



GridBuddy Install and Migration Guide

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Introduction

GridBuddy is a Force.com web application developed by AppBuddy that sits on top of the Salesforce platform. There are two major components to the application - the Grid Wizard and the Grid. The Grid Wizard enables GridBuddy admins to define and configure Grid views. The Grid is what end-users use to see and manage their data.

- Grids can be migrated between organizations by exporting records from the GBLite__GridBuddySettings__c and GBLite__GB_Global_Meta__c custom objects from the source environment (typically a sandbox)
 - GridBuddy Settings is the object GridBuddy uses to store grid configurations
 - GB Global Meta is the object that GridBuddy uses to store code extensions, grid actions, & tabbed page definitions
- Complete the migration by importing these records into the GBLite__GridBuddySettings__c and GBLite__GB_Global_Meta__c custom object of the destination environment (typically an upper environment)

Installing & migrating GridBuddy from sandbox into a target org - **For the first time**

Install GridBuddy from the AppExchange In the Destination Environment

- Install GridBuddy from the “Get It Now” link in the AppExchange:
<https://appexchange.salesforce.com/listingDetail?listingId=a0N30000003IkInEAK>
- During the install process, you need to assign profile access.
 - This selection determines whether you give GridBuddy profile access to just Admins, certain Profiles, or all Users.
 - 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).
 - Full steps available in the [Getting Started Guide](#)
- Send the AppBuddy team an email (that includes the org ID) to activate the Production licenses. Sandbox installs are active by default.

Migrate the Configuration from Sandbox

- Create an outbound change set that includes Salesforce artifacts to be migrated:
 - Any Visualforce pages created that reference GridBuddy (these will be prefixed by GBTabs_ if they were created using Grid Wizard > Manage Tabbed Pages)
 - Any Lightning Components that reference GridBuddy
 - Any affected page layouts (e.g. Account record detail page with embedded grids)
- Deploy the change set to Production

Export Grids from the Sandbox

- Use Data Loader or an equivalent tool to export GridBuddySettings (GBLite__GridBuddySettings__c object) from the source environment
 - Select the following columns for export:
 1. Custom CSS File
 2. Custom JS File
 3. Default Definition
 4. Definition
 5. Grid Name
 6. GridBuddySettings Name
- Apply the following filters on the GridBuddySettings export in Data Loader:
 - Default Definition = TRUE
 1. This will exclude all user-defined filters that were created in the Sandbox
 2. If you would like to include user-defined filters in your migration, do not include filter ‘Default Definition = TRUE’ on your GridBuddySettings export.
 - Grid Name = {include the named grids you want to migrate from Sandbox}
 1. This filter should include the names of the grids that you **want** to migrate from Sandbox
 2. This filter should exclude the grids that you **don’t want** to migrate to Production
- For Example: Sample SOQL query in Data Loader:

- SELECT GBLite__Custom_CSS_File__c, GBLite__Custom_JS_File__c, GBLite__Default_Definition__c, GBLite__Definition__c, GBLite__Grid_Name__c, Name FROM GBLite__GridBuddySettings__c WHERE GBLite__Default_Definition__c = true **AND** (GBLite__Grid_Name__c = 'Grid Name 1' OR GBLite__Grid_Name__c = 'Grid Name 2' OR GBLite__Grid_Name__c = 'Grid Name 3')

- Export the file
 - **IMPORTANT: Do not open this file in Excel after the export as certain field metadata may exceed the max in Excel and corrupt the columns. It can be opened in Google Sheets or any other .csv supporting application or Text Editor.**
- Delete the out-of-the-box grids from the GridBuddySettings export:
 - If you did not specify which grids to include in the GridBuddy Settings record as explained in step 2.1.b, you can manually delete grids from the export.
 - Filter for the out-of-the-box grids using this field: GBLITE__GRID_NAME__C is:
 1. Leads
 2. Open Tasks
 3. Opportunities with Tasks
 4. Accounts with Contacts and Opps
 - Or delete these grids manually in Production after the migration is complete
- Save this file as a CSV file with the name GridsToInsert.csv

