



Update Anything Free User Guide

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Introduction

This document will guide you through the process of integrating the Cloud Builders Update Anything application with your Salesforce org. It is broken into two sections: Installation and the User Manual.

You may email any support questions to support@cloud-builders.com or call us at: 480-382-1372.

Installation

Installing the Package in Salesforce

Download and Install the App

Retrieve and install the package from AppExchange listing using the following URL:
<https://appexchange.salesforce.com/listingDetail?listingId=a0N3A00000DqDOrUAN>

Once the package is successfully installed, you can use Update Anything app to update/delete records.

User Manual

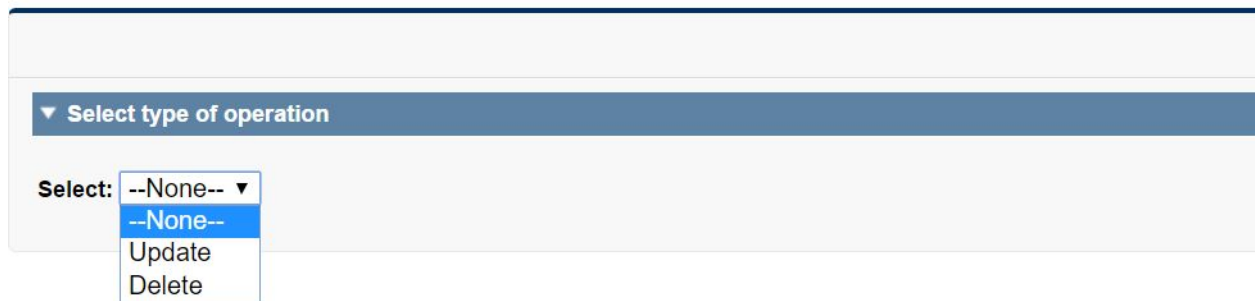
Update Anything Tab

This is the core of this application. Go the Update Anything app, click on Update Anything tab and below screen appears that starts the wizard for updating/deleting records.

Select Operation Type : you need to select operation type whether you want to update records or delete records.



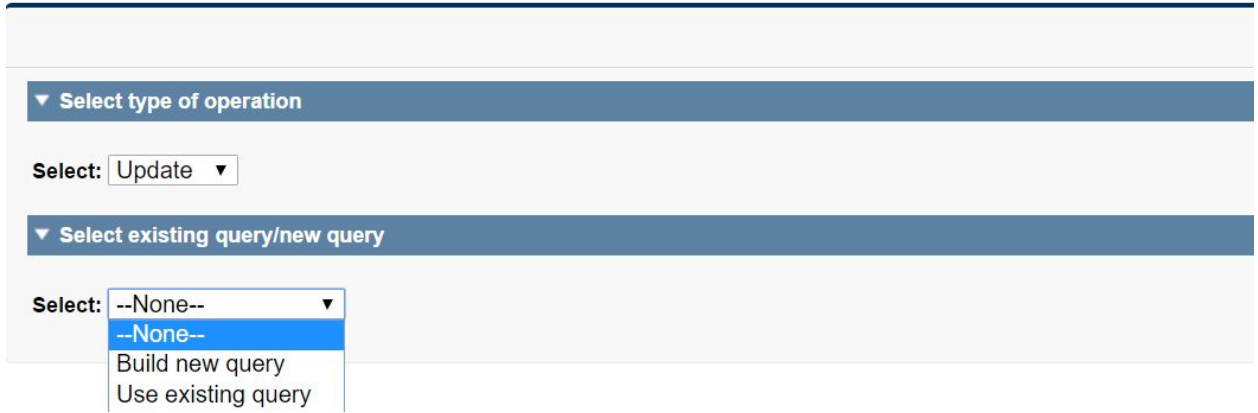
Update/Delete Anything



The screenshot shows a web interface for the 'Update/Delete Anything' application. At the top, there is a header bar with the text 'Select type of operation'. Below this, there is a 'Select:' label followed by a dropdown menu. The dropdown menu is open, showing three options: '--None--' (which is highlighted in blue), 'Update', and 'Delete'.

