

Toolz

Power Tools for Admins

from

effeXoft

committed to be effective

Toolz Installation Guide

Document Version 1.00

Package Version 1.4024

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For current and all previous versions, please refer to:

<http://www.fffexoft.com>

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1. Introduction

Toolz package is a set of tools that are managed by Effexoft's team. Effexoft uses these tools in their enterprise applications such as Effecta and in their implementations actively.

One of the tools in the Toolz package is Look up roll up summaries, built based on open source code from Andrew Fawcett. Inspired by the open source and with a thought of giving back to the Salesforce community, Effexoft has decided to make Toolz as a free tool forever.

Effexoft will continue to maintain and enhance this package.

2. List of Tools in the Toolz package

Toolz package has two tools as of now. Lookup Rollup Summaries and Data Alerts.

1. Look up Roll up Summaries

Look up roll up summaries tool helps create and manage multiple roll up fields based on a look up relationship as well as master-detail relationship.

Refer to Rollup Summaries User Guide for more details.

2. Roll ups on objects with a Master-Detail relationship

Salesforce has a limited functionality in the roll up summary fields when there is a master-detail relationship between two objects. The following summary features are available in Salesforce.

- Count
- Sum
- Min
- Max

Look up rollup summaries tool in Toolz package provides the following additional features on objects with master-detail relationship:

- Avg
- Count Distinct
- Concatenate
- Concatenate Distinct
- First
- Last

3. Roll ups on objects with a Look up relationship

Look up rollup summaries tool in Toolz package provides the following features on objects with look up relationship:

- Avg
- Count
- Count Distinct
- Concatenate
- Concatenate Distinct
- First
- Last
- Max
- Min
- Sum

Refer to Rollup Summaries User Guide for more details.

4. Data Alerts

Data keeps changing for various reasons and checking the data proactively for any inaccuracies is a very critical task. Data Alerts tool in Toolz makes it an easy task.

3. Installation

Toolz package is listed on AppExchange at:

<https://appexchange.salesforce.com/appxListingDetail?listingId=a0N3A00000FABeMUAX>

1. Considerations before installing Toolz

Please install Toolz package in your Sandbox or in a developer edition to make sure it meets your requirements. Go through the User guides for each tool you would like to use.

Do test the results with some sample / test cases.

Since Toolz is a free tool, Effexoft can only provide limited support.

Effexoft may provide support to Toolz package, implementation for advanced use cases as a consulting service. For the consulting services, Effexoft's standard consulting rates may apply.

Salesforce consulting firms and anyone with Salesforce Administrator or Developer certification may be able to provide additional support for Toolz package and its implementation.

2. Requirements before installation

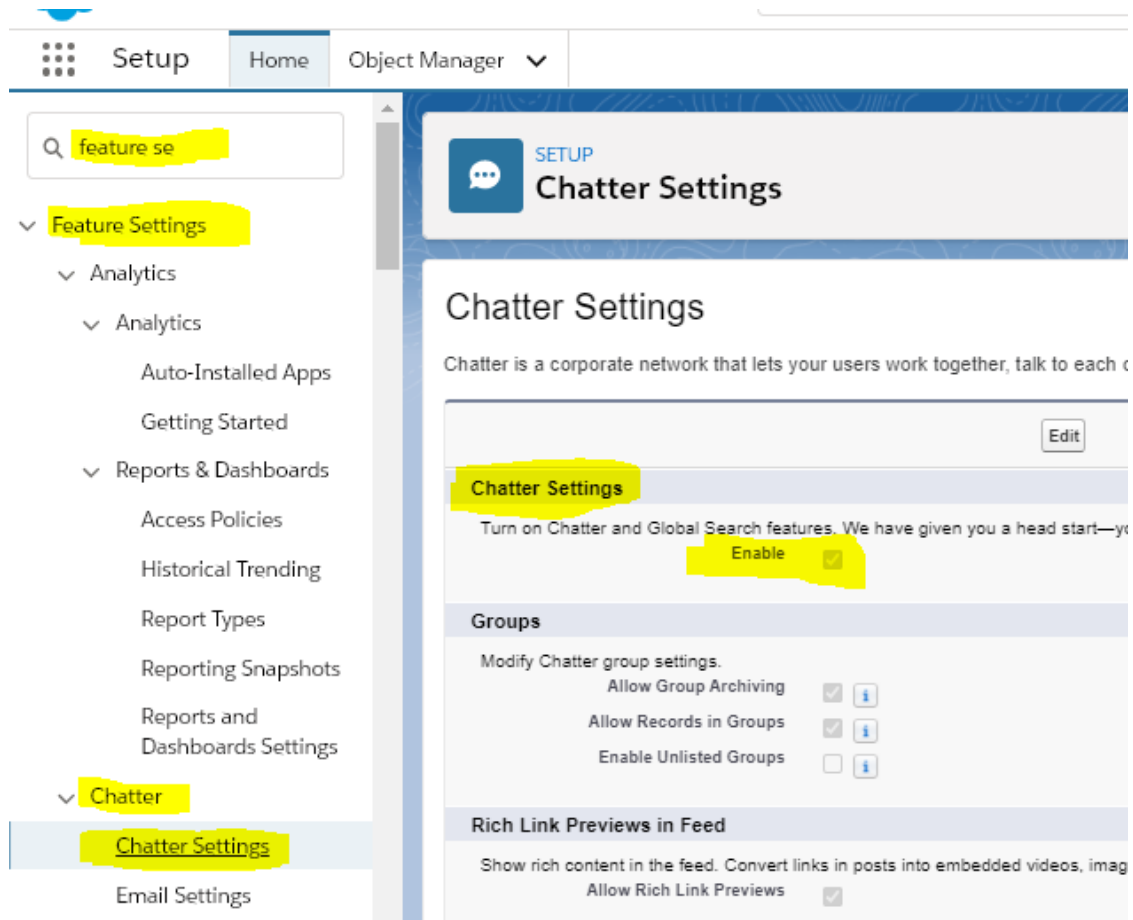
Enable Chatter and Actions.

