



Excel.IO





1

Preface



2

App Overview



3

Manual



4

Notifications



5

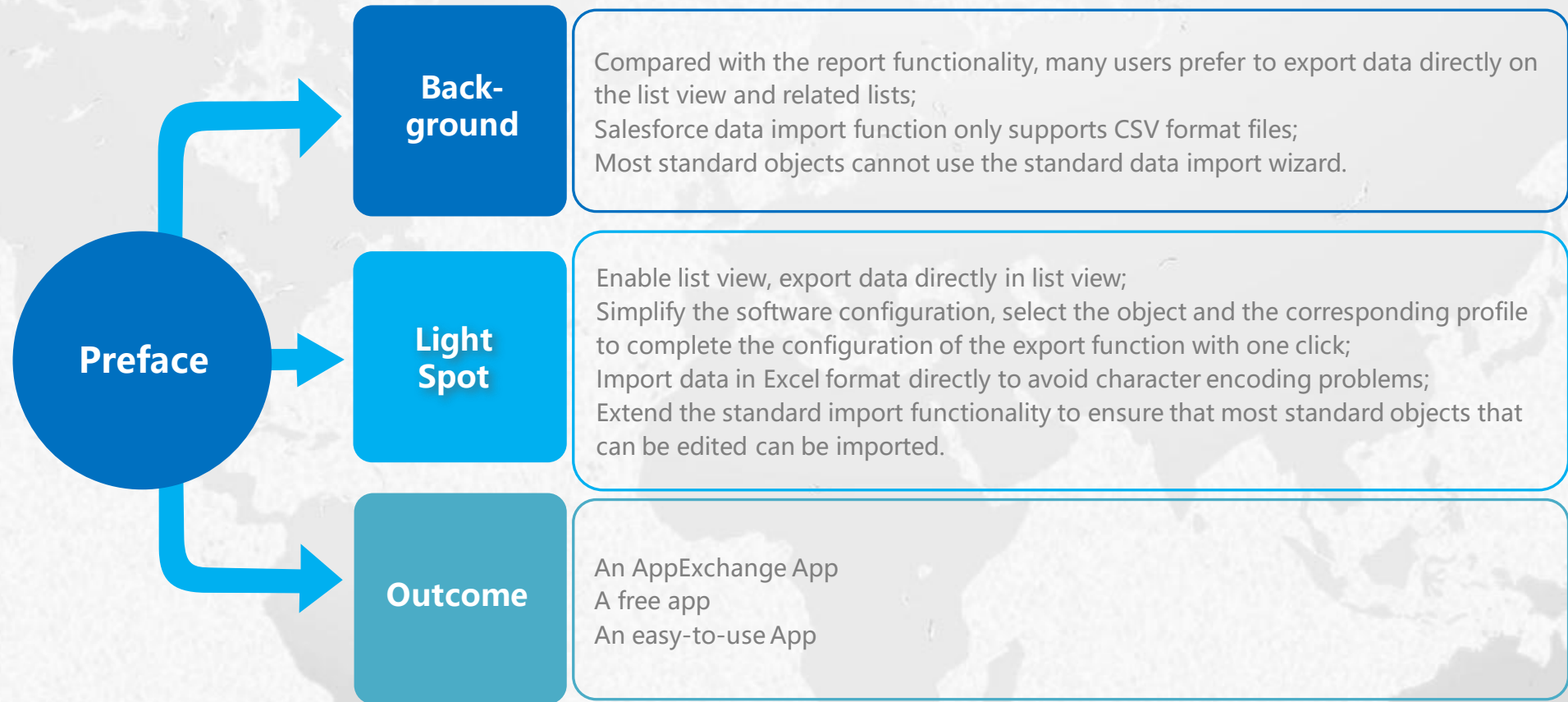
About Us





Preface

E C
EachCloud





App Overview



App Overview

Improve Experience



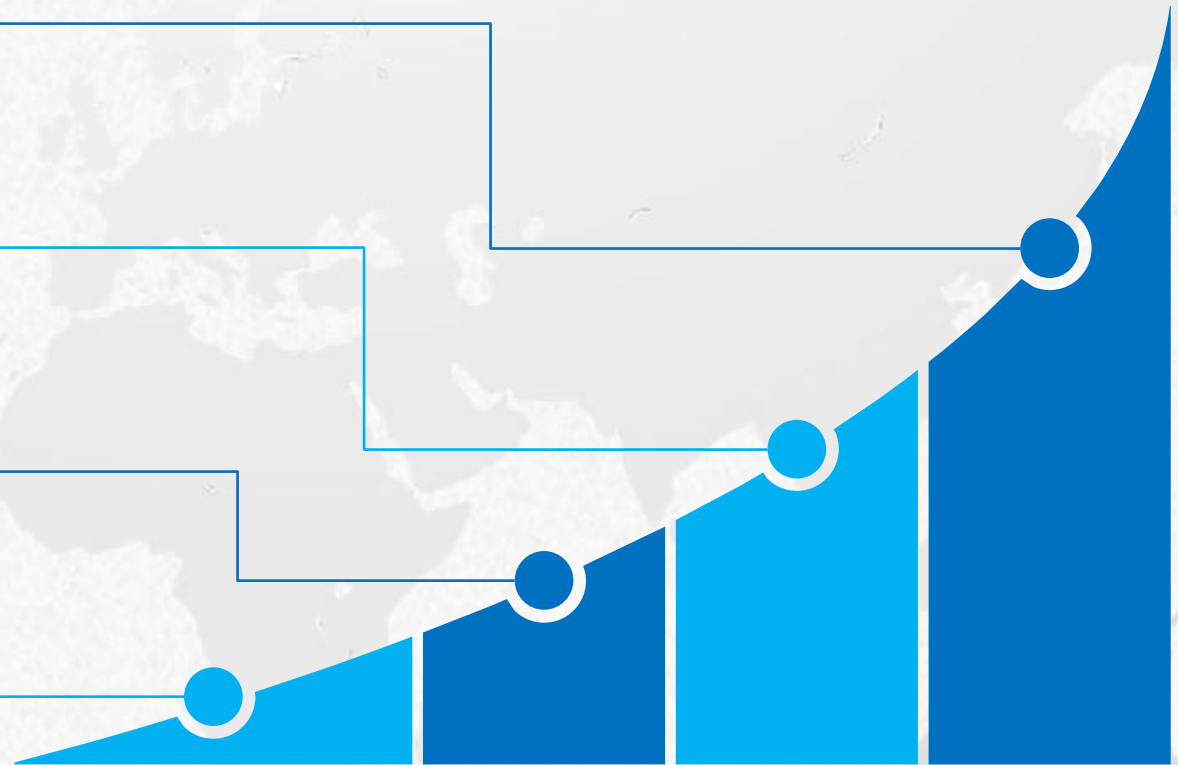
Improve Efficiency



Reduce Workload



Simplify Operation



Improve Efficiency

End users can directly export all or specified data of the current page on the list view page

Excel format data can be imported directly into the system, and most standard objects can be imported

Reduce Workload

Admin does not need to configure various reports according to the needs of end users, users can adjust the list view page to export data by themselves. And we provide the Excel.IO Setup page, which can complete the configuration of the export function with one click



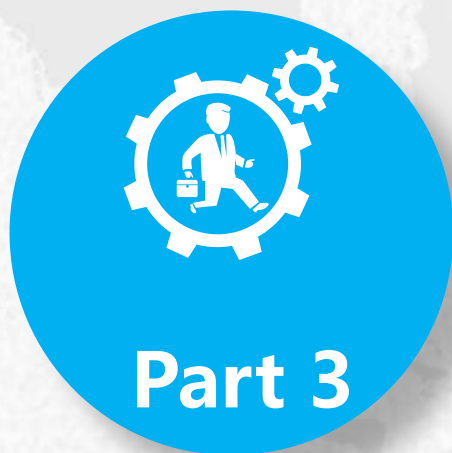
Simplify Operation

No need to go to the report page to make (or wait for the administrator to make) the report and then export and input, just click the "Export2Excel" button on the list view to export. Data import does not need to be converted to CSV format.