Select Query Type : you need to select query type whether you want to build a new query or you want to use existing query for update/delete operation.

Update/Delete Anything

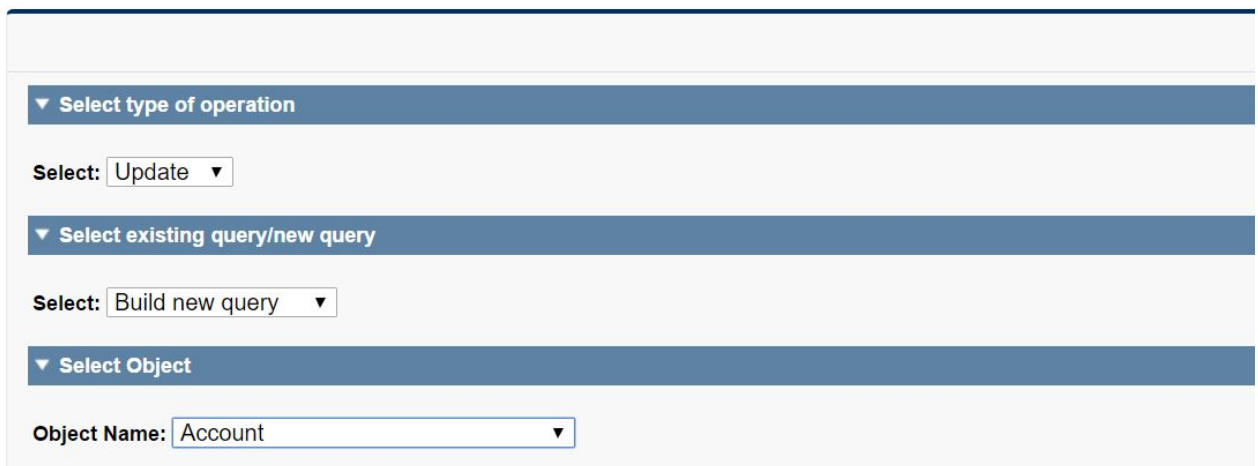


The screenshot shows the 'Update/Delete Anything' form. It has two main sections: 'Select type of operation' and 'Select existing query/new query'. In the first section, the 'Select:' dropdown is set to 'Update'. In the second section, the 'Select:' dropdown is open, showing options: '--None--', 'Build new query', and 'Use existing query'.

Build New Query

2.1 Select Object : If you select Build new query option, this displays a new section below to select the object for update/delete query.

Update/Delete Anything



The screenshot shows the 'Update/Delete Anything' form with the 'Build new query' option selected. It now includes a third section, 'Select Object', where the 'Object Name:' dropdown is set to 'Account'.

3. Add Filters : After you select object name, new section is displayed to select the filters for update/delete query. Here you can select appropriate filters to select the records that you want to update/delete.

Add Filters

Account Name

does not contain

Test

Active

Equals

Yes

Add Row

Remove

Show Sample Data

4. Sample Data : You can use show sample data button to see 10 sample records matching the filter criteria that you selected. Every time you change the filters, you need to refresh the sample data.

Add Filters

Account Name

does not contain

Test

Active

Equals

Yes

Add Row

Remove

Refresh Data

Hide Sample Data

Account Name	Account ID	Active
GenePoint	00141000004STgm	Yes
United Oil & Gas, UK	00141000004STgk	Yes
United Oil & Gas, Singapore	00141000004STgl	Yes
Edge Communications	00141000004STgc	Yes
Grand Hotels & Resorts Ltd	00141000004STgg	Yes
Express Logistics and Transport	00141000004STgi	Yes
University of Arizona	00141000004STgj	Yes
United Oil & Gas Corp.	00141000004STgh	Yes

5. Field Update : In this section, you can select fields and enter the value of the field to be updated. You can select any number of fields using add row to update. This section is applicable to update operation only.

