validity

GridBuddy

Getting Started Guide

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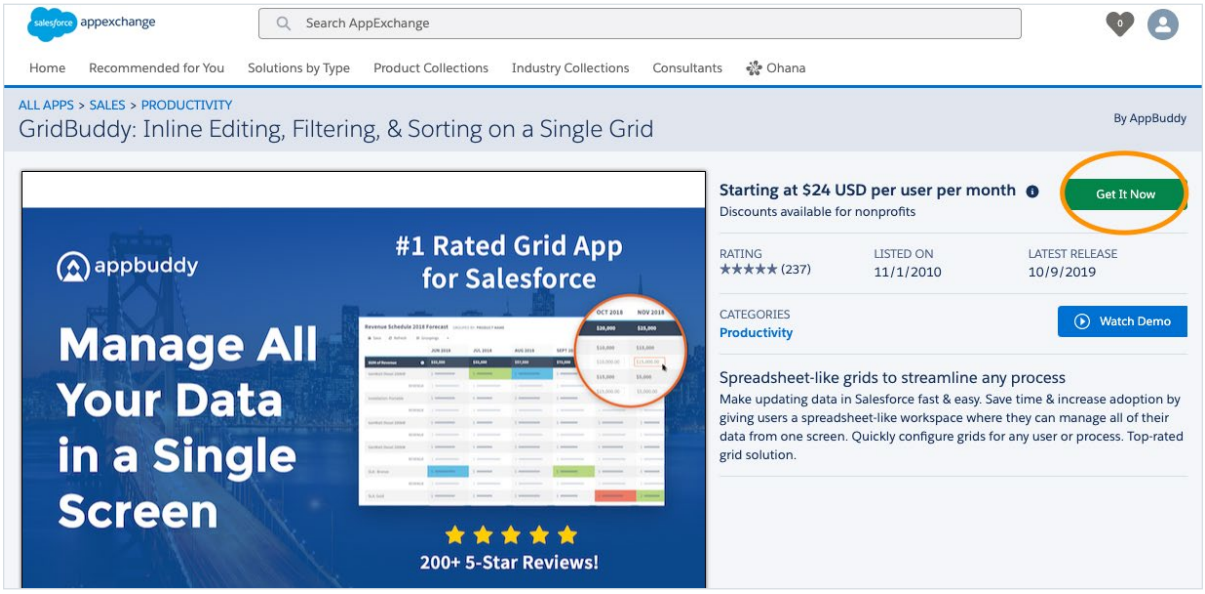
Step 1 | Install the GridBuddy app from the SFDC Appexchange.

https://appexchange.salesforce.com/listingDetail?listingId=a0N30000003IkInEAK

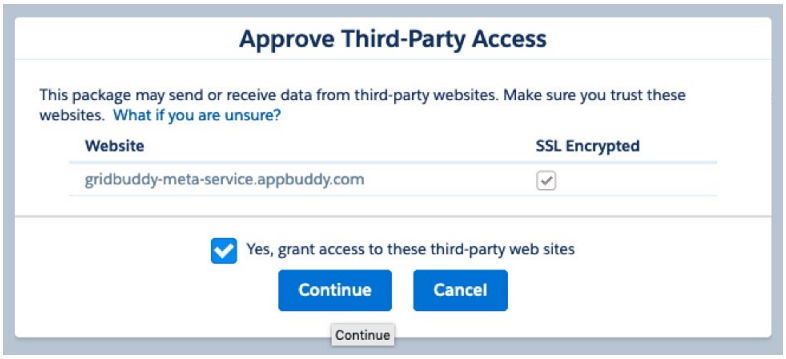
Click the ‘Get it now’ button to install the GridBuddy app into the Salesforce org of your choice. You will need to do steps 2 and 3 before the installation is complete.



Step 2 | Approve access.

During the install process, you will see a message to approve third-party data access. GridBuddy has a Heroku-hosted service to ping the Salesforce Meta Data API in order to render dependent picklists and lookup filter definitions on the grid. Note that GridBuddy does NOT transmit or store any production data outside of your org to this or any other service.

Select ‘yes’ and click ‘continue’.