Improve Experience

Users do not need to go to the report page to export data, directly export it in the list view, which perfectly achieves what they see and what they get, which improves the predictability of the system and enhances the user experience. Import can use most of the standard objects and all custom objects, the operation is more convenient and quick

Excel.IO



Manual

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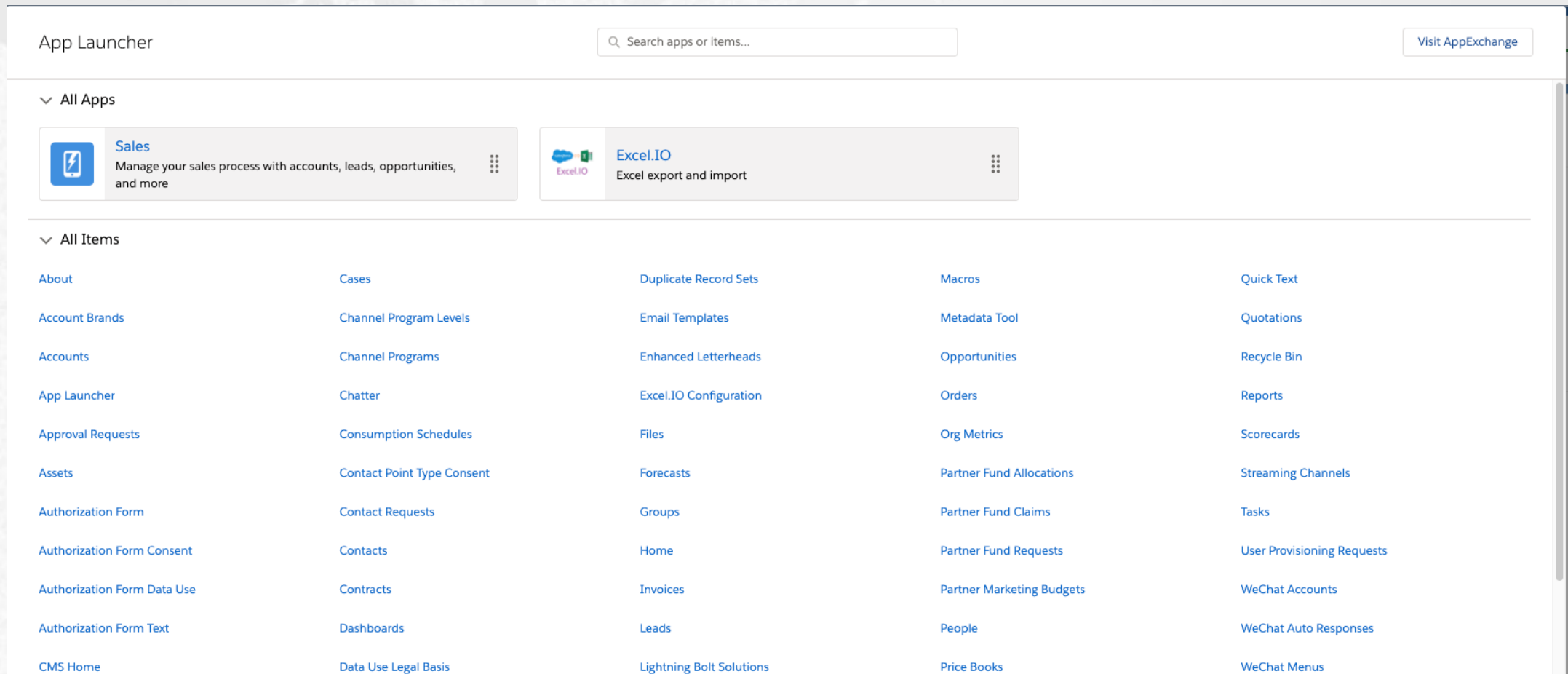
- ▶ Configuration
- ▶ Data Export
- ▶ Data Import

Manual - Configuration

The admin completes the configuration of the export functionality with one click

Please note that users authorized to access this APP while installation can also use the configuration function

1. Choose Excel.IO Application From App Launcher

The screenshot shows the 'App Launcher' interface. At the top, there's a search bar with the placeholder text 'Search apps or items...' and a button labeled 'Visit AppExchange'. Below the search bar, there's a section titled 'All Apps' which contains two app cards. The first card is for 'Sales' with a lightning bolt icon and the description 'Manage your sales process with accounts, leads, opportunities, and more'. The second card is for 'Excel.IO' with a cloud and document icon and the description 'Excel export and import'. Below the 'All Apps' section, there's a section titled 'All Items' which contains a grid of 25 links arranged in 5 rows and 5 columns. The links are: About, Cases, Duplicate Record Sets, Macros, Quick Text, Account Brands, Channel Program Levels, Email Templates, Metadata Tool, Quotations, Accounts, Channel Programs, Enhanced Letterheads, Opportunities, Recycle Bin, App Launcher, Chatter, Excel.IO Configuration, Orders, Reports, Approval Requests, Consumption Schedules, Files, Org Metrics, Scorecards, Assets, Contact Point Type Consent, Forecasts, Partner Fund Allocations, Streaming Channels, Authorization Form, Contact Requests, Groups, Partner Fund Claims, Tasks, Authorization Form Consent, Contacts, Home, Partner Fund Requests, User Provisioning Requests, Authorization Form Data Use, Contracts, Invoices, Partner Marketing Budgets, WeChat Accounts, Authorization Form Text, Dashboards, Leads, People, WeChat Auto Responses, CMS Home, Data Use Legal Basis, Lightning Bolt Solutions, Price Books, and WeChat Menus.

Manual - Configuration

The admin completes the configuration of the export functionality with one click

2. Select the Subject that needs to configure for the export function

The screenshot displays the 'Excel.IO Configuration' interface. At the top, there's a navigation bar with the 'Excel.IO' logo and a tab labeled 'Excel.IO Configuration'. Below this, a header section contains the title 'Excel.IO Configuration' and the instruction 'Select an object and configure its profiles.'.

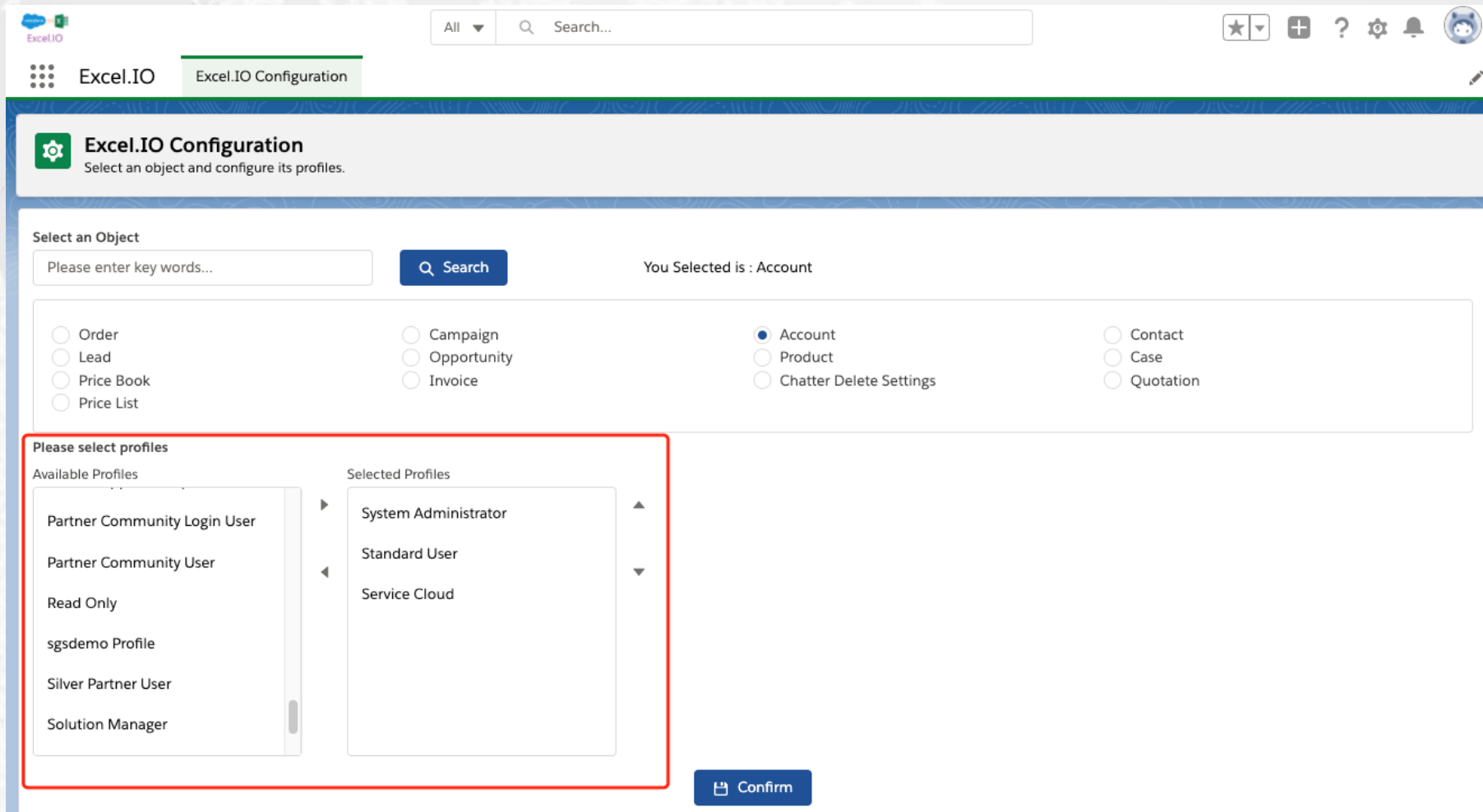
The main content area is titled 'Select an Object' and features a search input field with the placeholder text 'Please enter key words...'. To the right of the input field is a blue 'Search' button. Below the search field, a list of objects is displayed, each with a radio button. The objects are: Order, Lead, Price Book, Price List, Campaign, Opportunity, Invoice, Account (which is selected), Product, Chatter Delete Settings, Contact, Case, and Quotation. The text 'You Selected is : Account' is displayed to the right of the search button.

