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UPDATE MULTIPLE RECORDS IN SIMPLE STEPS





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1) Product Description:

A Guide to Mass Update / Mass Delete Records from any List View of Standard or Customized objects.

Note: You can perform Mass Update and Mass Delete actions on both Standard and Custom objects. List of Objects to perform Mass actions:

- 1) Account
- 2) Opportunity
- 3) Asset
- 4) Lead
- 5) Contact
- 6) Contract
- 7) Case
- 8) Order
- 9) Custom Objects

Salesforce offers its users a partner app to install. This app includes “Mass Update / Mass Delete” to Update/Edit or Delete records. The records can be accessed from the list view of a standard or customized objects. The app supports all type of Salesforce Editions(Classic and Lightning).

2) Button Creation: Before performing the operation of mass update / mass delete you need to create either of two buttons according to your requirement on the related object on which you have to perform the operations.

Note: List of standard objects already have buttons are:

- 1) Account
- 2) Opportunity
- 3) Asset
- 4) Lead
- 5) Contact
- 6) Contract
- 7) Case
- 8) Order



Now, to create buttons on custom objects follow the given procedure.

3) Button creation for Salesforce Classic Version:

1- Mass Update/Edit Button

2- Mass Delete Button

Steps to perform for **Mass Update/Edit** button.

Before creating button for Mass Update/edit and Mass Delete you need to create a VF Page first. For that please follow the given process.

Step 1: SetUp -> Develop -> Visualforce Pages -> New

Step 2: After clicking on “New”. Fill the details as follows.

Visualforce Page
MassUpdateVFP

Page Detail

Label: MassUpdateVFP
Namespace Prefix: NINEMU
Name: MassUpdateVFP
Available for Lightning Experience, Lightning Communities, and the mobile app: ☒
Require CSRF protection on GET requests: ☐
Description:
Created By: Palak Arora, 12/8/2018 11:30 PM
Last Modified By: Palak Arora, 12/8/2018 11:30 PM

Visualforce Markup

```
<apex:page standardController="Invoice__c" extensions="MUD_RedirectExt" recordSetVar="Invoices" action="{!validateAndRedirect}" >
</apex:page>
```

After this you need to copy and paste the visualforce code for creating your button.

Visualforce code for Mass Update/Edit button

```
<apex:page          standardController="Invoice__c"          extensions="MyExtClass"
recordSetVar="invoices" action="{!validateAndRedirect}" >
```

```
</apex:page>
```



After adding this click save.

Note: Please replace the object name as per your selected object name on which you are creating the buttons and performing the operations. As shown in the above image in red marked.

Now, steps to create button for Mass Update/Edit.

Step 1: SetUp -> Create-> Object -> Selected Object -> Buttons & Links ->New Button or Link.

Step 2: After clicking on “New Button or Link”. Fill the details as follows. Click Save.

The screenshot shows the Salesforce 'Edit Account Custom Button or Link' interface for a button named 'MassUpdate'. The form is titled 'Custom Button or Link Edit' and includes the following fields and options:

- Label:** MassUpdate
- Name:** MassUpdate
- Namespace Prefix:** NINEMU
- Description:** (Empty text box)
- Display Type:** Radio buttons for Detail Page Link, Detail Page Button, and List Button. The 'List Button' option is selected. There is also a checkbox for 'Display Checkboxes (for Multi-Record Selection)' which is checked.
- Behavior:** A dropdown menu set to 'Display in existing window without sidebar'.
- Content Source:** A dropdown menu set to 'Visualforce Page'.
- Content:** A text box containing 'MassUpdateNew [NINEMU__MassUpdateNew]', which is highlighted with a red box.

Buttons at the top and bottom of the form include 'Save', 'Quick Save', 'Preview', and 'Cancel'.

Note: Please select the visualforce page as you created from the above process as per your selected object name on which you are creating the buttons and performing the update operation. As shown in the above image in red marked box.

Steps to perform for **Mass Delete** button.



Same as Mass Update/Edit first you need to create VF Page. For that follow the below given process.

Step 1: SetUp -> Develop -> Visualforce Pages -> New

Step 2: After clicking on “New”. Fill the details as follows.

