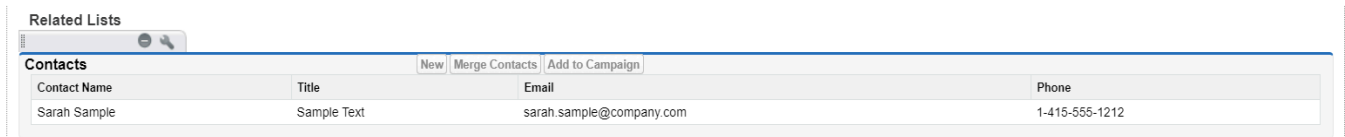
- For Mass Edit :- `/flow/Kcloud_Actions__MassEditLWC`
- For Mass Update:- `/flow/Kcloud_Actions__MassUpdateLwcFlow`
- For Mass Delete:- `/flow/Kcloud_Actions__MassDeleteLwc`
- For Mass Merge Duplicate:- `/flow/Kcloud_Actions__mergingandDeletingDuplicate`

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

6.If you want to show list view buttons on a related object, then you need to go to the page layout of that particular object, and you need to go to the related list of page layouts, and then select the object name you want to add as seen in below screenshot.



7.Click on the setting icon on Related lists



8.One popup will be shown after Click on Button '+' icon add the Mass Action buttons click on Ok button as Shown in Below Screenshot.

Related List Properties - Contacts



[Help](#) 

Columns



Buttons



OK

Cancel

Revert to Defaults

Related List Properties - Contacts
✕

[Help](#)
?

Columns
+

Buttons
-

Select standard buttons to display on the related list.

☒ New
☒ Merge Contacts
☒ Add to Campaign

Custom Buttons:

Select custom buttons to display on the related list. You can also reorder the selected buttons.

Available Buttons		Selected Buttons	
Mass Delete	Add Remove	Mass Edit lwc	Up Down
Mass Delete Lightning		Mass Update Lwc	
Mass Edit		Mass Delete Lwc	
Mass Edit Lightning			
Mass Update			
Mass Update Lightning			

