



GridBuddy Administration:

Installing/Migrating GridBuddy from Sandbox into a Target Org.

Updated: June 2017

Grids can be migrated between organizations by exporting records from the `GBLite__GridBuddySettings__c` custom object and `GBLite__GB_Global_Meta__c` custom object from one organization, and importing these records into the `GBLite__GridBuddySettings__c` and `GBLite__GB_Global_Meta__c` custom object of the target organization.

1. Install GridBuddy from the AppExchange In Target Environment

- a. Install GridBuddy from the “Get It Now” link in the AppExchange:
<https://appexchange.salesforce.com/listingDetail?listingId=a0N300000031kInEAK>
- b. During the install process, you need to assign profile access.
 - i. This selection determines whether you give GridBuddy profile access to just Admins, certain Profiles, or all Users.
 - ii. We recommend install for “Admins Only” for Production install and assign permissions for end users later, either via profile or permission set (see step #4).
 - iii. Full steps available in the [Getting Started Guide](#)
- c. Send the AppBuddy team an email (that includes the org ID) to activate the Production licenses. Sandbox installs are active by default.

2. Migrate Configuration from Sandbox

- a. Create an outbound change set that includes Salesforce artifacts to be migrated:
 - i. Any Visualforce pages created that reference GridBuddy (e.g. GBTabs_...)
 - ii. Any Lightning Components that reference GridBuddy
 - iii. Any affected page layouts (e.g. Account page Visualforce page with embedded Competitive Products grid section)
 - iv. Any additional fields created, etc.
 - v. Any custom tabs that are created

Export New Grids

- a. Use Data Loader to export **new** Grids from GridBuddySettings (GBLite__GridBuddySettings__c)
- b. Remove all records in GridBuddy Settings where:
 - i. OwnerId
 - ii. IsDeleted
 - iii. Name
 - iv. CreatedDate
 - v. CreatedById
 - vi. LastModifiedDate
 - vii. LastModifiedById
 - viii. SystemModstamp
- c. Remove any records where the GBLite__Default_Definition__c column has a value of "FALSE".
- d. Remove any duplicate grids that are already deployed in Production and delete the default grids where GBLITE__GRID_NAME__C is:
 - i. Leads
 - ii. Open Tasks
 - iii. Opportunities with Tasks
 - iv. Accounts with Contacts and Opps
- e. Save this file as a CSV file with the name `GridsToInsert.csv`

Create Export of Customizations and Managed Tab definition from Sandbox

- a. Use Data Loader to export updated Managed Tab definitions from GB Global Meta (GBLite__GB_Global_Meta__c)
- b. Remove the following columns:
 - i. OwnerId
 - ii. IsDeleted
 - iii. CreatedDate
 - iv. CreatedById
 - v. LastModifiedDate
 - vi. LastModifiedById

- vii. SystemModstamp
- c. Note: Do *not* remove the Id column, so that Actions and custom code components can maintain their relationship to Grids.
- d. Remove any records where the GBLite__Type__c column value is *not*
 - i. Action
 - ii. Tabbed Page
 - iii. Custom Code - CSS
 - iv. Custom Code - JavaScript
 - v. Custom Code - Global CSS
 - vi. Custom Code - Global JavaScript
- e. Save this file as a CSV file with the name `GBGlobalMetaToInsert.csv`

3. Deploy Change Set

4. Assign Profile or Permission Set access to GridBuddy Enabled Visualforce Page Access

- a. Modify each profile¹, OR create two permission sets² for GridBuddy Administrators and GridBuddy End Users.
- b. GridBuddy Administrators (*need access to the Grid Wizard so they can configure grids*)
 - i. GBLite.GridWizard1
 - ii. GBLite.GridWizard2
 - iii. GBLite.GridWizard3
 - iv. GBLite.ManageActions
 - v. GBLite.ManageFolders
 - vi. GBLite.AllGrids
 - vii. GBLite.Grid
 - viii. GBLite.GridSave
 - ix. GBLite.GridExport
 - x. GBLite.GridLoad
 - xi. GBLite.LookupAjaxResponder
 - xii. GBLite.ManageTabbedPages
 - xiii. GBLite.UserFilter
 - xiv. GBLite.ManageCustomCode
 - xv. GridAjaxResponder
 - xvi. Any Visualforce pages created in GridBuddy > Grid Wizard > Manage Tabbed Pages
- c. End Users (*need access to grids*)
 - i. GBLite.AllGrids
 - ii. GBLite.Grid
 - iii. GBLite.GridExport
 - iv. GBLite.GridLoad
 - v. GBLite.GridSave
 - vi. GBLite.LookupAjaxResponder

- vii. `GBLite.UserFilter`
- viii. `GridAjaxResponder`
- ix. Any Visualforce pages created in GridBuddy > Grid Wizard > Manage Tabbed Pages

5. Insert GridBuddy Settings Definitions

- a. Use Data Loader to **insert** `GridBuddySettings` (`GBLite__GridBuddySettings__c`) using the CSV created earlier (`GridsToInsert.csv`).

6. Insert GB Global Meta Definitions

- a. Use Data Loader to **update** GB Global Meta (`GBLite__GB_Global_Meta__c`) using the CSV created earlier (`GBGlobalMetaToInsert.csv`).

7. Refresh GridBuddy Metadata

- a. Navigate to the Grid Wizard
- b. In the Manage Grid Meta Data, click on the Refresh All Grid Meta Data link

Manage Grid Meta Data

Meta data refresh status: Completed as of 2017-02-08 18:04:03

Refresh the meta data that GridBuddy uses to display dependent and record type picklists, and lookup filters: [Refresh All Grid Meta Data](#)

If you don't want GridBuddy to retrieve meta data for your grids you can disable the meta data service and enable it later: [Disable Meta Data Service](#)

8. Assign GridBuddy Licenses to Users (Prod only)

- a. Note: This step does not exist in a Sandbox environment - only Production.
- b. GridBuddy will not be visible to users until this step is complete.
- c. *Setup > Installed Packages > GridBuddy > Manage Licenses.*

9. Future: Upgrade Steps

- a. Upgrade notification email will be sent out for new releases.
- b. To upgrade, simply install over the existing version from the AppExchange.
- c. Do not uninstall GridBuddy in this process. This will erase any configuration. Simply install over the existing version.
- d. Release notes: <http://www.appbuddy.com/release-notes.html>

10. Future: GridBuddy Support / Granting Login Access

- a. Log support cases with support@appbuddy.com.
- b. To granting login access to AppBuddy Support for troubleshooting, follow these steps: *Setup > My Personal Information > Grant Login Access > choose AppBuddy Support > 5 days > Save.*

¹To grant Visualforce page access to a profile:

1. Go to Setup > Manage Users > Profiles
2. Click on the Profile name to open the Profile view screen.
3. Scroll to the bottom of the page and click the **Edit** button next to **Enabled Visualforce Page Access**.
4. In the **Available Visualforce Pages** section, select the Visualforce pages indicated above and move them to the **Enabled Visualforce Pages** section by clicking the "Add" arrow.
5. Click Save.

²To grant Visualforce page access to using permission sets:

6. Go to Setup > Manage Users > Permission Sets.
7. Click "New" and populate the Label and select the User License (most often, it's "Salesforce").
8. Click on "Visualforce Page Access" then click "Edit".
9. In the **Available Visualforce Pages** section, select the Visualforce pages indicated above and move them to the **Enabled Visualforce Pages** section by clicking the "Add" arrow.
10. Click Save.