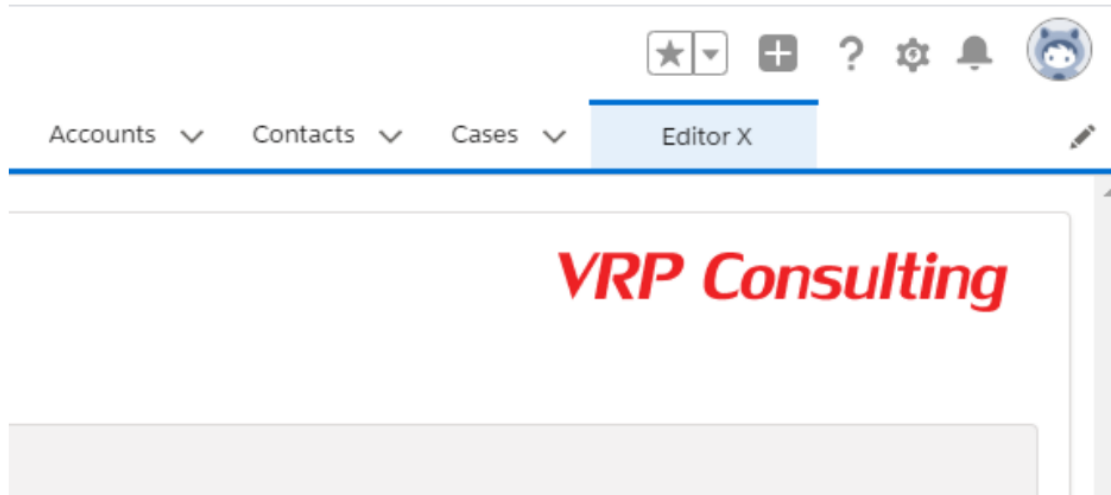


# **EditorX: Installation and Configuration Guideline**

EditorX application is designed to simplify and ease the process of working with a large amount of data in Salesforce, specifically for the actions related to mass data Delete, Edit, Create, Clone, and Import/Export.

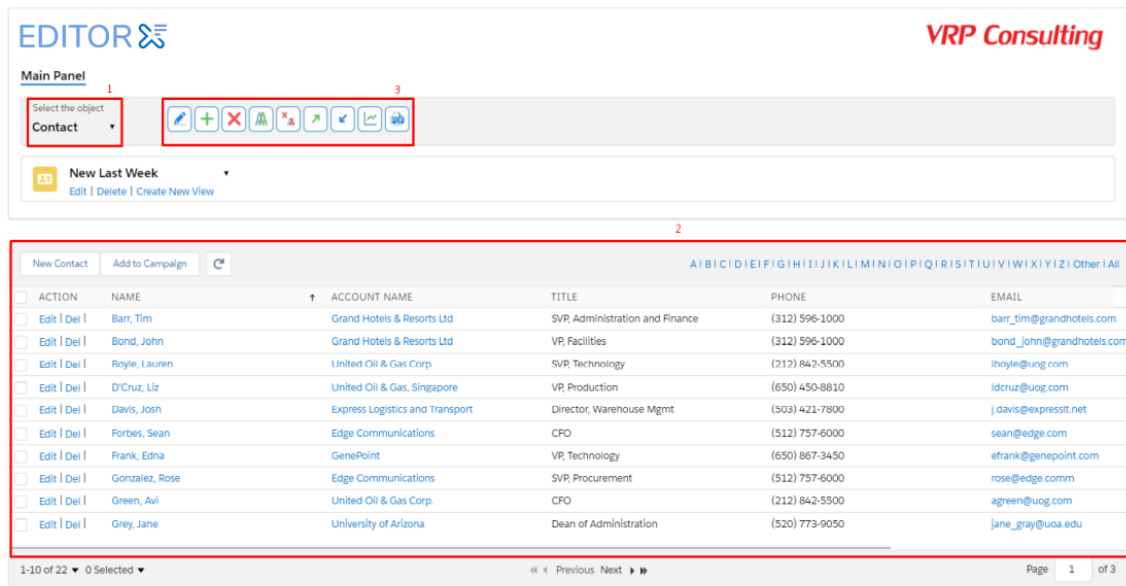
Once you install the application, find the EditorX tab at the top of the screen.



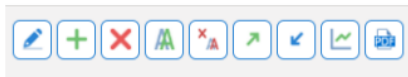
Click on the EditorX tab to access EditorX Tool:

A screenshot of the EditorX tool interface. The top bar shows the 'EDITORX' logo and the 'VRP Consulting' logo. Below the logo, there is a 'Main Panel' with a 'Select the object' dropdown set to 'Contact'. To the right of the dropdown are several icons for actions like edit, delete, create, clone, and import/export. Below the 'Main Panel', there is a 'New Last Week' section with a dropdown arrow. The main area of the tool is a table with columns: ACTION, NAME, ACCOUNT NAME, TITLE, PHONE, and EMAIL. The table contains 10 rows of contact data. At the bottom of the table, there is a status bar showing '1-22 of 22' and '0 Selected'. On the right side of the status bar, there are navigation buttons: '&lt;&lt; Previous', 'Next &gt;&gt;', and 'Page 1 of 1'.

The main elements of the application include:

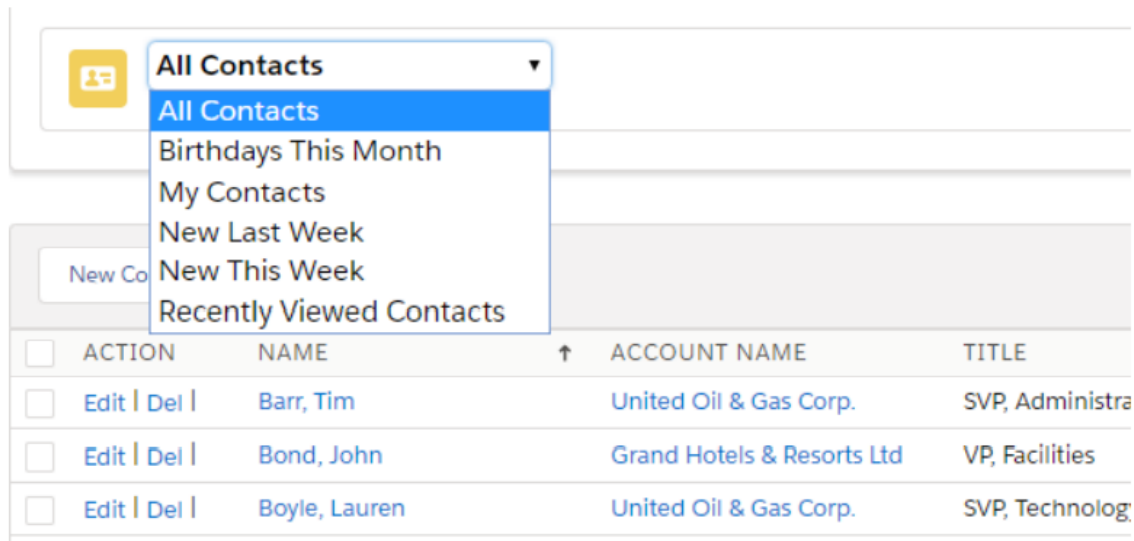


1. Select List – allows you to choose an Object that contains the Records you would like to edit. It can be Standard (Account, Campaign, Case, Contact, Contract, Lead, Opportunity, Price Book, Product, Solution) and Custom objects.
2. Records of the chosen Object
3. Available buttons for mass operations with Records



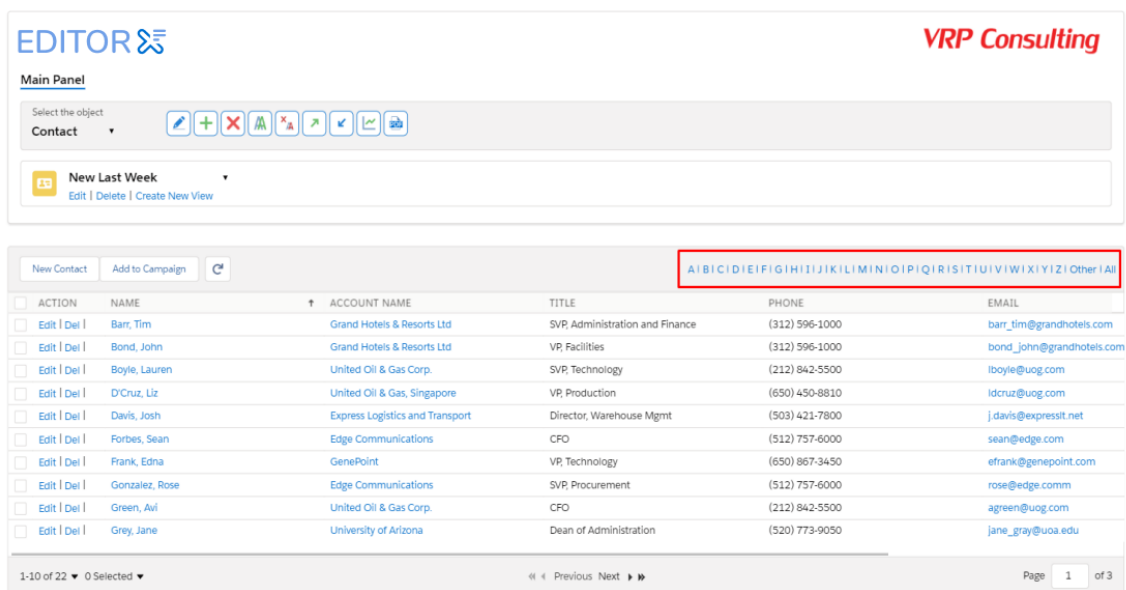
- |                                                                                     |                     |                                                                                     |               |
|-------------------------------------------------------------------------------------|---------------------|-------------------------------------------------------------------------------------|---------------|
|  | - Mass Edit         |  | - Export CSV  |
|  | - Mass Create       |  | - Import CSV  |
|  | - Mass Delete       |  | - Charts      |
|  | - Mass Clone        |  | - Save to PDF |
|  | - Remove Duplicates |                                                                                     |               |