Create Export of GB Global Meta file from Sandbox

- Use Data Loader to export the GB Global Meta records (GBLite__GB_Global_Meta__c object)
 - Select the following columns for export:
 1. Id (IMPORTANT! This field allows actions and custom code components can maintain their relationship to Grids through Id)
 2. Controlling Field
 3. Grid Name
 4. Object API Name
 5. Object Dot Field Name
 6. Original Record Id [used to map custom code files and actions to grids]
 7. Picklist Meta
 8. Request Status
 9. Response Message
 10. Scope
 11. Summary
 12. Type
 - Filter GB Global Meta records and KEEP records where the GBLite__Type__c column value is:
 1. Action
 2. Tabbed Page
 3. Custom Code - CSS
 4. Custom Code - JavaScript
 5. Custom Code - Global CSS
 6. Custom Code - Global JavaScript
 7. Theme - Grid

8. Theme - Global
 - o Save this file as a CSV file with the name GBGlobalMetaToInsert.csv

IMPORTANT: Do not open this file in Excel as certain field metadata may exceed the max in Excel and corrupt the columns. It can be opened in Google Sheets or any other .csv supporting application or Text Editor.

Insert GridBuddy Settings Definitions

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

Insert GB Global Meta Definitions

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

Refresh GridBuddy Metadata

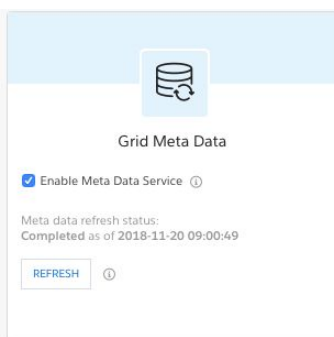
- Navigate to the Grid Wizard
- In the Manage Grid Meta Data, click on the “Refresh All Grid Meta Data” link

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](#)



****GRIDS ARE SUCCESSFULLY MIGRATED TO YOUR DESTINATION ENVIRONMENT. CONTINUE TO BELOW STEPS TO SET UP GRIDBUDDY PERMISSIONS****

Assigning User Permissions

Assign GridBuddy Licenses to Users (Prod only)

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

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

- Modify each profile¹, OR create two permission sets² for GridBuddy Administrators and GridBuddy End Users:
 - For Permission Sets, make sure that the License type is 'Salesforce Platform'
 - Permission set for GridBuddy Administrators (need to access grids and the Grid Wizard so they can configure grids)
 1. GBLite.GridWizard1
 2. GBLite.GridWizard2
 3. GBLite.GridWizard3
 4. GBLite.ManageActions
 5. GBLite.ManageFolders
 6. GBLite.AllGrids
 7. GBLite.Grid
 8. GBLite.GridExport
 9. GBLite.GridLoad
 10. GBLite.LookupAjaxResponder
 11. GBLite.ManageTabbedPages
 12. GBLite.UserFilter
 13. GBLite.ManageCustomCode (if available)
 14. GBLite.ManageCustomTheme (if available)
 15. GridAjaxResponder
 16. Any Visualforce pages created in GridBuddy > Grid Wizard > Manage Tabbed Pages
 - Permission Set for End Users (need to access to grids)
 1. GBLite.AllGrids
 2. GBLite.Grid
 3. GBLite.GridExport
 4. GBLite.GridLoad
 5. GBLite.LookupAjaxResponder
 6. GBLite.UserFilter
 7. Any Visualforce pages created in GridBuddy > Grid Wizard > Manage Tabbed Pages

Making the Application Visible (Grid and Grid Wizard tabs)

- For Profiles: Use the Getting Started guide > "Making the Application Visible" section to assign access to Grid, Grid Wizard, GridBuddy Settings and GB Global Meta Object
- For Permission Sets:
 - Go to the Admin Permission Set
 1. Click on Object Settings
 2. Click on Grids > Enable 'Available' and 'Visible' Access
 3. Click on Grid Wizard > Enable 'Available' and 'Visible' Access
 - Go to End User Permission Set
 1. Click on Object Settings
 2. Click on Grids > Enable 'Available' and 'Visible' Access

If you have migrated a Manage Tabbed Page, you must grant users access to the associated VF page before they will see the tab content:

- To grant Visualforce page access to a profile:
 - Go to Setup > Manage Users > Profiles
 - Click on the Profile name to open the Profile view screen.
 - Scroll to the bottom of the page and click the Edit button next to Enabled Visualforce Page Access.
 - 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.
 - Click Save.
- To grant Visualforce page access to using permission sets:
 - Go to Setup > Manage Users > Permission Sets.
 - Click "New" and populate the Label and select the User License (most often, it's "Salesforce").
 - Click on "Visualforce Page Access" then click "Edit".
 - 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.
 - Click Save.

