



**Unleash Your Salesforce**

**Mass Edit + Update + Delete**

**Post Install Setup Instructions and User Guide**

# Add Mass Update, Mass Edit and Mass Delete Buttons to Leads, Accounts, Contacts and Opportunities List View

Step 1: Click **Your Name | Setup | Customize**, select the appropriate record (leads, Accounts, Contacts, Opportunities) and choose the **Search Layouts** link.

**App Setup**

- Customize
  - Tab Names and Labels
  - Home
  - Activities
  - Campaigns
  - Leads**
    - Fields
    - Validation Rules
    - Triggers
    - Page Layouts
    - Field Sets
    - Search Layouts**
    - Assignment Rules
    - Settings
    - Buttons and Links
    - Lead Processes
    - Record Types
    - Web-to-Lead
    - Auto-Response Rules

- Search Results for search and tagging.
- List Views for filtering records. [View example](#)

Lead Search Layouts			
Action	Layout	Columns Displayed	Buttons Displayed
<a href="#">Edit</a>	Search Results	Name, Title, Phone, Company, Email, Lead Status, Owner Alias	
<a href="#">Edit</a>	Lookup Dialogs	Name, Company	N/A
<a href="#">Edit</a>	Lookup Phone Dialogs	Name, Company, Phone, Mobile	N/A
<a href="#">Edit</a>	Leads Tab	Name, Company, Phone	N/A
<a href="#">Edit</a>	Leads List View	N/A	Mass Delete, Mass Update, Mass Edit
<a href="#">Edit</a>	Search Filter Fields		N/A

Step 2: Click **Edit** next to the "List View"

# Add Mass Update, Mass Edit and Mass Delete Buttons to Leads, Accounts, Contacts and Opportunities List View

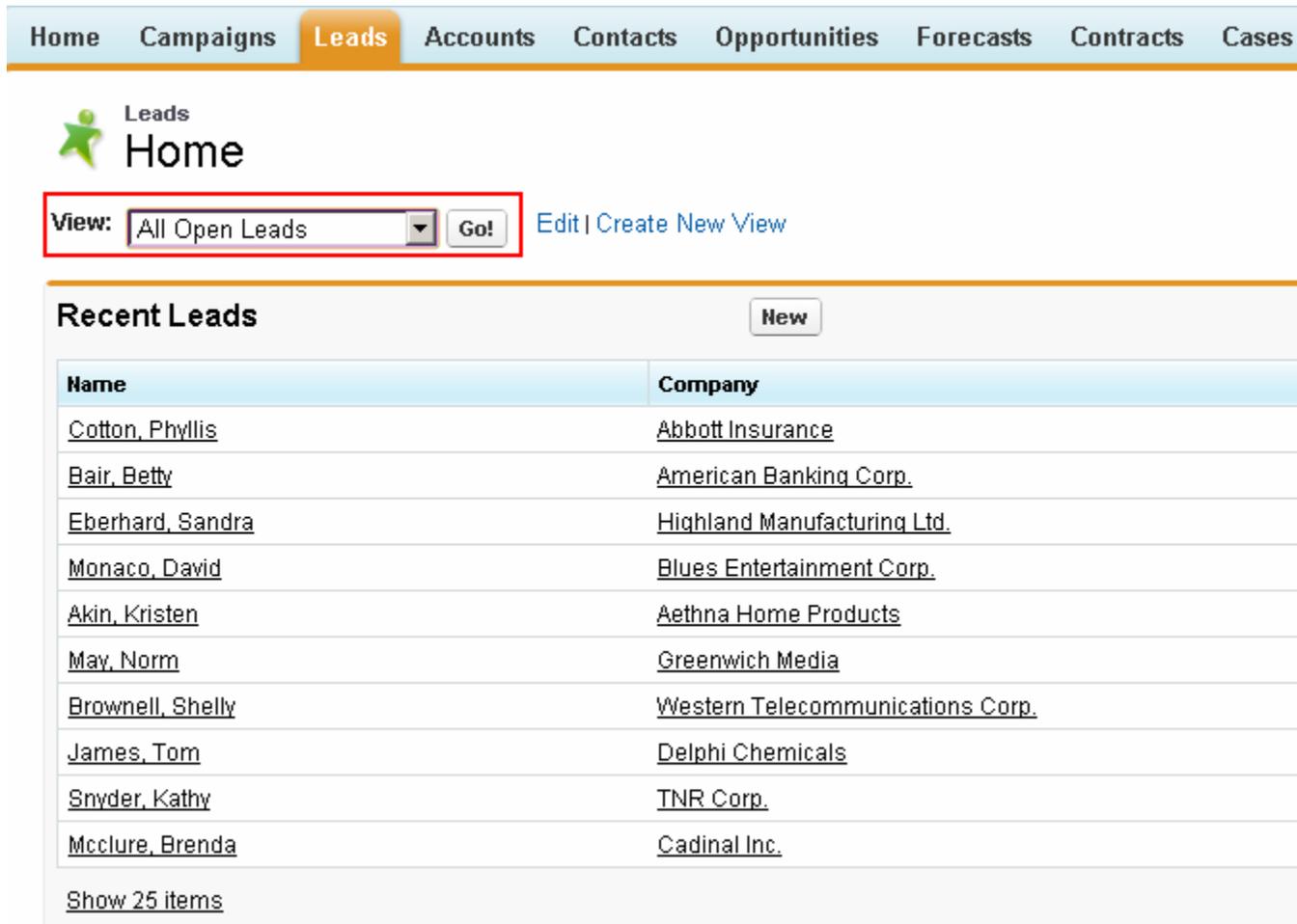
Step 3: Add Button(s).