Below the object selection section, there's a section titled 'Please select profiles'. It contains two columns: 'Available Profiles' and 'Selected Profiles'. The 'Available Profiles' column lists several profiles: Analytics Cloud Integration User, Analytics Cloud Security User, Authenticated Website, Authenticated Website, Chatter External User, and Chatter Free User. The 'Selected Profiles' column is currently empty. At the bottom right of the interface, there is a blue 'Confirm' button.

Manual - Configuration

The admin completes the configuration of the export functionality with one click

3. Select the profiles that can use this export function



The screenshot displays the 'Excel.IO Configuration' interface. At the top, there's a search bar and navigation icons. Below the header, the 'Excel.IO Configuration' section is active, with the instruction 'Select an object and configure its profiles.'.

Select an Object

Please enter key words... You Selected is : Account

☐ Order ☐ Campaign ☒ Account ☐ Contact
☐ Lead ☐ Opportunity ☐ Product ☐ Case
☐ Price Book ☐ Invoice ☐ Chatter Delete Settings ☐ Quotation
☐ Price List

Please select profiles

Available Profiles

- Partner Community Login User
- Partner Community User
- Read Only
- sgsdemo Profile
- Silver Partner User
- Solution Manager

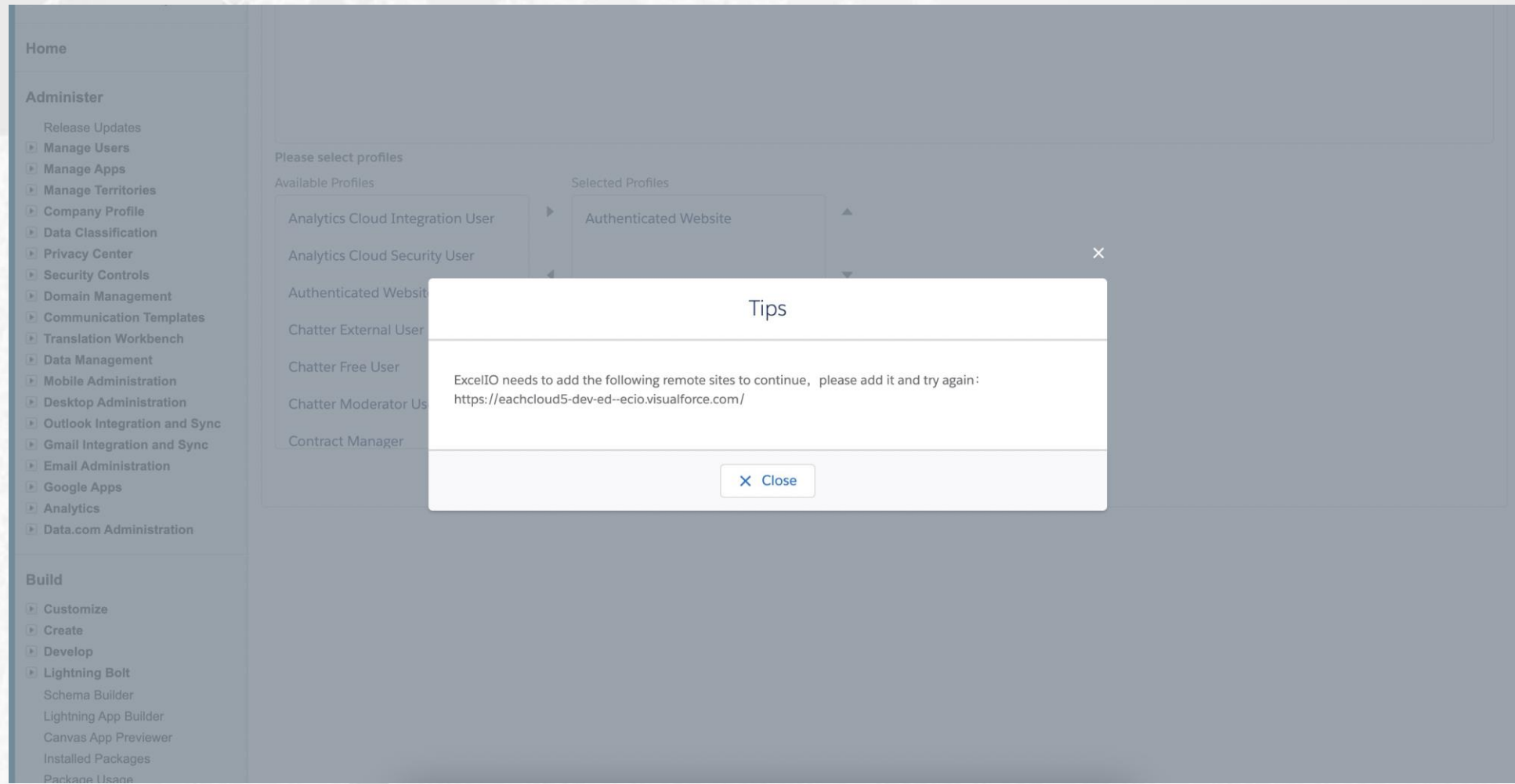
Selected Profiles

- System Administrator
- Standard User
- Service Cloud

Manual - Configuration

The admin completes the configuration of the export functionality with one click

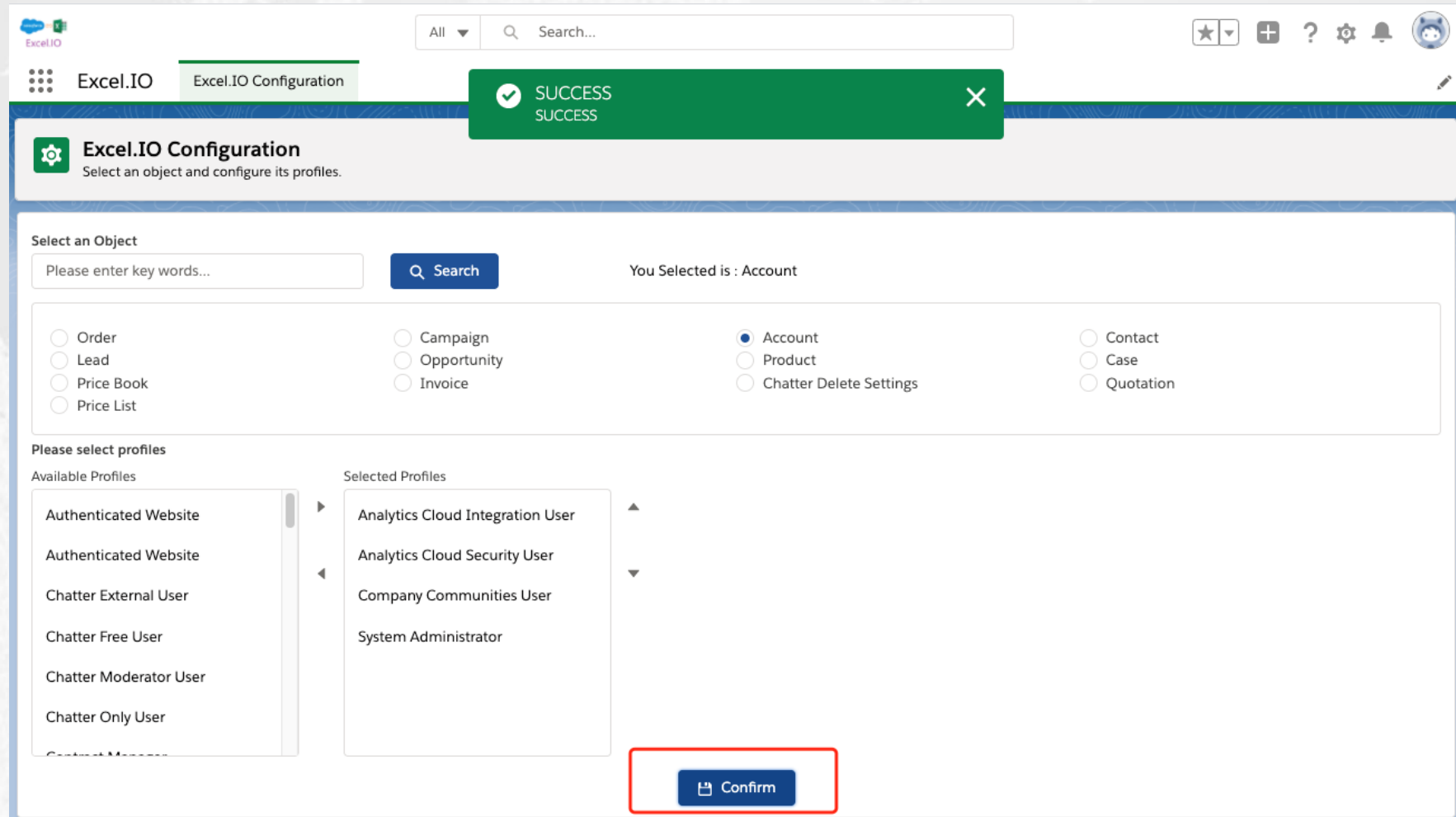
4. If you are prompted to receive the following prompt, please follow the prompts to add a remote site



