E2Excel

Convert your list view into Excel

E2Excel is the Salesforce application designed to Export the Records from Listview in an Excel Sheet. This can be used to export **Standard** as well as **Custom** Objects records in Excel sheets on the desktop.

The app supports exporting records in two ways:

- We can export the Standard and custom object records using the **Export To Excel** list view button which is supported for both Salesforce Lightning Experience and Salesforce Classic.
- Another option is we have added **Export To Excel Tab** and **ExportListView Component** where we get all the supported Standard and custom objects in the form of picklist and can export the records directly from there. It is supported in Salesforce Lightning Experience and in Salesforce Experience Cloud (Salesforce Community Cloud).

The Configuration required to setup the export functionality after successful installation of the application in your org is explained below:

You have to create a Named credential in your production/sandbox environment to use the export functionality in the org.

Following are the steps to connect to an external system using "Named Credential":

1) Create Connected App
2) Create Authorization Provider
3) Define Named Credential

1. Create Connected App:

Step 1: For Lightning Experience navigate to "Setup | Apps | App Manger" and click on New Connected App or for Classic navigate to "Setup | Create | Apps" and click on New Connected App.

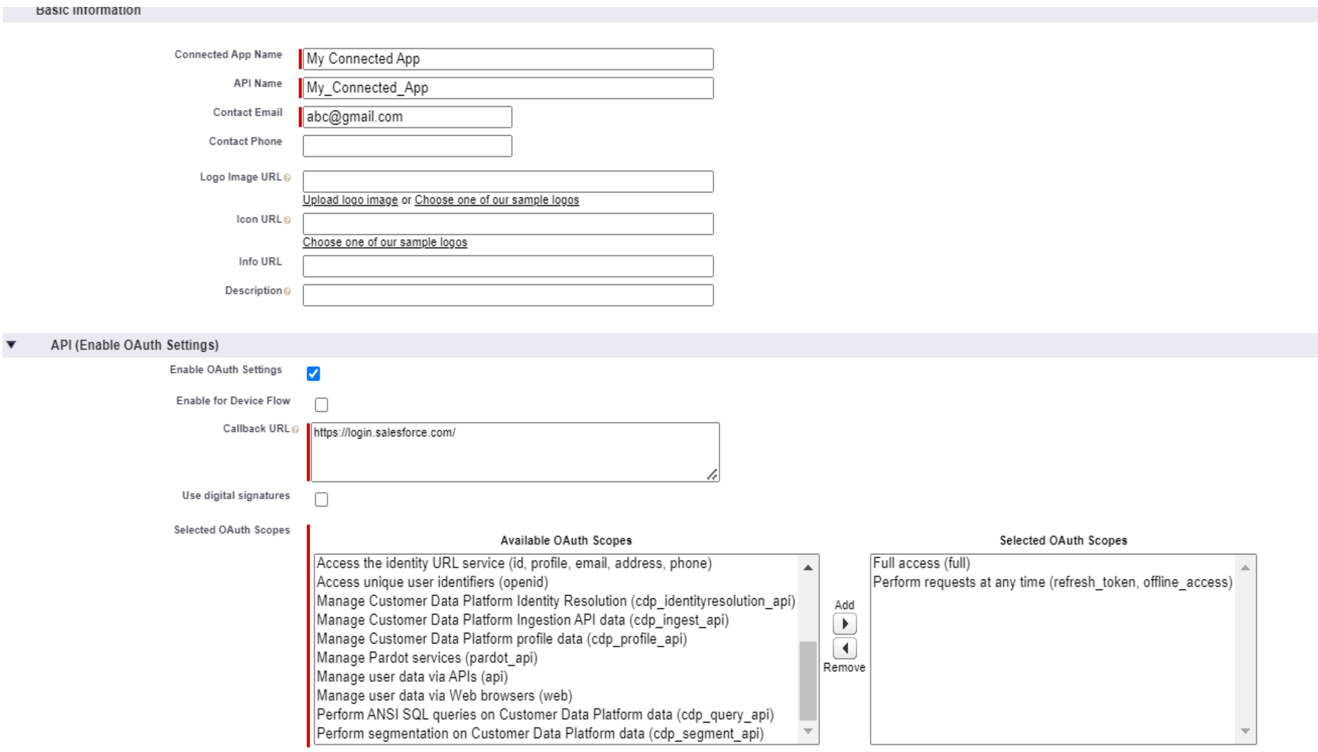
Step 2: Provide all necessary information.

Step 3: Check the "Enable OAuth Settings" checkbox to use OAuth.

Step 4: In "Callback URL" enter the temporary Salesforce URL. We will come back again on this step later to provide a Callback URL.

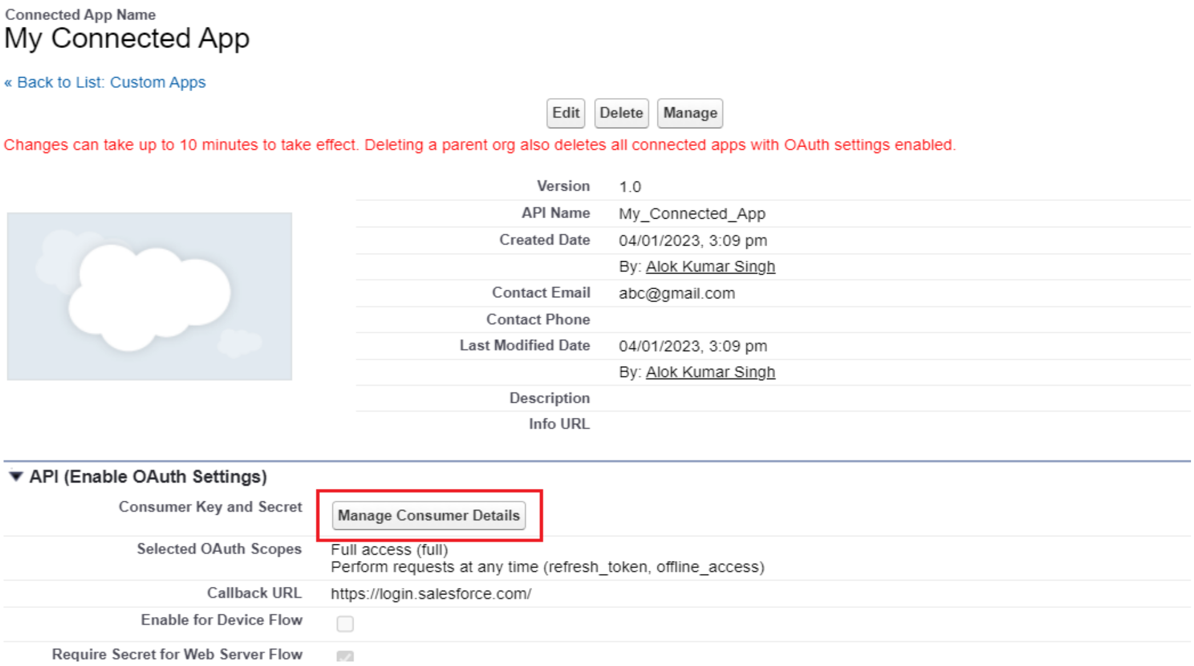
Step 5: Select the OAuth Scopes **Full access (full)** and **Perform requests at any time (refresh_token, offline_access)** from Available OAuth Scopes and add it to Selected OAuth Scopes:

Step 6: Click on Save button.



Step 7: Once you save it, then on the same tab a message will display as: Changes can take up to 10 minutes to take effect. Deleting a parent org also deletes all connected apps with OAuth settings enabled. Click on Continue.

Step 8: After clicking on Continue button, you will see your newly created connected app and from there Click on **Manage Consumer Details** button and a login screen will be displayed to enter your salesforce login credentials and after that you will be able to see your Consumer Secret & Consumer Key.



Note: Copy the "Consumer Key" and "Consumer Secret" from there. We need this information in the **Authorization Provider.**

2. Create Authorization Provider:

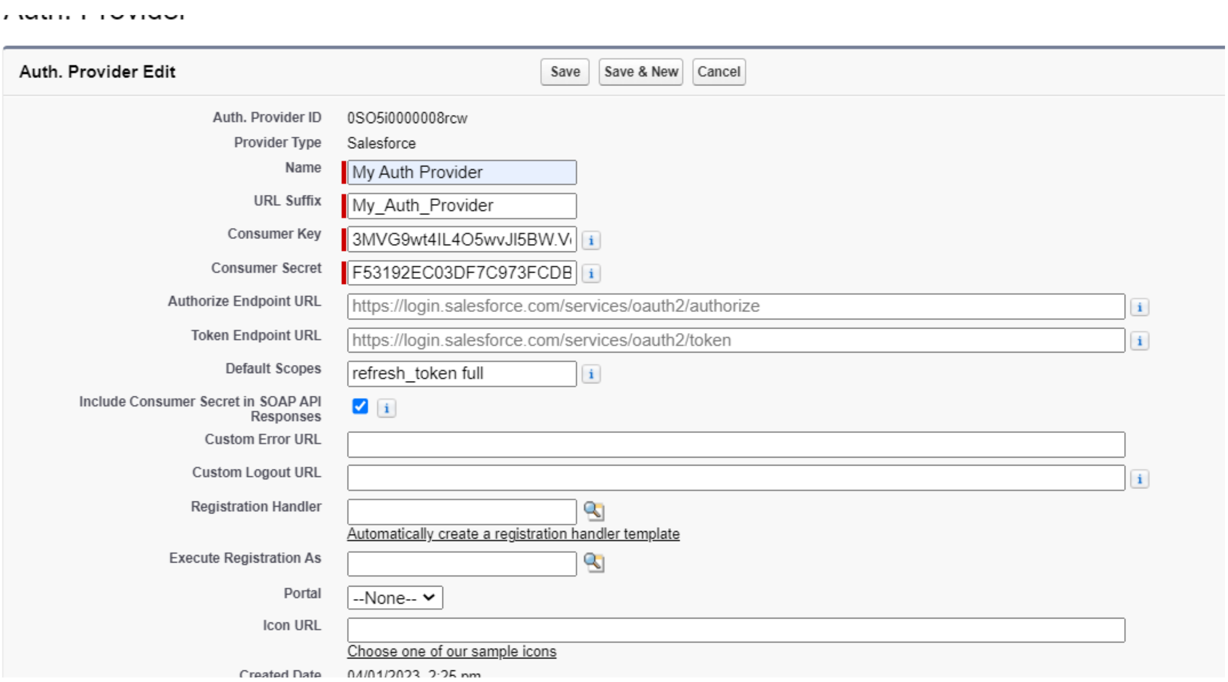
Step 1: For Lightning Experience navigate to "Setup | Identity | Auth. Providers" and click on New or for Classic navigate to "Setup | Security Controls | Auth. Providers" and click on New.