The screenshot displays the Salesforce App Setup interface for configuring custom buttons. On the left, the 'App Setup' sidebar is visible, with 'Leads' selected under the 'Customize' section. The main content area shows the 'Custom Buttons' configuration for the 'Leads' object. At the top, there are several checkboxes for standard buttons: 'Accept [Accept]', 'Change Status [ChangeStatus]', 'Change Owner [ChangeOwner]', and 'Add to Campaign [AddToCampaign]'. Below this is the 'Custom Buttons' section, which is divided into two columns: 'Available Buttons' and 'Selected Buttons'. The 'Available Buttons' list currently contains only '--None--'. The 'Selected Buttons' list contains 'Mass Edit', 'Mass Update', and 'Mass Delete'. Between the two lists are 'Add' and 'Remove' buttons. The 'Add' button is highlighted with a red square. To the right of the 'Selected Buttons' list are 'Up' and 'Down' arrow buttons. At the bottom right of the configuration area are 'Save' and 'Cancel' buttons.

**Repeat the steps to add “Mass Action” buttons for appropriate records (leads, accounts, contacts and opportunities)**

## How to Use Mass Edit + Update + Delete Functionality?

Step 1: Goto Leads/Accounts/Contacts/Opportunities tab | select a list view | hit "go".



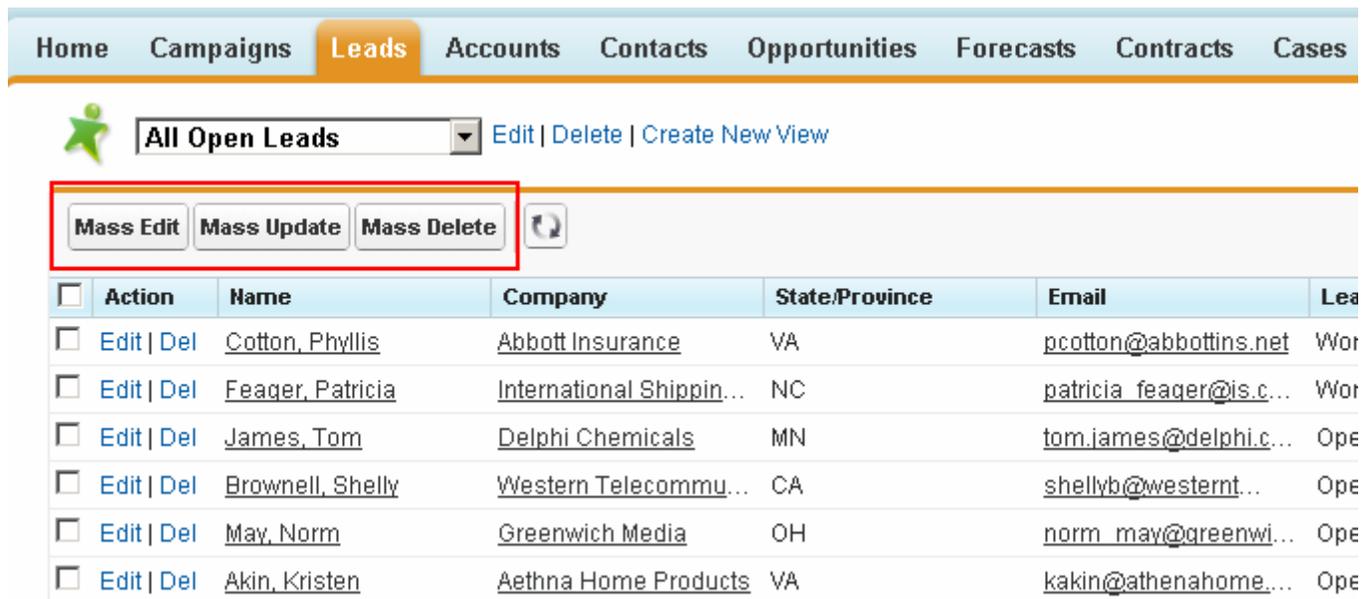
The screenshot shows the 'Leads Home' page. At the top is a navigation bar with tabs for Home, Campaigns, Leads (highlighted), Accounts, Contacts, Opportunities, Forecasts, Contracts, and Cases. Below the navigation bar is the 'Leads Home' header with a green person icon. A 'View:' dropdown menu is set to 'All Open Leads' and is highlighted with a red box, with a 'Go!' button next to it. To the right of the dropdown are links for 'Edit' and 'Create New View'. Below the view selector is a 'Recent Leads' section with a 'New' button. The table below lists leads with columns for Name and Company.