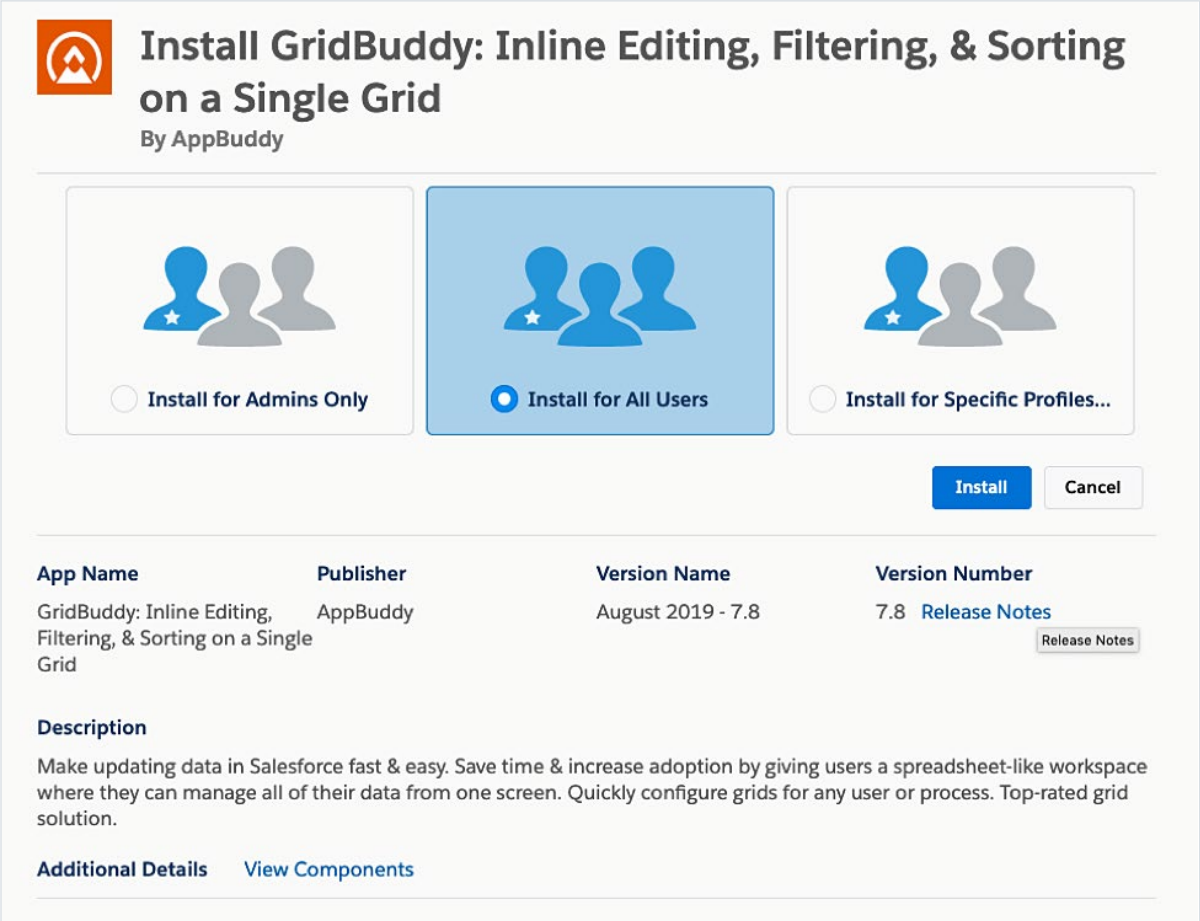


Step 3 | Grant User/Profile access to GridBuddy.

Select the appropriate profile access for your org. For all options, you will need to assign a GridBuddy license to your named Users in the installed package for them to access the GridBuddy application.

- 'Install for All Users' will grant GridBuddy permissions to all profiles and will not require the additional access configuration listed in steps 6-8
- 'Install for Specific Profiles' will allow you to select individual profile combinations and for those profiles will not require the additional access configuration listed in steps 6-8.
- 'Installs for Admins Only' will only grant access to the System Administrator profile. Extending access to other User profiles and permission sets will need to be done manually in steps 6-8.

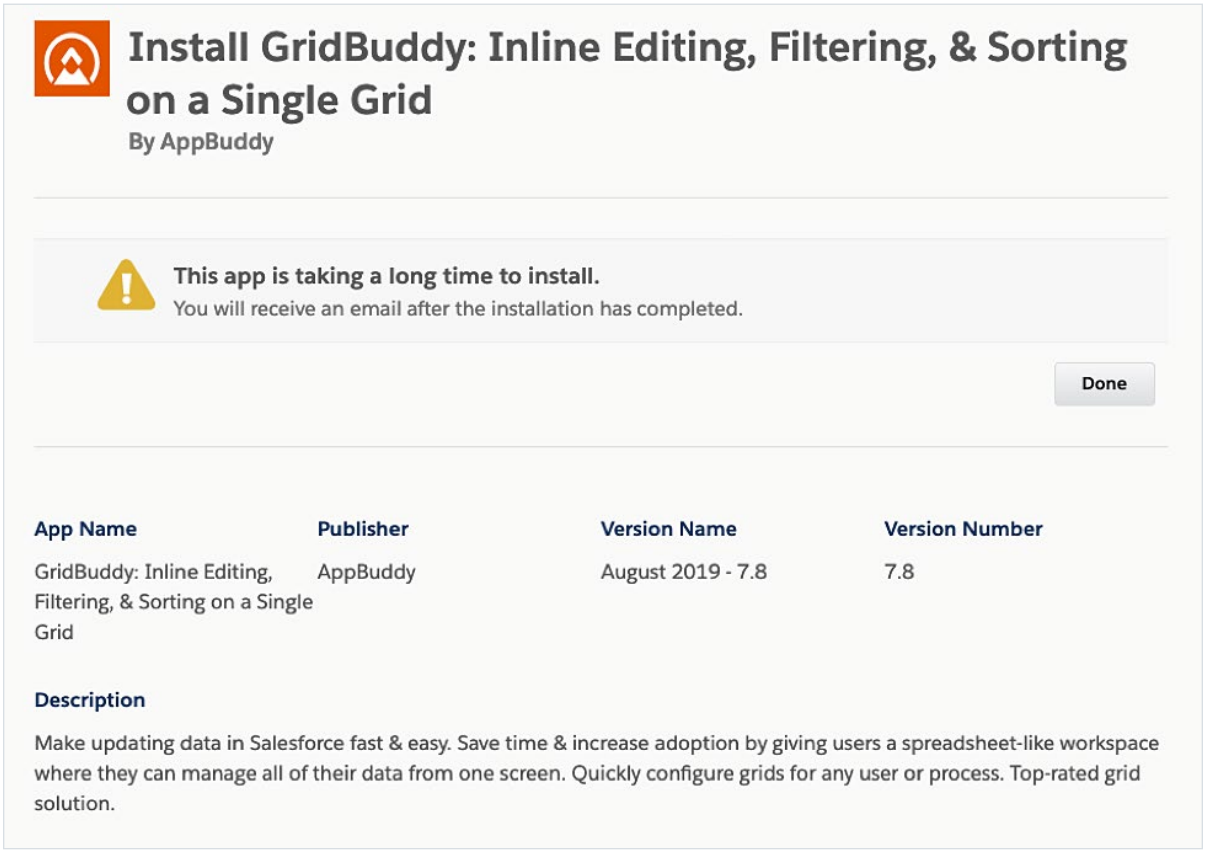
Click 'Install'.