****MIGRATION AND PERMISSIONS ARE NOW COMPLETE. USERS SHOULD NOW BE ABLE TO ACCESS THE GRIDS IN YOUR DESTINATION ENVIRONMENT. CONTINUE BELOW TO SEE STEPS FOR UPGRADING & WORKING WITH SUPPORT****

FUTURE:

Upgrade Steps

- Upgrade notification emails are sent out when there are new GridBuddy releases. Email info@appbuddy.com if you would like to be added to this email distribution list.
- To upgrade, simply install over the existing version from the AppExchange.
 - Do not uninstall GridBuddy in this process. Uninstalling will erase any grid configuration you've built. Simply install over the existing version.
- New feature release notes: <http://www.appbuddy.com/release-notes.html>

Future: GridBuddy Support / Granting Login Access

- Log support cases with support@appbuddy.com.
- To grant login access to AppBuddy Support for troubleshooting, follow these steps: [Setup > My Personal Information > Grant Login Access > Choose AppBuddy Support > 5 days > Save](#).
- To find your org ID (which AppBuddy Support will need), go to [Company Profile > Company Information](#)

Migrating NET NEW grids from sandbox into a target org - For subsequent launches

→ If you have done at least one migration to your destination environment, follow these steps.

→ If you are migrating grids brand new grids that do not exist in the destination environment, follow these steps.

→ If you are migrating grids that do exist in the destination environment and have been updated for this launch, go to the [MIGRATING UPDATED AND NET NEW GRIDS \(UPSERT\)](#) section.

Migrate the Configuration from Sandbox

- Create an outbound change set that includes Salesforce artifacts to be migrated:
 - Any Visualforce pages created that reference GridBuddy (these will be prefixed by GBTabs_ if they were created using Grid Wizard > Manage Tabbed Pages)
 - Any Lightning Components that reference GridBuddy
 - Any affected page layouts (e.g. Account record detail page with embedded grids)
- Deploy the change set to Production

Export Grids from the Sandbox

- Use Data Loader or an equivalent tool to export GridBuddySettings from the source environment (GBLite__GridBuddySettings__c)
 - Select the following columns for export:
 1. Custom CSS File
 2. Custom JS File
 3. Default Definition
 4. Definition
 5. Grid Name
 6. GridBuddySettings Name
- Apply the following filters on the GridBuddySettings export:
 - Default Definition = TRUE
 1. This will exclude all user-defined filters that were created in the Sandbox
 2. If you would like to include user-defined filters in your migration, do not include filter 'Default Definition = TRUE' on your GridBuddySettings export.
 - Grid Name = Grid Name1 OR Grid Name 2 OR Grid Name3
 1. This filter should include the names of the grids that you **want** to migrate from Sandbox
 2. This filter should exclude the grids that you **don't want** to migrate to Production
 - For Example: Sample SOQL query in Data Loader:
 1.

```
SELECT GBLite__Custom_CSS_File__c, GBLite__Custom_JS_File__c,
GBLite__Default_Definition__c, GBLite__Definition__c, GBLite__Grid_Name__c, Name
FROM GBLite__GridBuddySettings__c WHERE GBLite__Default_Definition__c = true
AND (GBLite__Grid_Name__c = 'Grid Name 1' OR
GBLite__Grid_Name__c = 'Grid Name 2' OR
GBLite__Grid_Name__c = 'Grid Name 3')
```

- Export the file

IMPORTANT: Do not open this file in Excel as certain field metadata may exceed the max in Excel and corrupt the columns. It can be opened in Google Sheets or any other .csv supporting application or Text Editor.