Visualforce Page
MassDeleteVFP

Page Detail

Edit Delete Clone Where is this used? Show Dependencies Preview

Label	MassDeleteVFP	Name	MassDeleteVFP
Namespace Prefix	NINEMU	Available for Lightning Experience, Lightning Communities, and the mobile app	☒
Require CSRF protection on GET requests	☐	Description	
Last Modified By	Palak Arora, 12/8/2018 11:30 PM	Created By	Palak Arora, 12/8/2018 11:30 PM

Visualforce Markup Version Settings

```
<apex:page standardController="Invoice__c" lightningStyleSheets="true" extensions="MUD_RedirectExt" recordSetVar="Invoices" >
<apex:form >
<apex:pageBlock >
<apex:pageMessages id="showmsg"></apex:pageMessages>
<apex:pageBlockSection rendered="{!!flag}">
<apex:pageBlockSectionItem >
<apex:outputLabel value="Do you want to proceed to delete these records?"> </apex:outputLabel>
</apex:pageBlockSectionItem>
</apex:pageBlockSection>
<apex:pageBlockSectionItem >
<apex:commandButton id="confirm" value="Ok" title="Ok" action="{!deleteRecords}" rendered="{!!flag}"/>
<apex:commandButton id="back" value="Cancel" title="Cancel" action="{!cancel}" />
</apex:pageBlockSectionItem>
</apex:pageBlockSection>
</apex:pageBlock>
</apex:form>
</apex:page>
```

Visualforce code for Mass Delete button

```
<apex:page standardController="Invoice__c" lightningStyleSheets="true"
extensions="MyExtClass" recordSetVar="invoices" >
```

```
<apex:form >
```

```
<apex:pageBlock >
```

```
<apex:pageMessages id="showmsg"></apex:pageMessages>
```

```
<apex:pageBlockSection rendered="{!!flag}">
```



```
<apex:pageBlockSectionItem >
<apex:outputLabel value="Do you want to proceed to delete these records?">
</apex:outputLabel>
</apex:pageBlockSectionItem>
</apex:pageBlockSection>
<apex:pageBlockSection columns="2" >
```

```
<apex:pageBlockSectionItem >
<apex:commandButton id="confirm" value="Okay" title="Ok" action="{!
deleteRecords}" rendered="{!(!flag)}"/>
```

```
<apex:commandButton id="back" value="Cancel" title="Cancel" action="{!
cancel}" />
</apex:pageBlockSectionItem>
</apex:pageBlockSection>
</apex:pageBlock>
</apex:form>
</apex:page>
```

Note: Please replace the object name as per your selected object name on which you are creating the buttons and performing the operations. As shown in the above image in red marked.

Now, steps to create button for Mass Delete.

Step 1: SetUp -> Create-> Object -> Selected Object -> Buttons & Links ->New Button or Link.

Step 2: After clicking on “New Button or Link”. Fill the details as follows.

Invoice Custom Button or Link
New Button or Link

Custom Button or Link Edit

Save

Quick Save

Preview

Cancel

Label

MassDelete

Name

MassDelete

Namespace Prefix

NINEMU

Description

Display Type

Detail Page Link [View example](#)

Detail Page Button [View example](#)

List Button [View example](#)

☒ Display Checkboxes (for Multi-Record Selection)

Behavior

Display in existing window with sidebar

[View Behavior Options](#)

Content Source

Visualforce Page

Content

MassDeleteVFP [NINEMU__MassDeleteVFP]

Save

Quick Save

Preview

Cancel

Note: Please select the visualforce page as you created from the above process as per your selected object name on which you are creating the buttons and performing the delete operation. As shown in the above image in red marked box.

4) Add button to the layout (For Classic):

Setup-> Objects-> SelectedObject-> SearchLayout-> ListView

Opportunities
Assets
Contacts
Contracts
Cases
Orders
Invoices
+

Edit Search Layout

Invoices List View

Customize the buttons on the Invoices list view:

- To remove any standard buttons, remove the check next to the standard button name.
- To add custom buttons, select them and click Add.

Standard Buttons

☒ New [New]
☒ Open in Quip [OpenListInQuip]
☒ Accept [Accept]
☒ Change Owner [ChangeOwner]
☒ Change Owner [MassChangeOwner]

Custom Buttons

Available Buttons

--None--

Add
Remove

Selected Buttons

MassDelete
MassUpdate

Up
Down

List View Actions in Lightning Experience

[New Quick Action](#)

Save
Cancel

9



5) Button creation for Salesforce Lightning Version:

1- Mass Update/Edit Button

2- Mass Delete Button

Steps to perform for **Mass Update/Edit** button.

Before creating button for Mass Update/edit and Mass Delete you need to create a VF Page first. For that please follow the given process.

Step 1: SetUp -> Visualforce Pages -> New

Step 2: After clicking on “New”. Fill the details as follows.

The screenshot shows the Salesforce Setup interface for creating a Visualforce Page. The page is titled "Visualforce Page" and "MassUpdateVFP". It includes a "Page Detail" section with fields for Label, Namespace Prefix, Name, and a checkbox for "Available for Lightning Experience, Lightning Communities, and the mobile app". Below this is a "Visualforce Markup" section with a text area for the page code. The code is: `<apex:page standardController="Invoice__c" extensions="MUD_RedirectExt" recordSetVar="Invoices" action="{!validateAndRedirect}" > </apex:page>`. The interface also includes buttons for Edit, Delete, Clone, Where is this used?, Show Dependencies, and Preview.