Step 3 | continued

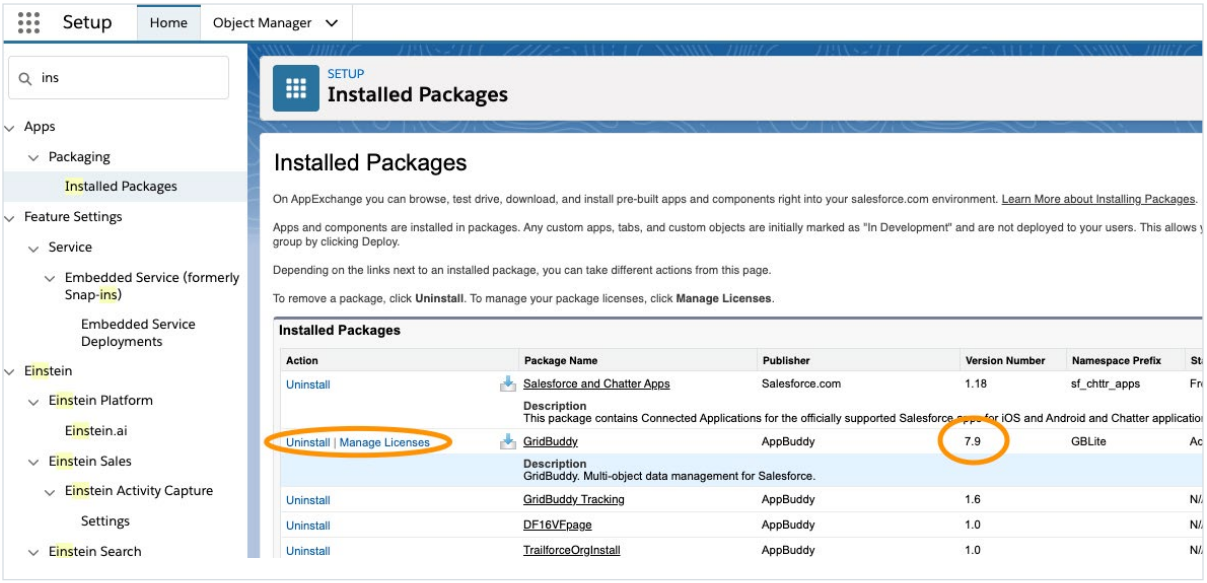
You might see a message that says that “This app is taking a long time to install.” This is normal.

- Click ‘done’ and go to Setup.
- Check your installed packages; you’ll see GridBuddy here shortly.



Step 3 | continued

Installed Packages is also where you can check your GridBuddy version, and assign GridBuddy licenses to your users. 10 licenses are included in the free trial.