- Save this file as a CSV file with the name GridsToInsert.csv

Create Export of GB Global Meta file from Sandbox

- Use Data Loader to export the GB Global Meta records (GBLite__GB_Global_Meta__c)
- Select the following columns for export:
 - Id (IMPORTANT! This field allows actions and custom code components can maintain their relationship to Grids through Id)
 - Controlling Field
 - Grid Name
 - Object API Name
 - Object Dot Field Name
 - Original Record Id [used to map custom code files and actions to grids]
 - Picklist Meta
 - Request Status
 - Response Message
 - Scope
 - Summary
 - Type
- Filter GB Global Meta records and KEEP records where the GBLite__Type__c column value is:
 - Action
 - Tabbed Page
 - Custom Code - CSS
 - Custom Code - JavaScript
 - Custom Code - Global CSS
 - Custom Code - Global JavaScript
 - Theme - Grid
 - Theme - Global
- Save this file as a CSV file with the name GBGlobalMetaToInsert.csv
- **IMPORTANT: Do not open this file in Excel as certain field metadata may exceed the max in Excel and corrupt the columns. It can be opened in Google Sheets or any other .csv supporting application or Text Editor.**

Delete existing files from Production

- GridBuddy Settings can be imported without deleting the same file from the destination environment, since all the grids included in the launch are net-new
- Delete GridBuddy metadata ('GBLite__GB_Global_Meta__c' records) from the destination environment
 - This deletion is necessary to avoid duplicate metadata in the destination environment after the import is complete.

- **WARNING:** When GB metadata is deleted, the grids won't reflect any of the metadata from the GridBuddy metadata service until it is imported in step 6.

Insert GridBuddy Settings Definitions

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

Insert GB Global Meta Definitions

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

Refresh GridBuddy Metadata

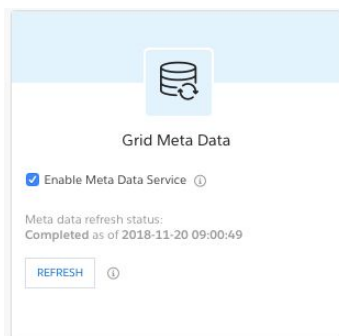
- Navigate to the Grid Wizard
- In the Manage Grid Meta Data, click on the "Refresh All Grid Meta Data" link

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](#)



****NET-NEW GRIDS ARE SUCCESSFULLY MIGRATED TO YOUR DESTINATION ENVIRONMENT****

Migrating net-new and updated grids (UPSERT) from sandbox into a target org - For subsequent launches

→ If you are migrating net-new grids and updates in grids that exist in the destination environment (UPSERT), follow the below steps.

→ If you are migrating only net-new grids, follow the steps provided in the [MIGRATING NET NEW GRIDS](#) section above.

Migrate the Configuration from Sandbox

- Create an outbound change set that includes Salesforce artifacts to be migrated:
 - Any Visualforce pages created that reference GridBuddy (these will be prefixed by GBTabs_ if they were created using Grid Wizard > Manage Tabbed Pages)
 - Any Lightning Components that reference GridBuddy
 - Any affected page layouts (e.g. Account record detail page with embedded grids)
- Deploy the change set to Production

Export Grids from the Sandbox

- Use Data Loader or an equivalent tool to export GridBuddySettings from the source environment (GBLite__GridBuddySettings__c)
 - Select the following columns for export:
 1. Custom CSS File
 2. Custom JS File
 3. Default Definition
 4. Definition
 5. Grid Name
 6. GridBuddySettings Name
- Apply the following filters on the GridBuddySettings export:
 - Default Definition = TRUE
 1. This will exclude all user-defined filters that were created in the Sandbox
 2. If you would like to include the sandbox user-defined filters in your migration, do not include filter 'Default Definition = TRUE' on your GridBuddySettings export.
 - Grid Name = Grid Name1 OR Grid Name 2 OR Grid Name3
 1. This filter should include the names of the grids that you **want** to migrate from Sandbox
 2. This filter should exclude the grids that you **don't want** to migrate to Production
 - For Example: Sample SOQL query in Data Loader:
 1.

```
SELECT GBLite__Custom_CSS_File__c, GBLite__Custom_JS_File__c,
GBLite__Default_Definition__c, GBLite__Definition__c, GBLite__Grid_Name__c, Name
FROM GBLite__GridBuddySettings__c WHERE GBLite__Default_Definition__c = true
AND (GBLite__Grid_Name__c = 'Grid Name 1' OR
GBLite__Grid_Name__c = 'Grid Name 2' OR
GBLite__Grid_Name__c = 'Grid Name 3')
```
- Export the file

IMPORTANT: Do not open this file in Excel as certain field metadata may exceed the max in Excel and corrupt the columns. It can be opened in Google Sheets or any other .csv supporting application or Text Editor.

