

OCTOPUS

-GET TO KNOW YOUR SALESFORCE
INSTANCE



ASTREA IT SERVICES

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C-52 Sector 65
NOIDA, INDIA

OCTOPUS

Overview

The app gives an overview of the listed items such as Apex classes, triggers, workflows, validation rules and visualforce pages. By default, all items are selected. The user has the option of selecting the items for which he requires documentation.

It can be very time consuming to get hold of all the information present in your organization at a single place. Octopus app does this for you. It gives you information of all the fields, attributes, classes etc. on a single page in downloadable word, excel and PDF formats.



Get to know your Salesforce Instance

☒ Select All
☐ Do not include Managed Package Components

- ☒ Apex Classes
- ☒ Apex Components
- ☒ Approval Processes
- ☒ Async Apex Job Information
- ☒ Standard Objects and Fields
- ☒ Custom Objects and Fields
- ☒ Dashboard Information
- ☒ Email Template Information
- ☒ Mail Merge Templates
- ☒ Object Permission
- ☒ Organisation
- ☒ Profiles
- ☒ Queues
- ☒ Record Types
- ☒ Reports
- ☒ Static Resources
- ☒ Triggers
- ☒ Role
- ☒ Users
- ☒ Validation Rules
- ☒ VisualForce Pages
- ☒ Workflow Rules
- ☒ Workflow Field Updates
- ☒ Flows
- ☒ Process Builder

To select maximum no. of records to display for each selected item

Maximum number of records to be displayed for each: 10000 ▼

view

Download As

Downloadable PDF Format

Downloadable Word Format

Downloadable Excel Format

Displays a Web Page

If you are unable to view Approval Processes/ Validation Rules/ Workflow Rules/ Workflow Field Updates, please ensure that your salesforce instance URL has been added in the remote site settings. (Go to Setup> in Administer> Security Controls> Remote Site Settings) For example, if your Salesforce instance is na12.salesforce.com remote site setting would be https://na12.salesforce.com

Octopus can sometimes encounter 'Apex heap size too large' error due to Salesforce governor limits, please deselect a few items or choose a lower picklist value to resolve the error.

Settings

Since this app uses Salesforce API to retrieve information for some of the listed components, user needs to add his Salesforce instance URL in **Remote Site Settings**.

Follow the below steps to add Remote Site Settings.

1. Goto Setup> in Administer>Security Controls> Remote Site Settings.
2. Add your Salesforce instance URL.

For example, if your Salesforce instance is na12.salesforce.com the Remote Site Setting would be <https://na12.salesforce.com>.

Sample:

The screenshot displays the Salesforce 'All Remote Sites' page. On the left, the 'Administer' menu is expanded, and 'Remote Site Settings' is selected. The main area shows a table with the following data:

Action	Remote Site Name	Namespace Prefix	Remote Site URL	Active	Created By
Edit Del	ApexDevNet	astrea_oct	http://www.apexdevnet.com	✓	ku
Edit Del	myInstance	astrea_oct	https://ap1.salesforce.com	✓	ku

Please note that we do not access or save any information from your organization.

Steps to be followed and Sample Screenshots

Step 1: Check the desired items whose details you want to get. To get details of all the items in the list, check the „Select All“ box (as shown in the red rectangle in a screenshot below).

Step 2: Choose the maximum number of records of each type. By default it is 10,000.

Step 3: The details of above selected checked items can be viewed in four ways.

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Maximum number of records to be displayed for each:

Download As

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Octopus can sometimes encounter 'Apex heap size too large' error due to Salesforce governor limits, please deselect a few items or choose a lower picklist value to resolve the error.

1. As a Web Page
2. As PDF
3. AS MS Word File
4. AS Excel File

In case you get an exception 'Apex heap size too large' please deselect a few items or choose a lower picklist value.

WEB PAGE

Salesforce Instance Details

Class Information:

Name	NamespacePrefix	ApiVersion	SizeWithoutComments	status	Is Valid
GetToolingApiObjects		30.0	1879	Active	true
GetToolingApiObjectsTest		30.0	379	Active	true
SystemDetailsCtr		31.0	19799	Active	true
SystemDetailsCtrTest		30.0	899	Active	false
ThisIsAnotherTestClassForCheckingBigName		31.0	58	Active	true
ThisIsATestClassForCheckingBigNames		31.0	53	Active	true

Apex Component Information:

Name	Name Space Prefix	Api Version	Master Label	Controller Type	Controller Key
overlay		31.0	overlay	3	core.apexpages.components.cdk.NullController

Approval Processes:

Name	Object	Description
testproct	Opportunity	

By clicking on the fields (in blue) gives a detailed information about

PDF

Salesforce Instance Details

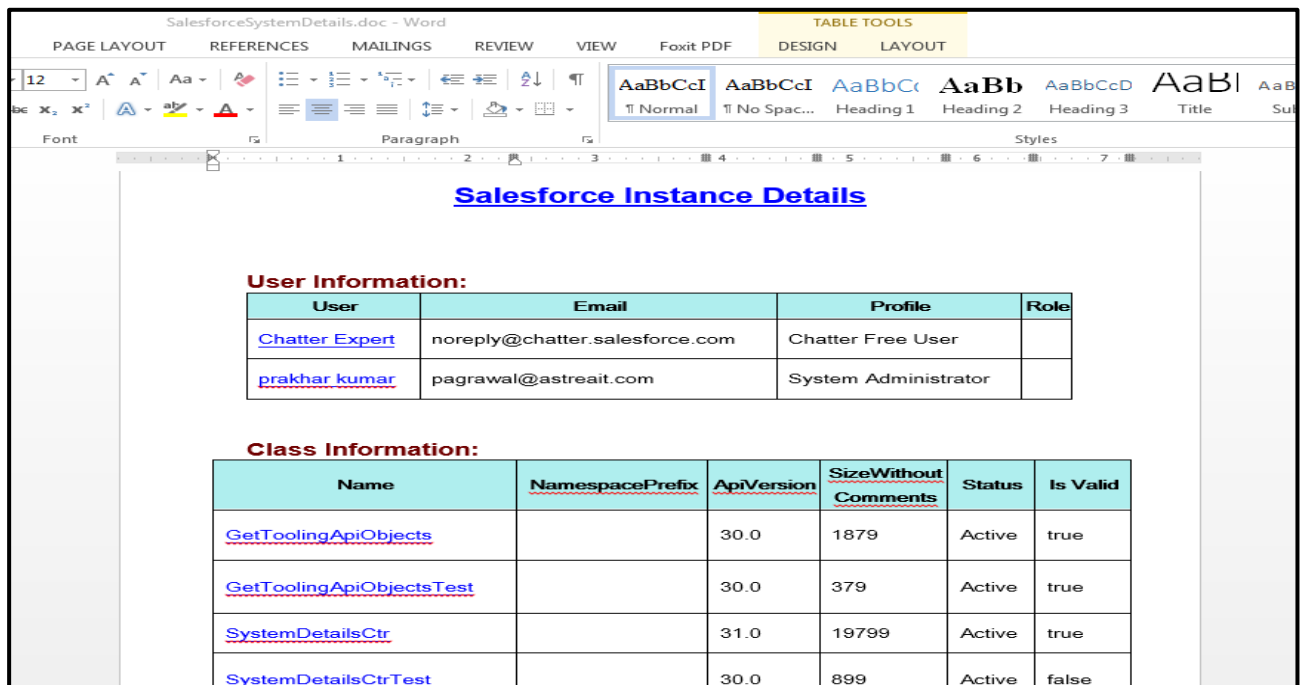
Class Information:

Name	NamespacePrefix	ApiVersion	SizeWithoutComments	status	Is Valid
GetToolingApiObjects		30.0	1879	Active	true
GetToolingApiObjectsTest		30.0	379	Active	true
SystemDetailsCtr		31.0	19799	Active	true
SystemDetailsCtrTest		30.0	899	Active	false
ThisIsAnotherTestClassForCheckingBigName		31.0	58	Active	true
ThisIsATestClassForCheckingBigNames		31.0	53	Active	true

Apex Component Information:

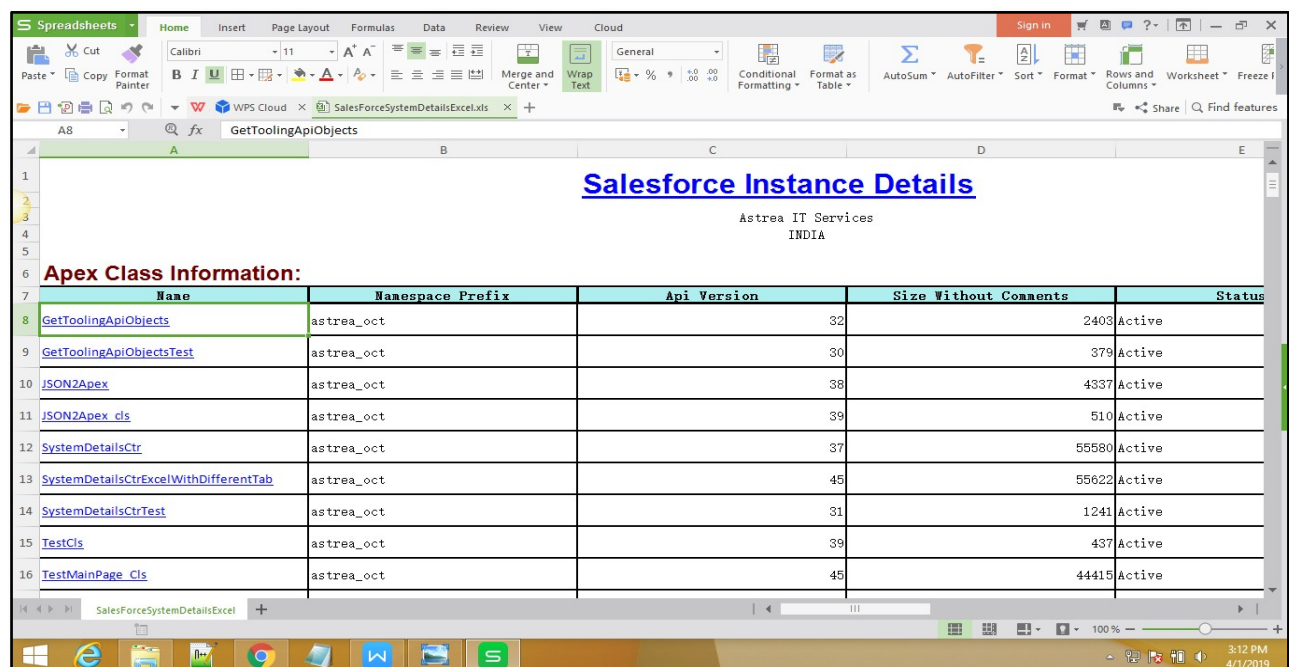
Name	Name Space Prefix	Api Version	Master Label	Controller Type	Controller Key
overlay		31.0	overlay	3	core.apexpages.components.cdk.NullController

MS WORD FILE



The MS Word file will be downloaded in your PC with file name “SalesforceSystemDetails.doc”.

EXCEL FILE



The MS Excel file will be downloaded in your PC with file name “SalesforceSystemDetails.xls”.