For the Records of chosen Objects, Standard and Custom views can be used.



| ACTION                              | NAME          | ACCOUNT NAME               | TITLE               |
|-------------------------------------|---------------|----------------------------|---------------------|
| <input type="checkbox"/> Edit   Del | Barr, Tim     | United Oil & Gas Corp.     | SVP, Administration |
| <input type="checkbox"/> Edit   Del | Bond, John    | Grand Hotels & Resorts Ltd | VP, Facilities      |
| <input type="checkbox"/> Edit   Del | Boyle, Lauren | United Oil & Gas Corp.     | SVP, Technology     |

For quicker access to necessary Records, use alphabetical search.



| ACTION                              | NAME           | ACCOUNT NAME                    | TITLE                           | PHONE          | EMAIL                     |
|-------------------------------------|----------------|---------------------------------|---------------------------------|----------------|---------------------------|
| <input type="checkbox"/> Edit   Del | Barr, Tim      | Grand Hotels & Resorts Ltd      | SVP, Administration and Finance | (312) 596-1000 | barr_tim@grandhotels.com  |
| <input type="checkbox"/> Edit   Del | Bond, John     | Grand Hotels & Resorts Ltd      | VP, Facilities                  | (312) 596-1000 | bond_john@grandhotels.com |
| <input type="checkbox"/> Edit   Del | Boyle, Lauren  | United Oil & Gas Corp.          | SVP, Technology                 | (212) 842-5500 | lboyle@uog.com            |
| <input type="checkbox"/> Edit   Del | D'Cruz, Liz    | United Oil & Gas, Singapore     | VP, Production                  | (650) 450-8810 | ldcruz@uog.com            |
| <input type="checkbox"/> Edit   Del | Davis, Josh    | Express Logistics and Transport | Director, Warehouse Mgmt        | (503) 421-7800 | j.davis@expressit.net     |
| <input type="checkbox"/> Edit   Del | Forbes, Sean   | Edge Communications             | CFO                             | (512) 757-6000 | sean@edge.com             |
| <input type="checkbox"/> Edit   Del | Frank, Edna    | GenePoint                       | VP, Technology                  | (650) 867-3450 | efrank@genepoint.com      |
| <input type="checkbox"/> Edit   Del | Gonzalez, Rose | Edge Communications             | SVP, Procurement                | (512) 757-6000 | rose@edgecomm             |
| <input type="checkbox"/> Edit   Del | Green, Avi     | United Oil & Gas Corp.          | CFO                             | (212) 842-5500 | agreen@uog.com            |
| <input type="checkbox"/> Edit   Del | Grey, Jane     | University of Arizona           | Dean of Administration          | (520) 773-9050 | jane_gray@uoa.edu         |

Each Record can be edited and/or deleted.

| <input type="checkbox"/> | ACTION     | NAME           | ↑ | ACCOUNT NAME                | TITLE                          | PHONE           | EMAIL                     |
|--------------------------|------------|----------------|---|-----------------------------|--------------------------------|-----------------|---------------------------|
| <input type="checkbox"/> | Edit   Del | Barr, Tim      |   | United Oil & Gas Corp.      | SVP, Administration and Fin... | (312) 596-10000 | barr_tim@grandhotels.com  |
| <input type="checkbox"/> | Edit   Del | Bond, John     |   | Grand Hotels & Resorts Ltd  | VP, Facilities                 | (312) 596-1000  | bond_john@grandhotels.com |
| <input type="checkbox"/> | Edit   Del | Boyle, Lauren  |   | United Oil & Gas Corp.      | SVP, Technology                | (212) 842-5500  | lboyle@uog.com            |
| <input type="checkbox"/> | Edit   Del | D'Cruz, Liz    |   | United Oil & Gas, Singapore | VP, Production                 | (650) 450-8810  | ldcruz@uog.com            |
| <input type="checkbox"/> | Edit   Del | Davis, Josh    |   | Express Logistics and Trans | Director, Warehouse Mgmt       | (503) 421-7800  | j.davis@expressl&t.net    |
| <input type="checkbox"/> | Edit   Del | Forbes, Sean   |   | Edge Communications         | CFO                            | (512) 757-6000  | sean@edge.com             |
| <input type="checkbox"/> | Edit   Del | Frank, Edna    |   | GenePoint                   | VP, Technology                 | (650) 867-3450  | efrank@genepoint.com      |
| <input type="checkbox"/> | Edit   Del | Gonzalez, Rose |   | Edge Communications         | SVP, Procurement               | (512) 757-6000  | rose@edge.com             |
| <input type="checkbox"/> | Edit   Del | Green, Avi     |   | United Oil & Gas Corp.      | CFO                            | (212) 842-5500  | agreen@uog.com            |
| <input type="checkbox"/> | Edit   Del | Grey, Jane     |   | University of Arizona       | Dean of Administration         | (520) 773-9050  | jane_gray@uoa.edu         |

## EditorX Application Description

Here is how EditorX works for Mass Editing. Go to the EditorX tab and choose an Object you want to edit from the dropdown menu.

**EDITORX** VRP Consulting

Main Panel

Select the object

Lead

Account

Activity

Campaign

Case

Contact

Contract

Lead

ListViewFieldCache

Status

Change Owner

Add to Campaign

1-16 of 16 0 Selected

After choosing the Object type, choose Records to edit. Select proper checkboxes on the left side of the screen & click on  the Mass Edit button. **Note:** click on the Mass Edit button only after you select the Records you wish to edit. You can choose from 1 to 200 Records for Mass Edit.

**EDITORX** VRP Consulting

Main Panel

Select the object

Contact

New Last Week

Create New View

New Contact

Add to Campaign

1-22 of 22 3 Selected

After selecting the necessary Records and pressing the Mass Edit button, you'll see the following pop-up window. Edit the fields and click on Save.

**Mass Edit Page**

Column Settings

AVAILABLE FIELDS

- Last Name
- First Name
- Salutation
- Middle Name
- Informal Name
- Suffix

SELECTED FILTER FIELDS

- Name
- Title
- Phone
- Email
- Contact ID
- Created Date

Apply

| NAME         | TITLE                      | PHONE          | EMAIL                     | CONTACT ID      | CREATED DATE      | LAST MODIFIED DATE |
|--------------|----------------------------|----------------|---------------------------|-----------------|-------------------|--------------------|
| Tim Barr     | SVP, Administration and Fi | (312) 596-1000 | barr_tim@grandhotels.com  | 0032x000003ITEO | 5/8/2020, 5:43 AM | 5/11/2020, 1:48 AM |
| John Bond    | VP, Facilities             | (312) 596-1000 | bond_john@grandhotels.com | 0032x000003ITEP | 5/8/2020, 5:43 AM | 5/11/2020, 1:48 AM |
| Lauren Boyle | SVP, Technology            | (212) 842-5500 | lboyle@uog.com            | 0032x000003ITER | 5/8/2020, 5:43 AM | 5/11/2020, 1:48 AM |

Save Cancel

## Mass Delete of Records

To delete Records, go to the EditorX tab and select an Object you want to delete from the dropdown menu.

**EDITORX** VRP Consulting

Main Panel

Select the object

- Contact
- Account
- Activity
- Campaign
- Case
- Contact
- Contract
- Lead
- ListViewFieldCache
- Opportunity
- Product
- Price Book
- Pdf Relation
- Solution

Create New View

|                          | ACCOUNT NAME                    | TITLE                           | PHONE          | EMAIL                     |
|--------------------------|---------------------------------|---------------------------------|----------------|---------------------------|
| <input type="checkbox"/> | Grand Hotels & Resorts Ltd      | SVP, Administration and Finance | (312) 596-1000 | barr_tim@grandhotels.com  |
| <input type="checkbox"/> | Grand Hotels & Resorts Ltd      | VP, Facilities                  | (312) 596-1000 | bond_john@grandhotels.com |
| <input type="checkbox"/> | United Oil & Gas Corp.          | SVP, Technology                 | (212) 842-5500 | lboyle@uog.com            |
| <input type="checkbox"/> | United Oil & Gas, Singapore     | VP, Production                  | (650) 450-8810 | ldcruz@uog.com            |
| <input type="checkbox"/> | Express Logistics and Transport | Director, Warehouse Mgmt        | (503) 421-7800 | j.davis@expressit.net     |
| <input type="checkbox"/> | Edge Communications             | CFO                             | (512) 757-6000 | sean@edge.com             |
| <input type="checkbox"/> | GenePoint                       | VP, Technology                  | (650) 867-3450 | efrank@genepoint.com      |
| <input type="checkbox"/> | Edge Communications             | SVP, Procurement                | (512) 757-6000 | rose@edge.com             |
| <input type="checkbox"/> | United Oil & Gas Corp.          | CFO                             | (212) 842-5500 | agreen@uog.com            |
| <input type="checkbox"/> | University of Arizona           | Dean of Administration          | (520) 773-9050 | jane_gray@uoa.edu         |

1-19 of 19 0 Selected Previous Next Page 1 of 1

Now choose the Records you want to delete. Mark the necessary checkboxes on the left side of the screen and click the Mass Delete button. **Note:** Select the necessary Records before clicking Mass Delete. You can choose from one to 200 Records for Mass Delete.