Manual - Configuration

The admin completes the configuration of the export functionality with one click

5. Click OK to complete the configuration of the Subject



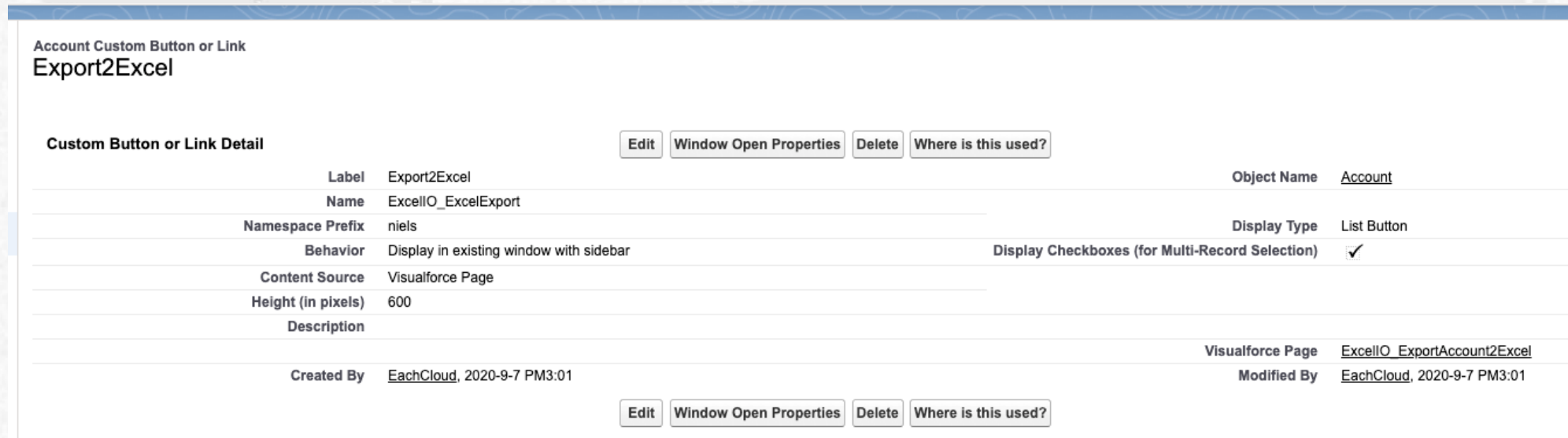
The screenshot displays the 'Excel.IO Configuration' interface. At the top, a green success banner reads 'SUCCESS SUCCESS'. Below this, the 'Excel.IO Configuration' header includes a sub-header 'Select an object and configure its profiles.' The main section, 'Select an Object', features a search bar with the placeholder 'Please enter key words...' and a 'Search' button. To the right, it states 'You Selected is : Account'. A grid of radio buttons lists various objects: Order, Lead, Price Book, Price List, Campaign, Opportunity, Invoice, Account (selected), Product, Chatter Delete Settings, Contact, Case, and Quotation. Below this, the 'Please select profiles' section shows two columns: 'Available Profiles' and 'Selected Profiles'. The 'Available Profiles' list includes 'Authenticated Website', 'Authenticated Website', 'Chatter External User', 'Chatter Free User', 'Chatter Moderator User', 'Chatter Only User', and 'Contact Message'. The 'Selected Profiles' list includes 'Analytics Cloud Integration User', 'Analytics Cloud Security User', 'Company Communities User', and 'System Administrator'. At the bottom right, a blue 'Confirm' button is highlighted with a red rectangle.

Manual - Configuration

The admin completes the configuration of the export functionality with one click

6 After the configuration is complete, a Visualforce page will be generated, Naming Rule is: "ExcellO_Export" + Subject Name + "2Excel", like 'ExcellO_ExportAccount2Excel'

7. After the configuration is complete, a list button will be generated, the button name will be "Export2Excel", API name is "ExcellO_ExcelExport", like:

The screenshot shows the Salesforce configuration page for a custom button or link named 'Export2Excel'. The page title is 'Account Custom Button or Link Export2Excel'. Below the title, there are four buttons: 'Edit', 'Window Open Properties', 'Delete', and 'Where is this used?'. The main configuration area is a table with the following fields: 'Label' (Export2Excel), 'Object Name' (Account), 'Name' (ExcellO_ExcelExport), 'Namespace Prefix' (niels), 'Display Type' (List Button), 'Behavior' (Display in existing window with sidebar), 'Display Checkboxes (for Multi-Record Selection)' (checked), 'Content Source' (Visualforce Page), 'Height (in pixels)' (600), 'Description' (empty), 'Visualforce Page' (ExcellO_ExportAccount2Excel), and 'Created By' (EachCloud, 2020-9-7 PM3:01). At the bottom, there are four more buttons: 'Edit', 'Window Open Properties', 'Delete', and 'Where is this used?'.