- Save this file as a CSV file with the name GridsToInsert.csv

Create Export of GB Global Meta file from Sandbox

- Use Data Loader to export the GB Global Meta records (GBLite__GB_Global_Meta__c)
- Select the following columns for export:
 - Id (IMPORTANT! This field allows actions and custom code components can maintain their relationship to Grids through Id)
 - Controlling Field
 - Grid Name
 - Object API Name
 - Object Dot Field Name
 - Original Record Id [used to map custom code files and actions to grids]
 - Picklist Meta
 - Request Status
 - Response Message
 - Scope
 - Summary
 - Type
- Filter GB Global Meta records and KEEP records where the GBLite__Type__c column value is:
 - Action
 - Tabbed Page
 - Custom Code - CSS
 - Custom Code - JavaScript
 - Custom Code - Global CSS
 - Custom Code - Global JavaScript
 - Theme - Grid
 - Theme - Global
- Save this file as a CSV file with the name GBGlobalMetaToInsert.csv

IMPORTANT: Do not open this file in Excel as certain field metadata may exceed the max in Excel and corrupt the columns. It can be opened in Google Sheets or any other .csv supporting application or Text Editor.

Delete existing files from Production

- Because you are migrating updated grids that already exist in Production, you'll need to delete those grids from Production GBLite__GridBuddySettings__c records to avoid creating duplicates in the destination environment.
- Delete existing grids from the destination environment using this Database query:
 - Database.delete([Select Id from GBLite__GridBuddySettings__c WHERE Default_Definition__c='TRUE']);
 - **NOTE:** This query deletes grids but **does not** delete user-defined records such as user-defined filters. However, any major changes to imported grid definitions may affect the validity of the user-defined filters.

- Delete GridBuddy metadata ('GBLite__GB_Global_Meta__c' records) from the destination environment
- **WARNING:**
 - **When GB metadata is deleted, the grids won't reflect any of the metadata from the GridBuddy metadata service until it's imported in step 6.**
 - **When GridBuddy Settings are deleted from the destination environment, grids won't appear in that environment until the new file is imported in step 5.**

Insert GridBuddy Settings Definitions

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

Insert GB Global Meta Definitions

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

Refresh GridBuddy Metadata

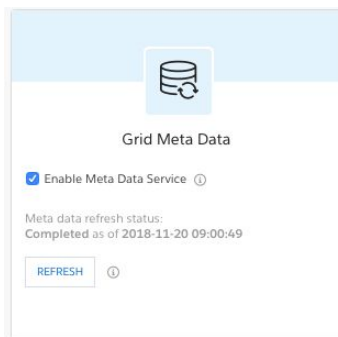
- Navigate to the Grid Wizard
- In the Manage Grid Meta Data, click on the "Refresh All Grid Meta Data" link

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](#)



****NET-NEW AND UPDATED GRIDS (UPSERT) ARE SUCCESSFULLY MIGRATED TO YOUR DESTINATION ENVIRONMENT****

Upgrading & working with AppBuddy Support

Future: Upgrade Steps

- Upgrade notification email will be sent out for new releases.
- To upgrade, simply install over the existing version from the AppExchange.
- Do not uninstall GridBuddy in this process. Uninstalling will erase any grid configuration you've built. Simply install over the existing version.
- New feature release notes: <http://www.appbuddy.com/release-notes.html>

Future: GridBuddy Support / Granting Login Access

- Log support cases with support@appbuddy.com.
- To grant login access to AppBuddy Support for troubleshooting, follow these steps: Setup > My Personal Information > Grant Login Access > Choose AppBuddy Support > 5 days > Save.
- To find your org ID (which AppBuddy Support will need), go to Company Profile > Company Information



About AppBuddy

AppBuddy is the industry leader in data interaction solutions that simplify complex work. With AppBuddy businesses create a single user experience from disparate business data, and enable their users to get work done fast. AppBuddy takes the enterprise systems you have and intelligently turns them into applications that are loved by end users.

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