Go to Setup | Feature Settings | Chatter | Chatter Settings.

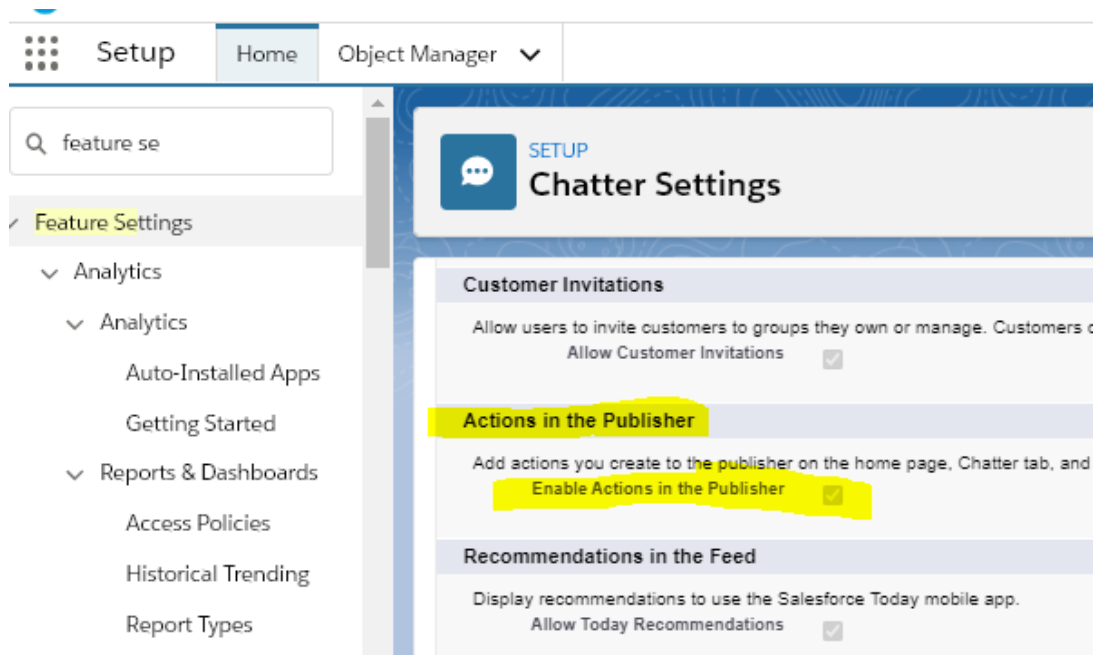
Enable Chatter Settings

Enable Actions in the Publisher

Please refer to the screenshots below:



If you scroll down in the same page, you can see “Actions in the Publisher” section.



3. Installation Process

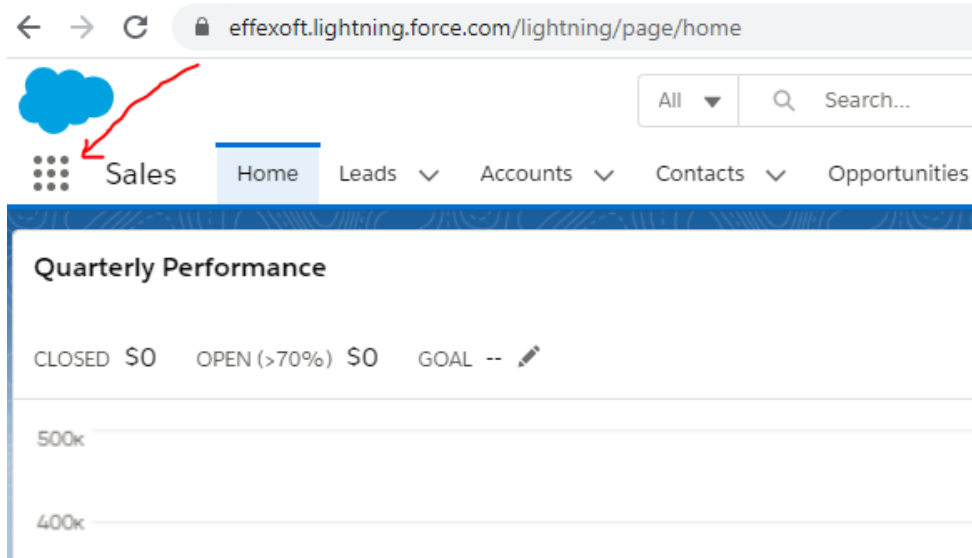
Follow the instructions on the AppExchange to install Toolz package at the following link:

<https://appexchange.salesforce.com/appxListingDetail?listingId=a0N3A00000FABeMUAX>

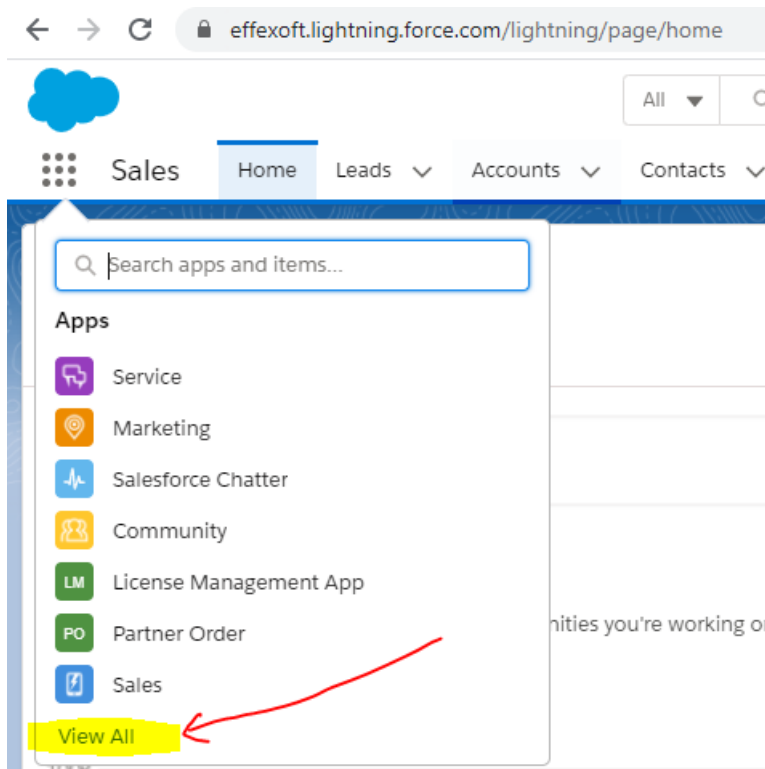
4. Setup and Configuration – Lookup Roll up Summaries

After installation is complete, please follow the setup and configuration instructions.

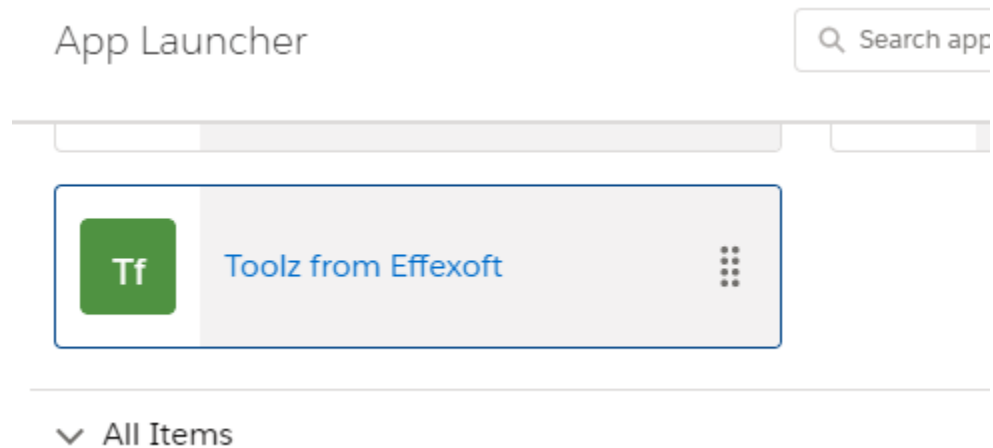
Click on App Launcher as shown in the following screenshot.