Field	Value
Label	MassUpdateVFP
Namespace Prefix	NINEMU
Name	MassUpdateVFP
Available for Lightning Experience, Lightning Communities, and the mobile app	☒
Require CSRF protection on GET requests	☐
Description	
Created By	Palak Arora, 12/8/2
Last Modified By	Palak Arora, 12/8/2018 11:30 PM

Visualforce Markup

```
<apex:page standardController="Invoice__c" extensions="MUD_RedirectExt" recordSetVar="Invoices" action="{!validateAndRedirect}" >
</apex:page>
```

After this you need to copy and paste the visualforce code for creating your button.



Visualforce code for Mass Update/Edit button

```
<apex:page          standardController="Invoice__c"          extensions="MyExtClass"  
recordSetVar="invoices" action="{!validateAndRedirect}" >
```

```
</apex:page>
```

After adding this click save.

Note: Please replace the object name as per your selected object name on which you are creating the buttons and performing the operations. As shown in the above image in red marked.

Now, steps to create button for Mass Update/Edit.

Step 1: SetUp -> Object Manager -> Selected Object -> Buttons & Links -> New Button or Link.

Step 2: After clicking on “New Button or Link”. Fill the details as follows. Click Save.

The screenshot shows the Salesforce Setup interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The left sidebar shows the 'Object Manager' section with 'Invoice' selected. The main content area is titled 'Edit Invoice Custom Button or Link' and 'MassUpdate'. The 'Custom Button or Link Edit' form includes the following fields:

- Label: MassUpdate
- Name: MassUpdate
- Namespace Prefix: NINEMU
- Description: (empty)
- Display Type: ☒ List Button [View example](#)
- Behavior: Display in existing window with sidebar [View Behavior Options](#)
- Content Source: Visualforce Page
- Content: MassUpdateVFP [NINEMU__MassUpdateVFP] (highlighted with a red box)



Note: Please select the visualforce page as you created from the above process as per your selected object name on which you are creating the buttons and performing the update operation. As shown in the above image in red marked box.

Steps to perform for **Mass Delete** button.

Same as Mass Update/Edit first you need to create VF Page. For that follow the below given process.

Step 1: SetUp -> Visualforce Pages -> New

Step 2: After clicking on “New”. Fill the details as follows.

The screenshot shows the Salesforce Visualforce Pages setup interface. At the top, there's a 'SETUP' header with a gear icon and the text 'Visualforce Pages'. Below this, the page title is 'MassDeleteVFP'. There are several action buttons: 'Edit', 'Delete', 'Clone', 'Where is this used?', 'Show Dependencies', and 'Preview'. The 'Page Detail' section shows the following information:

Label	MassDeleteVFP	Name	MassDeleteVFP
Namespace Prefix	NINEMU	Available for Lightning Experience, Lightning Communities, and the mobile app	✓
Require CSRF protection on GET requests	☐	Description	
Last Modified By	Palak Arora, 12/8/2018 11:30 PM	Created By	Palak Arora, 12/8/2018 11:30 PM

Below the page details, there are two tabs: 'Visualforce Markup' and 'Version Settings'. The 'Visualforce Markup' tab is selected, showing the following code:

```
<apex:page standardController="Invoice__c" lightningStyleSheets="true" extensions="MUD_RedirectExt" recordSetVar="Invoices" >
  <apex:form >
    <apex:pageBlock >
      <apex:pageMessages id="showmsg"></apex:pageMessages>
      <apex:pageBlockSection rendered="{!!flag}">
        <apex:pageBlockSectionItem >
          <apex:outputLabel value="Do you want to proceed to delete these records?"> </apex:outputLabel>
        </apex:pageBlockSectionItem>
      </apex:pageBlockSection>
      <apex:pageBlockSectionItem >
        <apex:commandButton id="confirm" value="Okay" title="Ok" action="{!deleteRecords}" rendered="{!!flag}" />
        <apex:commandButton id="back" value="Cancel" title="Cancel" action="{!cancel}" />
      </apex:pageBlockSectionItem>
    </apex:pageBlockSection>
  </apex:form>
</apex:page>
```

Visualforce code for Mass Delete button

```
<apex:page standardController="Invoice__c" lightningStyleSheets="true"
extensions="MyExtClass" recordSetVar="invoices" >
```

```
<apex:form >
```

```
<apex:pageBlock >
```



```
<apex:pageMessages id="showmsg"></apex:pageMessages>
<apex:pageBlockSection rendered="{!(flag)}">
```

```
<apex:pageBlockSectionItem >
<apex:outputLabel value="Do you want to proceed to delete these records?">
</apex:outputLabel>
</apex:pageBlockSectionItem>
</apex:pageBlockSection>
<apex:pageBlockSection columns="2" >
```

```
<apex:pageBlockSectionItem >
<apex:commandButton id="confirm" value="Okay" title="Ok" action="{!
deleteRecords}" rendered="{!(flag)}"/>
```

```
<apex:commandButton id="back" value="Cancel" title="Cancel" action="{!
cancel}" />
</apex:pageBlockSectionItem>
</apex:pageBlockSection>
</apex:pageBlock>
</apex:form>
</apex:page>
```

Note: Please replace the object name as per your selected object name on which you are creating the buttons and performing the operations. As shown in the above image in red marked.