EDITOR

VRP Consulting

Main Panel

Select the object

Contact

All Contacts

Edit | Delete | Create New View

New Contact

Add to Campaign

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z I Other | All

|                                     | ACTION     | NAME           | ACCOUNT NAME                    | TITLE                           | PHONE          | EMAIL                     | CONTACT OWNER ALIAS |
|-------------------------------------|------------|----------------|---------------------------------|---------------------------------|----------------|---------------------------|---------------------|
| <input checked="" type="checkbox"/> | Edit   Del | Barr, Tim      | Grand Hotels & Resorts Ltd      | SVP, Administration and Finance | (312) 596-1000 | barr_tim@grandhotels.com  | OMych               |
| <input checked="" type="checkbox"/> | Edit   Del | Bond, John     | Grand Hotels & Resorts Ltd      | VP, Facilities                  | (312) 596-1000 | bond_john@grandhotels.com | OMych               |
| <input checked="" type="checkbox"/> | Edit   Del | Boyle, Lauren  | United Oil & Gas Corp.          | SVP, Technology                 | (212) 842-5500 | lboyle@uog.com            | OMych               |
| <input checked="" type="checkbox"/> | Edit   Del | D'Cruz, Liz    | United Oil & Gas, Singapore     | VP, Production                  | (650) 450-8810 | ldcruz@uog.com            | OMych               |
| <input type="checkbox"/>            | Edit   Del | Davis, Josh    | Express Logistics and Transport | Director, Warehouse Mgmt        | (503) 421-7800 | j.davis@expressit.net     | OMych               |
| <input type="checkbox"/>            | Edit   Del | Forbes, Sean   | Edge Communications             | CFO                             | (512) 757-6000 | sean@edge.com             | OMych               |
| <input type="checkbox"/>            | Edit   Del | Frank, Edna    | GenePoint                       | VP, Technology                  | (650) 867-3450 | efrank@genepoint.com      | OMych               |
| <input type="checkbox"/>            | Edit   Del | Gonzalez, Rose | Edge Communications             | SVP, Procurement                | (512) 757-6000 | rose@edge.comm            | OMych               |
| <input type="checkbox"/>            | Edit   Del | Green, Avi     | United Oil & Gas Corp.          | CFO                             | (212) 842-5500 | agreen@uog.com            | OMych               |
| <input type="checkbox"/>            | Edit   Del | Grey, Jane     | University of Arizona           | Dean of Administration          | (520) 773-9050 | jane_gray@uoa.edu         | OMych               |

1-22 of 22

13 Selected

« Previous Next »

Page 1 of 1

Right after clicking Mass Delete, a confirmation message will appear on the screen. Click OK if you would like to delete the selected Records.

An embedded page at [vrprce.ap16.visual.force.com](http://vrprce.ap16.visual.force.com) says

Are you sure?

OK

Cancel

After the confirmation, the window will refresh to update the results of the Mass Delete.

**EDITORX** VRP Consulting

**Main Panel**

Select the object  
**Contact**

**All Contacts**  
Edit | Delete | Create New View

New Contact | Add to Campaign

| ACTION                              | NAME           | ACCOUNT NAME                    | TITLE                           | PHONE           | EMAIL                     | CONTACT OWNER ALIAS |
|-------------------------------------|----------------|---------------------------------|---------------------------------|-----------------|---------------------------|---------------------|
| <input type="checkbox"/> Edit   Del | Barr, Tim      | Grand Hotels & Resorts Ltd      | SVP, Administration and Finance | (312) 596-1000  | barr_tim@grandhotels.com  | OMych               |
| <input type="checkbox"/> Edit   Del | Bond, John     | Grand Hotels & Resorts Ltd      | VP, Facilities                  | (312) 596-1000  | bond_john@grandhotels.com | OMych               |
| <input type="checkbox"/> Edit   Del | Boyle, Lauren  | United Oil & Gas Corp.          | SVP, Technology                 | (212) 842-5500  | lboyle@uog.com            | OMych               |
| <input type="checkbox"/> Edit   Del | D'Cruz, Liz    | United Oil & Gas, Singapore     | VP, Production                  | (650) 450-8810  | ldcruz@uog.com            | OMych               |
| <input type="checkbox"/> Edit   Del | Davis, Josh    | Express Logistics and Transport | Director, Warehouse Mgmt        | (503) 421-7800  | j.davis@expressit.net     | OMych               |
| <input type="checkbox"/> Edit   Del | Forbes, Sean   | Edge Communications             | CFO                             | (512) 757-6000  | sean@edge.com             | OMych               |
| <input type="checkbox"/> Edit   Del | Frank, Edna    | GenePoint                       | VP, Technology                  | (650) 867-3450  | efrank@genepoint.com      | OMych               |
| <input type="checkbox"/> Edit   Del | Gonzalez, Rose | Edge Communications             | SVP, Procurement                | (512) 757-6000  | rose@edge.comm            | OMych               |
| <input type="checkbox"/> Edit   Del | Green, Avi     | United Oil & Gas Corp.          | CFO                             | (212) 842-5500  | agreen@uog.com            | OMych               |
| <input type="checkbox"/> Edit   Del | Grey, Jane     | University of Arizona           | Dean of Administration          | (520) 773-9050  | jane_gray@uoa.edu         | OMych               |
| <input type="checkbox"/> Edit   Del | James, Achlev  | United Oil & Gas, UK            | VP Finance                      | +44 191 4956203 | ajames@uog.com            | OMych               |

1-19 of 19 | 0 Selected | Page 1 of 1

## EditorX for Mass Create

Go to the EditorX tab, select the type of the Object, and click the button.

**EDITORX** VRP Consulting

**Main Panel**

Select the object  
**Opportunity**

**Opportunities**  
Create New View

| ACTION                              | OPPORTUNITY NAME                    | ACCOUNT NAME                       | AMOUNT       | CLOSE DATE | STAGE               | OPPORTUNITY OWNER A... |
|-------------------------------------|-------------------------------------|------------------------------------|--------------|------------|---------------------|------------------------|
| <input type="checkbox"/> Edit   Del | Burlington Textiles Weaving Pla...  | Burlington Textiles Corp of Ame... | \$235,000.00 | 3/10/2020  | Closed Won          | OMych                  |
| <input type="checkbox"/> Edit   Del | Dickenson Mobile Generators         | Dickenson pic                      | \$15,000.00  | 5/11/2020  | Qualification       | OMych                  |
| <input type="checkbox"/> Edit   Del | Edge Emergency Generator            | Edge Communications                | \$75,000.00  | 5/4/2020   | Closed Won          | OMych                  |
| <input type="checkbox"/> Edit   Del | Edge Emergency Generator            | Edge Communications                | \$35,000.00  | 5/10/2020  | Id. Decision Makers | OMych                  |
| <input type="checkbox"/> Edit   Del | Edge Installation                   | Edge Communications                | \$50,000.00  | 2/24/2020  | Closed Won          | OMych                  |
| <input type="checkbox"/> Edit   Del | Edge SLA                            | Edge Communications                | \$60,000.00  | 1/20/2020  | Closed Won          | OMych                  |
| <input type="checkbox"/> Edit   Del | Express Logistics Portable Truck... | Express Logistics and Transport    | \$80,000.00  | 1/28/2020  | Value Proposition   | OMych                  |
| <input type="checkbox"/> Edit   Del | Express Logistics SLA               | Express Logistics and Transport    | \$120,000.00 | 1/29/2020  | Perception Analysis | OMych                  |
| <input type="checkbox"/> Edit   Del | Express Logistics Standby Gene...   | Express Logistics and Transport    | \$220,000.00 | 1/30/2020  | Closed Won          | OMych                  |
| <input type="checkbox"/> Edit   Del | GenePoint Lab Generators            | GenePoint                          | \$60,000.00  | 4/28/2020  | Id. Decision Makers | OMych                  |

1-25 of 31 | 0 Selected | Page 1 of 2

A Mass Create page will appear:

The screenshot shows the 'Mass Create Page' interface. At the top, there's a 'Column Settings' section with two columns: 'AVAILABLE FIELDS' and 'SELECTED FILTER FIELDS'. The 'AVAILABLE FIELDS' column lists: Private, Probability (%), Quantity, Opportunity Type, Next Step, and Lead Source. The 'SELECTED FILTER FIELDS' column lists: Opportunity Name, Amount, Close Date, Stage, Opportunity ID, and Created Date. Below these columns is a table with headers: OPPORTUNITY NAME, AMOUNT, CLOSE DATE, STAGE, OPPORTUNITY ID, CREATED DATE, and LAST MODIFIED DATE. The table has one row with input fields for each header. The 'CLOSE DATE' field has a date picker showing '5/11/2020'. Below the table is a '+Add Row' button. At the bottom right, there are 'Save' and 'Cancel' buttons.

New rows can be added by pressing the button “+Add Row”.

This screenshot shows the 'Mass Create Page' interface with two rows in the table. Each row has input fields for OPPORTUNITY NAME, AMOUNT, CLOSE DATE (with a date picker showing '5/4/2020'), and STAGE (with a dropdown menu showing '--None--'). Below the table is a '+Add Row' button. A red arrow points to the '+Add Row' button.

Click on the red icon to delete Rows.

This screenshot shows the 'Mass Create Page' interface with two rows in the table. Each row has input fields for OPPORTUNITY NAME, AMOUNT, CLOSE DATE (with a date picker showing '5/4/2020'), and STAGE (with a dropdown menu showing '--None--'). A red square icon with a white 'x' is located to the left of each row, indicating a delete action. Below the table is a '+Add Row' button.

Use “Column Settings” to add a new Column.