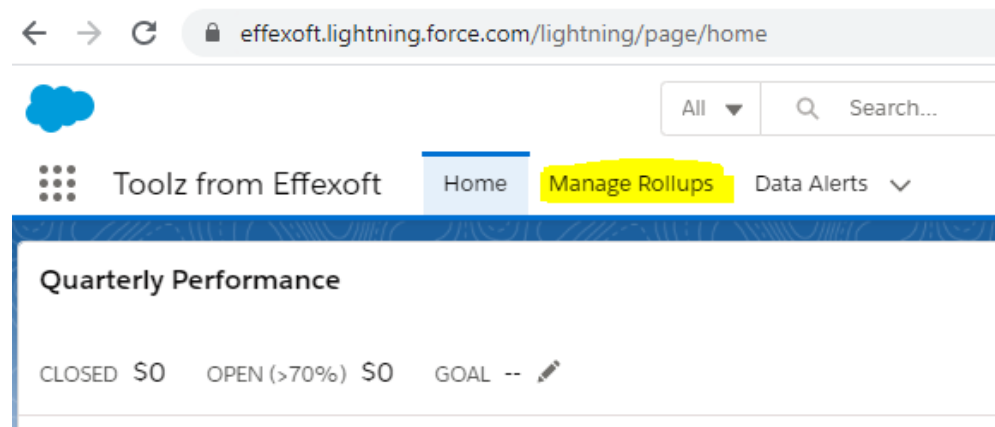
Click on “View All” as shown in the following screenshot.



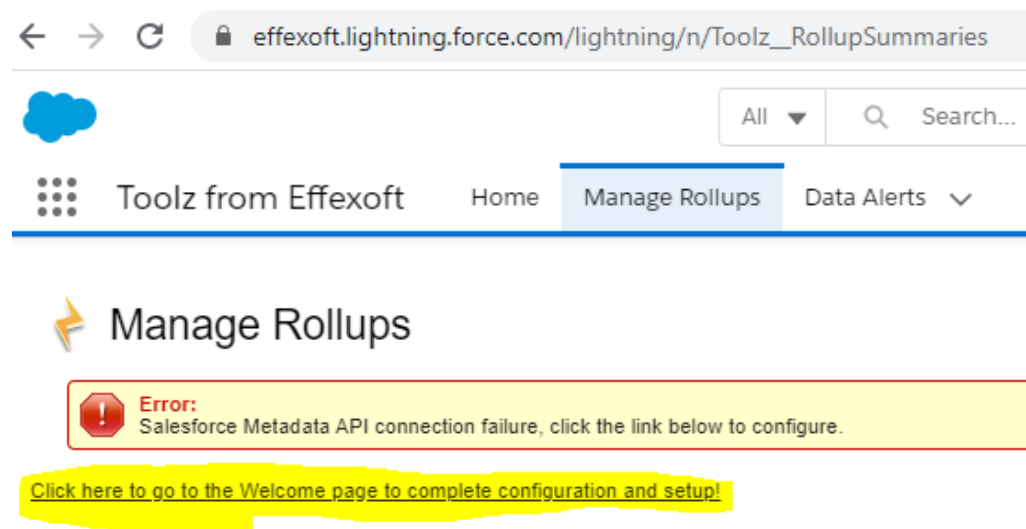
Click on “Toolz from Effexoft”



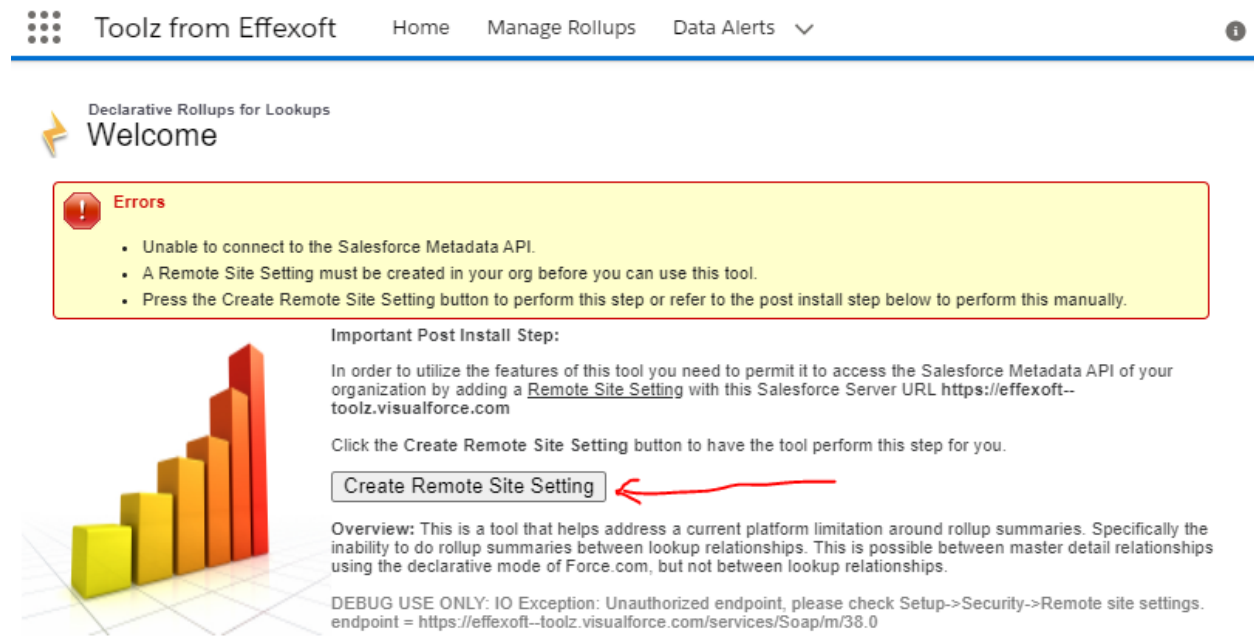
Click on “Manage Rollups” tab



Click on the link: “Click here to go to the Welcome page to complete configuration and setup!”