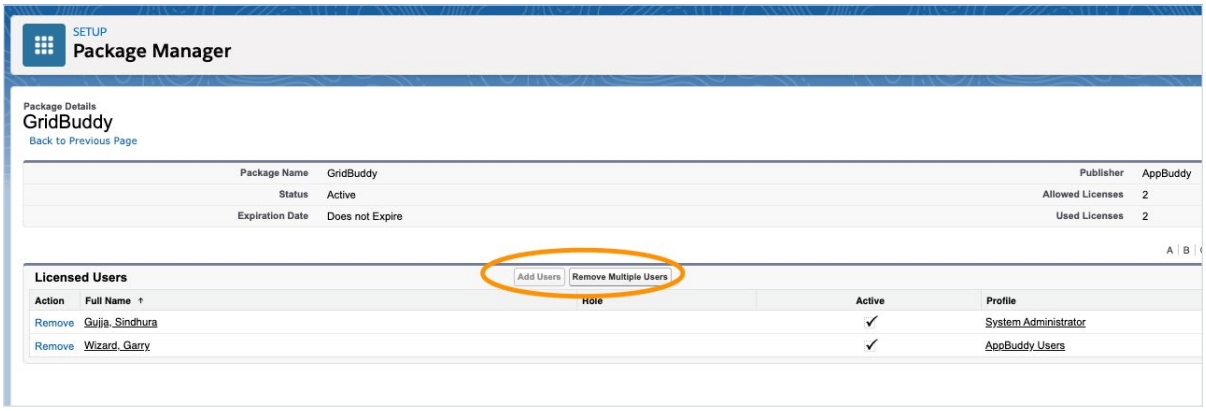


Step 4 | Assign licenses to users.

In Setup > Installed Packages, click the ‘manage licenses’ link to open the GridBuddy Package Manager. Click the ‘add users’ button to see a list of available users. Check the box beside each user to assign them a GridBuddy license.

Note: GB licenses are 1:1, one license for one user, unless you purchase a site license which can mean unlimited users. A site license also means you can skip this step.

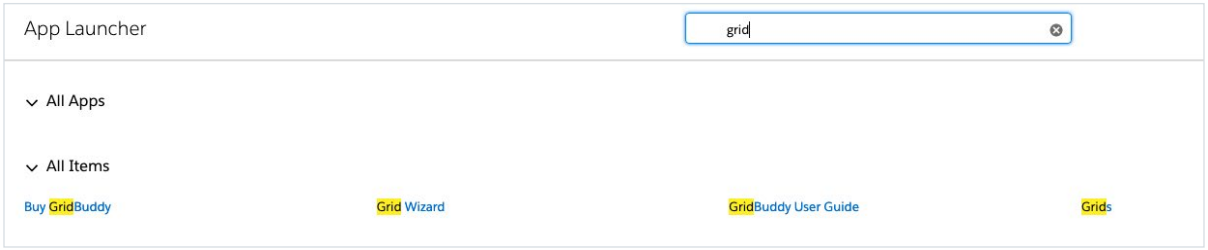
If you are installing GridBuddy in a Salesforce Sandbox – the ‘manage licenses’ link will not appear, and access to GridBuddy will be controlled only based on the profile permissions.

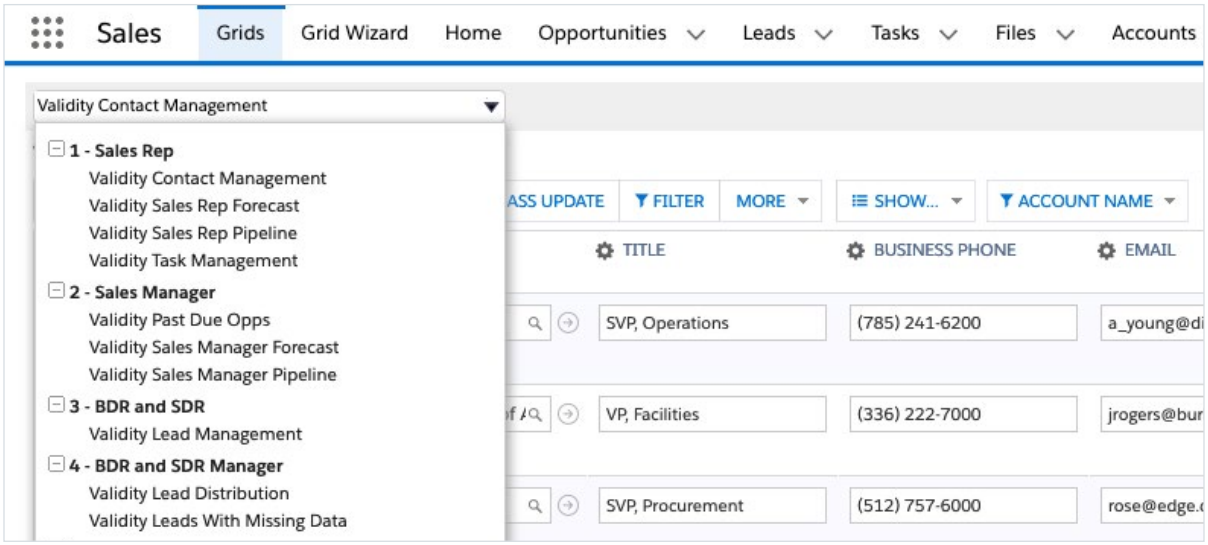


Step 5 | You and your assigned users are ready to use GridBuddy.

You don't have to configure anything else, because ReadyGrids (pre-packaged grids) are available for immediate use.