Column Settings

AVAILABLE FIELDS

- Private
- Probability (%)
- Quantity
- Opportunity Type
- Next Step
- Lead Source
- Forecast Category
- Forecast Category
- Campaign ID
- Price Book ID

SELECTED FILTER FIELDS

- Opportunity Name
- Amount
- Close Date
- Stage
- Opportunity ID
- Created Date
- Last Modified Date
- System Modstamp
- Account ID
- Owner ID

Apply

Now choose the necessary Fields to add from the Filter. Manage the Fields using the Add/Remove buttons.

Mass Create Page

Column Settings

AVAILABLE FIELDS

- Private
- Probability (%)
- Quantity
- Opportunity Type
- Next Step
- Lead Source

SELECTED FILTER FIELDS

- Opportunity Name
- Amount
- Owner ID
- Close Date
- Stage
- Opportunity ID

Apply

| OPPORTUNITY NAME     | AMOUNT               | OWNER ID                                              | CLOSE DATE                        | STAGE                                 | OPPORTUNITY ID |
|----------------------|----------------------|-------------------------------------------------------|-----------------------------------|---------------------------------------|----------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> <input type="button" value="Q"/> | <input type="text"/> [ 5/4/2020 ] | <input type="text" value="--None--"/> |                |

+Add Row

Save Cancel

The chosen Fields are displayed in the Selected Filter Fields.

Mass Create Page

Column Settings

AVAILABLE FIELDS

- Private
- Probability (%)
- Opportunity Type
- Next Step
- Forecast Category
- Forecast Category

SELECTED FILTER FIELDS

- Opportunity ID
- Created Date
- Last Modified Date
- System Modstamp
- Account ID
- Quantity
- Lead Source

Apply

| OPPORTUNITY NAME       | AMOUNT               | OWNER ID                 | CLOSE DATE                          | STAGE      | OPPORTUNITY ID |
|------------------------|----------------------|--------------------------|-------------------------------------|------------|----------------|
| * <input type="text"/> | <input type="text"/> | * <input type="text"/> Q | * <input type="text"/> [ 5/4/2020 ] | * --None-- |                |

+Add Row

Save Cancel

Click Apply after adding the required Fields to the Selected Filter Fields.

Mass Create Page

Column Settings

AVAILABLE FIELDS

- Private
- Probability (%)
- Opportunity Type
- Next Step
- Forecast Category
- Forecast Category

SELECTED FILTER FIELDS

- Opportunity ID
- Created Date
- Last Modified Date
- System Modstamp
- Account ID
- Quantity
- Lead Source

Apply

| OPPORTUNITY NAME       | AMOUNT               | OWNER ID                 | CLOSE DATE                          | STAGE      | OPPORTUNITY ID |
|------------------------|----------------------|--------------------------|-------------------------------------|------------|----------------|
| * <input type="text"/> | <input type="text"/> | * <input type="text"/> Q | * <input type="text"/> [ 5/4/2020 ] | * --None-- |                |

+Add Row

Save Cancel

The selected Fields will be displayed on the Mass Create Page.

| DATE | LAST MODIFIED DATE | SYSTEM MODSTAMP | ACCOUNT ID           | QUANTITY             | LEAD SOURCE |
|------|--------------------|-----------------|----------------------|----------------------|-------------|
|      |                    |                 | <input type="text"/> | <input type="text"/> | --None--    |

Save Cancel

Fill in the necessary Fields and click Save.

Mass Create Page

Column Settings

AVAILABLE FIELDS

Private  
Probability (%)  
Opportunity Type  
Next Step  
Forecast Category  
Forecast Category

SELECTED FILTER FIELDS

Opportunity ID  
Created Date  
Last Modified Date  
System Modstamp  
Account ID  
Quantity  
Lead Source

Apply

| NAME                                    | AMOUNT                          | OWNER ID                                 | CLOSE DATE                                            | STAGE                                    | OPPORTUNITY ID |
|-----------------------------------------|---------------------------------|------------------------------------------|-------------------------------------------------------|------------------------------------------|----------------|
| <input type="text" value="Jogn Smith"/> | <input type="text" value="35"/> | <input type="text" value="Olga Mychko"/> | <input type="text" value="5/4/2020"/><br>[ 5/4/2020 ] | <input type="text" value="Prospecting"/> |                |
| <span>+Add Row</span>                   |                                 |                                          |                                                       |                                          |                |

Save Cancel

You will see the following message:

**Mass Create Page** ✓ SUCCESS!! 1 Records were saved successfully

Column Settings

AVAILABLE FIELDS

- Forecast Category
- Campaign ID
- Price Book ID
- Contact ID
- Delivery/Installation Status
- Tracking Number

SELECTED FILTER FIELDS

- Name
- Amount
- Owner ID
- Close Date
- Stage
- Account ID

Apply

| NAME                 | AMOUNT               | OWNER ID             | CLOSE DATE                            | STAGE                                 | ACCOUNT ID           |
|----------------------|----------------------|----------------------|---------------------------------------|---------------------------------------|----------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text" value="5/4/2020"/> | <input type="text" value="--None--"/> | <input type="text"/> |

+Add Row

Save Cancel

Here are the results of Mass Create:

New Opportunity

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z I Other | All

| ACTION                              | OPPORTUNITY ...             | ACCOUNT NAME                | AMOUNT       | CLOSE DATE | STAGE               | OPPORTUNITY ... |
|-------------------------------------|-----------------------------|-----------------------------|--------------|------------|---------------------|-----------------|
| <input type="checkbox"/> Edit   Del | Express Logistics SLA       | Express Logistics and Tr... | \$120,000.00 | 11/13/2019 | Closed Lost         | OMych           |
| <input type="checkbox"/> Edit   Del | Express Logistics Standb... | Express Logistics and Tr... | \$220,000.00 | 11/14/2019 | Closed Won          | OMych           |
| <input type="checkbox"/> Edit   Del | GenePoint Lab Generat...    | GenePoint                   | \$60,000.00  | 2/11/2020  | Id. Decision Makers | OMych           |
| <input type="checkbox"/> Edit   Del | GenePoint SLA               | GenePoint                   | \$30,000.00  | 2/14/2020  | Closed Won          | OMych           |
| <input type="checkbox"/> Edit   Del | GenePoint Standby Gen...    | GenePoint                   | \$85,000.00  | 12/22/2019 | Closed Won          | OMych           |
| <input type="checkbox"/> Edit   Del | Grand Hotels Emergenc...    | Grand Hotels & Resorts ...  | \$210,000.00 | 1/29/2020  | Closed Won          | OMych           |
| <input type="checkbox"/> Edit   Del | Grand Hotels Generator ...  | Grand Hotels & Resorts ...  | \$350,000.00 | 1/31/2020  | Closed Won          | OMych           |
| <input type="checkbox"/> Edit   Del | Grand Hotels Guest Port...  | Grand Hotels & Resorts ...  | \$250,000.00 | 2/17/2020  | Value Proposition   | OMych           |
| <input type="checkbox"/> Edit   Del | Grand Hotels Kitchen G...   | Grand Hotels & Resorts ...  | \$15,000.00  | 11/9/2019  | Id. Decision Makers | OMych           |
| <input type="checkbox"/> Edit   Del | Grand Hotels SLA            | Grand Hotels & Resorts ...  | \$90,000.00  | 11/11/2019 | Closed Won          | OMych           |
| <input type="checkbox"/> Edit   Del | John Smith                  |                             | \$35.00      | 5/4/2020   | Prospecting         | OMych           |

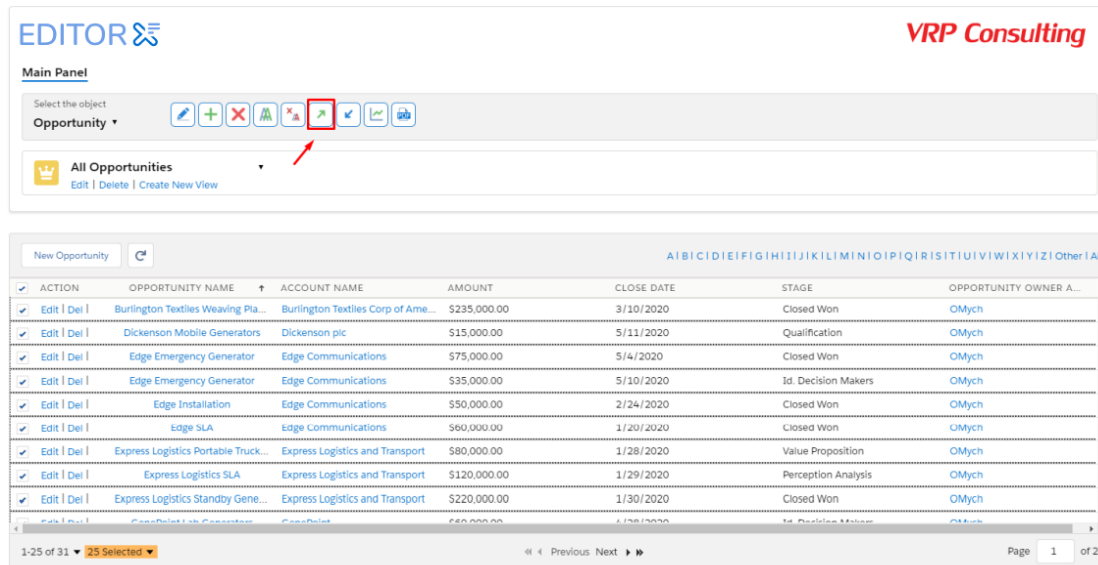
1-25 of 29 0 Selected

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## EditorX 1.27 Version

Use EditorX to export data from Salesforce via a CSV file. Choose the Records you would like to export and press  button.