Now, steps to create button for Mass Delete.

Step 1: SetUp -> Object Manager -> Selected Object -> Buttons & Links -> New Button or Link.

Step 2: After clicking on “New Button or Link”. Fill the details as follows.



Setup Home Object Manager

SETUP > OBJECT MANAGER
Invoice

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
Triggers

Edit Invoice Custom Button or Link
MassDelete

Custom Button or Link Edit

Save Quick Save Preview Cancel

Label MassDelete

Name MassDelete

Namespace Prefix NINEMU

Description

Display Type
☐ Detail Page Link [View example](#)
☐ Detail Page Button [View example](#)
☒ List Button [View example](#)
☒ Display Checkboxes (for Multi-Record Selection)

Behavior Display in existing window with sidebar [View Behavior Options](#)

Content Source Visualforce Page

Content MassDeleteVFP [NINEMU__MassDeleteVFP]

Save Quick Save Preview Cancel

Note: Please select the visualforce page as you created from the above process as per your selected object name on which you are creating the buttons and performing the delete operation. As shown in the above image in red marked box.

6) Add button to the layout(For Lightning):

Setup-> Object Manager-> Selected Object-> Search Layout-> List View-> Edit

SETUP > OBJECT MANAGER
Invoice

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
Triggers

Search Layouts
6 Items, Sorted by Layout

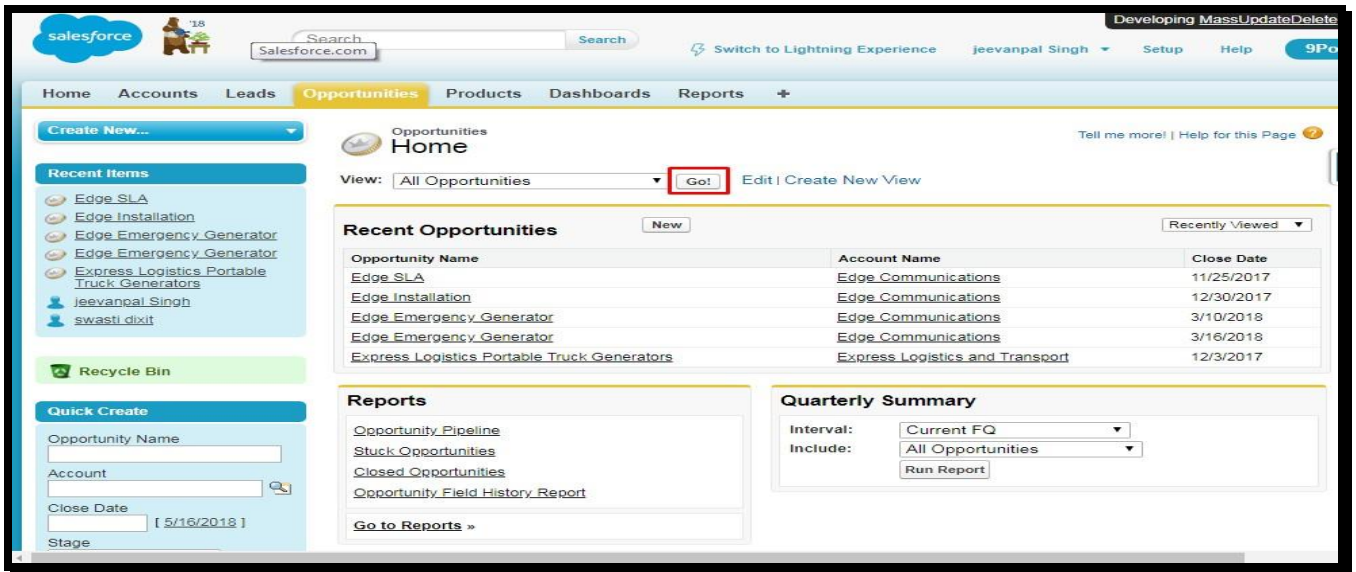
Q Quick Find

LAYOUT	COLUMNS DISPLAYED	BUTTONS DISPLAYED
List View	N/A	New, Open In Quip, Accept, Change Owner, Change Owner, MassDelete, MassUpdate
Lookup Dialogs	Invoice Name	N/A
Lookup Phone Dialogs	Invoice Name	N/A
Search Filter Fields	N/A	N/A
Search Results	Invoice Name	N/A
Tab	Invoice Name	N/A

7) To Perform Mass Update Action:

The action can be performed as many as on 50 records at the same time.