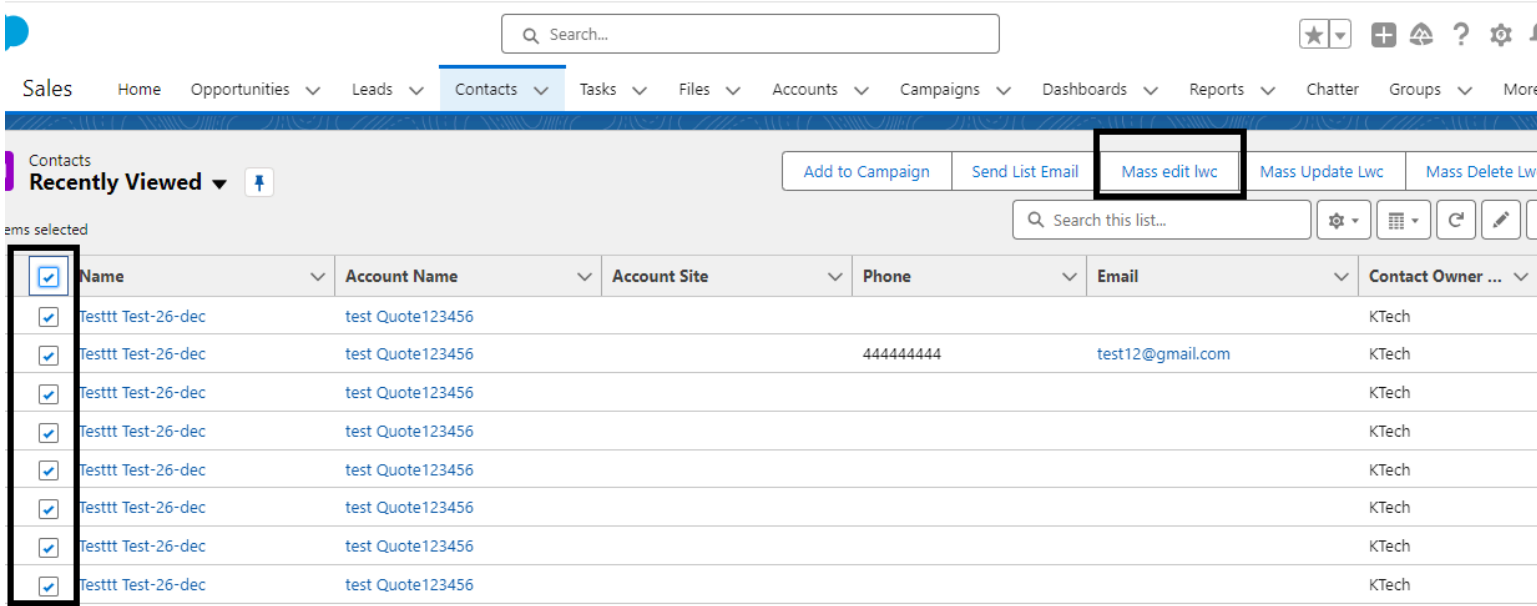
OK
Cancel
Revert to Defaults

It's time to use our Mass action buttons on related objects also. To begin mass editing/updating and deleting.

How To Use

- **For Edit Operation:-**

1. Select the records and click on the **Mass Edit** Button.

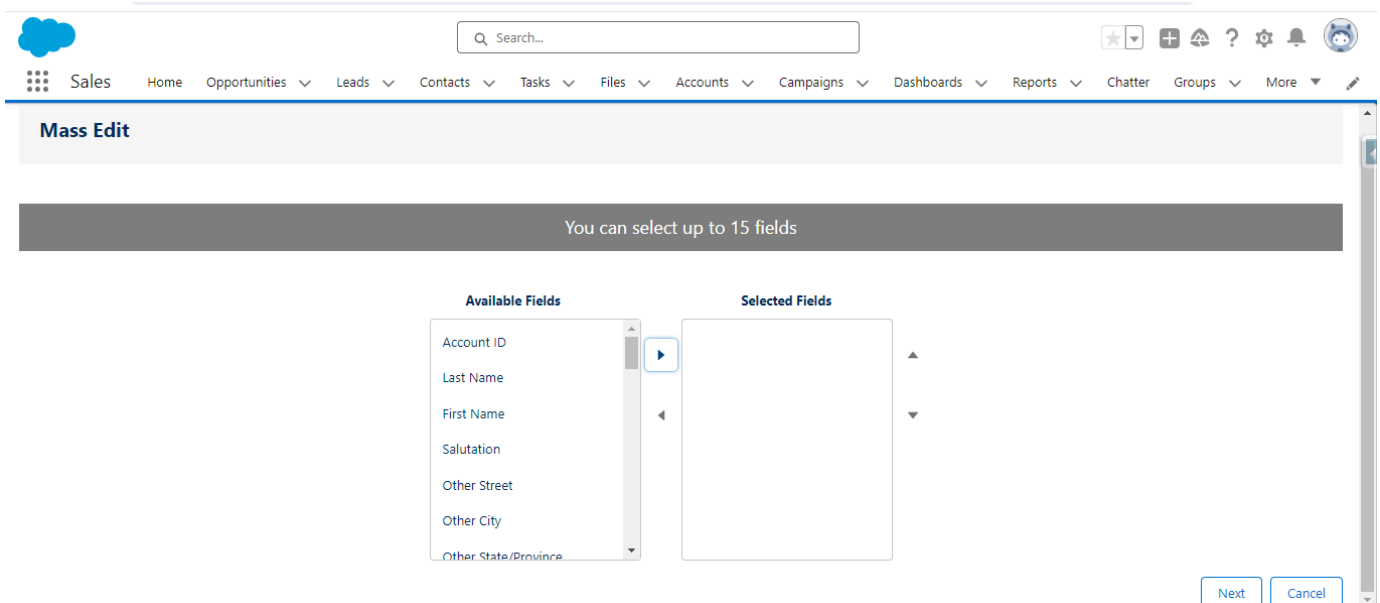


The screenshot shows the KCloud CRM interface. The 'Contacts' tab is selected, and the 'Recently Viewed' list is displayed. The 'Mass edit lwc' button is highlighted with a red box. The table below shows the list of contacts.