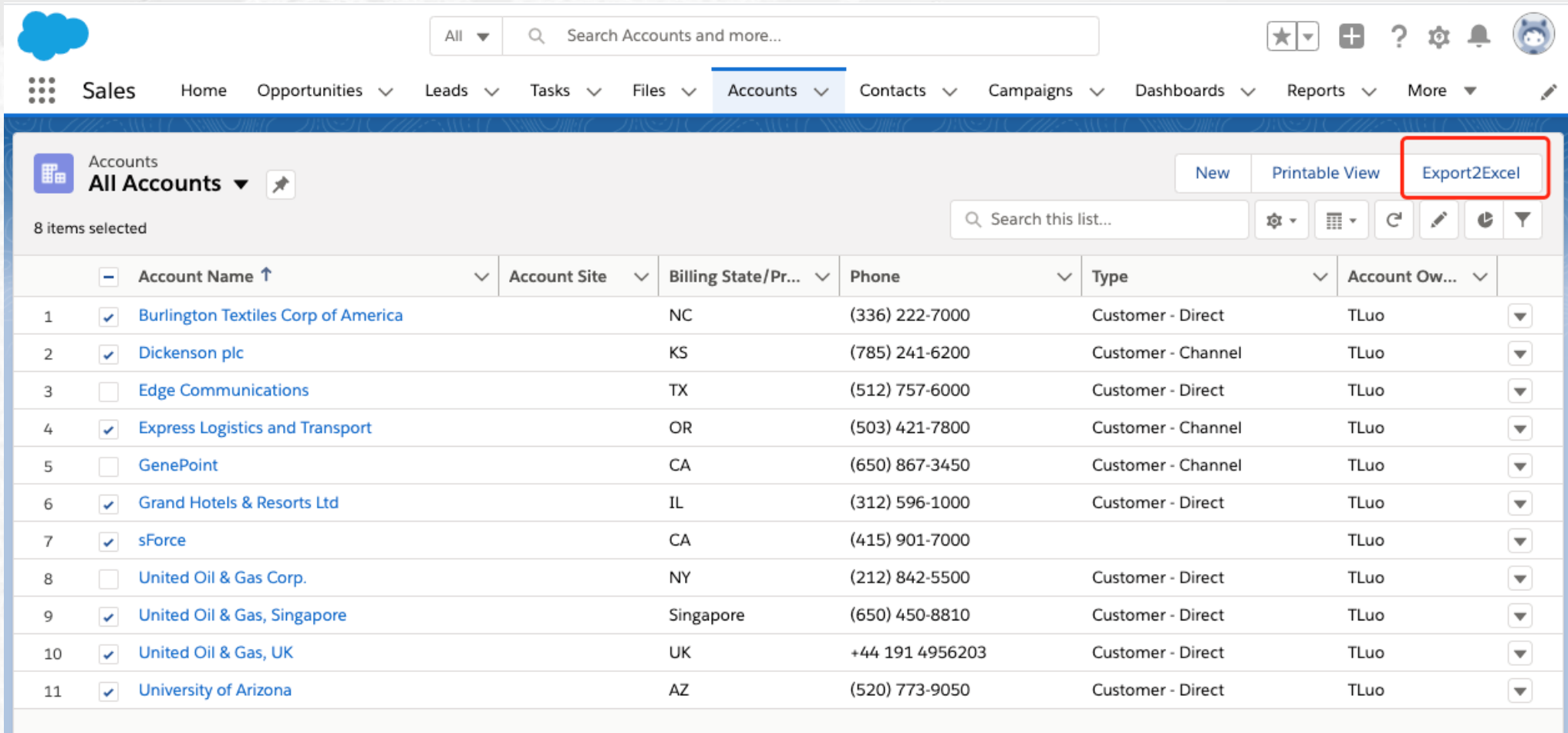
Custom Button or Link Detail	
Label	Export2Excel
Object Name	Account
Name	ExcellO_ExcelExport
Namespace Prefix	niels
Display Type	List Button
Behavior	Display in existing window with sidebar
Display Checkboxes (for Multi-Record Selection)	☒
Content Source	Visualforce Page
Height (in pixels)	600
Description	
Visualforce Page	ExcellO_ExportAccount2Excel
Created By	EachCloud, 2020-9-7 PM3:01
Modified By	EachCloud, 2020-9-7 PM3:01

8. Excel.IO will automatically add this list button to the list view

Manual - Export From List View

End users can export and download child-Subject data as Excel files with one click in the related lists

1. Select the data to be exported, click Export2Excel to export the selected data
2. If you do not select any data, all the data in the list view will be exported, and a maximum of 50,000 data will be exported at one time.



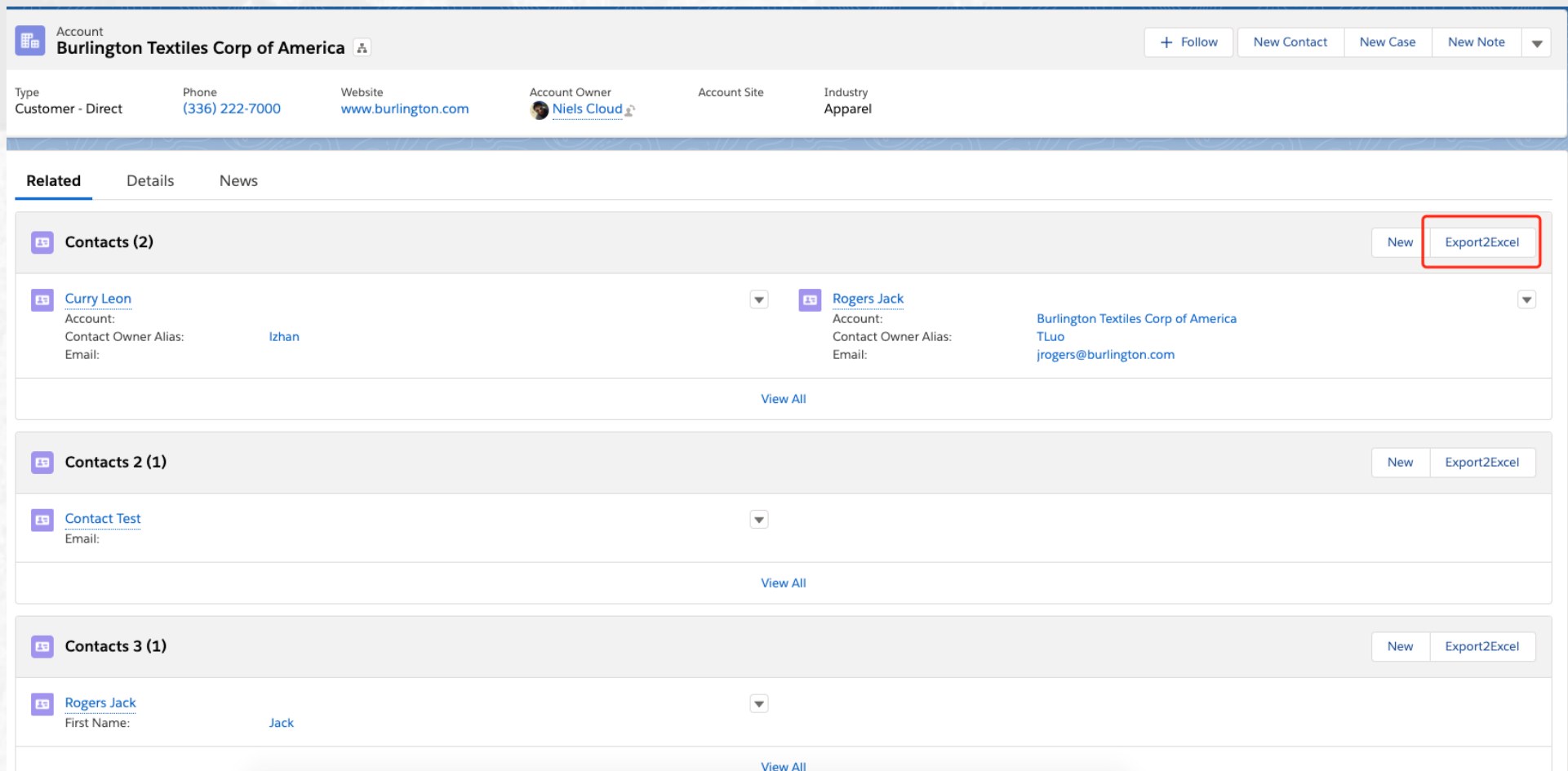
The screenshot shows the EachCloud interface for the 'Accounts' list view. The top navigation bar includes 'Sales', 'Home', 'Opportunities', 'Leads', 'Tasks', 'Files', 'Accounts', 'Contacts', 'Campaigns', 'Dashboards', 'Reports', and 'More'. The 'Accounts' section is active, showing 'All Accounts' with 8 items selected. The 'Export2Excel' button is highlighted in a red box. Below the table, there is a search bar and a list of accounts with checkboxes for selection.

	☐	Account Name ↑	Account Site	Billing State/Pr...	Phone	Type	Account Ow...
1	☒	Burlington Textiles Corp of America		NC	(336) 222-7000	Customer - Direct	TLuo
2	☒	Dickenson plc		KS	(785) 241-6200	Customer - Channel	TLuo
3	☐	Edge Communications		TX	(512) 757-6000	Customer - Direct	TLuo
4	☒	Express Logistics and Transport		OR	(503) 421-7800	Customer - Channel	TLuo
5	☐	GenePoint		CA	(650) 867-3450	Customer - Channel	TLuo
6	☒	Grand Hotels & Resorts Ltd		IL	(312) 596-1000	Customer - Direct	TLuo
7	☒	sForce		CA	(415) 901-7000		TLuo
8	☐	United Oil & Gas Corp.		NY	(212) 842-5500	Customer - Direct	TLuo
9	☒	United Oil & Gas, Singapore		Singapore	(650) 450-8810	Customer - Direct	TLuo
10	☒	United Oil & Gas, UK		UK	+44 191 4956203	Customer - Direct	TLuo
11	☒	University of Arizona		AZ	(520) 773-9050	Customer - Direct	TLuo

Manual - Export From Related List

End users can export and download child-Subject data as Excel files with one click in the related lists

1. Click the Export2Excel button in the related list to export the data in the related list



The screenshot displays the 'Related' tab for the account 'Burlington Textiles Corp of America'. The account details include: Type: Customer - Direct, Phone: (336) 222-7000, Website: www.burlington.com, Account Owner: Niels Cloud, Account Site, and Industry: Apparel. The 'Related' section shows three contact lists: 'Contacts (2)', 'Contacts 2 (1)', and 'Contacts 3 (1)'. The 'Contacts (2)' list is expanded, showing two contacts: 'Curry Leon' and 'Rogers Jack'. The 'Export2Excel' button is highlighted with a red box in the 'Contacts (2)' section.