Go to the app launcher and type in 'grid'. Select 'Grids' to load the Grid tab or click into the GridBuddy application and access your preconfigured ReadyGrids.





Users with Grid Administrator permissions can access the "Grid Wizard" tab or click into the grid editing options under the "More" button on the grid in order to make configuration changes to the ReadyGrids or create new grid configurations.

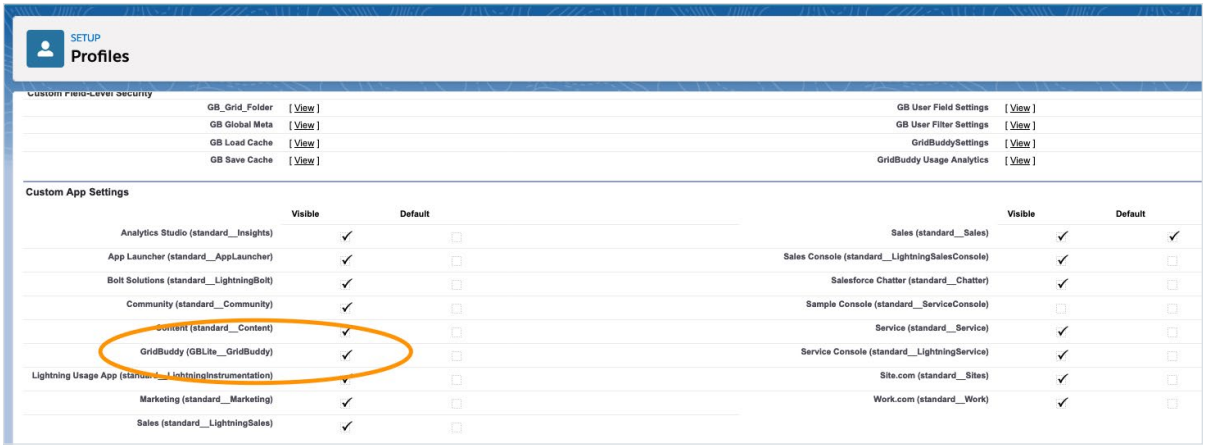
Step 6 | Making the GridBuddy application visible.

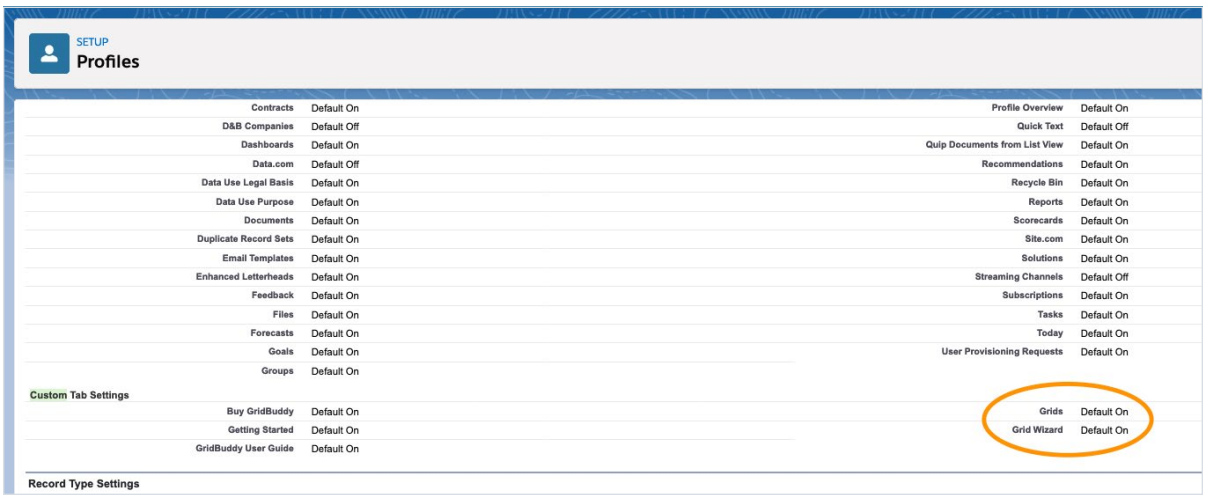
If you didn't click 'Install for All Users' in Step 3

You will need to make the GridBuddy application visible to specific users, profiles, or permission sets, if you didn't click 'install for all users' when installing the package in step 3. The following steps will explain how to set up GridBuddy admins and GridBuddy end-users, and how to enable access to the GridBuddy Visualforce pages.

Profiles:

1. Go to Setup > Profiles and click 'edit' beside the profile you want to modify
2. Custom app settings: Check the "visible" box beside GridBuddy
3. Tab settings: Choose "default on" for Grids, Getting Started, GridBuddy User Guide. Add Grid Wizard if this is a GridBuddy admin profile.





Step 6 | continued

Permission sets:

Create two permission sets. One for GridBuddy Administrators and one for GridBuddy End Users. For Permission Sets, make sure that the License type is ‘Salesforce Platform’.