Name	Company
<a href="#">Cotton, Phyllis</a>	<a href="#">Abbott Insurance</a>
<a href="#">Bair, Betty</a>	<a href="#">American Banking Corp.</a>
<a href="#">Eberhard, Sandra</a>	<a href="#">Highland Manufacturing Ltd.</a>
<a href="#">Monaco, David</a>	<a href="#">Blues Entertainment Corp.</a>
<a href="#">Akin, Kristen</a>	<a href="#">Aethna Home Products</a>
<a href="#">May, Norm</a>	<a href="#">Greenwich Media</a>
<a href="#">Brownell, Shelly</a>	<a href="#">Western Telecommunications Corp.</a>
<a href="#">James, Tom</a>	<a href="#">Delphi Chemicals</a>
<a href="#">Snyder, Kathy</a>	<a href="#">TNR Corp.</a>
<a href="#">Mcclure, Brenda</a>	<a href="#">Cadinal Inc.</a>

[Show 25 items](#)

## How to Use Mass Edit + Update + Delete Functionality?

Step 2: Select multiple records -> hit Mass Edit/Update/Delete



The screenshot shows a CRM interface with a navigation bar at the top containing 'Home', 'Campaigns', 'Leads', 'Accounts', 'Contacts', 'Opportunities', 'Forecasts', 'Contracts', and 'Cases'. The 'Leads' tab is selected. Below the navigation bar, there is a green person icon, a dropdown menu set to 'All Open Leads', and links for 'Edit | Delete | Create New View'. A red box highlights three buttons: 'Mass Edit', 'Mass Update', and 'Mass Delete', along with a refresh icon. Below these buttons is a table of leads with columns for 'Action', 'Name', 'Company', 'State/Province', 'Email', and 'Lea'.

<input type="checkbox"/>	Action	Name	Company	State/Province	Email	Lea
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Cotton, Phyllis</a>	<a href="#">Abbott Insurance</a>	VA	<a href="#">pcotton@abbottins.net</a>	Wor
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Feager, Patricia</a>	<a href="#">International Shippin...</a>	NC	<a href="#">patricia_feager@is.c...</a>	Wor
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">James, Tom</a>	<a href="#">Delphi Chemicals</a>	MN	<a href="#">tom.james@delphi.c...</a>	Ope
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Brownell, Shelly</a>	<a href="#">Western Telecommu...</a>	CA	<a href="#">shellyb@westernt...</a>	Ope
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">May, Norm</a>	<a href="#">Greenwich Media</a>	OH	<a href="#">norm_may@greenwi...</a>	Ope
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Akin, Kristen</a>	<a href="#">Aethna Home Products</a>	VA	<a href="#">kakin@athenahome...</a>	Ope

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**Your Success.**

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