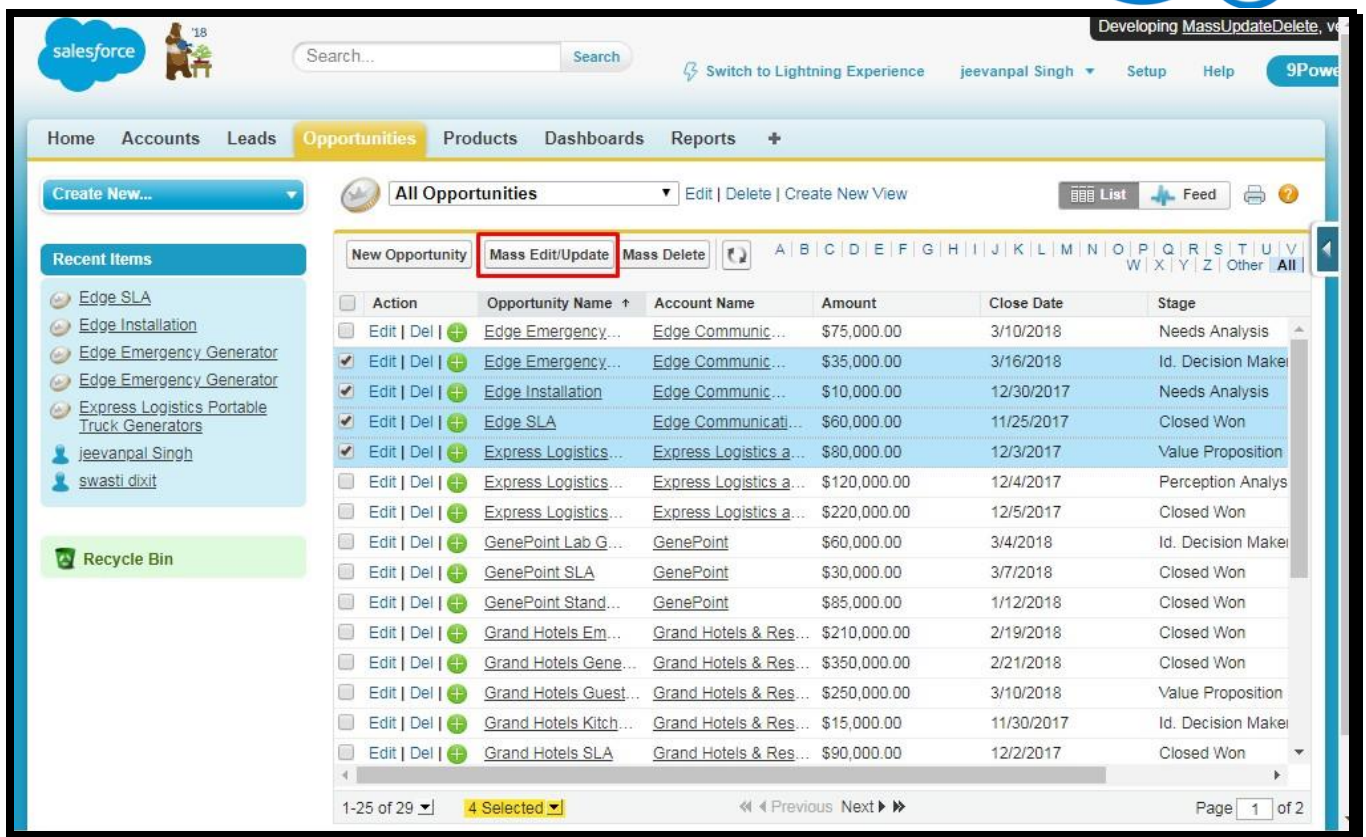
Step 1: Go to list view of the selected object by clicking on “GO” button.



The screenshot shows the Salesforce interface for the 'Opportunities' object. The 'View: All Opportunities' dropdown menu is open, and the 'Go!' button is highlighted with a red box. The 'Recent Opportunities' table is visible below the dropdown.

Opportunity Name	Account Name	Close Date
Edge SLA	Edge Communications	11/25/2017
Edge Installation	Edge Communications	12/30/2017
Edge_Emergency_Generator	Edge Communications	3/10/2018
Edge_Emergency_Generator	Edge Communications	3/16/2018
Express Logistics Portable Truck Generators	Express Logistics and Transport	12/3/2017