Select Fields to update

Account Site

Test

Remove

Active

Yes

Add Row

Remove

Billing City

Add Row

Remove

Update Now

Schedule Update

Use existing Query : If the user want to use the existing query that he/she already built and saved, user can select use existing query option and then select the query to use for update/delete operation. As he/she selects any query, all filters and fields to be updated will auto populate on the page saving the time for user to enter every time.

 Update/Delete Anything

Screen for Update Operation

▼ Select type of operation

Select:

▼ Select existing query/new query

Select: Query Name:

▼ Select Object

Object Name:

▼ Add Filters

[Add Row](#)

▼ Select Fields to update

[Add Row](#)

 Update/Delete Anything

Screen for Delete Operation

▼ Select type of operation

Select:

▼ Select existing query/new query

Select: Query Name:

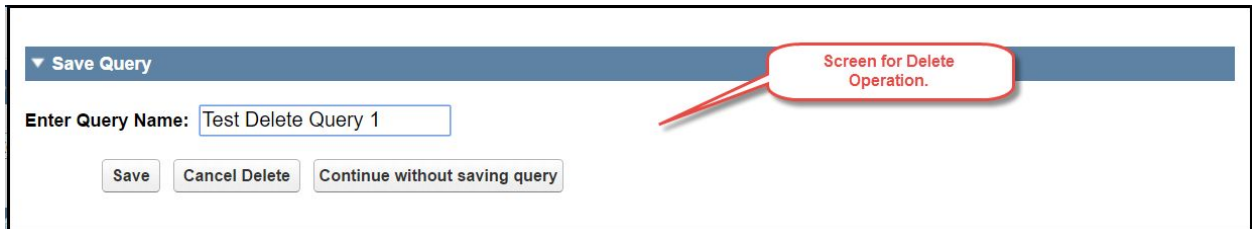
▼ Select Object

Object Name:

▼ Add Filters

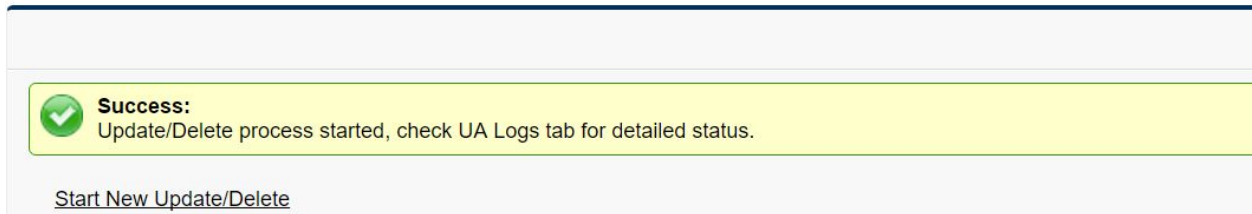
[Add Row](#) [Remove](#)

Update/Delete Now : If you want to run the update/delete process immediately and don't want to schedule it for later run, use Update Now or Delete Now buttons. Clicking this button will show you count of records to be updated/deleted and option for saving the query for future use.



You will need to provide query name to save the query. Then you will see a success message if the update request is successfully submitted.

Update/Delete Anything



Schedule Update/Delete : Use this button if you want to schedule the update/delete process for later run or automatically run update/delete jobs daily/weekly/monthly/yearly as per your requirement. You will see query save option and then redirected to schedule update/delete panel where you need to select the time/duration for the scheduler to run, scheduler name and then click the schedule button at bottom to start the process.

▼ Schedule Update

Frequency:
☒ Weekly
☐ Monthly

Rekurs every week on:
☐ Sunday
☐ Monday
☐ Tuesday
☐ Wednesday
☐ Thursday
☐ Friday
☐ Saturday

Start Time:

Start Date:

End Date:

Enter Scheduler Name:

You will see a success message if the update/delete request is successfully scheduled.



Update/Delete Anything



Success:
Test Scheduler 1 scheduled successfully, check UA Logs tab for detailed status.

[Start New Update/Delete](#)

Admin Setting Tab

Clicking admin setting tab on Update Anything app, takes user to admin setting page. There are 2 sections on this page.