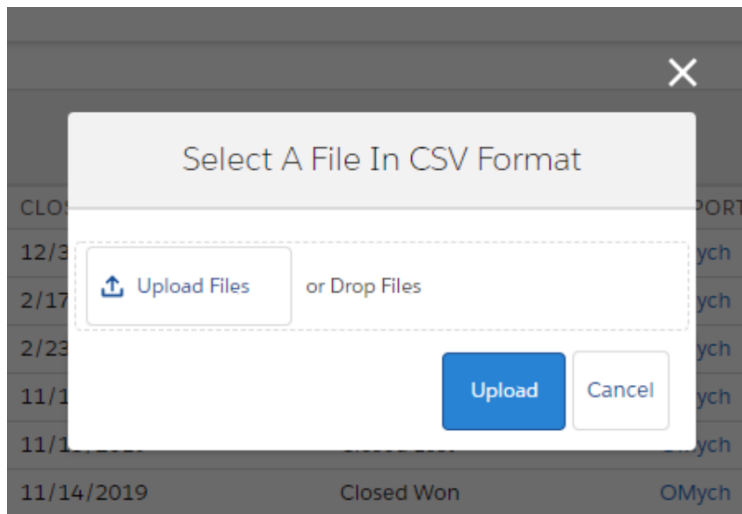


The screenshot shows the EditorX 1.27 interface. At the top, there's a header with the 'EDITORX' logo and 'VRP Consulting' text. Below the header is the 'Main Panel' which includes a 'Select the object' dropdown set to 'Opportunity'. A toolbar contains several icons, with the 'Export' icon (a document with a download arrow) highlighted by a red arrow. Below the toolbar, there's a section for 'All Opportunities' with a dropdown menu. The main area displays a table of opportunities with columns: ACTION, OPPORTUNITY NAME, ACCOUNT NAME, AMOUNT, CLOSE DATE, STAGE, and OPPORTUNITY OWNER. The table lists various opportunities like 'Burlington Textiles Weaving Pla...', 'Dickenson Mobile Generators', 'Edge Emergency Generator', etc. At the bottom, there's a pagination bar showing '1-25 of 31' and '25 Selected'.

The download of the CSV file will begin. The data in the downloaded file will be displayed in the following way:

|    | A                        | B      | C              | D                   | E                   | F              | G                | H              | I                  | J                  | K | L |
|----|--------------------------|--------|----------------|---------------------|---------------------|----------------|------------------|----------------|--------------------|--------------------|---|---|
| 1  | Name                     | Amount | CloseDate      | StageName           | Id                  | CreatedDate    | LastModifiedDate | SystemModstamp | AccountId          | OwnerId            |   |   |
| 2  | Burlington Textiles Wea  | 235000 | 3/10/2020 0:00 | Closed Won          | 0062x00000350qUAAQ  | 5/11/2020 8:52 | 5/11/2020 8:52   | 5/11/2020 8:52 | 0012x000005BBH2AAO | 0052x000001WEzKAAG |   |   |
| 3  | Dickenson Mobile Gene    | 15000  | 5/11/2020 0:00 | Qualification       | 0062x000003hdAKAAY  | 5/8/2020 12:43 | 5/11/2020 6:45   | 5/11/2020 6:45 | 0012x000005BBH1AAO | 0052x000001WEzKAAG |   |   |
| 4  | United Oil Office Portat | 125000 | 5/10/2020 0:00 | Negotiation/Review  | 0062x000003hdALAAAY | 5/8/2020 12:43 | 5/11/2020 6:45   | 5/11/2020 6:45 | 0012x000005BBH3AAO | 0052x000001WEzKAAG |   |   |
| 5  | Express Logistics Standb | 220000 | 1/30/2020 0:00 | Closed Won          | 0062x000003hdAMAAY  | 5/8/2020 12:43 | 5/11/2020 6:45   | 5/11/2020 6:45 | 0012x000005BBH4AAO | 0052x000001WEzKAAG |   |   |
| 6  | GenePoint Standby Gen    | 85000  | 3/8/2020 0:00  | Closed Won          | 0062x000003hdANAAY  | 5/8/2020 12:43 | 5/11/2020 6:45   | 5/11/2020 6:45 | 0012x000005BBH8AAO | 0052x000001WEzKAAG |   |   |
| 7  | Grand Hotels Kitchen Gi  | 15000  | 1/25/2020 0:00 | Id. Decision Makers | 0062x000003hdAOAAAY | 5/8/2020 12:43 | 5/11/2020 6:45   | 5/11/2020 6:45 | 0012x000005BBH2AAO | 0052x000001WEzKAAG |   |   |
| 8  | United Oil Refinery Gen  | 270000 | 4/19/2020 0:00 | Proposal/Price Quot | 0062x000003hdAPAAAY | 5/8/2020 12:43 | 5/11/2020 6:45   | 5/11/2020 6:45 | 0012x000005BBH3AAO | 0052x000001WEzKAAG |   |   |
| 9  | Grand Hotels Guest Port  | 250000 | 5/4/2020 0:00  | Value Proposition   | 0062x000003hdASAAAY | 5/8/2020 12:43 | 5/11/2020 6:45   | 5/11/2020 6:45 | 0012x000005BBH2AAO | 0052x000001WEzKAAG |   |   |
| 10 | Edge Emergency Genera    | 75000  | 5/4/2020 0:00  | Closed Won          | 0062x000003hdASAAAY | 5/8/2020 12:43 | 5/11/2020 6:45   | 5/11/2020 6:45 | 0012x000005BBH4AAO | 0052x000001WEzKAAG |   |   |
| 11 | Pyramid Emergency Ger    | 100000 | 3/13/2020 0:00 | Prospecting         | 0062x000003hdAUAAAY | 5/8/2020 12:43 | 5/11/2020 6:45   | 5/11/2020 6:45 | 0012x000005BBH0AAO | 0052x000001WEzKAAG |   |   |
| 12 | Express Logistics Portab | 80000  | 1/28/2020 0:00 | Value Proposition   | 0062x000003hdAVAAY  | 5/8/2020 12:43 | 5/11/2020 6:45   | 5/11/2020 6:45 | 0012x000005BBH4AAO | 0052x000001WEzKAAG |   |   |
| 13 | GenePoint Lab Generati   | 60000  | 4/28/2020 0:00 | Id. Decision Makers | 0062x000003hdAWAAAY | 5/8/2020 12:43 | 5/11/2020 6:45   | 5/11/2020 6:45 | 0012x000005BBH8AAO | 0052x000001WEzKAAG |   |   |
| 14 | GenePoint SLA            | 30000  | 5/1/2020 0:00  | Closed Won          | 0062x000003hdAXAAAY | 5/8/2020 12:43 | 5/11/2020 6:45   | 5/11/2020 6:45 | 0012x000005BBH8AAO | 0052x000001WEzKAAG |   |   |
| 15 | United Oil Installations | 270000 | 3/1/2020 0:00  | Negotiation/Review  | 0062x000003hdDAYAAY | 5/8/2020 12:43 | 5/11/2020 6:45   | 5/11/2020 6:45 | 0012x000005BBH3AAO | 0052x000001WEzKAAG |   |   |
| 16 | Edge Installation        | 50000  | 2/24/2020 0:00 | Closed Won          | 0062x000003hdAZAAAY | 5/8/2020 12:43 | 5/11/2020 6:45   | 5/11/2020 6:45 | 0012x000005BBH4AAO | 0052x000001WEzKAAG |   |   |
| 17 | Edge SLA                 | 60000  | 1/20/2020 0:00 | Closed Won          | 0062x000003hdAaAAI  | 5/8/2020 12:43 | 5/11/2020 6:45   | 5/11/2020 6:45 | 0012x000005BBH4AAO | 0052x000001WEzKAAG |   |   |
| 18 | United Oil Installations | 270000 | 2/29/2020 0:00 | Closed Won          | 0062x000003hdAbAAI  | 5/8/2020 12:43 | 5/11/2020 6:45   | 5/11/2020 6:45 | 0012x000005BBH3AAO | 0052x000001WEzKAAG |   |   |
| 19 | Grand Hotels Generator   | 350000 | 4/17/2020 0:00 | Closed Won          | 0062x000003hdAcAAI  | 5/8/2020 12:43 | 5/11/2020 6:45   | 5/11/2020 6:45 | 0012x000005BBH2AAO | 0052x000001WEzKAAG |   |   |
| 20 | Express Logistics SLA    | 120000 | 1/29/2020 0:00 | Perception Analysis | 0062x000003hdAfAAI  | 5/8/2020 12:43 | 5/11/2020 6:45   | 5/11/2020 6:45 | 0012x000005BBH4AAO | 0052x000001WEzKAAG |   |   |
| 21 | United Oil Installations | 235000 | 3/12/2020 0:00 | Closed Won          | 0062x000003hdAiAAI  | 5/8/2020 12:43 | 5/11/2020 6:45   | 5/11/2020 6:45 | 0012x000005BBH3AAO | 0052x000001WEzKAAG |   |   |
| 22 | United Oil Emergency G   | 440000 | 2/23/2020 0:00 | Closed Won          | 0062x000003hdAjAAI  | 5/8/2020 12:43 | 5/11/2020 6:45   | 5/11/2020 6:45 | 0012x000005BBH3AAO | 0052x000001WEzKAAG |   |   |
| 23 | Grand Hotels SLA         | 90000  | 1/27/2020 0:00 | Closed Won          | 0062x000003hdAkAAI  | 5/8/2020 12:43 | 5/11/2020 6:45   | 5/11/2020 6:45 | 0012x000005BBH2AAO | 0052x000001WEzKAAG |   |   |
| 24 | Grand Hotels Emergenc    | 210000 | 4/15/2020 0:00 | Closed Won          | 0062x000003hdAmAAI  | 5/8/2020 12:43 | 5/11/2020 6:45   | 5/11/2020 6:45 | 0012x000005BBH2AAO | 0052x000001WEzKAAG |   |   |
| 25 | United Oil Plant Standb  | 675000 | 3/29/2020 0:00 | Needs Analysis      | 0062x000003hdAnAAI  | 5/8/2020 12:43 | 5/11/2020 6:45   | 5/11/2020 6:45 | 0012x000005BBH3AAO | 0052x000001WEzKAAG |   |   |
| 26 | Edge Emergency Generi    | 35000  | 5/10/2020 0:00 | Id. Decision Makers | 0062x000003hdAoAAI  | 5/8/2020 12:43 | 5/11/2020 6:45   | 5/11/2020 6:45 | 0012x000005BBH4AAO | 0052x000001WEzKAAG |   |   |
| 27 |                          |        |                |                     |                     |                |                  |                |                    |                    |   |   |

For data Import from CSV, click the  Button. You'll see a Popup window asking you to choose a file to import. Choose the file from your computer and click Upload.