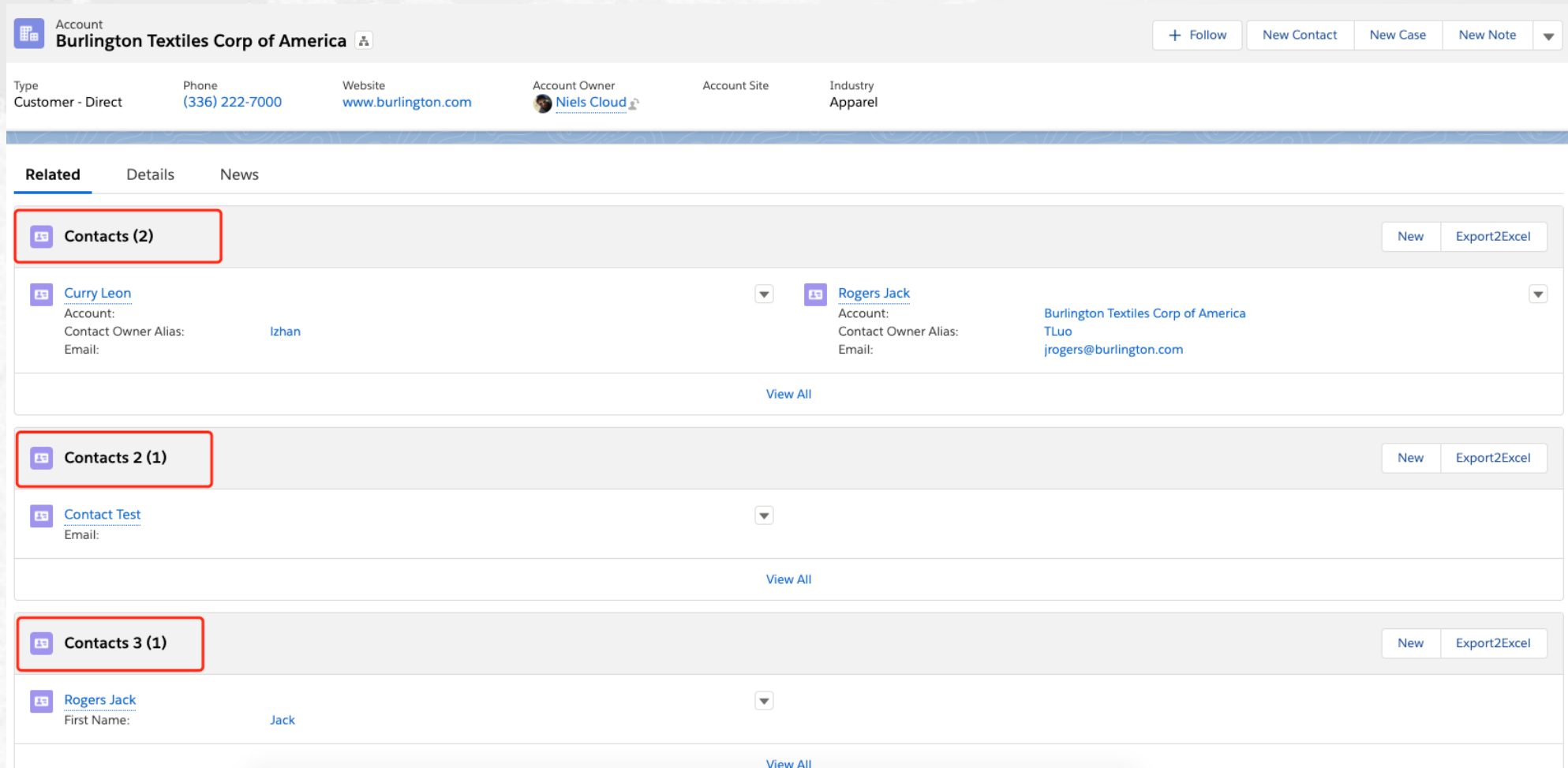
Account	Type	Phone	Website	Account Owner	Account Site	Industry
Burlington Textiles Corp of America	Customer - Direct	(336) 222-7000	www.burlington.com	Niels Cloud		Apparel

Related	Details	News
Contacts (2)		New Export2Excel
Curry Leon Account: Contact Owner Alias: Izhan Email:		Rogers Jack Account: Contact Owner Alias: TLuo Email: jrogers@burlington.com
View All		
Contacts 2 (1)		New Export2Excel
Contact Test Email:		
View All		
Contacts 3 (1)		New Export2Excel
Rogers Jack First Name: Jack		
View All		

Manual - Export From Related List

End users can export and download child-Subject data as Excel files with one click in the related lists

2. If multiple related lists refer to the same object, you need to select which related list is to be exported when exporting



Account: **Burlington Textiles Corp of America**

Type: Customer - Direct | Phone: (336) 222-7000 | Website: www.burlington.com | Account Owner: Niels Cloud | Account Site: | Industry: Apparel

Related | Details | News

Contacts (2) | New | Export2Excel

Curry Leon
Account: | Contact Owner Alias: Izhan | Email: |

Rogers Jack
Account: | Contact Owner Alias: Burlington Textiles Corp of America TLuo | Email: jrogers@burlington.com |

[View All](#)

Contacts 2 (1) | New | Export2Excel

Contact Test
Email: |

[View All](#)

Contacts 3 (1) | New | Export2Excel

Rogers Jack
First Name: Jack |

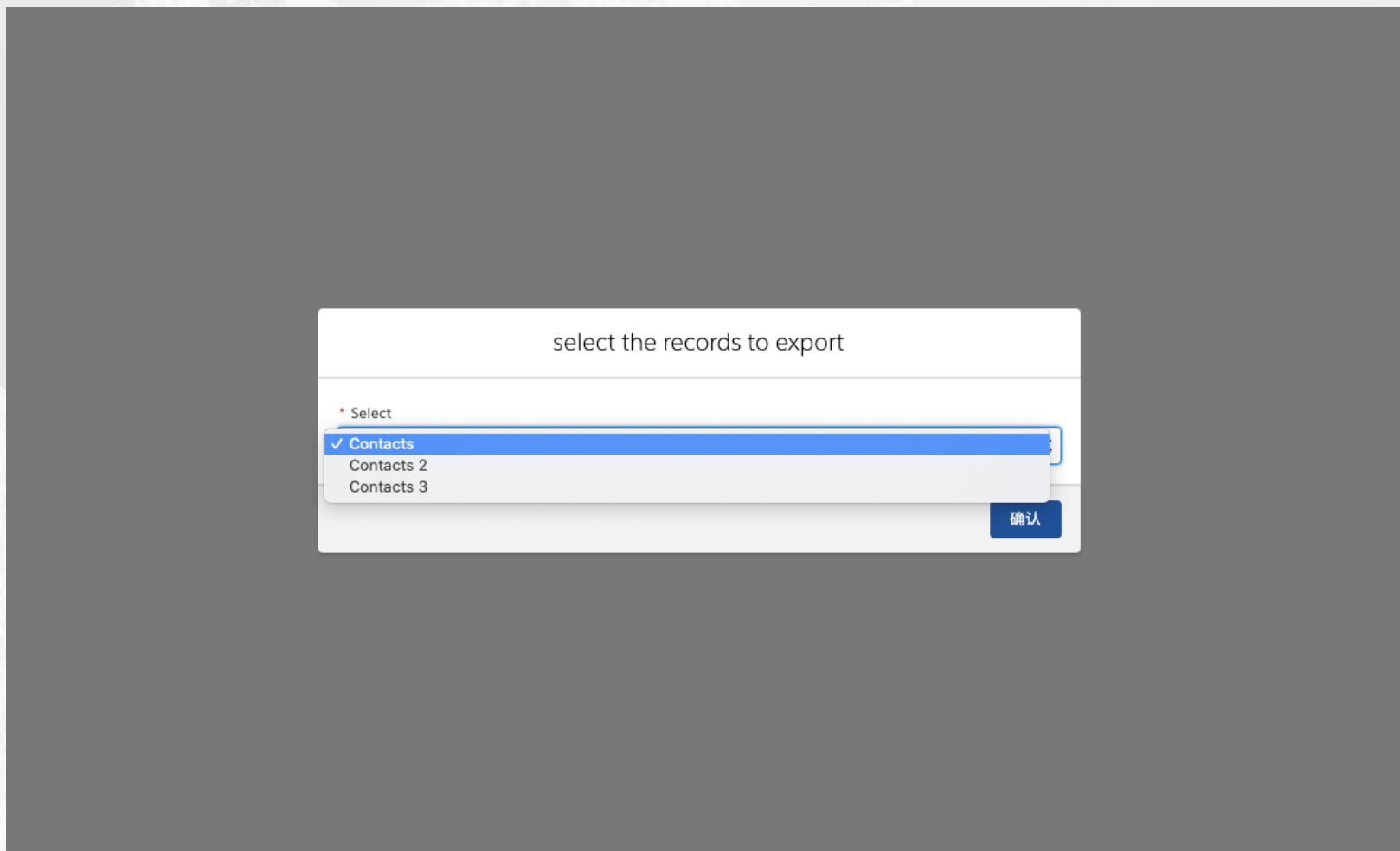
[View All](#)