Click on “Create Remote Site Setting” button.



Toolz from Effexoft Home Manage Rollups Data Alerts

Declarative Rollups for Lookups
Welcome

Errors

- Unable to connect to the Salesforce Metadata API.
- A Remote Site Setting must be created in your org before you can use this tool.
- Press the Create Remote Site Setting button to perform this step or refer to the post install step below to perform this manually.

Important Post Install Step:

In order to utilize the features of this tool you need to permit it to access the Salesforce Metadata API of your organization by adding a [Remote Site Setting](https://effexoft--toolz.visualforce.com) with this Salesforce Server URL <https://effexoft--toolz.visualforce.com>

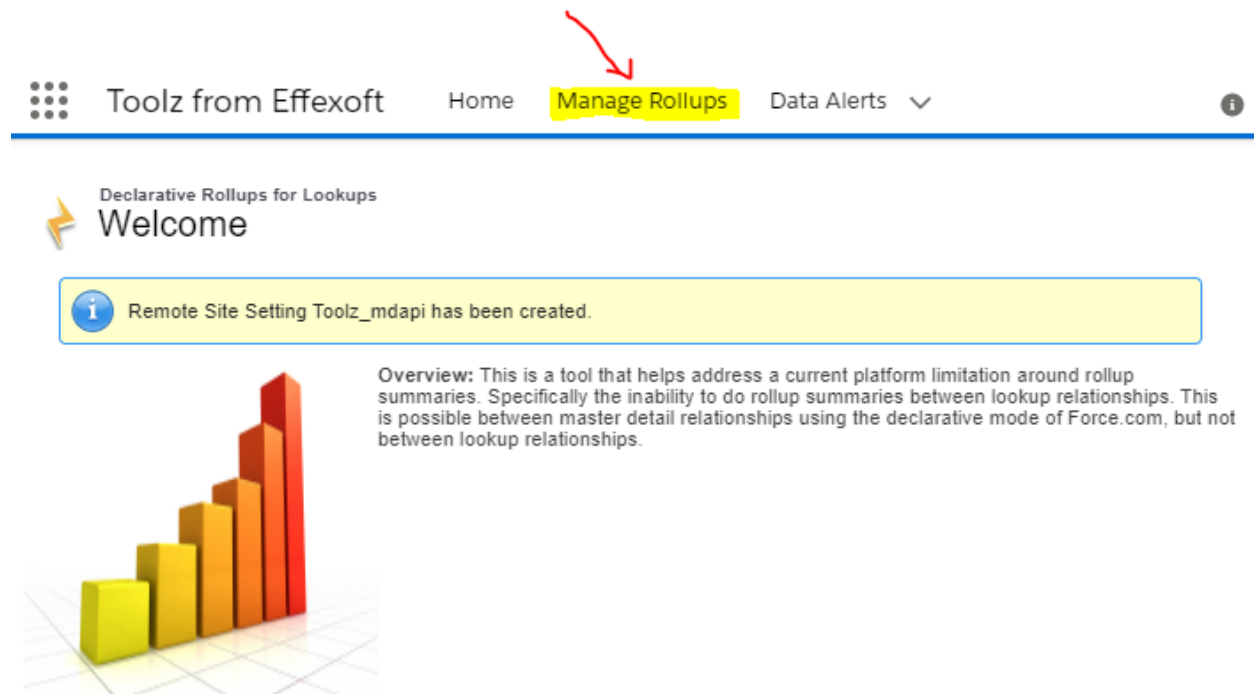
Click the Create Remote Site Setting button to have the tool perform this step for you.

[Create Remote Site Setting](#)

Overview: This is a tool that helps address a current platform limitation around rollup summaries. Specifically the inability to do rollup summaries between lookup relationships. This is possible between master detail relationships using the declarative mode of Force.com, but not between lookup relationships.

DEBUG USE ONLY: IO Exception: Unauthorized endpoint, please check Setup->Security->Remote site settings.
endpoint = <https://effexoft--toolz.visualforce.com/services/Soap/m/38.0>

Then, you will see the following screen. Click on “Manage Rollups” again to start using Look Up Rollup Summaries.