Here are the newly imported Records:

**EDITOR**

VRP Consulting

Main Panel

Select the object

Opportunity

New This Week

Edit | Delete | Create New View

New Opportunity

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z I Other | All

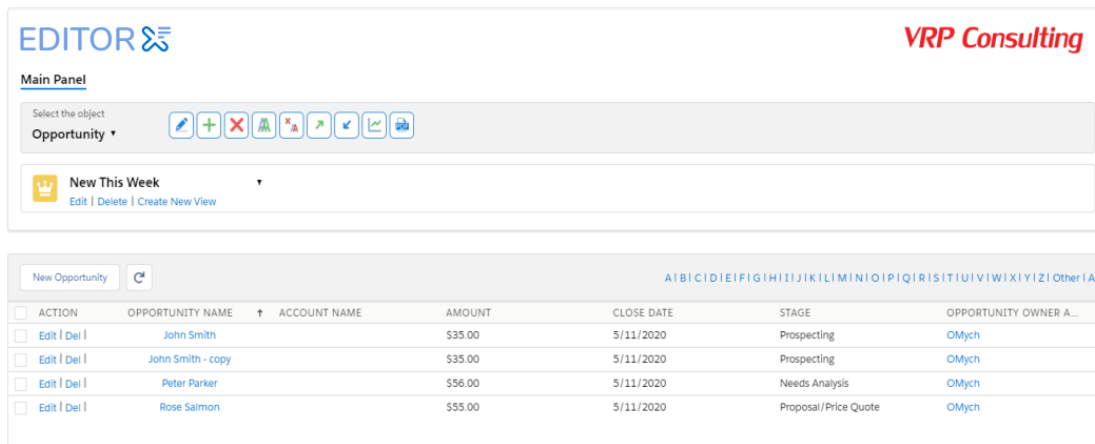
| ACTION                              | OPPORTUNITY NAME | ACCOUNT NAME | AMOUNT  | CLOSE DATE | STAGE                | OPPORTUNITY OWNER A... |
|-------------------------------------|------------------|--------------|---------|------------|----------------------|------------------------|
| <input type="checkbox"/> Edit   Del | John Smith       |              | \$35.00 | 5/11/2020  | Prospecting          | OMych                  |
| <input type="checkbox"/> Edit   Del | Peter Parker     |              | \$56.00 | 5/11/2020  | Needs Analysis       | OMych                  |
| <input type="checkbox"/> Edit   Del | Rose Salmon      |              | \$55.00 | 5/11/2020  | Proposal/Price Quote | OMych                  |

1-3 of 3 0 Selected

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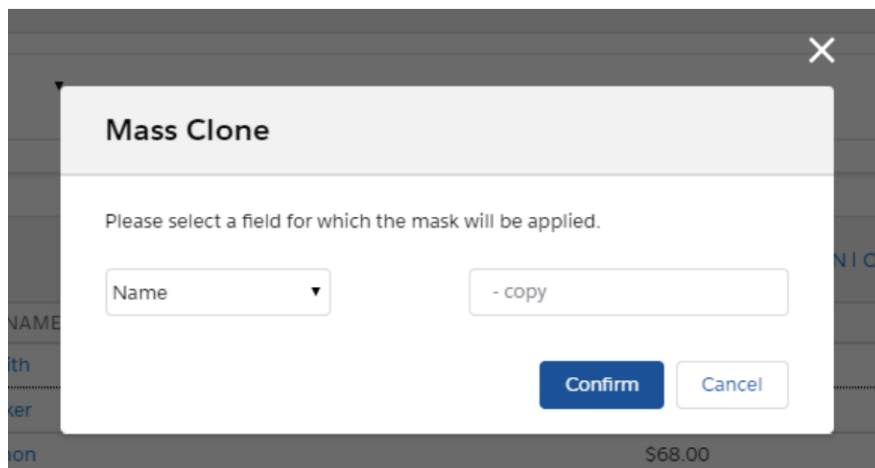
EditorX 1.27 allows you to clone necessary Records. Select the Records you want to clone and press  (the Mass Clone Button).



The screenshot shows the EditorX 1.27 interface. At the top, there's a header with the 'EDITORX' logo and 'VRP Consulting' text. Below the header is a 'Main Panel' with a 'Select the object' dropdown set to 'Opportunity'. A toolbar contains various icons, including a green 'A' icon for cloning. Below the toolbar is a 'New This Week' section with a crown icon and links for 'Edit', 'Delete', and 'Create New View'. The main area displays a table of Opportunities.

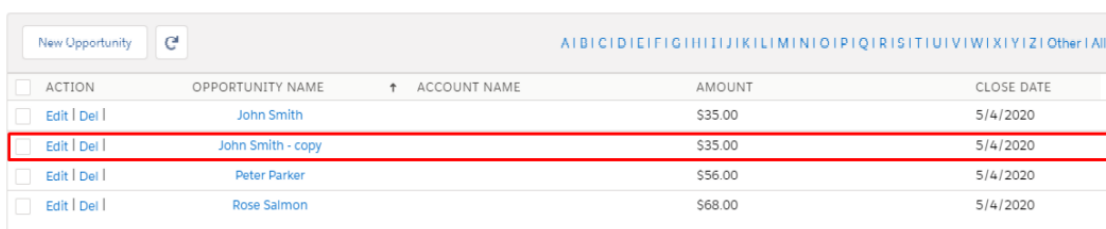
| ACTION                              | OPPORTUNITY NAME  | ACCOUNT NAME | AMOUNT  | CLOSE DATE | STAGE                | OPPORTUNITY OWNER A... |
|-------------------------------------|-------------------|--------------|---------|------------|----------------------|------------------------|
| <input type="checkbox"/> Edit   Del | John Smith        |              | \$35.00 | 5/11/2020  | Prospecting          | OMych                  |
| <input type="checkbox"/> Edit   Del | John Smith - copy |              | \$35.00 | 5/11/2020  | Prospecting          | OMych                  |
| <input type="checkbox"/> Edit   Del | Peter Parker      |              | \$56.00 | 5/11/2020  | Needs Analysis       | OMych                  |
| <input type="checkbox"/> Edit   Del | Rose Salmon       |              | \$55.00 | 5/11/2020  | Proposal/Price Quote | OMych                  |

Select a Field for which the mask will be applied, name it and click Confirm.



The screenshot shows a 'Mass Clone' dialog box. It has a title bar with a close button. The main text says 'Please select a field for which the mask will be applied.' Below this is a dropdown menu labeled 'Name' and a text input field containing '- copy'. At the bottom right are two buttons: 'Confirm' and 'Cancel'.

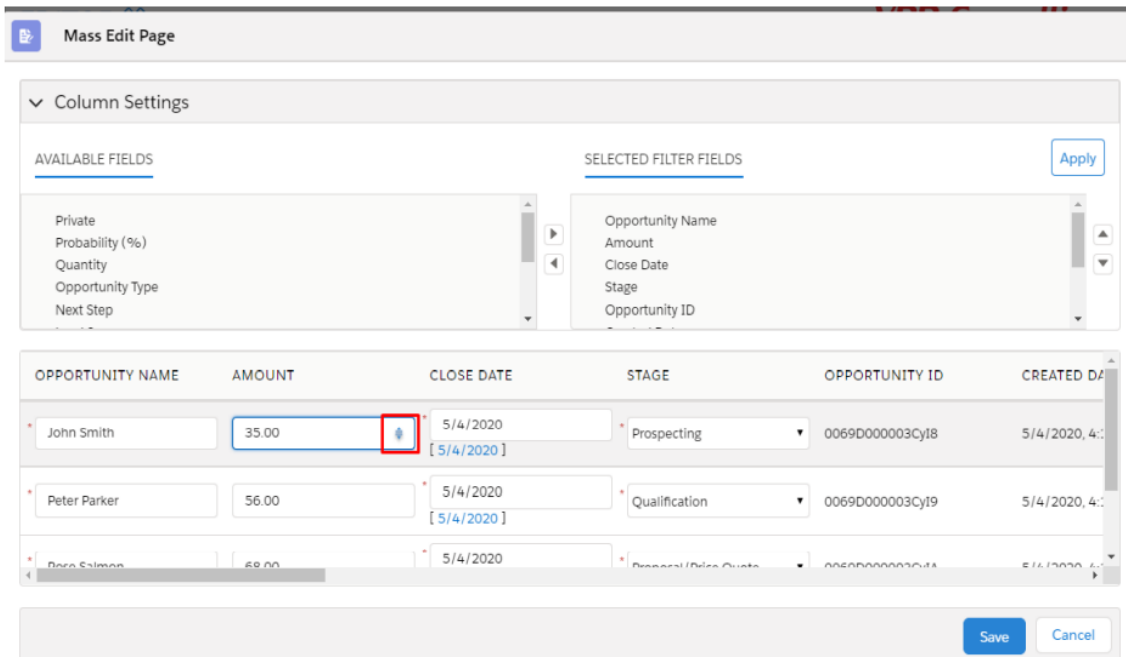
A new Record will be added to the list below.