1. First section allows view, edit or deletion task for UA Logs on recurring schedule. **(This feature is not available in the free version of Update Anything app.)**
2. Second section allows view, edit or create query or update/delete tasks on a recurring schedule. **(This feature is not available in the free version of Update Anything app.)**

Admin Setting

▼ Logs Deletion Schedulers

Job Name	Start Time	Previous Fire Time	Next Fire Time	Times Triggered	Action
Delete All Logs	Fri Sep 09 07:22:52 GMT 2016		Sat Oct 01 07:00:00 GMT 2016	0	Delete

▼ Query/Update/Delete Schedulers

Job Name	Start Time	Previous Fire Time	Next Fire Time	Times Triggered	Action
test	Fri Sep 09 07:07:12 GMT 2016	Mon Sep 26 07:00:01 GMT 2016	Tue Sep 27 07:00:00 GMT 2016	10	Delete
testv23ee	Fri Sep 09 07:10:50 GMT 2016	Mon Sep 26 07:00:00 GMT 2016	Tue Sep 27 07:00:00 GMT 2016	17	Delete

Click here to go to update/delete anything wizard:

[Update/Delete Anything wizard](#)

UA Queries

The queries generated through update/delete anything process are saved under UA Queries. These saved queries can be used again in update/delete process.

UA Query Account inactive to active

[Customize Page](#) | [Edit Layout](#) | [Printable View](#) | [Help for this Page](#)
[UA Logs \(Update Query\) \[2\]](#) | [UA Logs \(Delete Query\) \[0\]](#) | [UA Query History \[3\]](#)

UA Query Detail

[Edit](#) [Delete](#) [Clone](#)

▼ Information

Query Name	Account inactive to active
Query Type	Update
Query Object	account
Fields Updated	active__c
Query	select Id ,active__c from account where active__c = 'Yes'
Owner	 UA Free Testing [Change]
Created By	UA Free Testing , 9/17/2016 11:47 PM
Last Modified By	UA Free Testing , 9/26/2016 9:30 PM

[Edit](#) [Delete](#) [Clone](#)

UA Logs (Update Query)

[New UA Log](#)
[UA Logs \(Update Query\) Help](#)

Action	Log Name	Total Records	Total Failed	Updated Fields
Edit Del	9/17/2016 11:47 PM	8	0	active__c
Edit Del	9/26/2016 9:30 PM	8	0	active__c

UA Logs (Delete Query)

[New UA Log](#)
[UA Logs \(Delete Query\) Help](#)

No records to display

UA Logs

All the success/failure logs for update/delete process completed, can be found under UA Logs tab. UA logs contains all details about the Update/delete i.e. query, updated fields, total failed and success count etc.

Notes & Attachments [1] | UA Log History [1]

UA Log Detail

[Edit](#) [Delete](#) [Clone](#)

Log Name	9/17/2016 11:47 PM	Owner	UA Free Testing [Change]
Update Query	Account inactive to active	Batch Id	707410000052d9RAAQ
Delete Query		Error Details	
Total Records	8		
Total Failed	0		
Updated Fields	active__c		
Query	select Id ,active__c from account where active__c = 'No' LIMIT 500		
Created By	UA Free Testing , 9/17/2016 11:47 PM		Last Modified By UA Free Testing , 9/17/2016 11:47 PM

[Edit](#) [Delete](#) [Clone](#)

Notes & Attachments

[New Note](#) [Attach File](#) [View All](#) [Notes & Attachments Help ?](#)

Action	Type	Title	Last Modified	Created By
Edit View Del	Attachment	Update Anything Success File-9/17/2016 11:47 PM.csv	9/17/2016 11:47 PM	UA Free Testing

Success/Error Files

Success/Error files are generated for every update/delete process that has completed. These files contain all records ids and error if any occurred in update/delete process. These files can be downloaded from notes & attachment section below UA Logs.

Record Update Limits

1. **Paid version** : You can update any number of records with paid version of Update Anything.
2. **Free version** : You can update max. 500 records at one time with free version of Update Anything.