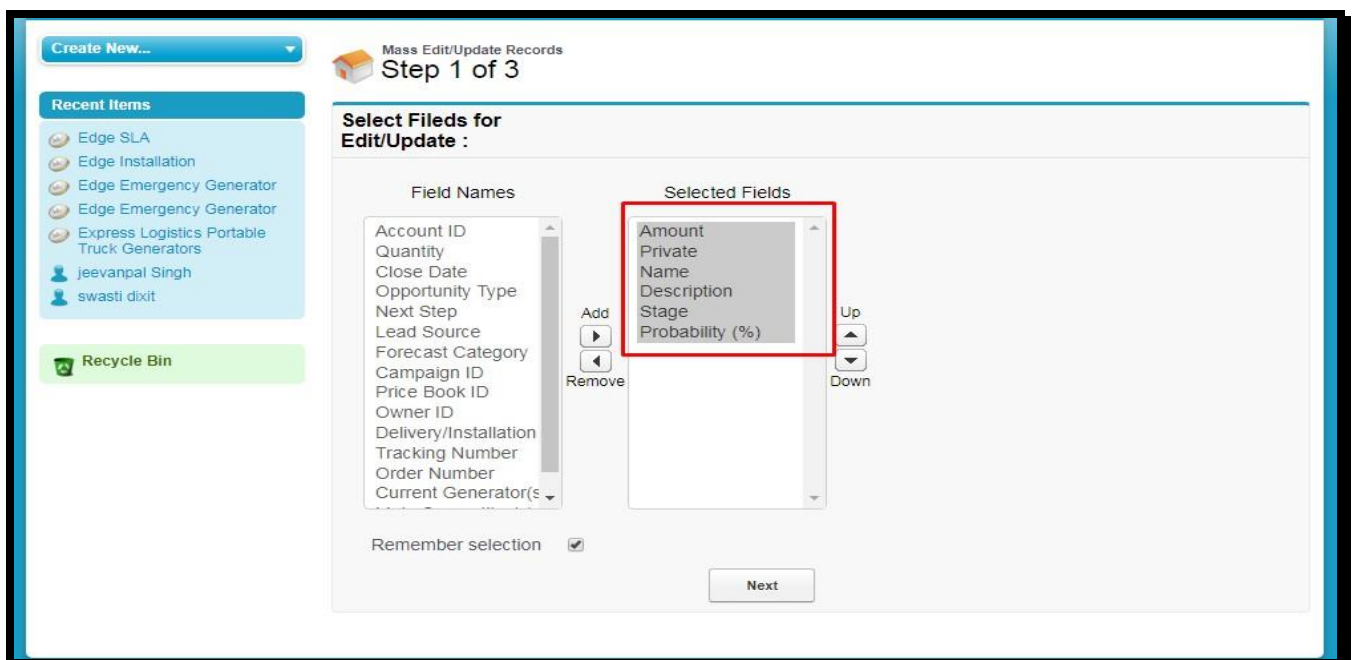
Step 2: Select the records on which you want to perform the “Mass Update” action from the list view.



The screenshot shows the Salesforce 'All Opportunities' page. The 'Mass Edit/Update' button is highlighted with a red box. Below it, a table of opportunities is displayed with columns: Action, Opportunity Name, Account Name, Amount, Close Date, and Stage. Four rows are selected, and the '4 Selected' status is shown at the bottom of the table.

Action	Opportunity Name	Account Name	Amount	Close Date	Stage
☐ Edit Del +	Edge Emergency...	Edge Communic...	\$75,000.00	3/10/2018	Needs Analysis
☒ Edit Del +	Edge Emergency...	Edge Communic...	\$35,000.00	3/16/2018	Id. Decision Maker
☒ Edit Del +	Edge Installation	Edge Communic...	\$10,000.00	12/30/2017	Needs Analysis
☒ Edit Del +	Edge SLA	Edge Communicati...	\$60,000.00	11/25/2017	Closed Won

Step3: Select the fields in which you want to update.



The screenshot shows the 'Mass Edit/Update Records' interface, Step 1 of 3. The 'Select Fields for Edit/Update' section is active. It features two lists: 'Field Names' and 'Selected Fields'. The 'Selected Fields' list is highlighted with a red box and contains six items: Amount, Private, Name, Description, Stage, and Probability (%). The 'Remember selection' checkbox is checked, and a 'Next' button is visible at the bottom.

Note: Please note you can only select 6 fields at one time.



Step 4: Enter the value to be updated and click “Edit/Update” button.
Your records are updated successfully.