Name	Account Name	Account Site	Phone	Email	Contact Owner ...
Testtt Test-26-dec	test Quote123456				KTech
Testtt Test-26-dec	test Quote123456		444444444	test12@gmail.com	KTech
Testtt Test-26-dec	test Quote123456				KTech
Testtt Test-26-dec	test Quote123456				KTech
Testtt Test-26-dec	test Quote123456				KTech
Testtt Test-26-dec	test Quote123456				KTech
Testtt Test-26-dec	test Quote123456				KTech
Testtt Test-26-dec	test Quote123456				KTech

2. Select the fields for edit and click on the **Next** button.

- The limit of editing fields is 15.



The screenshot shows the 'Mass Edit' dialog box. It displays a list of available fields and a selected fields list. The message 'You can select up to 15 fields' is shown. The 'Next' button is highlighted.

Mass Edit

You can select up to 15 fields

Available Fields

- Account ID
- Last Name
- First Name
- Salutation
- Other Street
- Other City
- Other State/Province

Selected Fields

Next Cancel












Sales

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Mass Edit

	Name ▾	Account ID ▾	Last Name ▾	First Name ▾	Salutation
1	Test Test-26-Dec	 test Quote123456 	Test-26-Dec		Mrs.
2	Test-12	 test Quote123456 	Test-12		
3	Testtt Test-26-dec	 test Quote123456 	Test-26-dec	Testtt	Mrs.
4	Testtt Test-26-dec	 test Quote123456 	Test-26-dec	Testtt	Mrs.
5	Test-26-Dec Test-26-Dec	 Test-211 	Test-26-Dec	Test-26-Dec	Mrs.
6	Test-26-Dec Test-26-Dec	 	Test-26-Dec	Test-26-Dec	Mrs.