Manual - Export From Related List

End users can export and download child-Subject data as Excel files with one click in the related lists

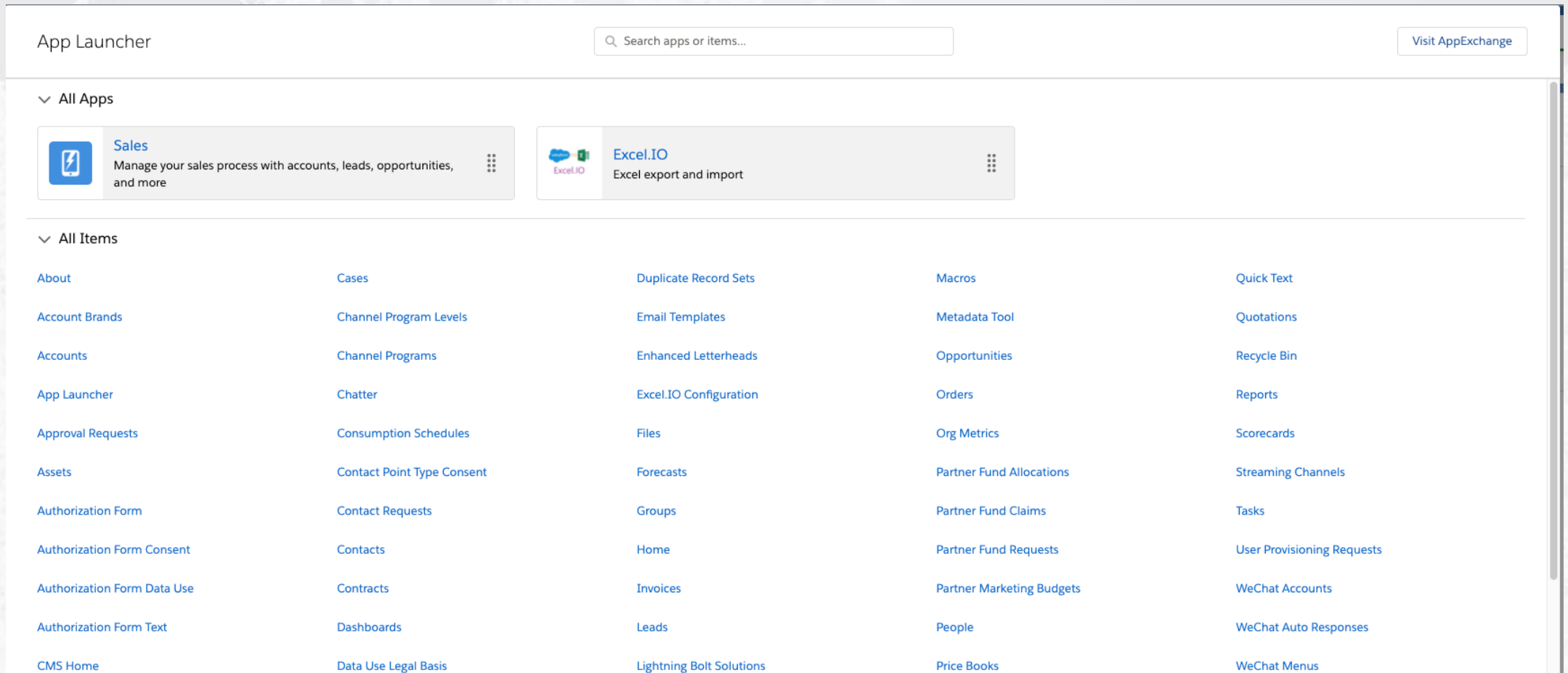
2. If multiple related lists refer to the same object, you need to select which related list is to be exported when exporting



Manual - Data Import

Users use the data import function of Excel.IO to directly import data in Excel format into Salesforce

1. Choose Excel.IO application



The screenshot shows the Salesforce App Launcher interface. At the top, there is a search bar labeled "Search apps or items..." and a button labeled "Visit AppExchange". Below the search bar, there are two sections: "All Apps" and "All Items".

All Apps

- Sales**: Manage your sales process with accounts, leads, opportunities, and more.
- Excel.IO**: Excel export and import.

All Items

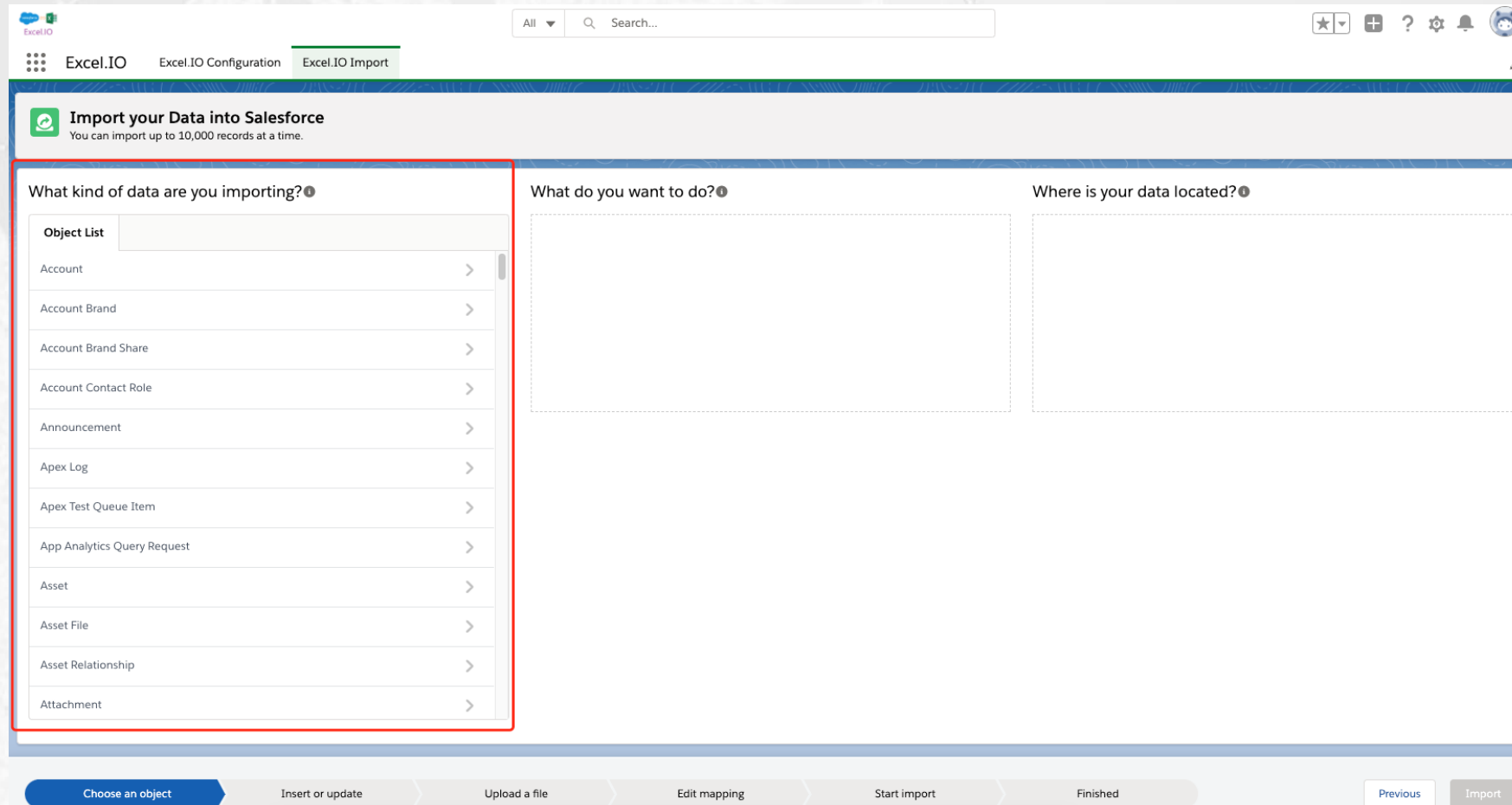
About	Cases	Duplicate Record Sets	Macros	Quick Text
Account Brands	Channel Program Levels	Email Templates	Metadata Tool	Quotations
Accounts	Channel Programs	Enhanced Letterheads	Opportunities	Recycle Bin
App Launcher	Chatter	Excel.IO Configuration	Orders	Reports
Approval Requests	Consumption Schedules	Files	Org Metrics	Scorecards
Assets	Contact Point Type Consent	Forecasts	Partner Fund Allocations	Streaming Channels
Authorization Form	Contact Requests	Groups	Partner Fund Claims	Tasks
Authorization Form Consent	Contacts	Home	Partner Fund Requests	User Provisioning Requests
Authorization Form Data Use	Contracts	Invoices	Partner Marketing Budgets	WeChat Accounts
Authorization Form Text	Dashboards	Leads	People	WeChat Auto Responses
CMS Home	Data Use Legal Basis	Lightning Bolt Solutions	Price Books	WeChat Menus