Mass Edit/Update Records

Step 2 of 3

Update/Edit the selected fields:

Opportunity ID	Amount	Private	Name	Description	Stage	Probability (%)
0067F00000APJwq	80,000.00	☐	Express Logistics Portable		Value Proposition	50
0067F00000APJwu	10,000.00	☐	Edge Installation		Needs Analysis	20
0067F00000APJwv	60,000.00	☐	Edge SLA		Closed Won	100
0067F00000APJx9	35,000.00	☐	Edge Emergency Generato		Id. Decision Makers	60

Previous **Edit/Update**

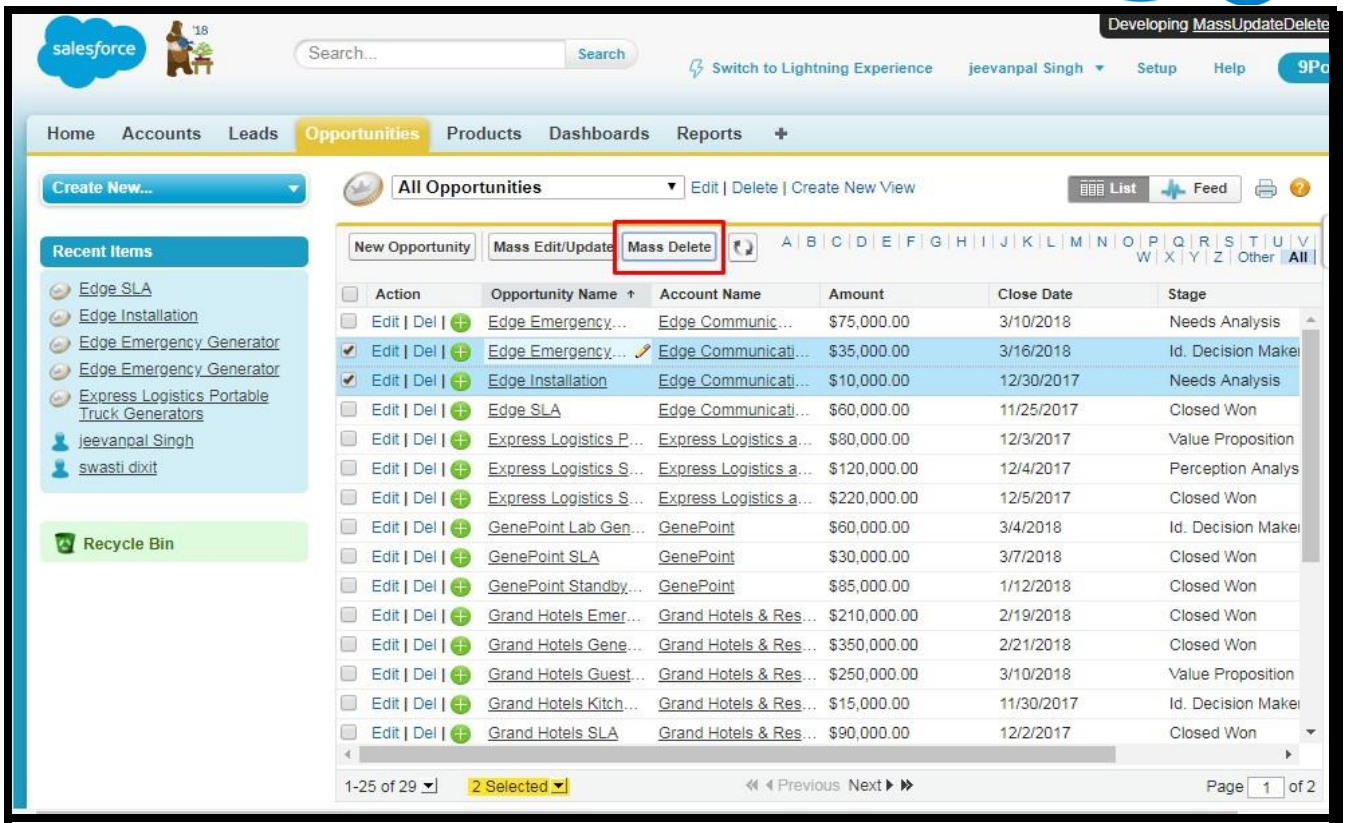
8) To Perform Mass Delete Action:

To perform Mass Delete action follow the following steps.

Step 1: Select the records you want to delete from the list view.

(Note: Not more than 50 records can be deleted at one time.)