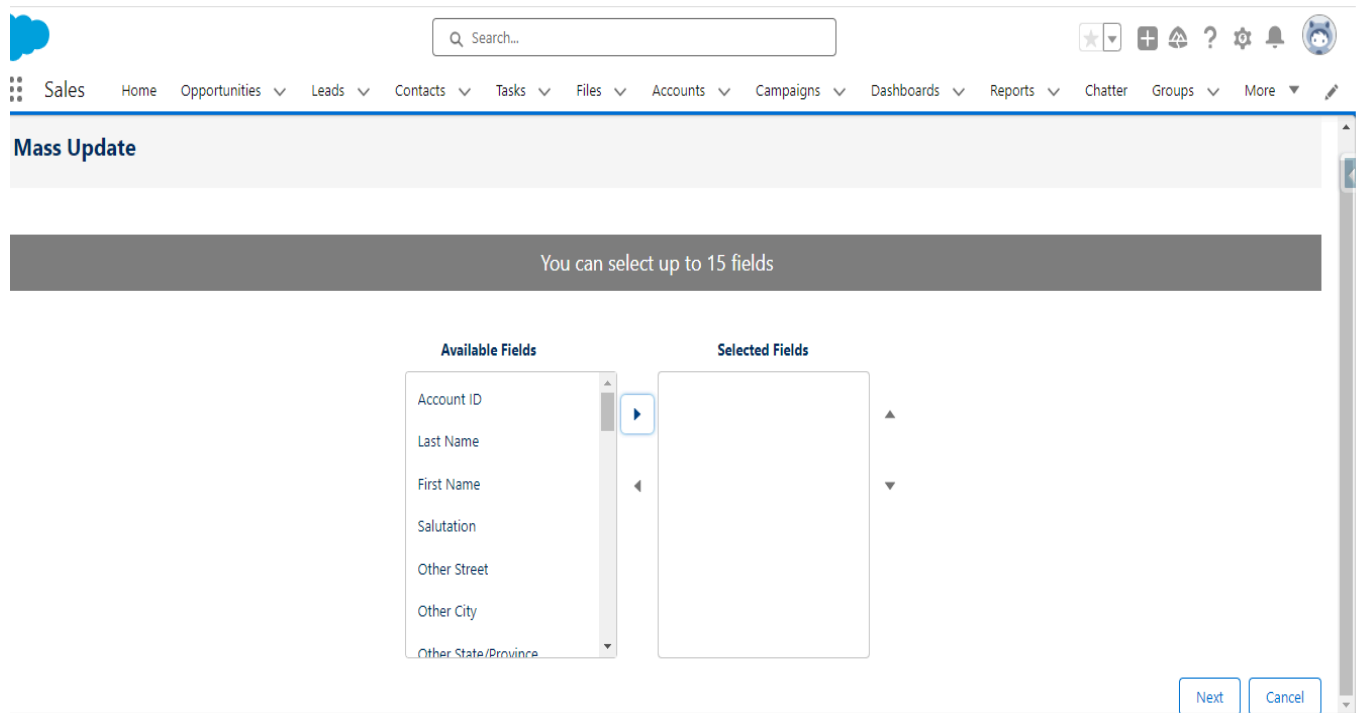




organizer

2. Select the fields for update and click on **Next** button.

- The limit of updating Fields is 15.



Search...

Sales Home Opportunities Leads Contacts Tasks Files Accounts Campaigns Dashboards Reports Chatter Groups More