The screenshot shows the EditorX 1.27 interface with the updated table of Opportunities. The table now includes a new record, 'John Smith - copy', which is highlighted with a red border.

| ACTION                              | OPPORTUNITY NAME  | ACCOUNT NAME | AMOUNT  | CLOSE DATE |
|-------------------------------------|-------------------|--------------|---------|------------|
| <input type="checkbox"/> Edit   Del | John Smith        |              | \$35.00 | 5/4/2020   |
| <input type="checkbox"/> Edit   Del | John Smith - copy |              | \$35.00 | 5/4/2020   |
| <input type="checkbox"/> Edit   Del | Peter Parker      |              | \$56.00 | 5/4/2020   |
| <input type="checkbox"/> Edit   Del | Rose Salmon       |              | \$68.00 | 5/4/2020   |

EditorX 1.27 enables you to fill in a Column with the same value. Place the cursor to the Field you want to copy and press the  icon. The data contained in the Field will be copied and automatically changed in the fields of the Column.



Mass Edit Page

Column Settings

AVAILABLE FIELDS

- Private
- Probability (%)
- Quantity
- Opportunity Type
- Next Step

SELECTED FILTER FIELDS

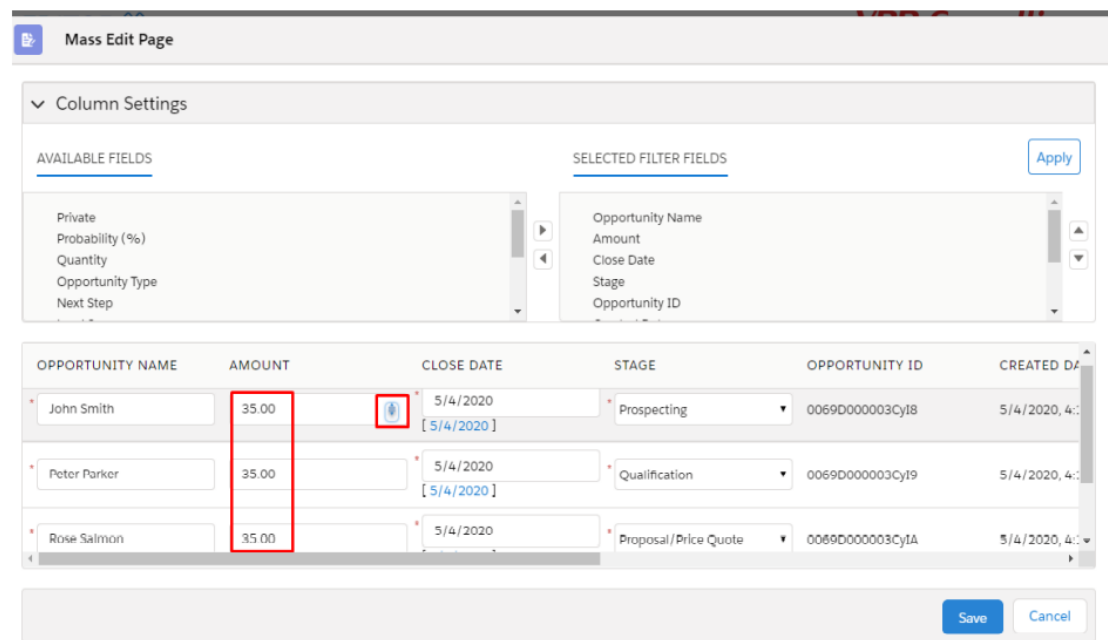
- Opportunity Name
- Amount
- Close Date
- Stage
- Opportunity ID

Apply

| OPPORTUNITY NAME | AMOUNT | CLOSE DATE               | STAGE                | OPPORTUNITY ID  | CREATED DATE   |
|------------------|--------|--------------------------|----------------------|-----------------|----------------|
| John Smith       | 35.00  | 5/4/2020<br>[ 5/4/2020 ] | Prospecting          | 0069D000003CyI8 | 5/4/2020, 4:00 |
| Peter Parker     | 56.00  | 5/4/2020<br>[ 5/4/2020 ] | Qualification        | 0069D000003CyI9 | 5/4/2020, 4:00 |
| Rose Salmon      | 68.00  | 5/4/2020                 | Proposal/Price Quote | 0069D000003CyIA | 5/4/2020, 4:00 |

Save Cancel

Using this functionality you can edit any Column. Here is the result:



Mass Edit Page

Column Settings

AVAILABLE FIELDS

- Private
- Probability (%)
- Quantity
- Opportunity Type
- Next Step

SELECTED FILTER FIELDS

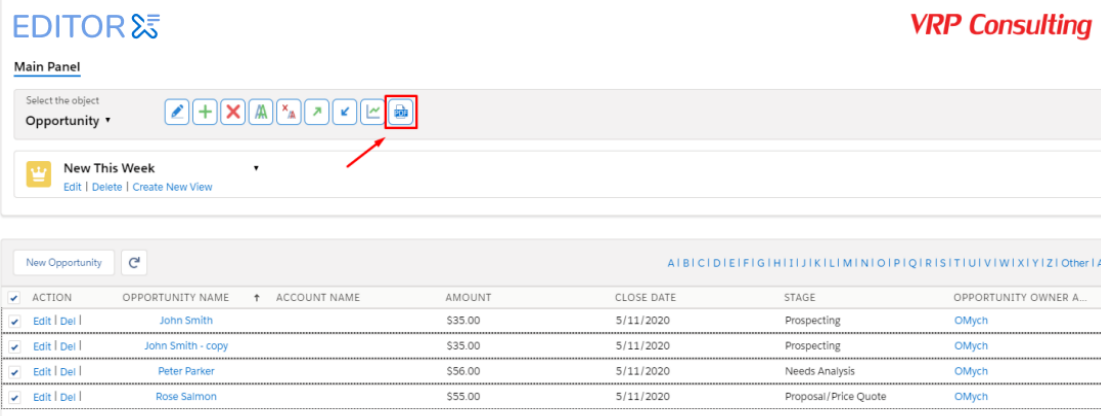
- Opportunity Name
- Amount
- Close Date
- Stage
- Opportunity ID

Apply

| OPPORTUNITY NAME | AMOUNT | CLOSE DATE               | STAGE                | OPPORTUNITY ID  | CREATED DATE   |
|------------------|--------|--------------------------|----------------------|-----------------|----------------|
| John Smith       | 35.00  | 5/4/2020<br>[ 5/4/2020 ] | Prospecting          | 0069D000003CyI8 | 5/4/2020, 4:00 |
| Peter Parker     | 35.00  | 5/4/2020<br>[ 5/4/2020 ] | Qualification        | 0069D000003CyI9 | 5/4/2020, 4:00 |
| Rose Salmon      | 35.00  | 5/4/2020                 | Proposal/Price Quote | 0069D000003CyIA | 5/4/2020, 4:00 |

Save Cancel

To export necessary data to a PDF file, select the Records you want to export and press the  button. This starts a download of a PDF file to your computer.



The screenshot shows the EDITOR interface with the VRP Consulting logo. The Main Panel has a 'Select the object' dropdown set to 'Opportunity'. Below it is a 'New This Week' section with links for 'Edit', 'Delete', and 'Create New View'. The main table lists four opportunities. The 'Export to PDF' icon (a document with a download arrow) is highlighted with a red box, and a red arrow points to it from the text above.

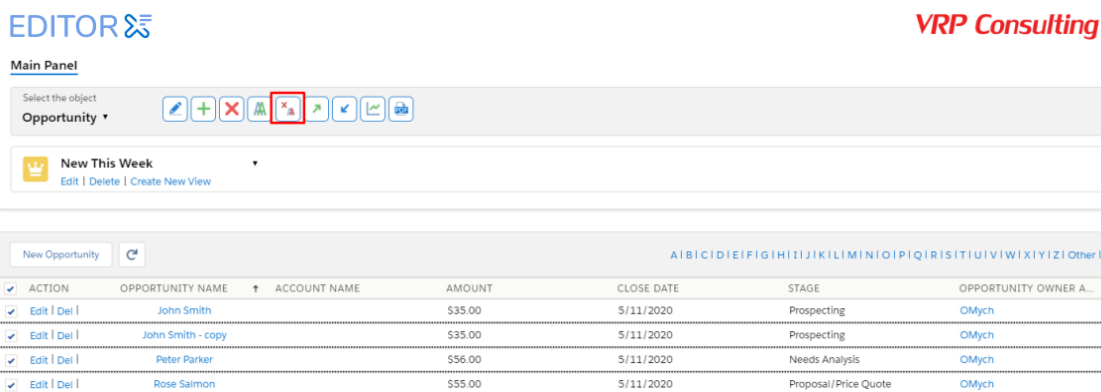
| ACTION                                         | OPPORTUNITY NAME  | ACCOUNT NAME | AMOUNT  | CLOSE DATE | STAGE                | OPPORTUNITY OWNER A... |
|------------------------------------------------|-------------------|--------------|---------|------------|----------------------|------------------------|
| <input checked="" type="checkbox"/> Edit   Del | John Smith        |              | \$35.00 | 5/11/2020  | Prospecting          | OMych                  |
| <input checked="" type="checkbox"/> Edit   Del | John Smith - copy |              | \$35.00 | 5/11/2020  | Prospecting          | OMych                  |
| <input checked="" type="checkbox"/> Edit   Del | Peter Parker      |              | \$56.00 | 5/11/2020  | Needs Analysis       | OMych                  |
| <input checked="" type="checkbox"/> Edit   Del | Rose Salmon       |              | \$55.00 | 5/11/2020  | Proposal/Price Quote | OMych                  |