Step 2: Select **Salesforce** as Provider Type.

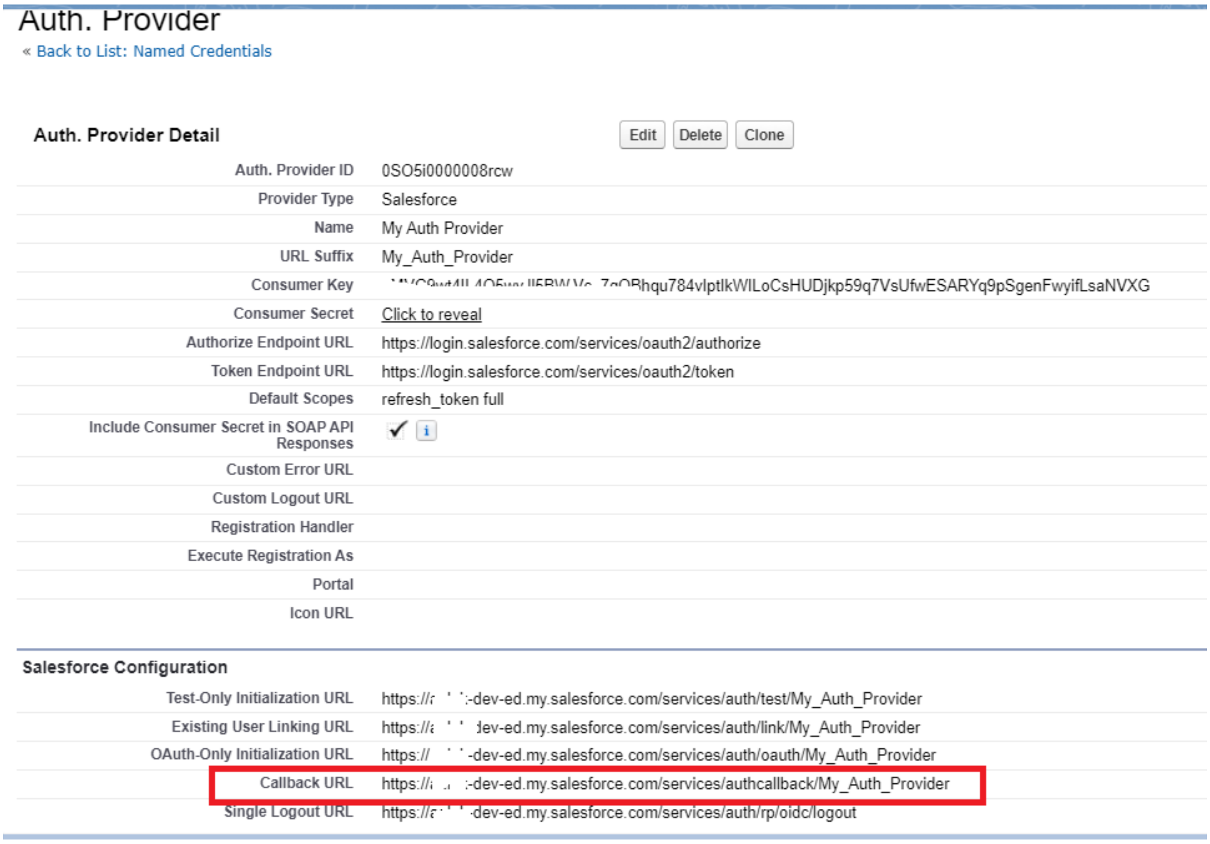
Step 3: Enter any Name.

Step 4: Enter the "Consumer Key" and "Consumer Secret" which you have already copied from the Connected app.

Step 5: In "Default Scopes" enter the value as "**refresh_token full**". "refresh_token" and "full" should be separated by space and Save.



Note: Once you save, it will provide you the set of URLs in the "Salesforce Configuration" section on the same page. Copy "Callback URL" and edit the **Connected App** which you created and paste the URL into connected app Callback URL and Save it.



3. Define Named Credentials:

Step 1: For Lightning Experience navigate to “Setup | Security | Named Credentials” and click on New Legacy or for Classic navigate to “Setup | Security Controls | Named Credentials” and click on New Named Credentials.

Step 2: Provide the Label and Name as **E2Excel** (The label and name should be the same as mentioned here for named credentials).

Step 3: In the URL, if My Domain is enabled then enter URL as: **https://yourDomain.my.salesforce.com** or if My Domain is not enabled then enter URL as: **https://yourInstance.salesforce.com** (You need to replace “yourDomain” in URL with your org Domain and also for “yourInstance” replace it with your org Instance name).

Step 4: Select **Named Principal** as Identity Type.

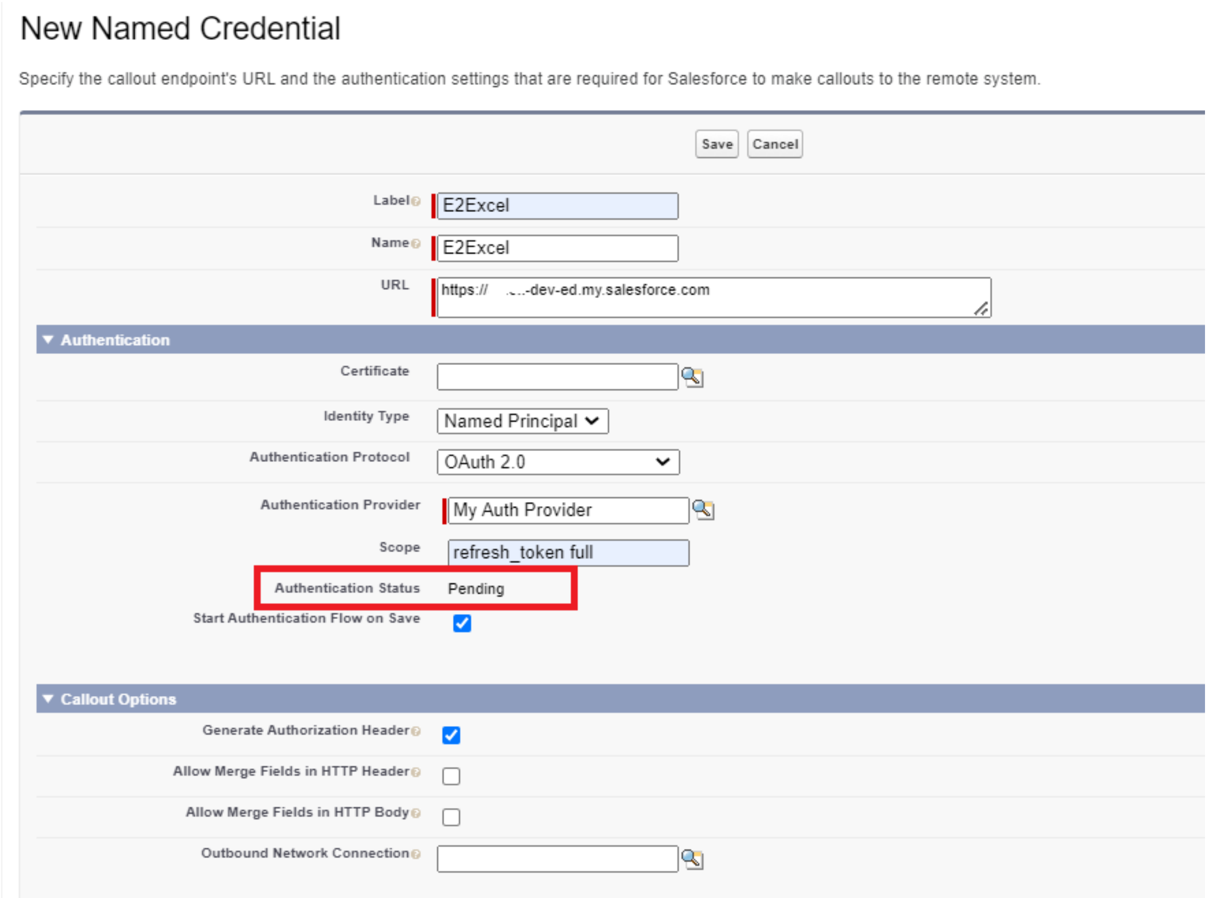
Step 5: Select Authentication Protocol as **OAuth 2.0**

Step 6: Select the Auth Provider created by you in the Authorization Provider step.

Step 7: In scope, enter the value as **refresh_token full**.

Step 8: Check “Start Authentication Flow on Save” (this is important).

Step 9: Save.



Note: After clicking on "Save" a new page will open to authenticate Salesforce Org using OAuth2 connected App. Log in using the credentials of the Salesforce instance that you want to connect to. If authentication is a success, you can see a message like "**Authenticated as** ".

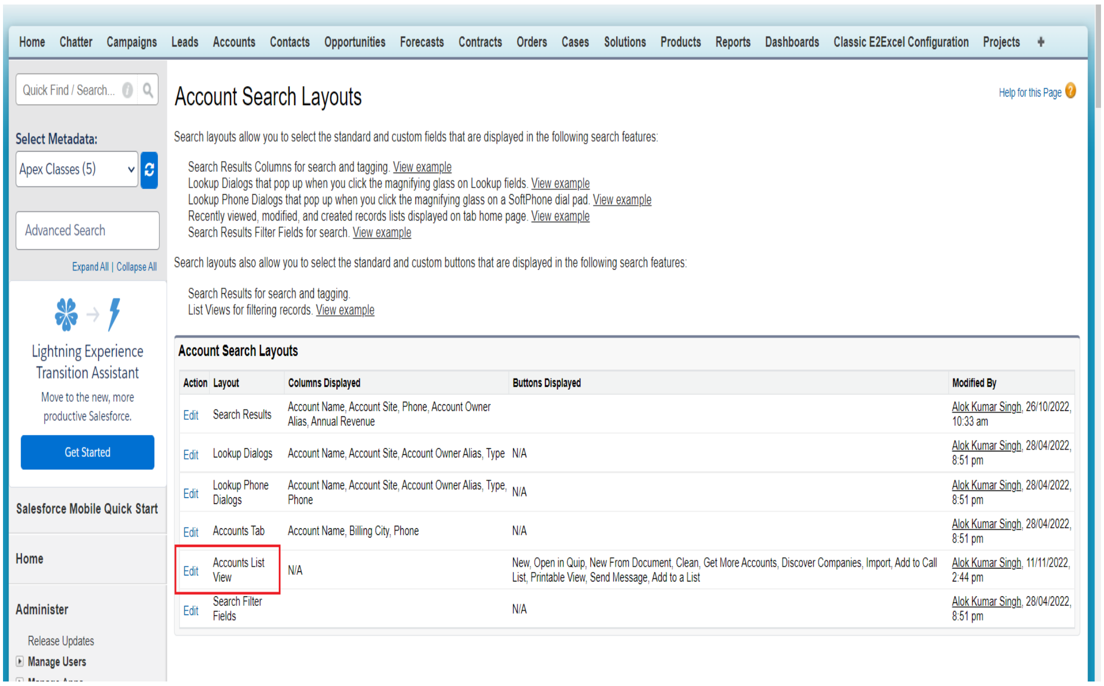
After successfully completing the process of Named credential in your org, follow all the steps given below to configure the E2Excel in your org.

1. To use Export To Excel List View Button is explained below: -

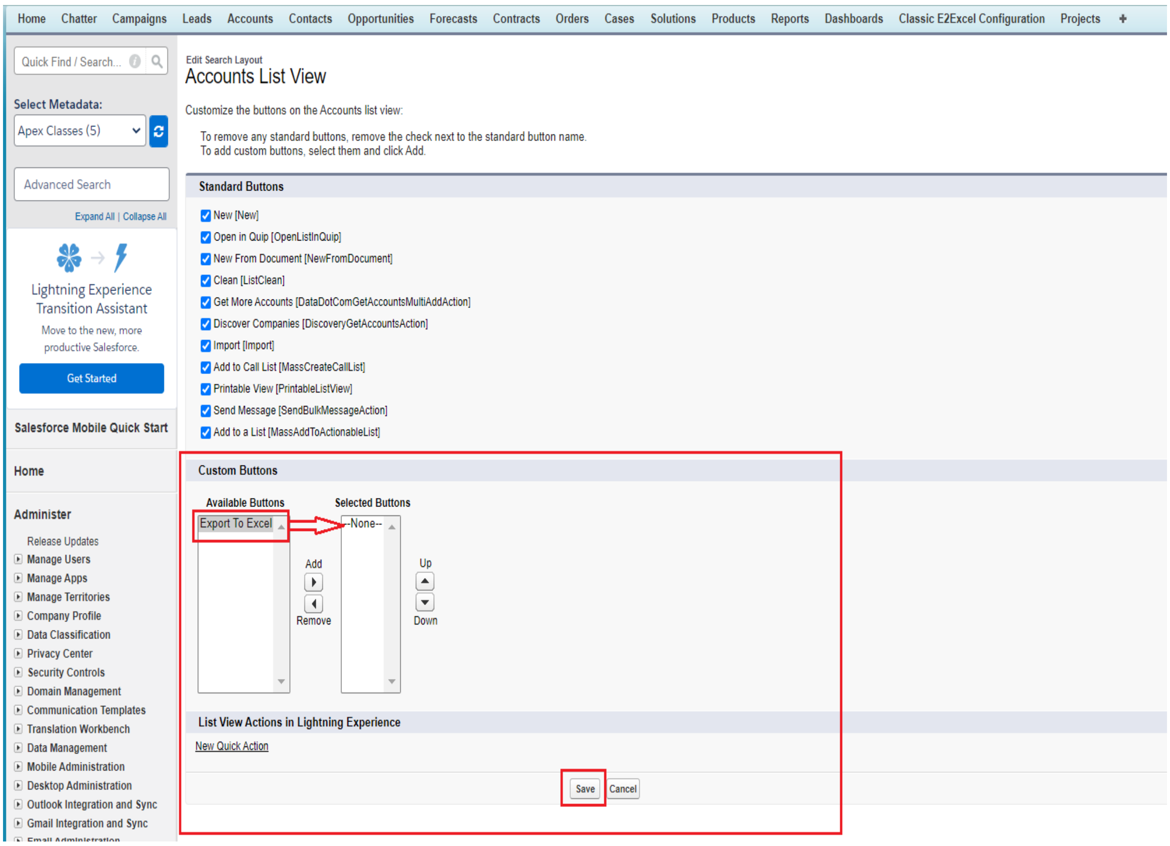
1.1 For **Standard** Objects go to any object, for e.g., Account object and follow the steps given below to add the Export To Excel list view button: -

1.1.1 Salesforce Classic:

Step 1: Click on **Setup** **Customize** **Accounts** **Search Layouts** **Edit Accounts List View**.

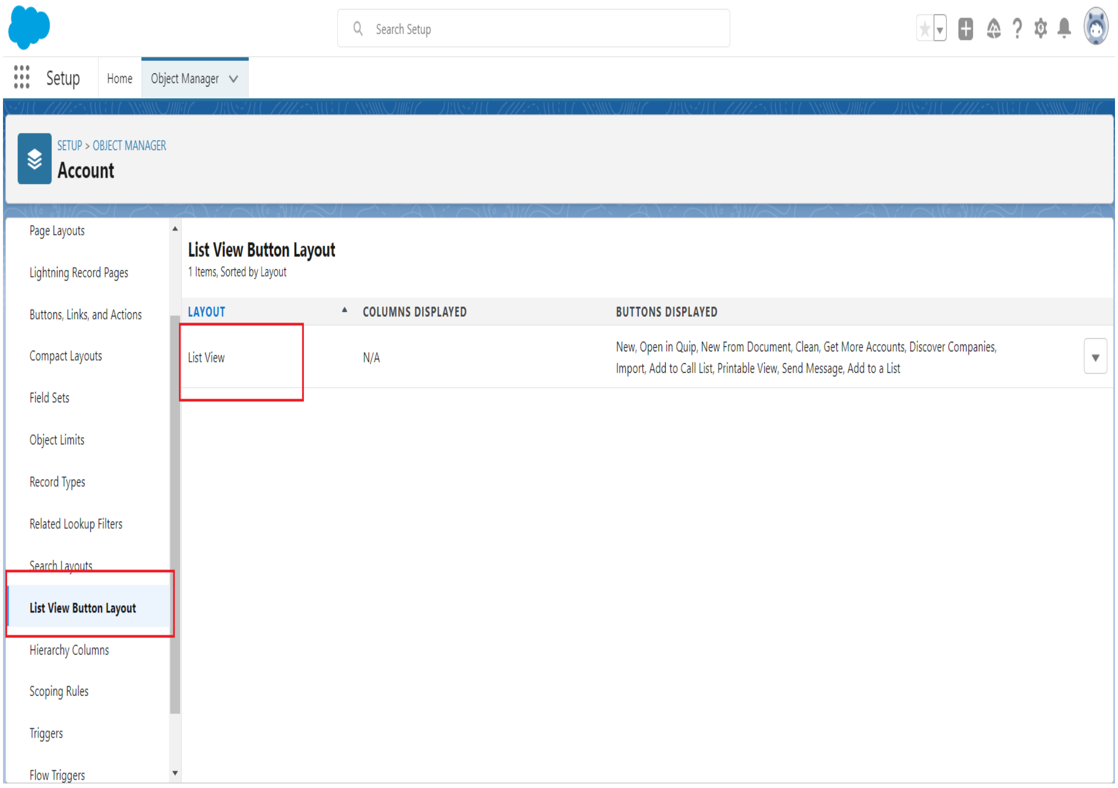


Step 2: Add the **Export To Excel** button and **Save**.

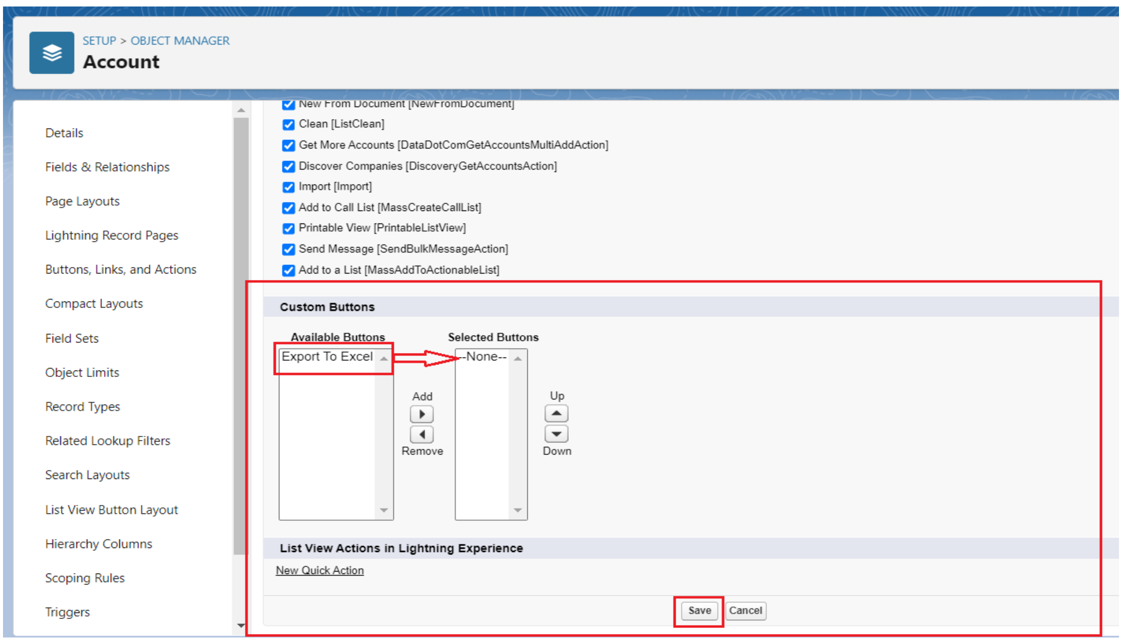


1.1.2 Salesforce Lightning Experience:

Step 1: Click on **Setup** **Object Manager** **Account** **List View Button Layout** **Edit List View**.



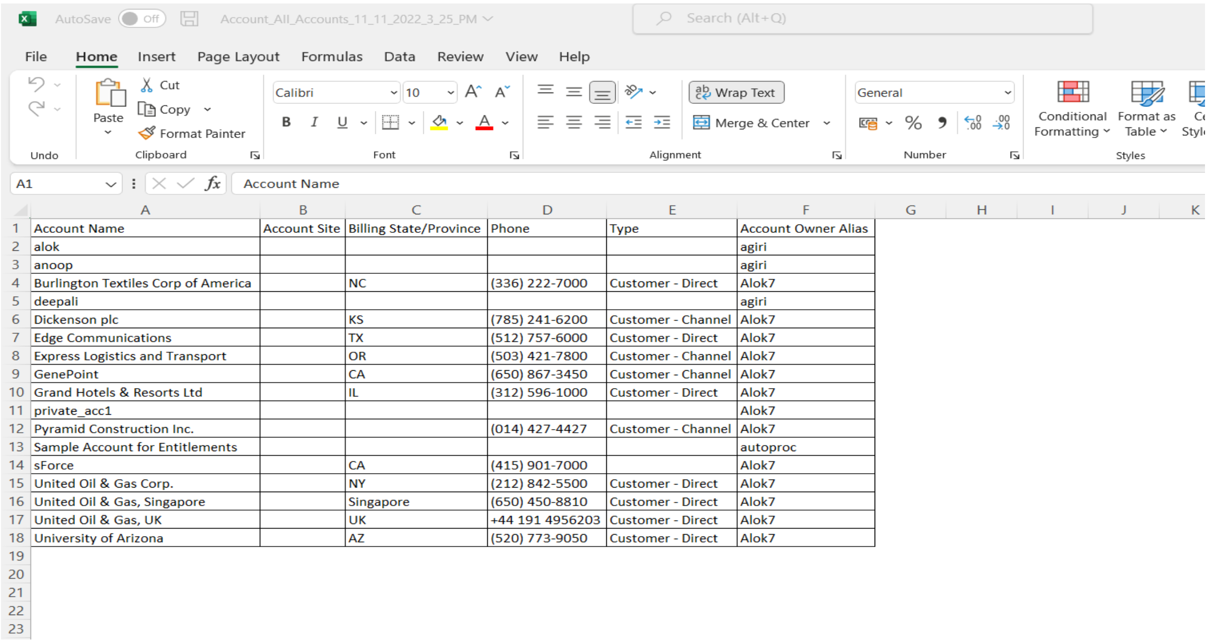
Step 2: Add the **Export To Excel** button and **Save**.



After adding the list view button on Account object, you can go to the Account list view page to Export the record.

- Select the Account records by selecting the checkboxes for exporting specific Accounts in Excel and click on Export to Excel Button. The Excel sheet with the selected records will be downloaded to your Desktop.
- If you want all the Account Records to be exported, you can unselect all the checkboxes, and just click on the Export to Excel button.

The downloaded Excel Sheet will look as follows –



Account Name	Account Site	Billing State/Province	Phone	Type	Account Owner Alias
alok					agiri
anoop					agiri
Burlington Textiles Corp of America		NC	(336) 222-7000	Customer - Direct	Alok7
deepali					agiri
Dickenson plc		KS	(785) 241-6200	Customer - Channel	Alok7
Edge Communications		TX	(512) 757-6000	Customer - Direct	Alok7
Express Logistics and Transport		OR	(503) 421-7800	Customer - Channel	Alok7
GenePoint		CA	(650) 867-3450	Customer - Channel	Alok7
Grand Hotels & Resorts Ltd		IL	(312) 596-1000	Customer - Direct	Alok7
private_acc1					Alok7
Pyramid Construction Inc.			(014) 427-4427	Customer - Channel	Alok7
Sample Account for Entitlements					autoproc
sForce		CA	(415) 901-7000		Alok7
United Oil & Gas Corp.		NY	(212) 842-5500	Customer - Direct	Alok7
United Oil & Gas, Singapore		Singapore	(650) 450-8810	Customer - Direct	Alok7
United Oil & Gas, UK		UK	+44 191 4956203	Customer - Direct	Alok7
University of Arizona		AZ	(520) 773-9050	Customer - Direct	Alok7

1.2 For **Custom** Objects, follow the steps given below to add the Export To Excel list view button: -

Step 1: If you want to export the Custom object's records. For e.g., Project is the name of my Custom object, so you first have to create a new VF Page and copy the given code –

```
<apex:page standardController="Project__c" recordSetVar="projects"
extensions="E2Ex.ExcelController"                     readOnly="true"
language="{!deflocale}"
contentType="application/vnd.ms-excel#{!etefileName}.xls" >
<E2Ex:ExportToExcel ObjCode="{!keyCode}" ViewId="{!listid}"
StdCtr="{!setCon}"></E2Ex:ExportToExcel>
</apex:page>
```

Save the VF Page with the name you want.

Step 2: Go to the custom object you want to add Export to Excel Button.

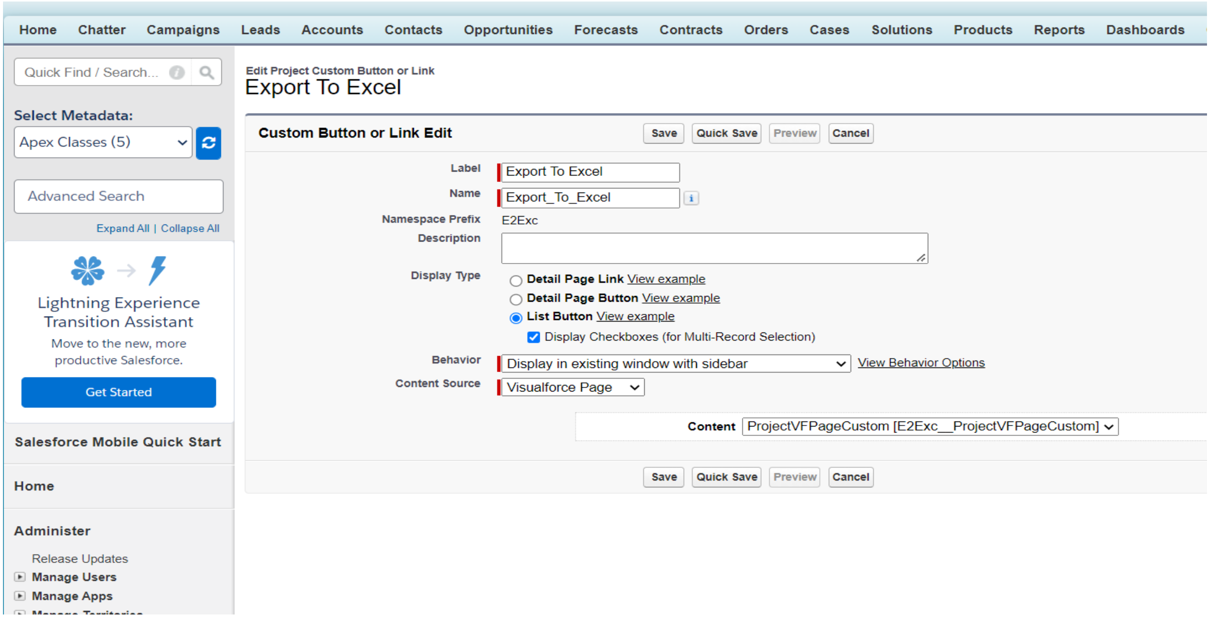
Step 3: Go to view fields from the right arrow in the object's page, then from the left side Quick Search box, under Object's name, Select Buttons, Links, and Actions.

Step 4: Select 'New Button or Link'. In Label, type 'Export to Excel'.

Step 5: In Content Source, select 'Visualforce Page'.

Step 6: Select List Button option and then select the Page you have just created.

Step 7: Then click on the save button.



Step 8: Now from the left side under the name of object, select 'Search Layouts' and then select edit Object List View.

Step 9: Select the button Export to Excel and add it in the list.

Step 10: Now save it.

After adding the list view button for the custom object, you can go to the custom object list view page to Export the record.

- Select the Object records by selecting the checkboxes for exporting specific Records in Excel and click on Export to Excel Button.
- If you want to export all records you do not need to select, just click on Export to Excel Button.

2. To use Export To Excel Tab and ExportListView Component is explained below: -

Export To Excel tab is a lightning component tab designed to export the records in an Excel format for Lightning Experience and ExportListView is a lightning component designed for Salesforce Communities as well as for Lightning Experience. These can be used to export standard as well as custom objects records, from list views, in Excel sheets.

Where to use the Export To Excel Tab and ExportListView Component:-

There are two places where you can export your list view records in Excel format.

- Lightning Experience (Export To Excel Tab, ExportListView component)
- Lightning Community (ExportListView component)

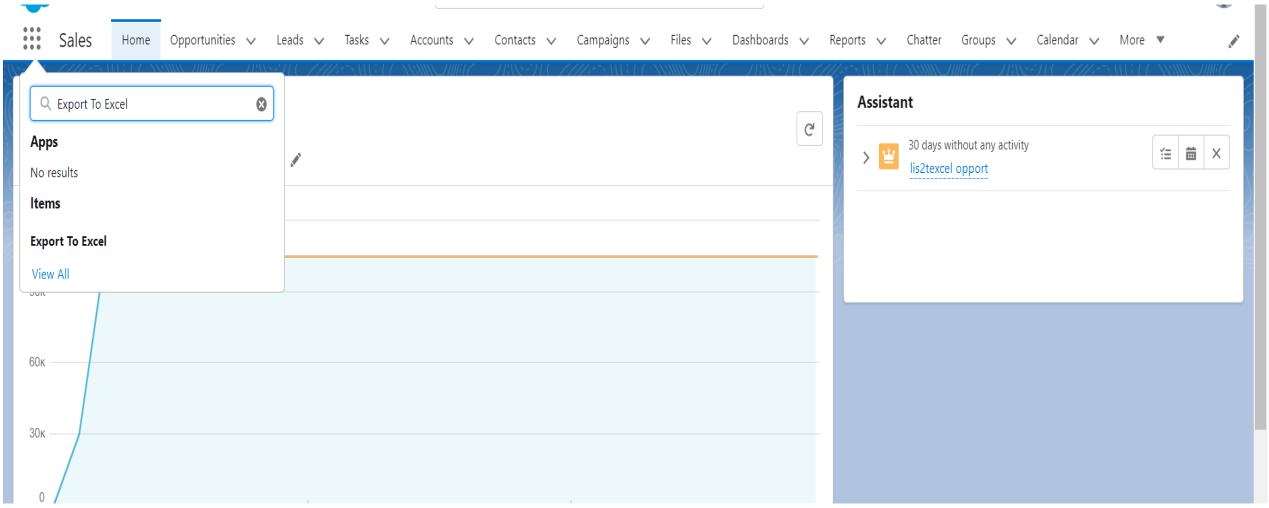
How to use in Lightning Experience:-

- By using Export To Excel Tab
- By using ExportListView component on Homepage Tab (After drag and drop the ExportListView component from lightning builder)

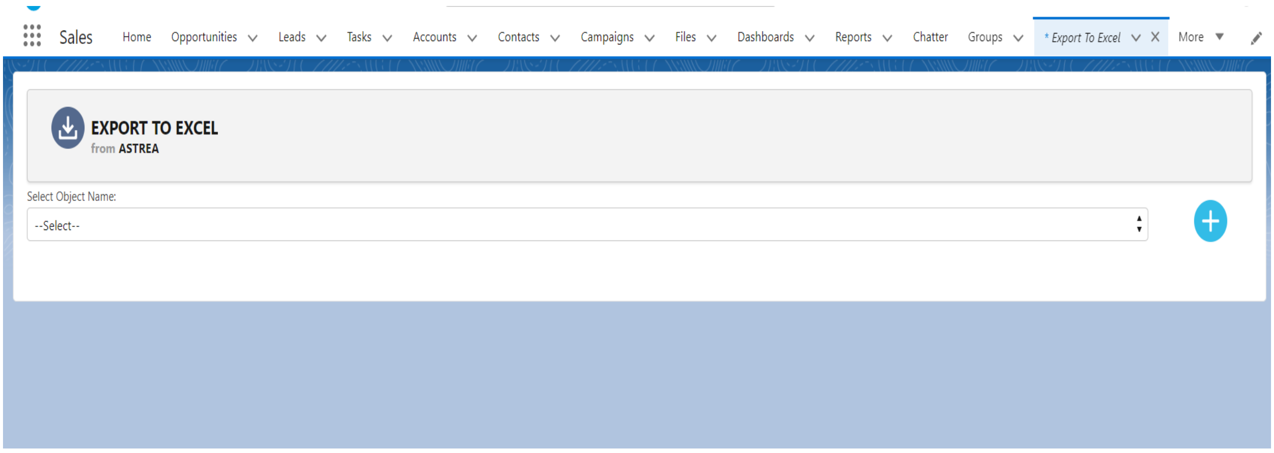
By Using Export To Excel Tab: -

Follow all the steps given below: -

Step 1: Click on the app launcher icon Then type Export To Excel and choose Export To Excel tab from available options.



Step 2: Here is the Export To Excel lightning component tab from where you can choose your list views corresponding to available object options in the picklist.

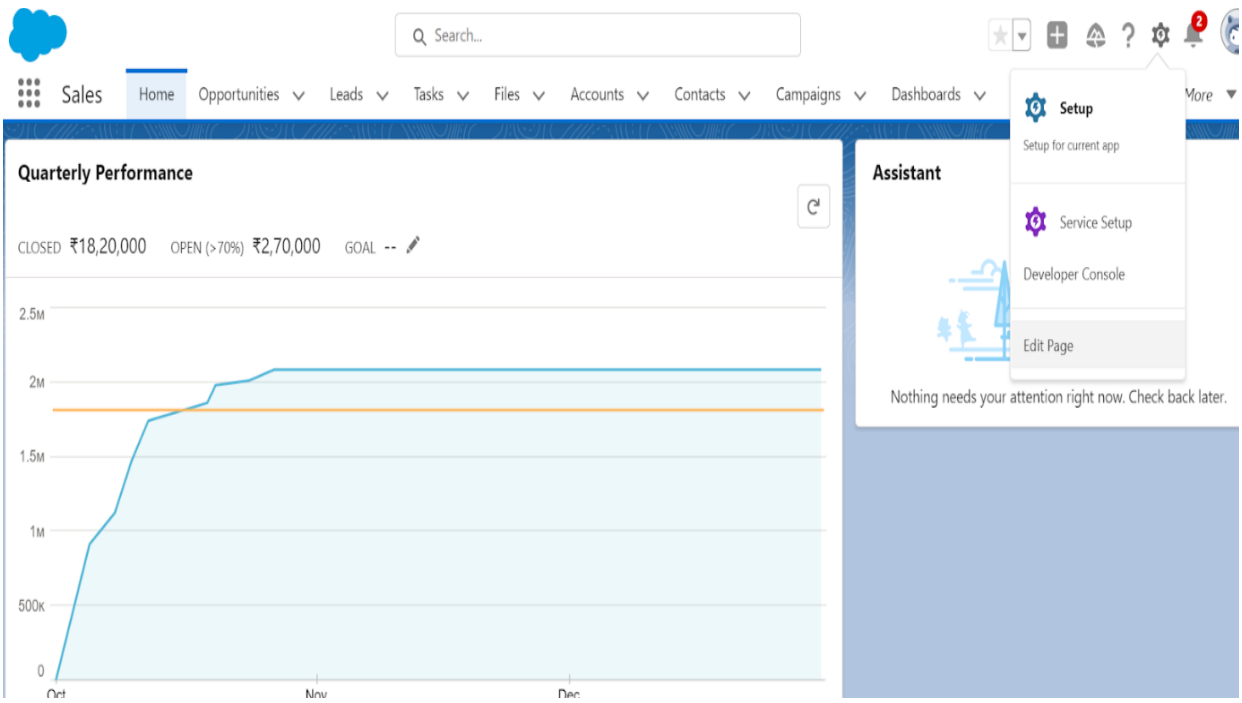


By Using ExportListView component on Homepage Tab: -

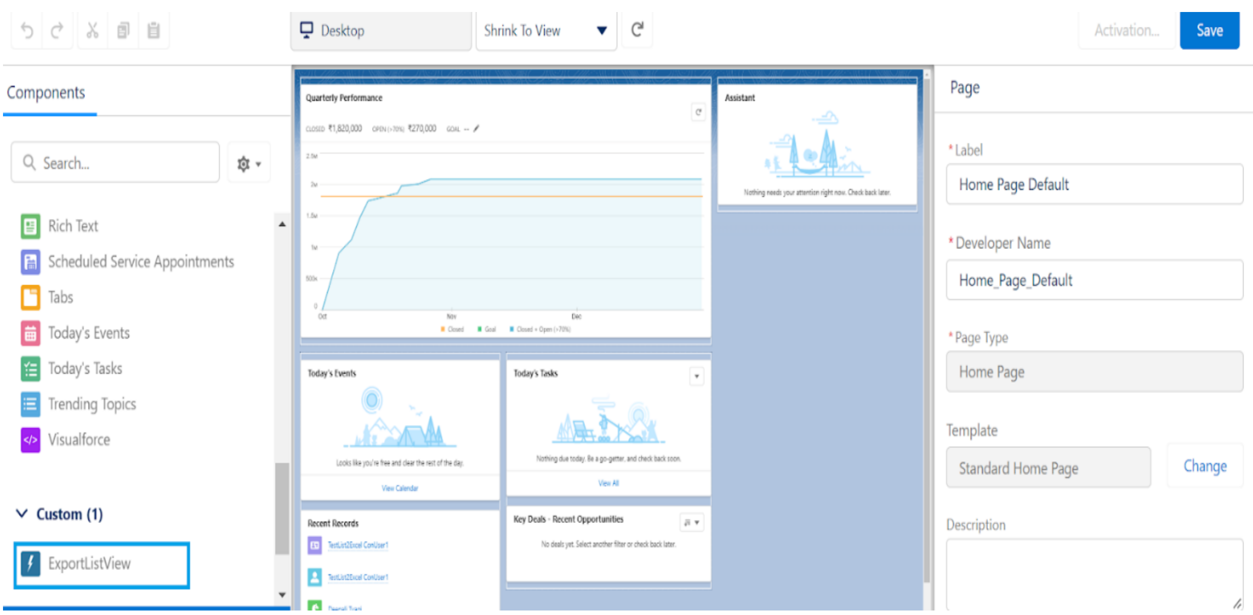
After successful installation of the package, a component with name "**ExportListView**" will be available, to add on the lightning builder page.

Steps for adding component on home page: -

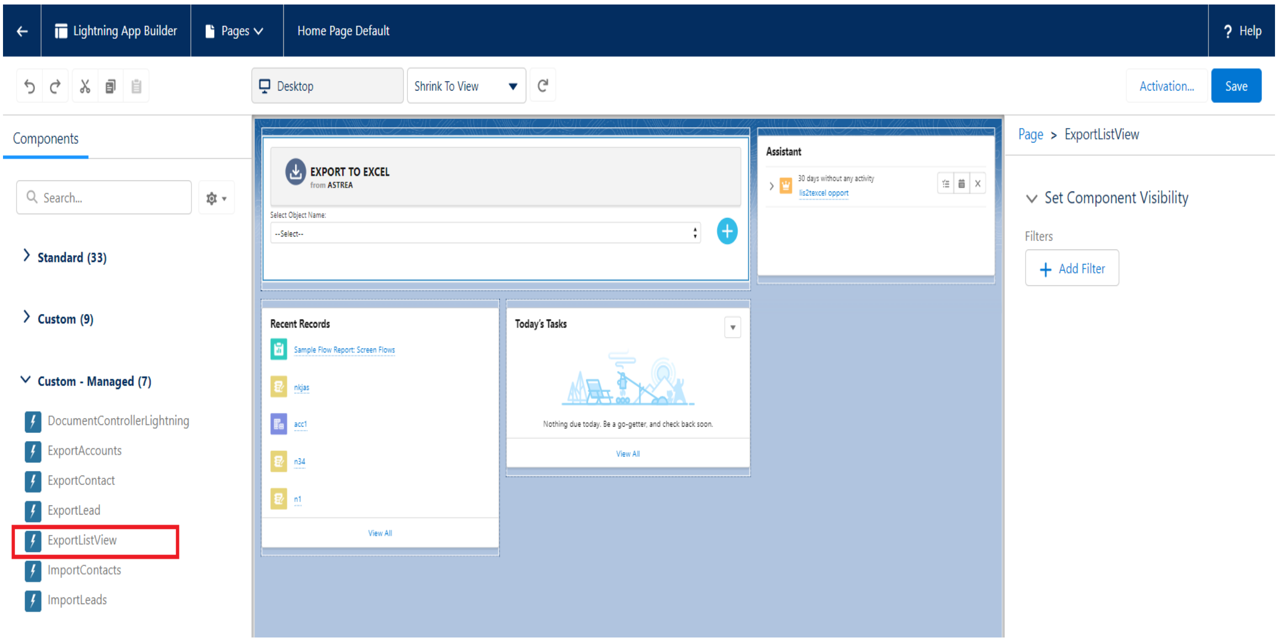
Step 1: First you need to go to the homepage of your org then you have to click on the gear icon and select "Edit Page".



Step 2: Then you will see lightning app builder as below: -



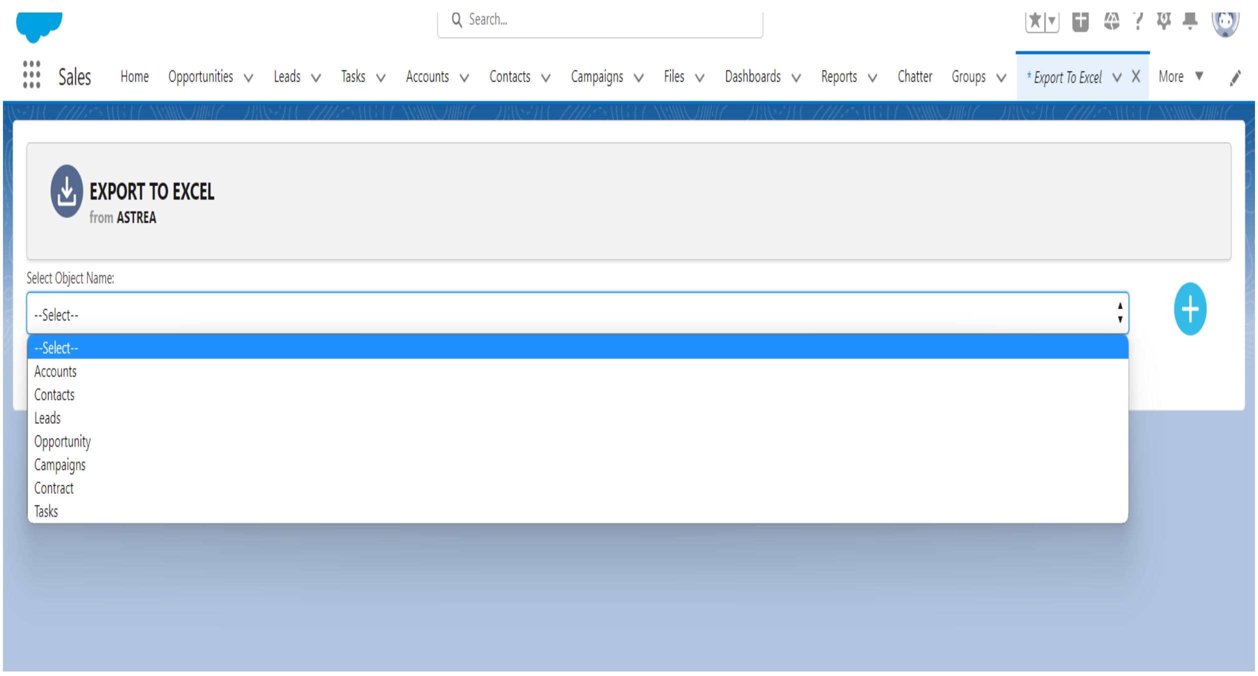
Step 3: Now from the left side of screen you will see available components, then drag and drop the “ExportListView” component from left to desired location on right side.



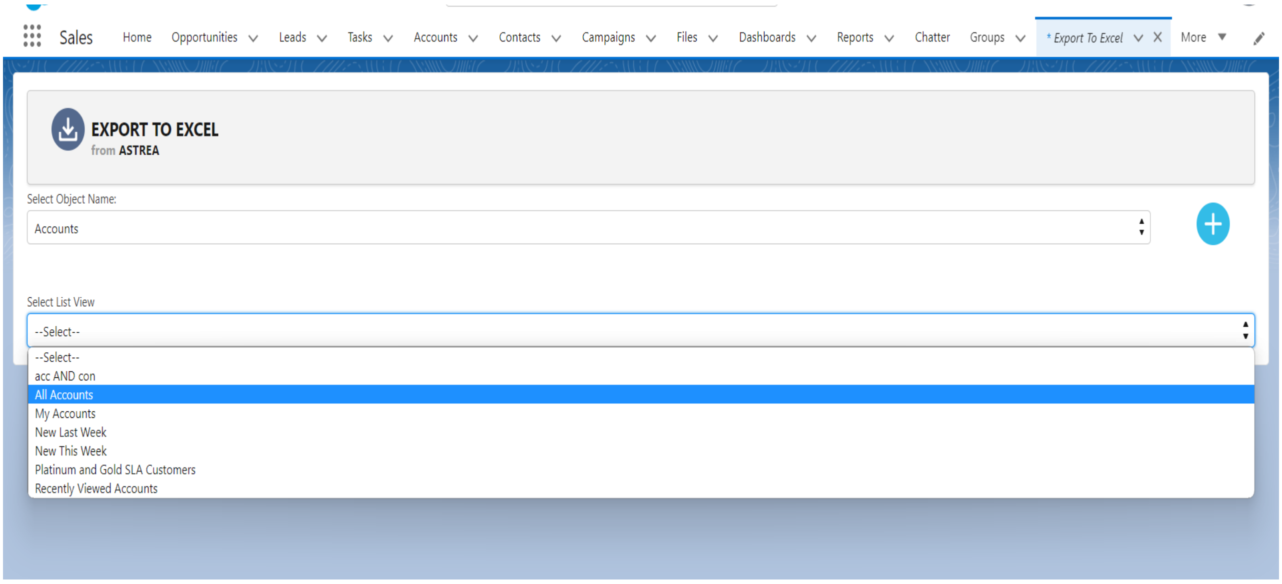
Step 4: Now click on the save button for saving the changes.

How to use the functionality of Export To Excel Tab and ExportListView component: -
You can download list view records for standard as well as custom objects.

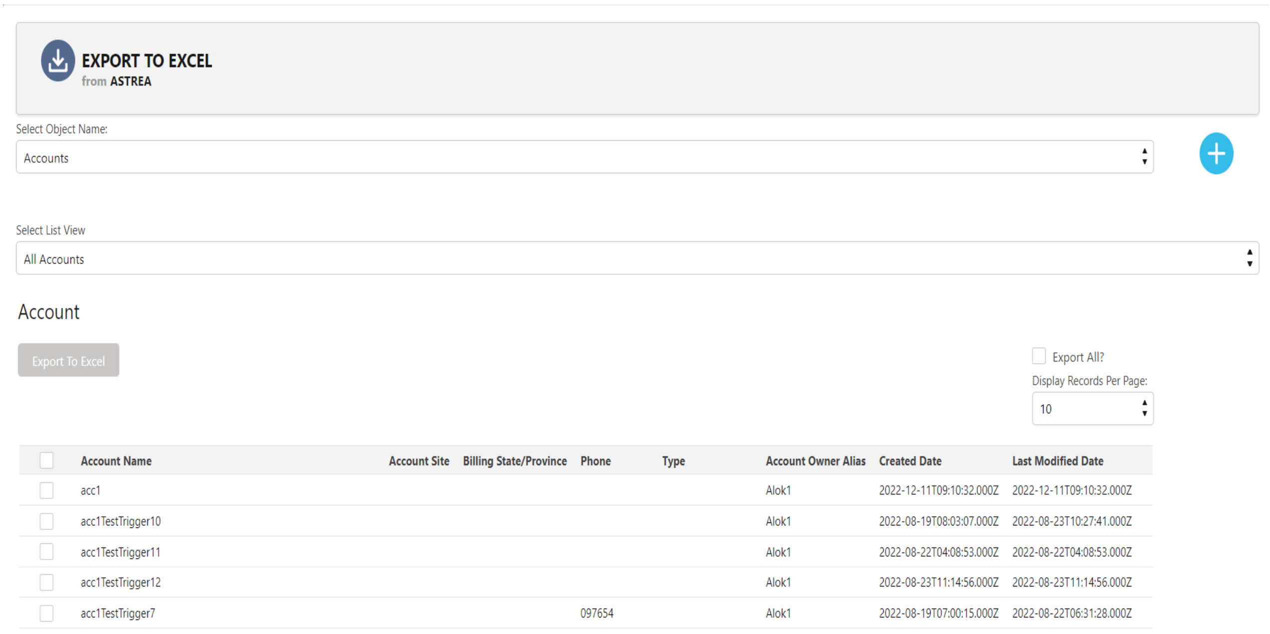
Hands-on standard object list view: -
Step 1: Select object name from available picklist options.



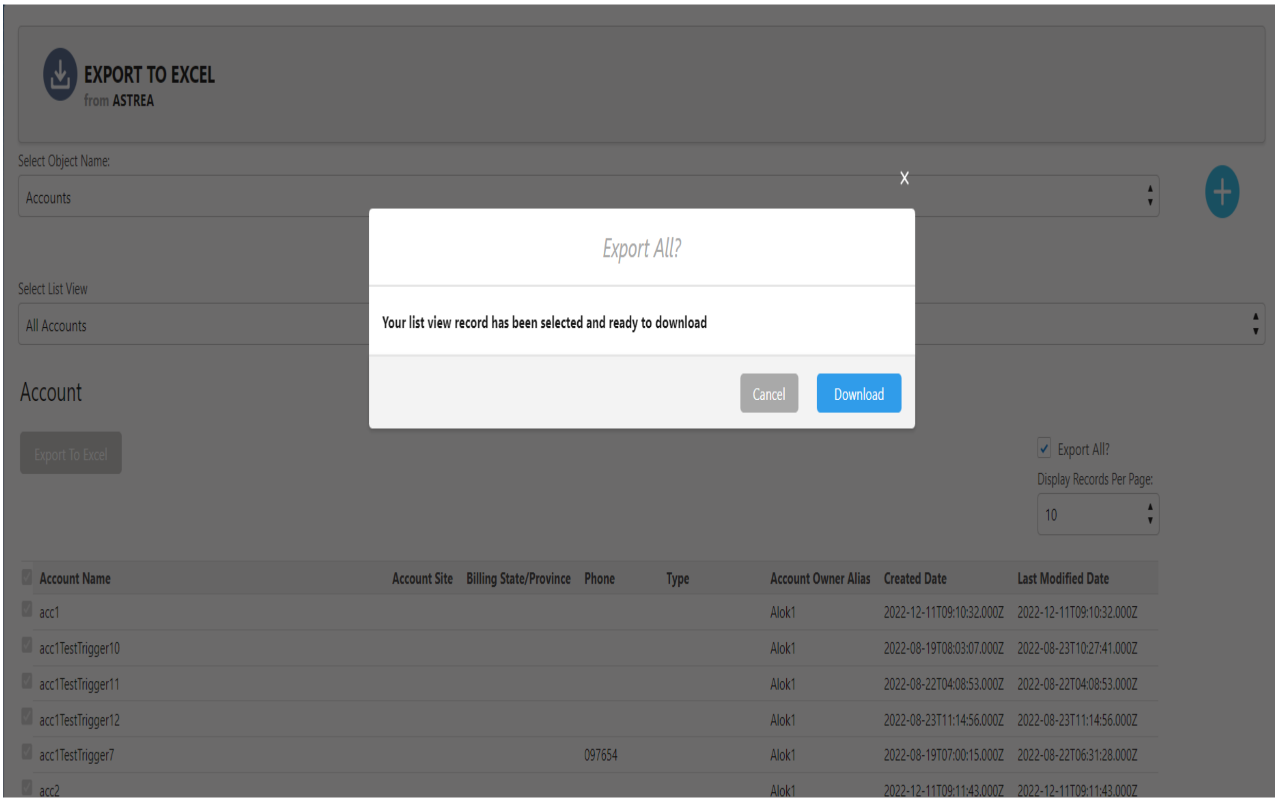
Step 2: Now select the available list option from the second picklist.



Step 3: You will see a table of all records corresponding to the list view and options to download them.



Step 4: In order to download all records of the list view, you can select the "Export All" checkbox from the top right corner of the table. This will show you a popup/modal to download all records.



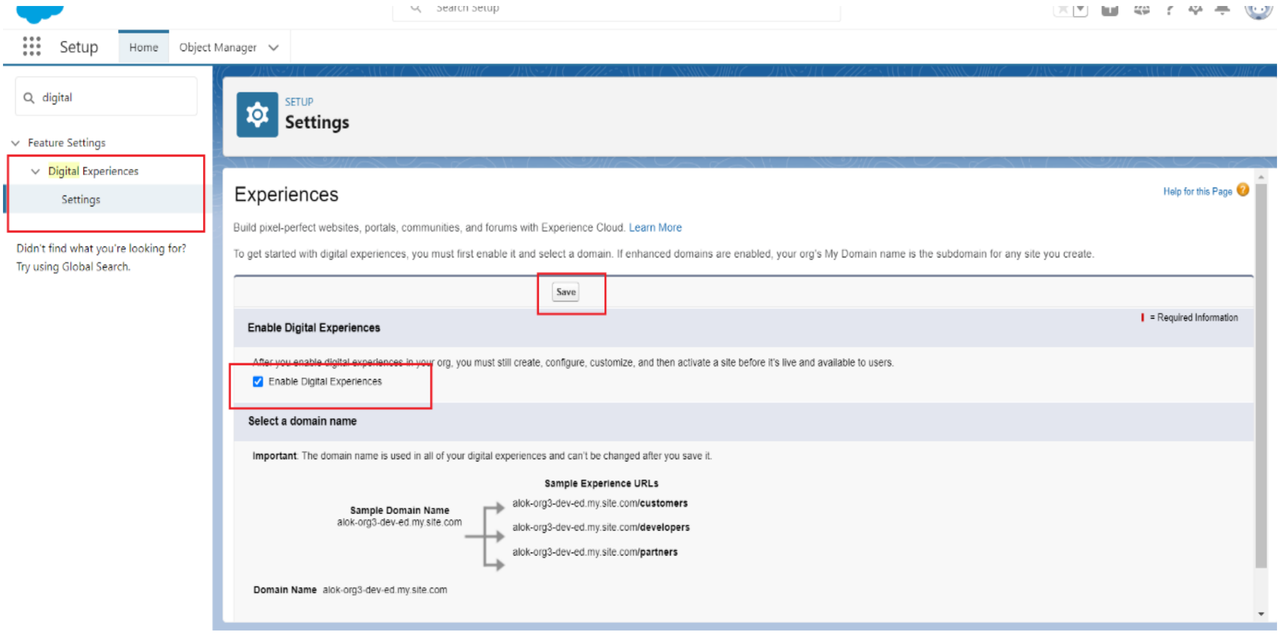
Step 5: If you want to download a specific record then you can select a checkbox corresponding to each record. After that you can click on the Export To Excel button, to download it to Excel.

Hands-on custom object list view: -
Before exporting a custom object record you have to add a custom object to the picklist via clicking on plus (+) icon corresponding to the first picklist. You just need to select a custom object from multi select picklist options. Then all the steps will be the same as the standard object list view export.

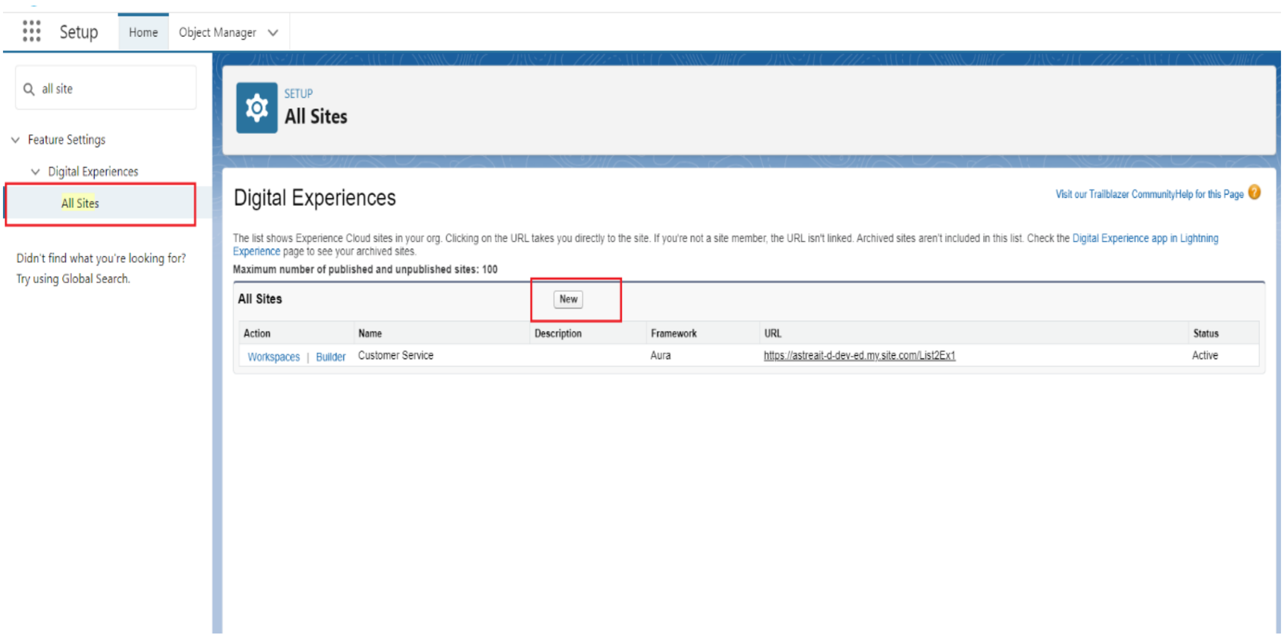
How to use in Lightning Communities: -

Before using components on community, follow below step: -
If Digital Experiences is already enabled into your org then follow all steps from Step 3 to Step 6 else follow all steps from Step 1 to Step 6.

Step 1: Click on Setup and in Quick Find box search Digital Experiences.
Step 2: Enable community from Digital Experience via clicking on Enable Digital Experience's checkbox.



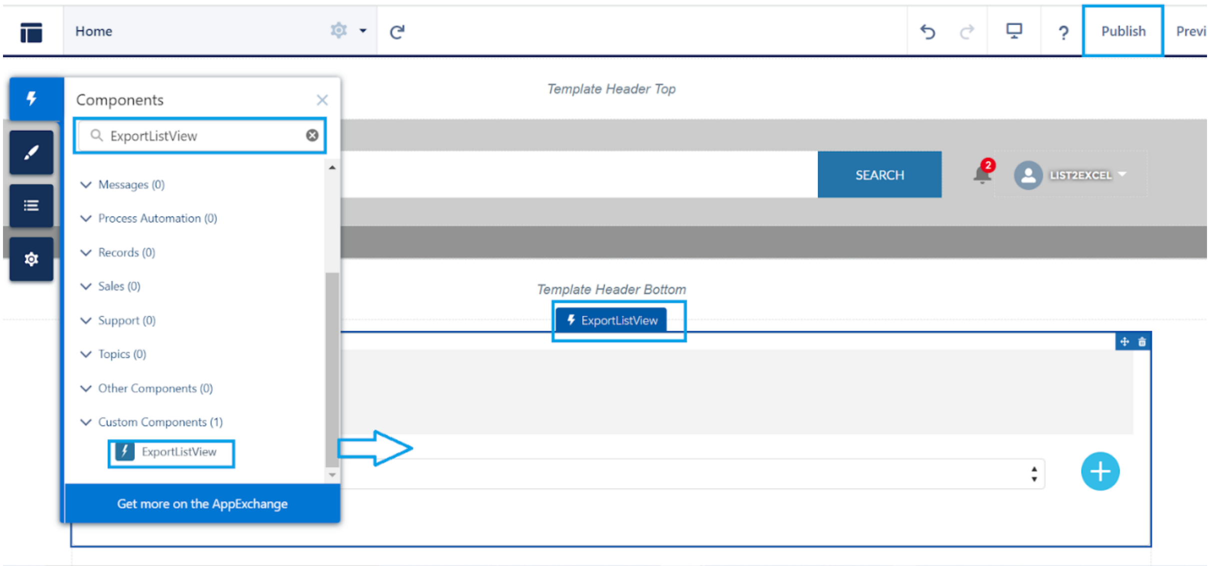
Step 3: Now again refresh the setup page and in the Quick Find box search for All Sites and click on the new button to create new site.



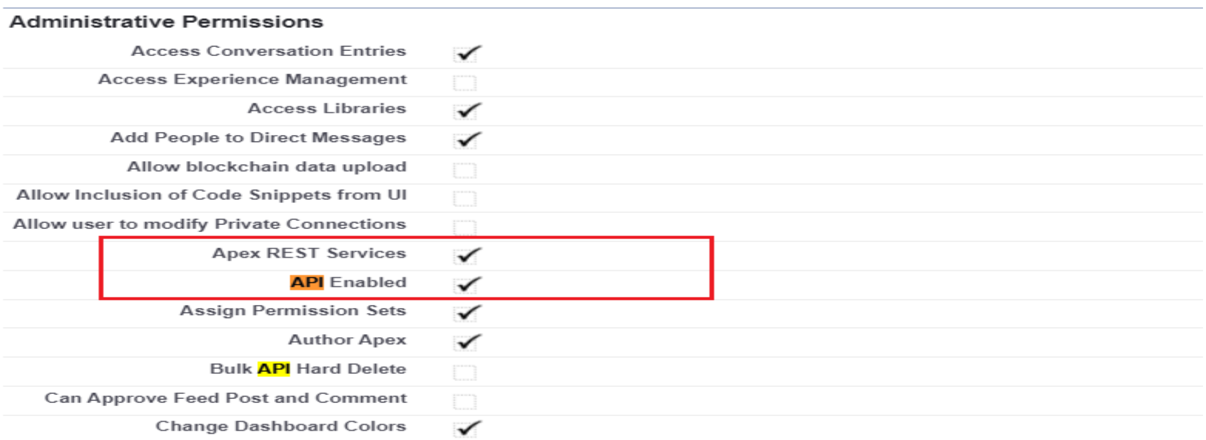
Step 4: You can choose below mentioned any template to create a new site.

- Customer Service
- Build Your Own (Aura)
- Customer Account Portal
- Help Centre
- Aloha
- Partner Central

Step 5: After the site is created just **Activate** and add members in it.
Step 6: Now from setup in Quick Find box search for All Sites and choose your site and click on Builder option to go to your community builder page, to drag and drop “ExportListView” component from available custom component list. Then publish it.



Note: - Make sure you must have a licensed community user (not the guest user) via enabling customer user. Also, you must enable the below option on community user profile:



Note: - You must also add the following components on community user profile:

- ListViewPaginationCtrl (Apex class)
- GetSession (VisualForce Page)

Now, the community user can export the record according to their need.