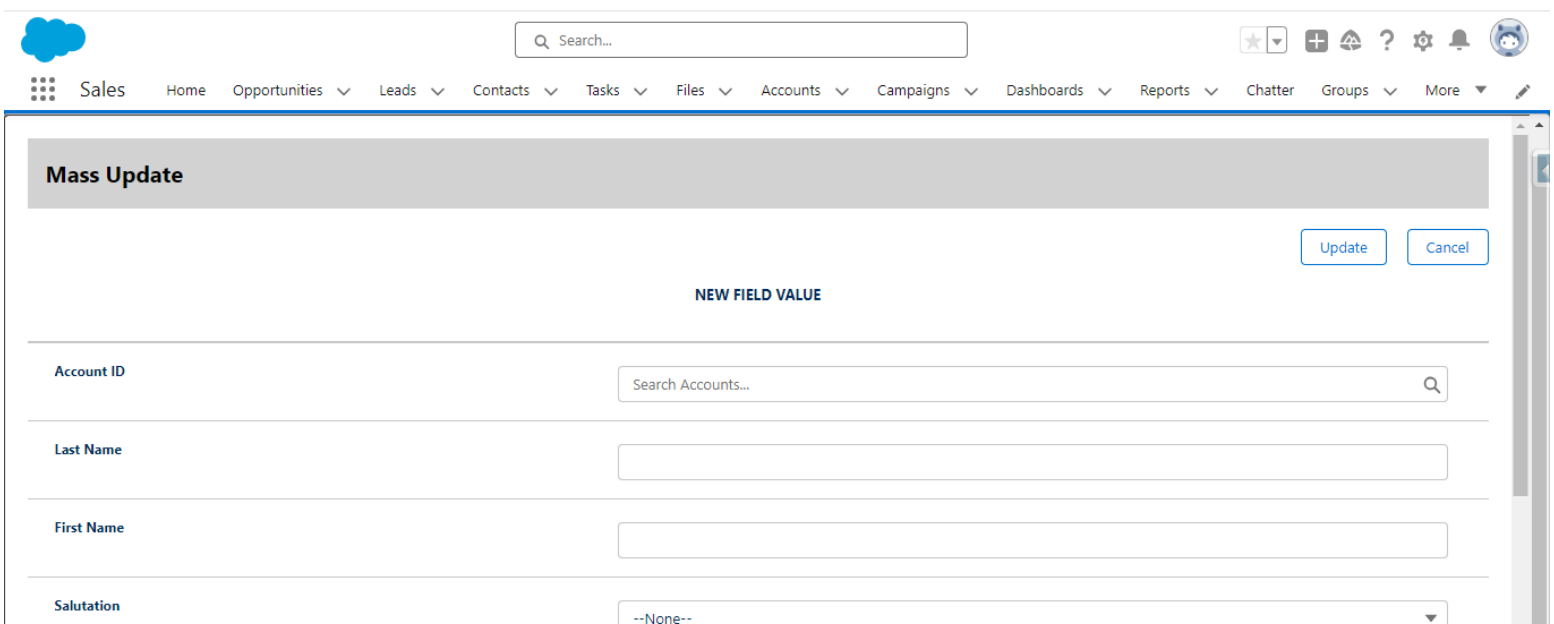
Mass Update

You can select up to 15 fields

Available Fields	Selected Fields
Account ID	
Last Name	
First Name	
Salutation	
Other Street	
Other City	
Other State/Province	

Next Cancel

3. Now update the fields from the mass update page and click on **Update** button.



Search...