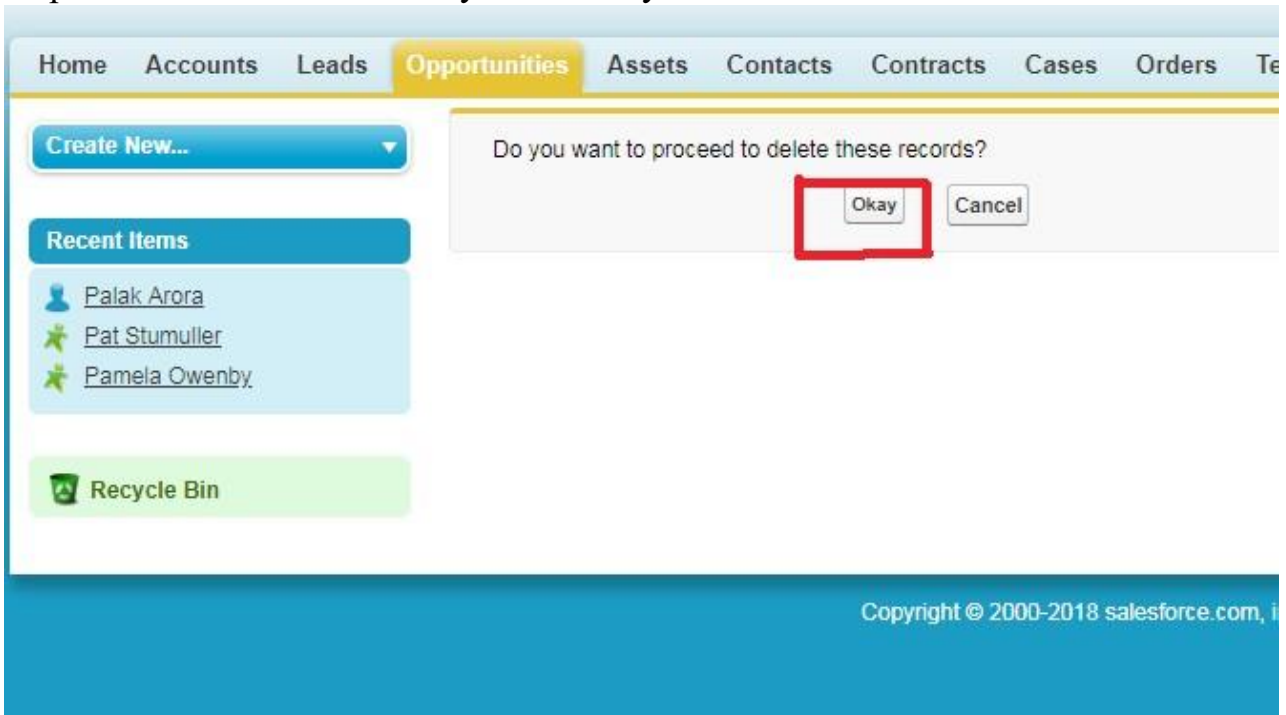
Step 2: Now click on the “Delete” button and delete the records successfully.



The screenshot shows the Salesforce 'Opportunities' page. The 'Mass Delete' button is highlighted with a red box. The table below lists the opportunities that are selected for deletion.

Action	Opportunity Name	Account Name	Amount	Close Date	Stage
☐	Edge Emergency...	Edge Communic...	\$75,000.00	3/10/2018	Needs Analysis
☒	Edge Emergency...	Edge Communicati...	\$35,000.00	3/16/2018	Id. Decision Maker
☒	Edge Installation	Edge Communicati...	\$10,000.00	12/30/2017	Needs Analysis
☐	Edge SLA	Edge Communicati...	\$60,000.00	11/25/2017	Closed Won
☐	Express Logistics P...	Express Logistics a...	\$80,000.00	12/3/2017	Value Proposition
☐	Express Logistics S...	Express Logistics a...	\$120,000.00	12/4/2017	Perception Analys
☐	Express Logistics S...	Express Logistics a...	\$220,000.00	12/5/2017	Closed Won
☐	GenePoint Lab Gen...	GenePoint	\$60,000.00	3/4/2018	Id. Decision Maker
☐	GenePoint SLA	GenePoint	\$30,000.00	3/7/2018	Closed Won
☐	GenePoint Standby...	GenePoint	\$85,000.00	1/12/2018	Closed Won
☐	Grand Hotels Emer...	Grand Hotels & Res...	\$210,000.00	2/19/2018	Closed Won
☐	Grand Hotels Gene...	Grand Hotels & Res...	\$350,000.00	2/21/2018	Closed Won
☐	Grand Hotels Guest...	Grand Hotels & Res...	\$250,000.00	3/10/2018	Value Proposition
☐	Grand Hotels Kitch...	Grand Hotels & Res...	\$15,000.00	11/30/2017	Id. Decision Maker
☐	Grand Hotels SLA	Grand Hotels & Res...	\$90,000.00	12/2/2017	Closed Won

Step 3: Now click on the “Okay” button if you want to delete selected records.



The screenshot shows the confirmation dialog for deleting records. The 'Okay' button is highlighted with a red box.

Do you want to proceed to delete these records?



Company Profile:

The NineHertz is providing Salesforce Application Development Services to its clients since 2013. We are expert in offshore Salesforce Development like Sales Cloud, Stack Development, Service Cloud, Heroku Development, Force.com, and Marketing Cloud. The NineHertz offers unique cloud based CRM solutions that help clients to increase their revenue. We are having a team of experienced Salesforce Developers which mainly focus on Salesforce CRM service. We use agile methodology for Salesforce customization and development. Agile methodology is the cluster of software development methodologies that is based on iterative development.

Learn More

Questions? We'd love to hear from you!

- **Contact Us.** Go to <https://theninehertz.com/contact-us/>

And fill out the form. One of our experts will reach out to help you find the solution that's best for you.

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