Toolz from Effexoft Home **Manage Rollups** Data Alerts

Declarative Rollups for Lookups
Welcome

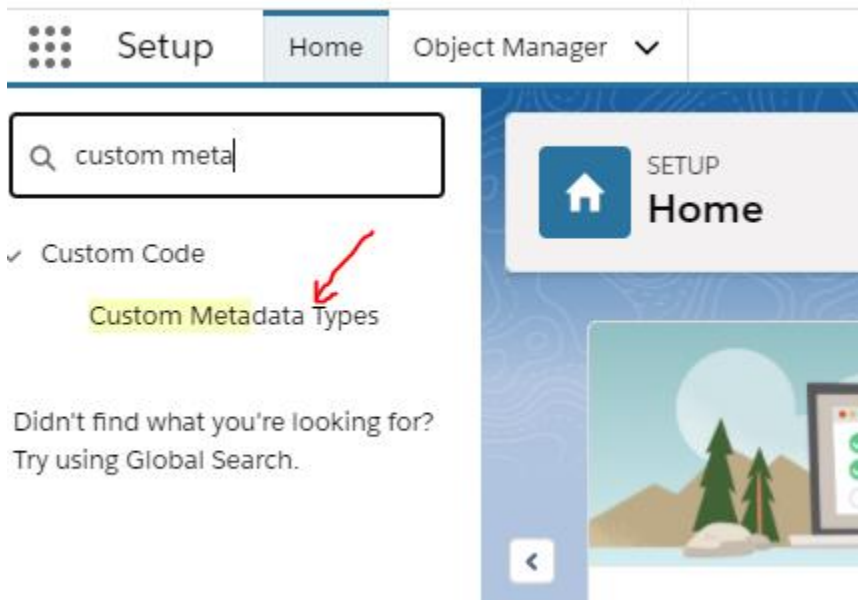
Remote Site Setting Toolz_mdapi has been created.

Overview: This is a tool that helps address a current platform limitation around rollup summaries. Specifically the inability to do rollup summaries between lookup relationships. This is possible between master detail relationships using the declarative mode of Force.com, but not between lookup relationships.

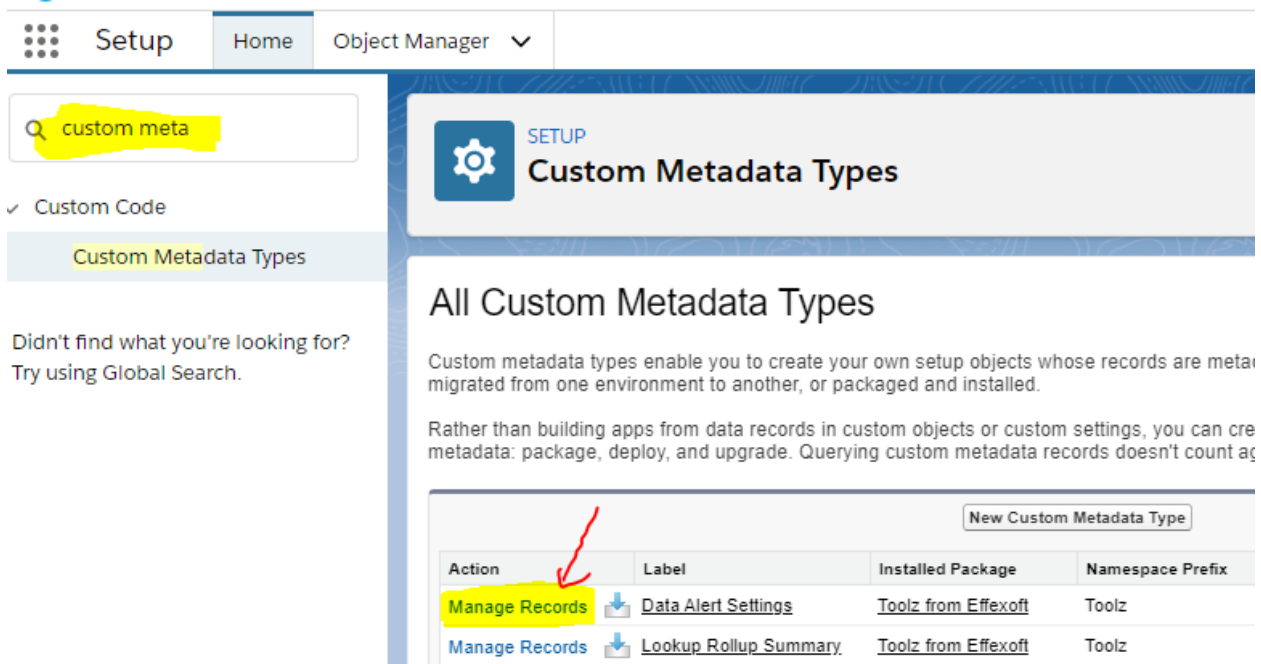
Refer to Rollup Summaries User Guide to learn how to use Rollup Summaries.