Manual - Data Import

Users use the data import function of Excel.IO to directly import data in Excel format into Salesforce

1. Select the Excel.IO Import tab, select the object to be imported on this page

If the object that needs to be imported is not easy to find, you can use the browser's built-in search function (Ctrl+F) to find the object that needs to be imported.



The screenshot shows the Excel.IO Import interface. At the top, there's a navigation bar with 'Excel.IO', 'Excel.IO Configuration', and 'Excel.IO Import' tabs. Below this, a header section says 'Import your Data into Salesforce' with a subtext 'You can import up to 10,000 records at a time.' The main content area is divided into three sections: 'What kind of data are you importing?', 'What do you want to do?', and 'Where is your data located?'. The first section, 'What kind of data are you importing?', is highlighted with a red box and contains an 'Object List' with the following items: Account, Account Brand, Account Brand Share, Account Contact Role, Announcement, Apex Log, Apex Test Queue Item, App Analytics Query Request, Asset, Asset File, Asset Relationship, and Attachment. The other two sections are empty. At the bottom, there's a progress bar with steps: 'Choose an object', 'Insert or update', 'Upload a file', 'Edit mapping', 'Start import', and 'Finished'. The 'Choose an object' step is currently active. There are also 'Previous' and 'Import' buttons at the bottom right.

Manual - Data Import

Users use the data import function of Excel.IO to directly import data in Excel format into Salesforce

2. Select the operation you need to perform: insert new data/or update existing data

Excel.IO

Excel.IO Configuration Excel.IO Import

Import your Data into Salesforce
You can import up to 10,000 records at a time.

What kind of data are you importing?

Object List

- Community Self Registration
- Conference Number
- Consumption Rate
- Consumption Schedule
- Consumption Schedule Share
- Contact**
- Contact Point Consent
- Contact Point Consent Share
- Contact Point Email
- Contact Point Email Share
- Contact Point Phone

What do you want to do?

- Add new records
- Update existing records

Where is your data located?

Insert or update Upload a file Edit mapping Start import Finished

Previous Import

Manual - Data Import

Users use the data import function of Excel.IO to directly import data in Excel format into Salesforce

3. Choose and upload the Excel file

**Import your Data into Salesforce**
You can import up to 10,000 records at a time.

What kind of data are you importing?

Object List

Community Self Registration

Conference Number

Consumption Rate

Consumption Schedule

Consumption Schedule Share

Contact

Contact Point Consent

Contact Point Consent Share

Contact Point Email

Contact Point Email Share

Contact Point Phone

What do you want to do?

Add new records

Update existing records

Where is your data located?

Select a file

Upload Files

Or drop files

✓

✓

Upload a file

Edit mapping

Start import

Finished

Previous

Import

Manual - Data Import

Users use the data import function of Excel.IO to directly import data in Excel format into Salesforce

4.1. Configure the Field Mapping Setting, the Excel.IO will auto mapping after Excel file uploaded

 **Import your Data into Salesforce**
You can import up to 10,000 records at a time.

Edit Field Mapping: Contact
Your file has been auto-mapped to existing Salesforce fields, but you can edit the mappings if you wish. Unmapped fields will not be imported.

Edit	Mapped Salesforce Object	Excel Header
	Id	Id
Map	Unmapped	Name
Change	FirstName	First Name
Change	LastName	Last Name
Map	Unmapped	Mobile
Change	Email	Email
Map	Unmapped	Created Date
Change	niels__Test_Date__c	Test Date
Change	niels__Test_Date_Time__c	Test Date Time

✓

✓

✓

Edit mapping

Start import

Finished

Previous

Import

Manual - Data Import

Users use the data import function of Excel.IO to directly import data in Excel format into Salesforce

4.2. Modify field mapping

4.3. Click Import at the bottom right to view the import information

**Import your Data into Salesforce**
You can import up to 10,000 records at a time.

Edit Field Mapping: Contact
Your file has been auto-mapped to existing Salesforce fields, but you can edit the mappings if you wish. Unmapped fields will not be imported.

Edit	Mapped Salesforce Object
	Id
Map	Unmapped
Change	FirstName
Change	LastName
Map	Unmapped
Change	Email
Map	Unmapped
Change	niels__Test_Date__c
Change	niels__Test_Date_Time__c

Map Your Field: Last Name
Select Field

Account
Account ID
Assistant's Name
Asst. Phone
Birthdate
Business Fax
Business Phone
Clean Status
Contact Description

CancelConfirm

✓

✓

✓

Edit mapping

Start import

Finished

Previous

Import

Manual - Data Import

Users use the data import function of Excel.IO to directly import data in Excel format into Salesforce

5. Check the import settings
6. Click the import button at the bottom right to start the data import

 **Import your Data into Salesforce**
You can import up to 10,000 records at a time.

Review and Start Import
Review your import information and click Start Import.

Your selections:

- Contact ✓
- INSERT ✓
- Contact (7) 1.xlsx ✓

Your import will include:

Mapped fields
6

Your import will not include:

Unmapped fields
3

✓

✓

✓

✓

Start import

Finished

Previous

Import



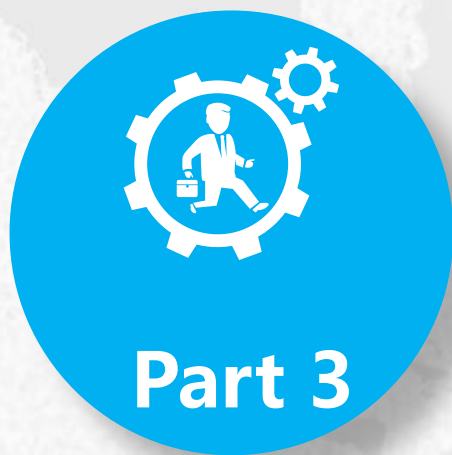
Notifications





Notification

1. The configuration function of Excel.IO only supports Chinese and English for the time being. We will add more international support in the future.
2. The Export2Excel button does not support multiple languages temporarily. If you need to configure multiple languages, please configure it in the translation function of Salesforce.
3. When configuring the export function, objects and profiles are mandatory options, that is, please select one object and at least one profile for each operation
4. Because the Excel.IO configuration function is implemented through MetadataService, Metadata operations are implemented through Metadata Service call out. When configuring profile permissions, try to select the profile that needs to be configured as accurately as possible to avoid "select all" operations. If you choose Too many profiles may cause Time out error
5. Excel.IO configuration can only be done in the Lightning environment
6. If you have any questions, please contact Support @eachcloud.io



About Us



Salesforce Partner
Salesforce Consulting + Salesforce App
Cloud Native
Each Cloud, Win Together!

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THANKS