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Mass Update

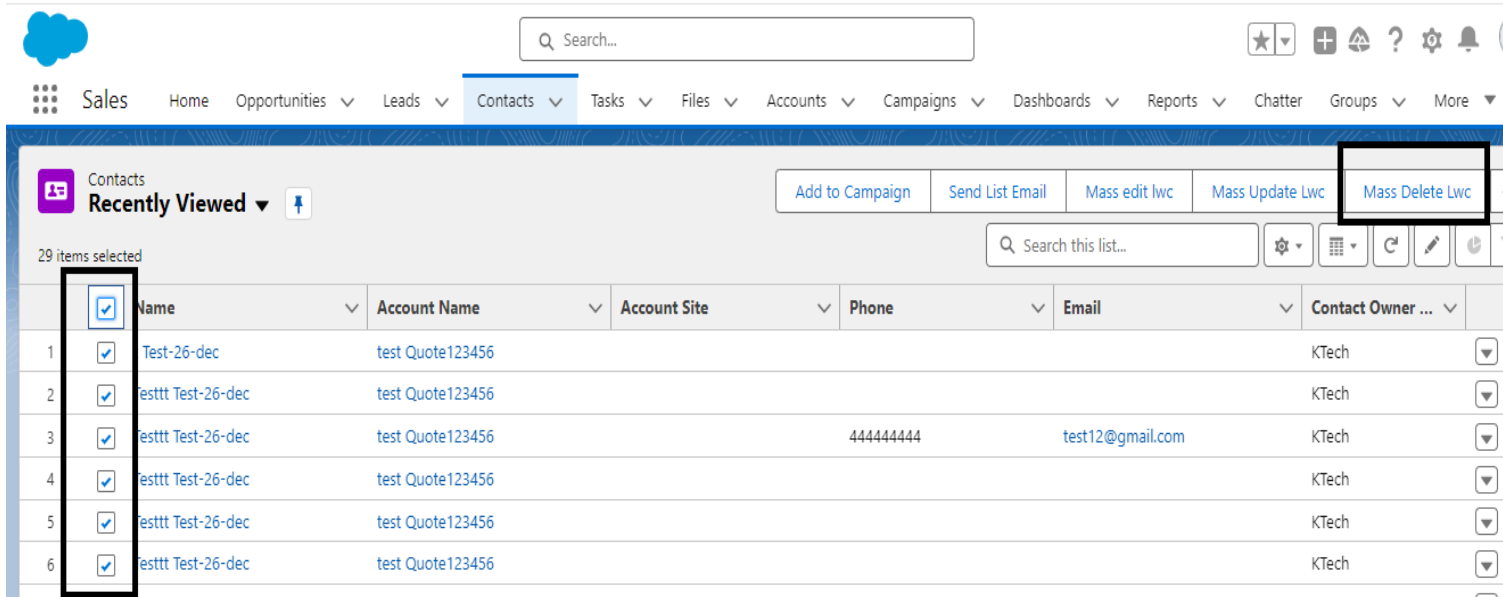
Update Cancel

NEW FIELD VALUE

Account ID	Search Accounts...
Last Name	
First Name	
Salutation	--None--

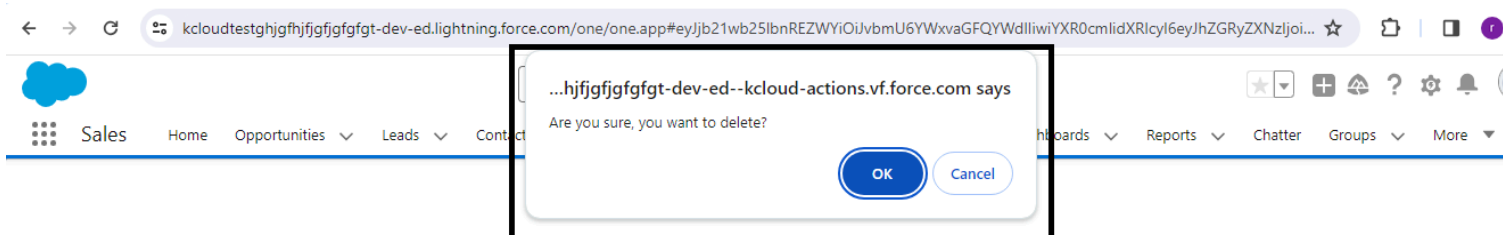
- **For Delete Operation:-**

1. Select the records and click on the **Mass Delete** Button.



The screenshot shows the Salesforce interface with the 'Contacts' tab selected. A search bar at the top right contains 'Search...'. Below the navigation bar, the 'Contacts' section shows 'Recently Viewed' with a pin icon. To the right, there are buttons: 'Add to Campaign', 'Send List Email', 'Mass edit lwc', 'Mass Update Lwc', and 'Mass Delete Lwc' (highlighted with a red box). Below these buttons, a table lists 29 items, with the first 6 items selected (indicated by checkboxes in the first column, also highlighted with a red box). The table columns are: Name, Account Name, Account Site, Phone, Email, and Contact Owner. The first 6 rows show test records with names like 'Test-26-dec' and 'esttt Test-26-dec'.

2. The pop up message asks for confirmation to delete the records click on **Ok** button.



The screenshot shows the same Salesforce interface as before, but with a confirmation dialog box open. The dialog box has a title bar that says '...hjfjgfgfgfgt-dev-ed--kcloud-actions.vf.force.com says' and a message that says 'Are you sure, you want to delete?'. There are two buttons at the bottom: 'OK' (highlighted with a red box) and 'Cancel'.

- **For Mass Merge Duplicate Operation:-**

1. Click on the Mass **Merge Duplicate** Button without selecting records.

2. Click on the Merge and Delete button. By selecting the one record we want to keep, we can delete all the remaining records.













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Duplicate Leads

Name	Title	Company	Phone	Mobile	Email
☐ testingjj		test	44444444		abc@gmail.com
☐ testq testing2n		test	44444444		abc@gmail.com
☒ testing		Test-417	44444444		abc@gmail.com
☐ testing		Test-108	44444444		abc@gmail.com
☐ testing		Test-227	44444444		abc@gmail.com
☐ testing		Test-23	44444444		abc@gmail.com

Merge & Delete



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