5. Setup and Configuration – Data Alerts

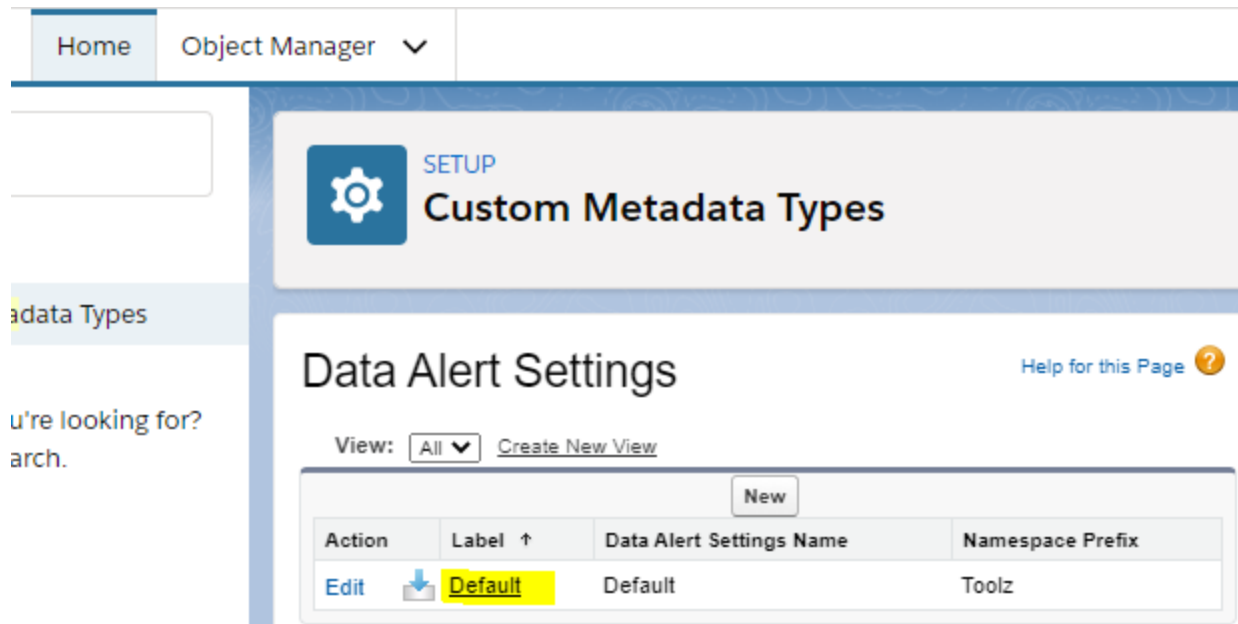
For Data Alerts, there are few settings that you need to be aware of. To access the settings, go to setup and search for “Custom Meta” and you will find “Custom Metadata Types” in the menu. Click on it.



You can now see “All Custom Metadata Types”. Click on “Manage Records” next to “Data Alert Settings”.



Click on “Default” link:



You can then see a screen similar to the following. Click on “Edit” if you would like to change any of the settings. Auto Delete Run Data and Auto Delete Run Data x Factor fields are currently not implemented. They will be implemented in a future release to automatically clean up the historical data.

Data Alert Settings (Managed)

« [Back to List: Environment Hub Members](#)

This Data Alert Settings is managed, meaning that you may only edit certain attributes. [Display More Information](#)

Data Alert Settings Detail

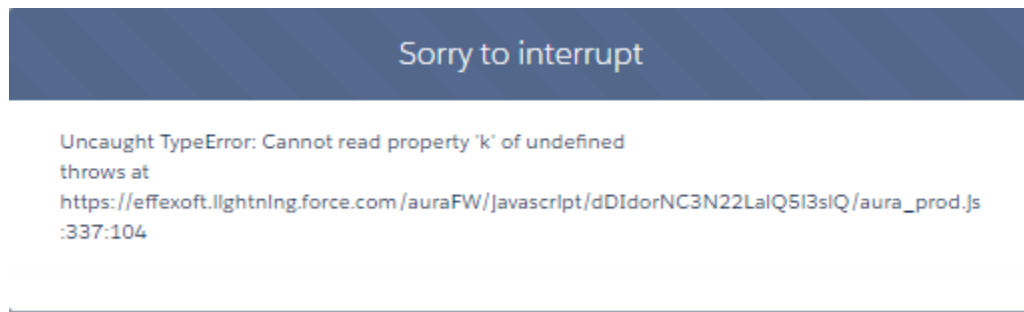
		Edit Clone	
Label	Default	Protected Component	☐
Data Alert Settings Name	Default	Namespace Prefix	Toolz
Auto Delete Run Data	☒	Limit Records	1,000
Auto Delete Run Data x Factor	30	Email when No Result	☐
Create Run Record when No Result	☒	Email after Batch Job	☒
Created By	Venkata PBO Kunisetty, 1/1/2021 5:03 PM		Last Modified By
			Venkata PBO Kunisetty, 1/
		Edit Clone	

Data Alerts tool is now setup. To create your first data alert, please refer to Data Alerts User Guide document.

6. Common Errors

1. Uncaught TypeError

If you encounter the following error message while installing the Toolz package, please ignore the error message. This error has no effect on the performance of the Toolz package. Effexoft is aware of this error will correct it in the future releases.



Uncaught TypeError: Cannot read property 'k' of undefined throws at:

7. Upgrade to a newer version of the Toolz package

Effexoft releases new versions of Toolz package from time to time. You can find the current version number on AppExchange at the following link:

<https://appexchange.salesforce.com/appxListingDetail?listingId=a0N3A00000FABeMUAX>

Current version is: Winter 2021 / 1.4024.0

If you are using an older version, or if you want to upgrade to a newer version when it is released, you can simply do so by going to the above link in the Salesforce AppExchange and install it as if you are installing the application for the first time.

During the time of installation, Salesforce Installation process detects if you already have an earlier version Toolz package and it will overwrite it.

You can see a message something similar to the following:

Upgrade Toolz - Power Tools for your Org

By Effexoft Inc



An earlier version is installed. It can be upgraded while preserving the existing data.

Installed: Winter 2021 (1.4023) New Version: Winter 2021 (1.4024)

Please note that you do not need to uninstall to upgrade to a newer version.

8. Uninstalling Toolz package

If you do not want to continue using Toolz package for any technical reasons such as you are unable to use it, you are not able to understand how to use it, having difficulties installing and setting up, please feel free to send us an email to: support-toolz@effexoft.com

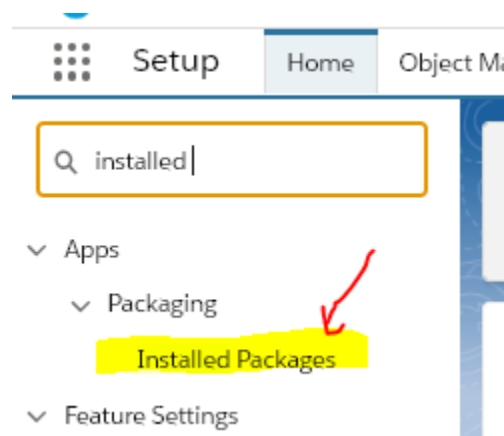
Someone from Effexoft will reach out to you with in 48 hours.

If you still for any reason, want to uninstall the Toolz package, you can do so.

Please note that uninstalling Toolz package will remove all the Tools in it. All the Rollup Summaries you created will be removed and all the Data Alerts will also be removed.

Please also note: If you would like to upgrade to a newer version of Toolz package, you can install the new version on top of the existing Toolz package without losing any of the existing Rollup Summaries and Data Alerts.

If you still decide to uninstall, please go to setup, and search for “Installed Packages”.



You can find “Uninstall” link next to Toolz package.

Click on the “Uninstall” link if you have decided to do so.

Installed Packages

On AppExchange you can browse, test drive, download, and install pre-built apps and components right into your salesforce.com envi

Apps and components are installed in packages. Any custom apps, tabs, and custom objects are initially marked as "In Development" before deploying. You can deploy the components individually using the other features in setup or as a group by clicking Deploy.

Depending on the links next to an installed package, you can take different actions from this page.

To remove a package, click Uninstall. To manage your package licenses, click Manage Licenses.

Installed Packages						
Action	Package Name	Publisher	Version Number	Namespace Prefix	Status	Allowed Lic
	License Management App	salesforce.com	1.20	sfLma	Active	Unlimited
Description This is the app publishers use to track the different versions of managed packages and the licenses of subscribers v						
Uninstall 	Checkout Management App	Checkout Management App Packaging Org	1.13	sfoma	Active	Unlimited
Uninstall 	Toolz from Effexoft	Effexoft Inc	1.4024	Toolz	Active	Unlimited

Follow the uninstallation steps.

9. Support

Effexoft provides support from the following channels for Toolz application.

1. Knowledge Base link on Toolz package listing page on AppExchange

Toolz package is listed on AppExchange at:

<https://appexchange.salesforce.com/appxListingDetail?listingId=a0N3A00000FABeMUAX>

Requirements

Salesforce Edition [Enterprise, Unlimited, Developer, Performance](#)

Other System Requirements [No additional system requirements](#)

Support

[Knowledge Base](#)
[Terms and Conditions](#)

Additional Information

Package Name [Toolz from Effexoft](#)

2. Email Support

Please send an email to support-toolz@effexoft.com if you have any questions related to Toolz package.

Effexoft will respond to all emails within 48 hours or two business days.

3. Reviews section on Toolz package listing page on AppExchange

AppExchange is a Salesforce managed portal and it provides a “Reviews” section to interact with App Developers. Effexoft responds to any question / review posted on the Toolz package page in the AppExchange.

Effexoft appreciates feedback from all the users. If you have trouble working with Toolz, please email us at support-toolz@effexoft.com instead of leaving a comment in the reviews section.