This is how the PDF file with the selected records looks:

Opportunity records

| Name              | Account ID | Amount  | Close Date | Stage                | Owner ID                     |
|-------------------|------------|---------|------------|----------------------|------------------------------|
| John Smith        |            | \$35.00 | 5/4/2020   | Prospecting          | <a href="#">Olyaa Mychko</a> |
| Peter Parker      |            | \$56.00 | 5/4/2020   | Qualification        | <a href="#">Olyaa Mychko</a> |
| Rose Salmon       |            | \$68.00 | 5/4/2020   | Proposal/Price Quote | <a href="#">Olyaa Mychko</a> |
| John Smith - copy |            | \$35.00 | 5/4/2020   | Prospecting          | <a href="#">Olyaa Mychko</a> |

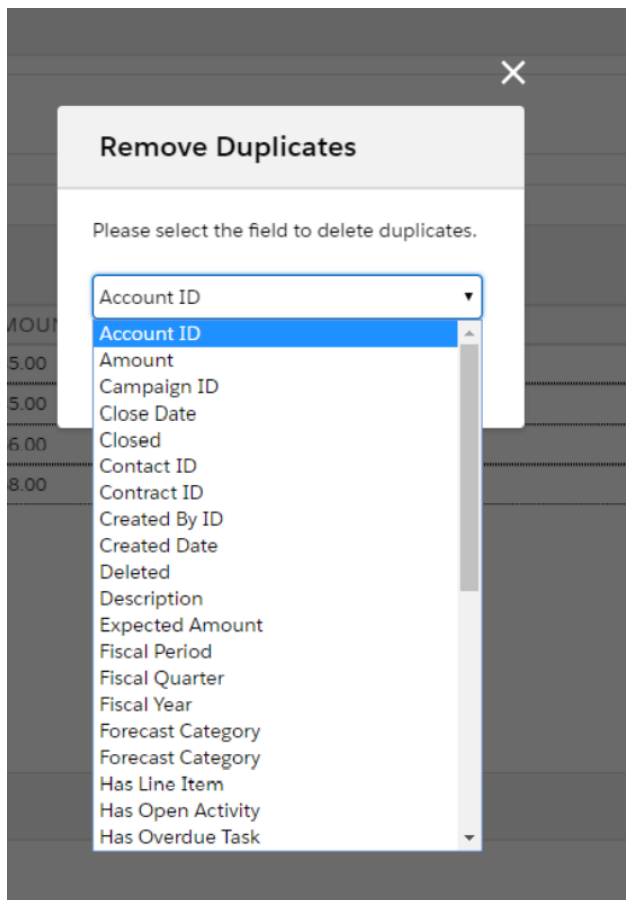
Using the button , you can remove duplicates. Select the necessary Records and press the  button.



The screenshot shows the EDITOR interface with the VRP Consulting logo. The Main Panel has a 'Select the object' dropdown set to 'Opportunity'. Below it is a 'New This Week' section with links for 'Edit', 'Delete', and 'Create New View'. The main table lists four opportunities. The 'Duplicate' icon (two overlapping documents) is highlighted with a red box.

| ACTION                                         | OPPORTUNITY NAME  | ACCOUNT NAME | AMOUNT  | CLOSE DATE | STAGE                | OPPORTUNITY OWNER A... |
|------------------------------------------------|-------------------|--------------|---------|------------|----------------------|------------------------|
| <input checked="" type="checkbox"/> Edit   Del | John Smith        |              | \$35.00 | 5/11/2020  | Prospecting          | OMych                  |
| <input checked="" type="checkbox"/> Edit   Del | John Smith - copy |              | \$35.00 | 5/11/2020  | Prospecting          | OMych                  |
| <input checked="" type="checkbox"/> Edit   Del | Peter Parker      |              | \$56.00 | 5/11/2020  | Needs Analysis       | OMych                  |
| <input checked="" type="checkbox"/> Edit   Del | Rose Salmon       |              | \$55.00 | 5/11/2020  | Proposal/Price Quote | OMych                  |

In the popup window, select the field to remove duplicate from and press confirm:



Duplicated fields will be deleted. Here is the result of Remove Duplicate action:

EDITOR

VRP Consulting

Main Panel

Select the object  
Opportunity

New This Week  
Edit | Delete | Create New View

New Opportunity

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z I Other | All

| ACTION                              | OPPORTUNITY NAME | ACCOUNT NAME | AMOUNT  | CLOSE DATE | STAGE                | OPPORTUNITY OWNER A... |
|-------------------------------------|------------------|--------------|---------|------------|----------------------|------------------------|
| <input type="checkbox"/> Edit   Del | John Smith       |              | \$35.00 | 5/11/2020  | Prospecting          | OMych                  |
| <input type="checkbox"/> Edit   Del | Peter Parker     |              | \$36.00 | 5/11/2020  | Needs Analysis       | OMych                  |
| <input type="checkbox"/> Edit   Del | Rose Salmon      |              | \$55.00 | 5/11/2020  | Proposal/Price Quote | OMych                  |

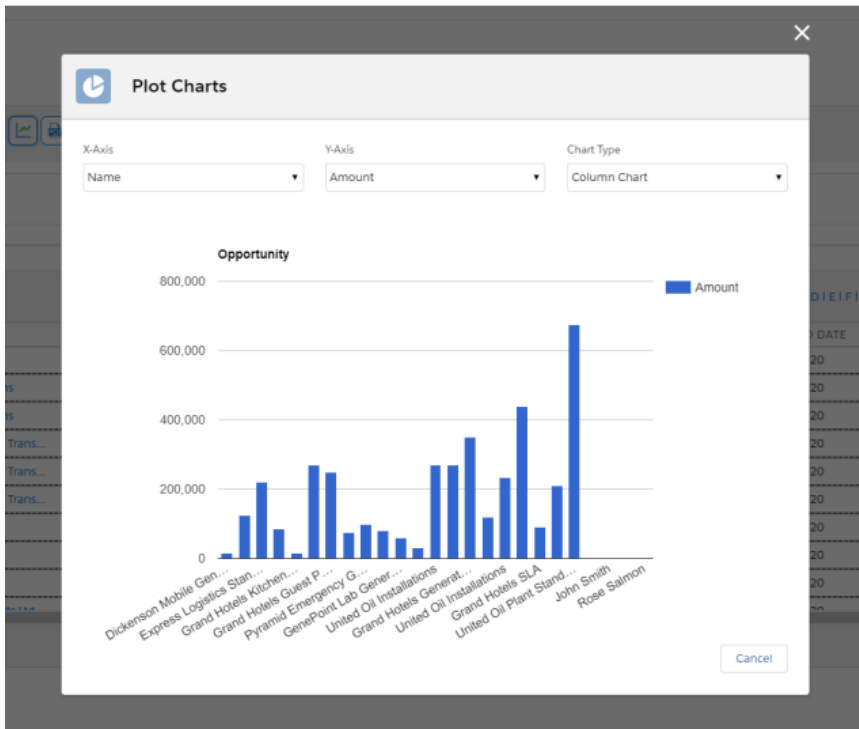
1-3 of 3 0 Selected

« Previous Next »

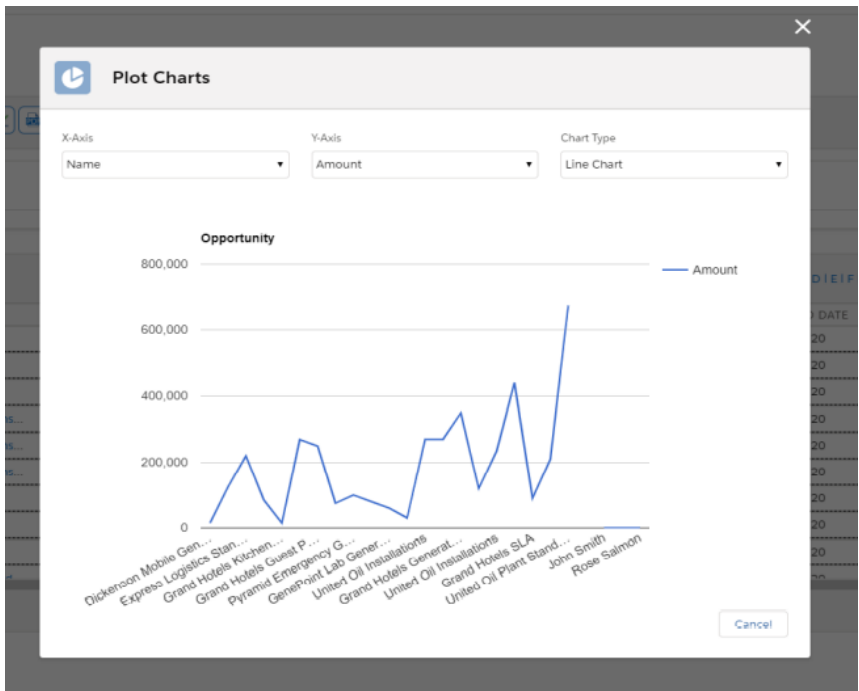
Page 1 of 1

EditorX 1.27 helps display data from the selected Objects. You can choose between Column, Line, and Pie charts. Select the necessary Records and press the  button. Here is how the Charts will look:

Column Chart:



Line Chart:



Pie Chart:

