

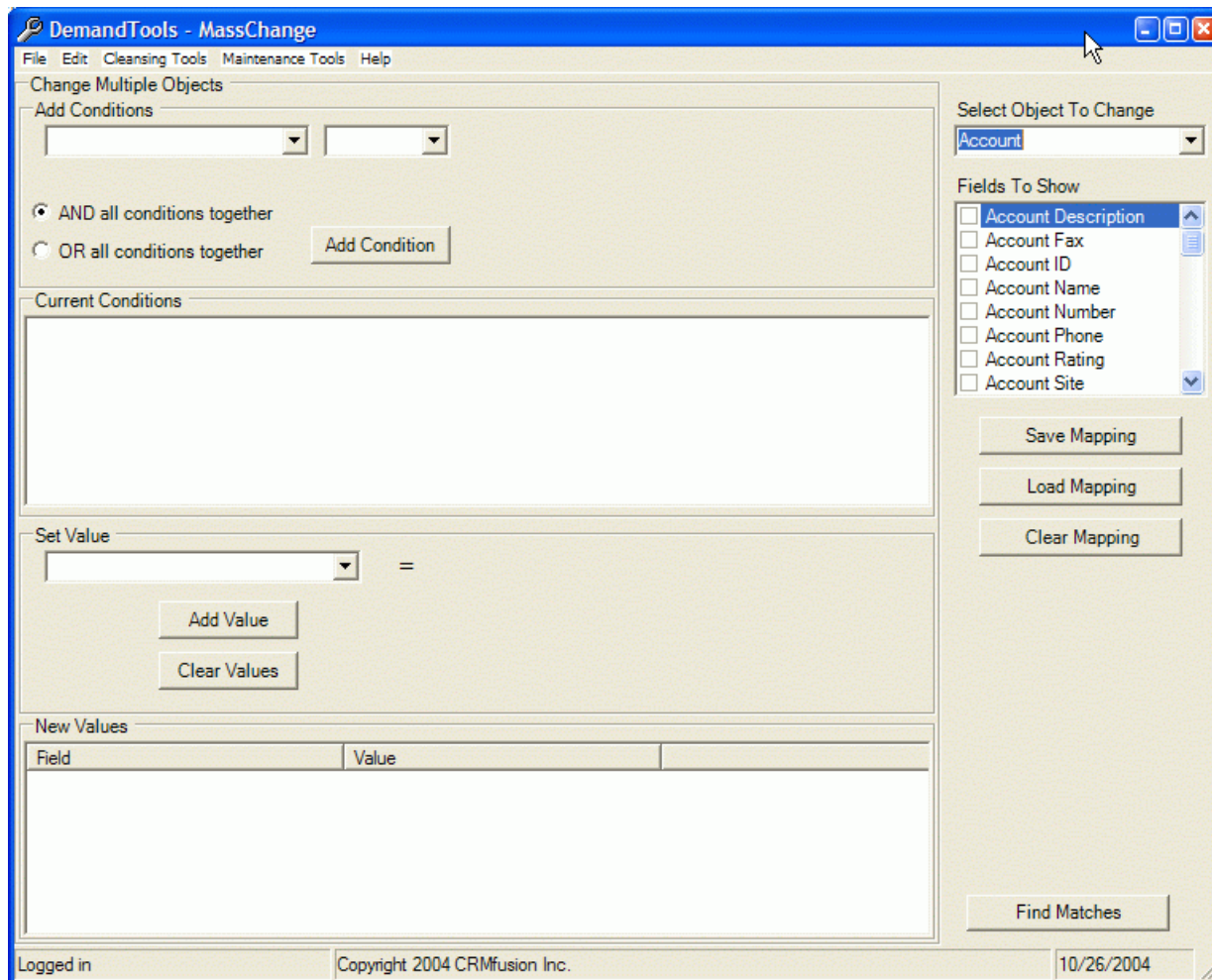
DemandTools Module Help for MassChange

The MassChange tool allows you to specify a condition to find matching objects of most salesforce.com tables and set values for those tables to specific values that you choose. It is designed to allow you to quickly change hundreds of records that require a common value in minutes.

With the MassChange tool you can:

- Roll the close date of open Opportunities over to the next month
- Combine leads from multiple users and queue's to a single user or queue
- Transfer Tasks and Events from one user to another with complex criteria
- Transfer ownership of objects from one user to another
- Transfer ownership of Accounts (plus attached Contacts, Opportunities, Activities and Contracts) based on specific account fields to a specific user.

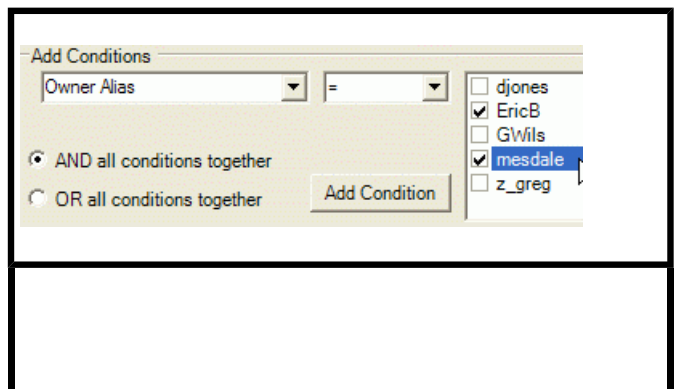
When you initially start the MassChange tool it will display all of the available objects from salesforce.com in the "Select Object To Change" selection box. Once you select an object (i.e. Account) the available fields for that object will be displayed in the "Fields To Show" checked list box. You must select between 1 to 6 of these field to display on the next screen. These fields will help you on the next section of the application to determine what of the found objects you want to change. For example, if you were MassChanging contacts you may want to show FirstName, LastName and Email in the next confirmation screen.



The second step is to specify the criteria for the change. These are the conditions that must be met in order for the objects (i.e. Accounts, Contacts, etc) to be changed. To do this you simply select the field from the top left of the screen. Once an object is selected the objects to the right of the field will update depending on the type of field selected. For example, if you select "Owner Alias" as the field the comparison operator will change to one of (equals, not equals) and the available Alias's will appear in the checked list box to the right of the field. You now must select one or more Alias's for your condition. The field condition selection will change depending on the field type (i.e. if you are using a date field in your condition the selection will become a date selector).

if you are satisfied with this select you use the "Add Condition" button to add this condition to the list of current conditions.

The current conditions that you have added are displayed in the "Current Conditions" text area. By default all of the conditions combined with an AND condition. This means that the more conditions you add, the fewer objects will be found as they must match all condition. If you choose to OR the conditions together you will find more objects with each condition.



When you are selecting text field (such as MailingState) you can separate the state names with comma's and the tool will find objects where any of those states are found. For example, if you are planning on changing account ownership based on state you can enter: WA,CA,AZ in the MailingState field and the tool will match any records that match one of those 3 MailingStates.

```
Current Conditions
(OwnerId = '00530000000cPGVAA2') OR (OwnerId = '00530000000cPERAA2')
(MailingState = 'CA') OR (MailingState = 'WA') OR (MailingState = 'OR')
LastModifiedDate < 2004-11-27
Title Like '%President%'
```

With the initial conditions set you now must select what field you want to change on the found objects. The controls for this section work in a similar fashion as the initial conditions except that you are setting a common field. The primary differences are that you can only select a single item for picklists (not multipicklists) and inactive users are not show.

Once you have determined the fields to change you select the "Find Matches" button and you will be brought to the confirmation screen. No data is changed by selecting this button as in the next step you will be confirming your changes.

DemandTools - MassChange

File Edit Cleansing Tools Maintenance Tools Help

Confirm Updates

Update Value?	Contact ID	First Name	Last Name	Mailing City	Mailing State
<input checked="" type="checkbox"/>	003300000022eg	Fred	Georgeson	Columbus	OH
<input checked="" type="checkbox"/>	003300000022eg	JEFF	CLARK	COLUMBIA CITY	IN
<input checked="" type="checkbox"/>	003300000022eh	Jim	Jones	Columbus	OH
<input type="checkbox"/>	003300000022ei	Emil	Slavik	Columbus	OH
<input checked="" type="checkbox"/>	003300000022ei	Lane	Beougher	Columbus	OH
<input checked="" type="checkbox"/>	003300000022ej	Mike	Rouch	Columbus	OH
<input checked="" type="checkbox"/>	003300000022ej	Michael	Chervenak	Columbus	OH
<input checked="" type="checkbox"/>	003300000022ek	Eric	Evans	Columbus	OH
<input checked="" type="checkbox"/>	003300000022ek	Chuck	Wermer	Columbus	OH
<input checked="" type="checkbox"/>	003300000022ek	Kurt	Louys	Columbus	OH
<input checked="" type="checkbox"/>	003300000022ek	Steven J.	Smetters	Columbus	OH
<input checked="" type="checkbox"/>	003300000022el	Jeff	Kreidler	Columbus	OH
<input checked="" type="checkbox"/>	003300000022e	Tom	Blazinic	Columbiana	OH
<input checked="" type="checkbox"/>	003300000022e	Dick	Ralston	Columbus	OH
<input checked="" type="checkbox"/>	003300000022e	Valued	Customer	Columbus	OH
<input checked="" type="checkbox"/>	003300000022eq	Accounts	Payable	Columbiana	OH
<input checked="" type="checkbox"/>	003300000022eq	John	Lowry	Columbus	OH
<input checked="" type="checkbox"/>	003300000022es	Pat	Lenihan	Columbus	OH
<input checked="" type="checkbox"/>	003300000022es	Larry S.	Fink	Columbus	OH
<input checked="" type="checkbox"/>	003300000022ev	Valued	Customer	Columbus	OH
<input checked="" type="checkbox"/>	003300000022e	Bob	Wells	Columbus	OH
<input checked="" type="checkbox"/>	003300000022e	James E.	Gabriel	Columbus	OH
<input checked="" type="checkbox"/>	003300000022e	Tim	Jewell	Columbus	OH
<input checked="" type="checkbox"/>	003300000022e	Greg	Evans	Columbus	OH
<input checked="" type="checkbox"/>	003300000022e	Roy	Thillberg	Columbus	OH

Select Object To Change: Contact

Fields To Show:

- Last Name
- Last Stay-in-Touch Req
- Last Stay-in-Touch Sav
- Lead Source
- Mailing City
- Mailing Country
- Mailing State
- Mailing Street

Save Mapping Load Mapping Clear Mapping

Check All Uncheck All **1422 Objects Found**

Back Process

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On this confirmation page all of the objects that match your criteria will be displayed and the total number will be shown in red text at the bottom of the page. You now can select the items (in the above sample the items shown represent Contacts) that you want the "New Values" assigned to. When you select the "Process" button the data will be updated in salesforce.com in a batch mode and the update will take at least 1 minute for each 1000 records to be changed (or longer depending on network conditions).