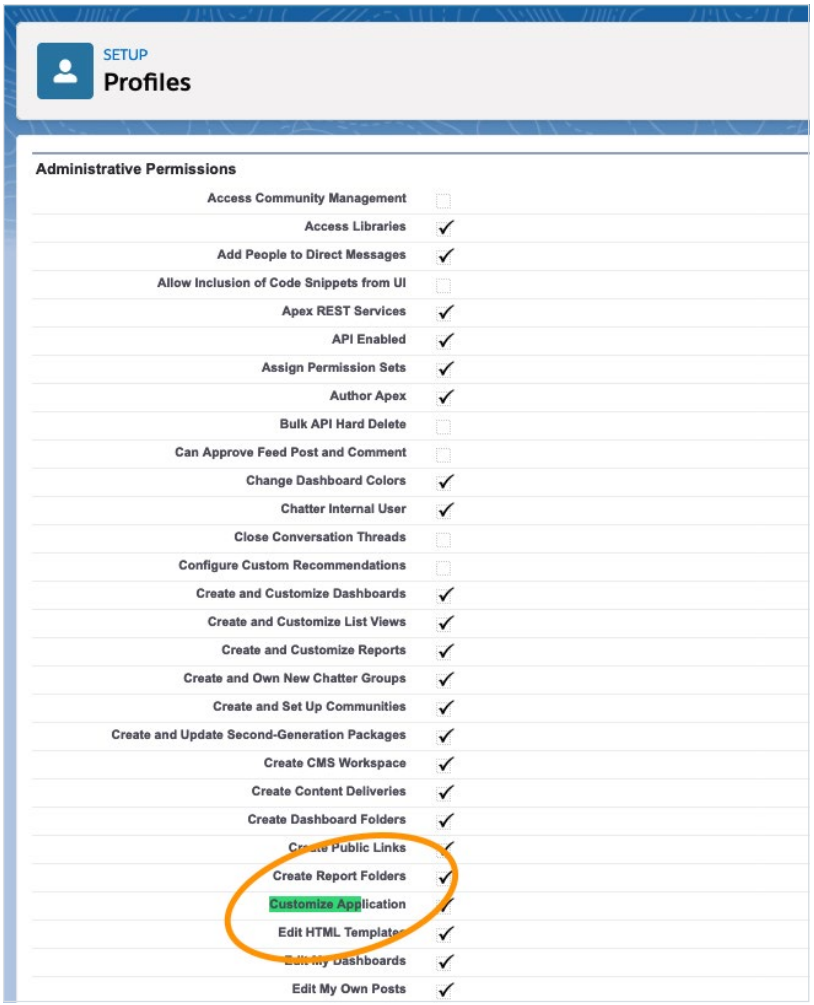
To enable access:

1. Go to the Admin Permission Set and click on Object Settings
    a. Click on Grids > Enable ‘Available’ and ‘Visible’ Access
    b. Click on Grid Wizard > Enable ‘Available’ and ‘Visible’ Access
2. Go to End User Permission Set and click on Object Settings
    a. Click on Grids > Enable ‘Available’ and ‘Visible’ Access

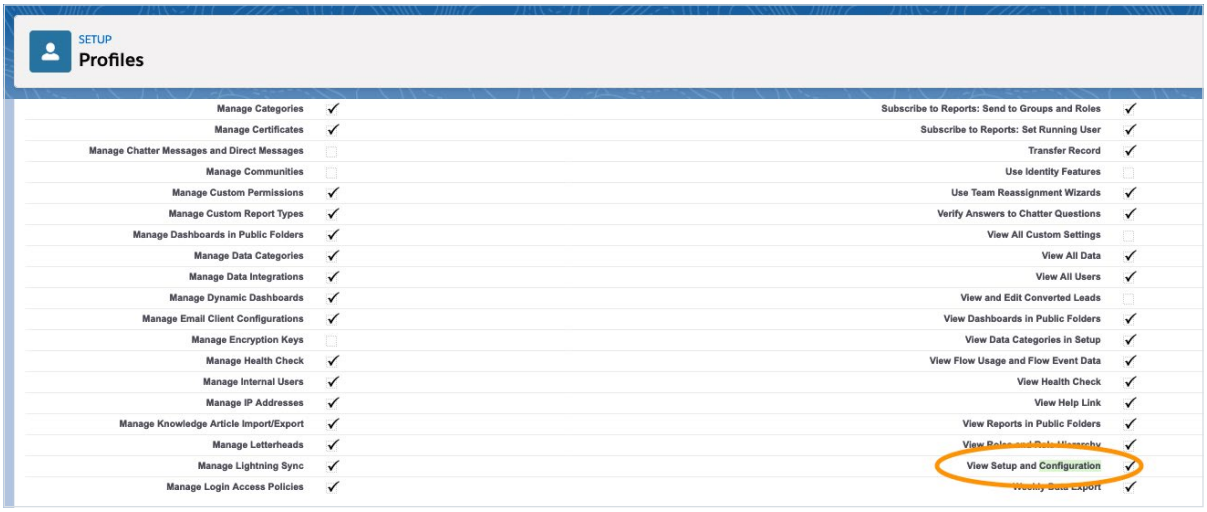
Step 7 | Setting up Grid Wizard admins.

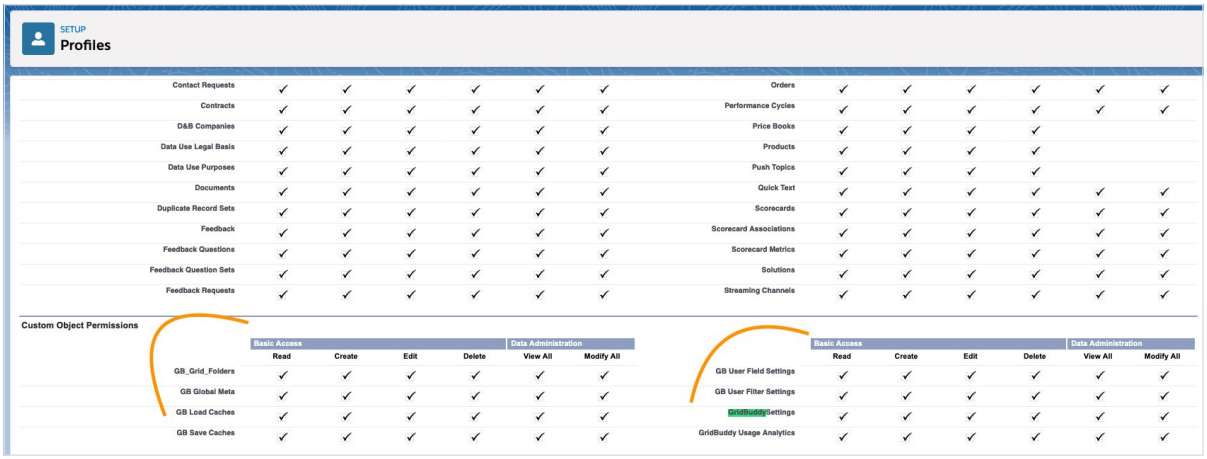
If you didn't select "grant access to all users" when installing the package, you will have to grant permissions to create grids using the Grid Wizard manually by following these steps.

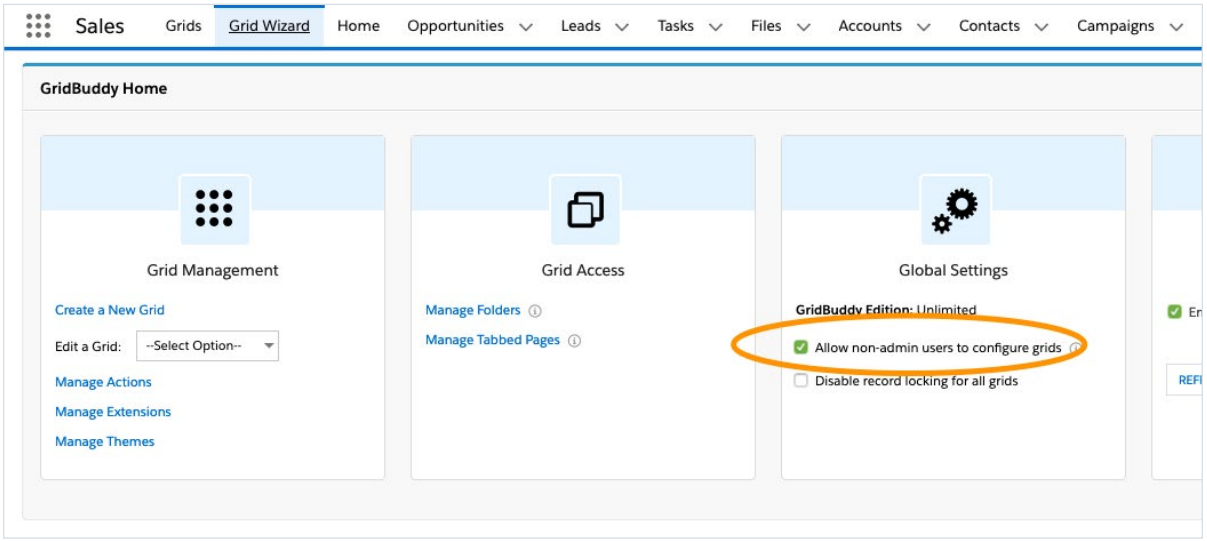
1. Go to Setup > Profiles
2. Admin profiles:
    a. Edit and check the box for the "Customize Application" and "View Setup and Configuration" permissions in order for this profile to use the Grid Wizard.
    b. Check the "Modify All" access on the "GridBuddy Settings" object
    c. Save
3. If you want to allow non-admin users to configure grids (profiles without the above permissions enabled), go to the Grid Wizard and enable the "non-admin" grid creation option.



Step 7 | continued

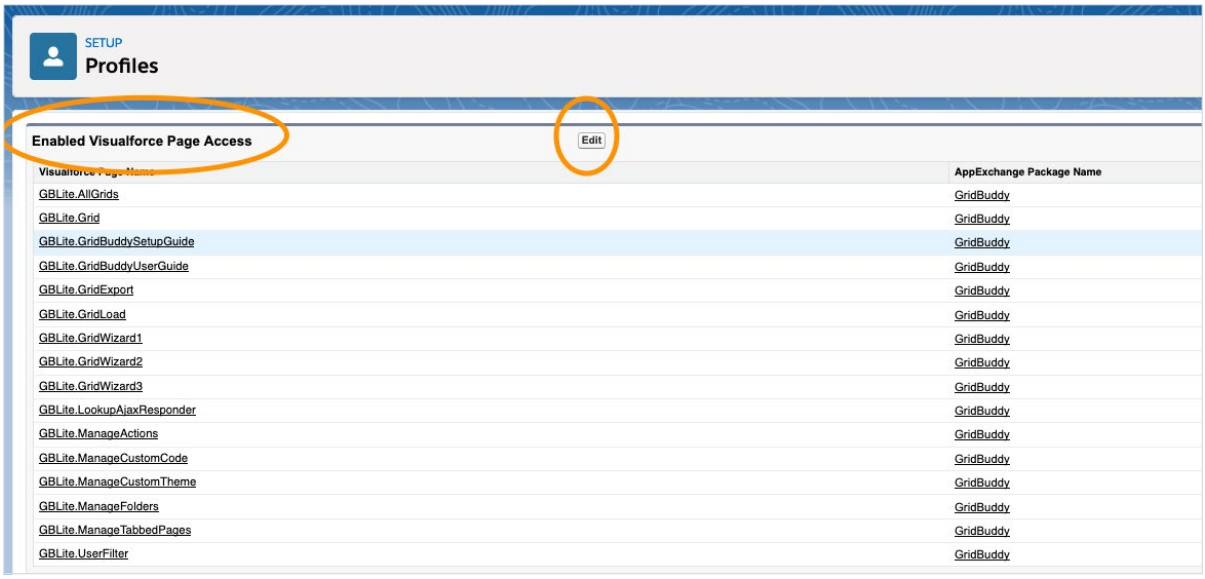






Step 8 | Enable access to GridBuddy Visualforce pages.

If you didn't select "grant access to all users" when installing the package, you will have to enable access to the necessary Visualforce pages manually by following these steps.



Profiles:

1. Go to Setup > Profiles and click the profile you want to modify
2. Edit the 'Enable Visualforce Page Access' section
3. In the 'Available Visualforce Pages' section, select the Visualforce pages listed below and move them to the 'Enabled Visualforce Pages' section by clicking the "Add" arrow.
4. Admins: To enable access to the Grid Wizard (for users who will be creating grids from scratch), add the following Visualforce pages:
    a. GBLite.GridWizard1
    b. GBLite.GridWizard2
    c. GBLite.GridWizard3
    d. GBLite.ManageActions
    e. GBLite.ManageCustomCode (only for GridBuddy Unlimited)
    f. GBLite.ManageFolders
    g. GBLite.ManageTabbedPages

Step 8 | continued

5. End-users: To enable access to a Grid (for users who will be viewing grids but not creating them), add the following Visualforce pages:
    a. GBLite.AllGrids
    b. GBLite.Grid
    c. GBLite.GridExport
    d. GBLite.GridLoad
    e. GBLite.LookupAjaxResponder
    f. GBLite.UserFilter
6. To grant Visualforce page access to a profile:
    a. Go to Setup > Manage Users > Profiles
    b. Click on the Profile name to open the Profile view screen.
    c. Scroll to the bottom of the page and click the Edit button next to Enable Visualforce Page Access.
    d. 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.
7. Click Save
    a. Note: the Visualforce page prefix will be GBLite if you are using the GridBuddy package.

Step 8 | continued

Permission sets:

1. Admins: To enable access to the Grid Wizard (for users who will be creating grids from scratch), add the following Visualforce pages:
    a. GBLite.GridWizard1
    b. GBLite.GridWizard2
    c. GBLite.GridWizard3
    d. GBLite.ManageActions
    e. GBLite.ManageFolders
    f. GBLite.AllGrids
    g. GBLite.Grid
    h. GBLite.GridExport
    i. GBLite.GridLoad
    j. GBLite.LookupAjaxResponder
    k. GBLite.ManageTabbedPages
    l. GBLite.UserFilter
    m. GBLite.ManageCustomCode (if available)
    n. GBLite.ManageCustomTheme (if available)
    o. GridAjaxResponder
    p. Any Visualforce pages created in GridBuddy > Grid Wizard > Manage Tabbed Pages
2. End-users: To enable access to a Grid (for users who will be viewing grids but not creating them), add the following Visualforce pages:
    a. GBLite.AllGrids
    b. GBLite.Grid
    c. GBLite.GridExport
    d. GBLite.GridLoad
    e. GBLite.LookupAjaxResponder
    f. GBLite.UserFilter
    g. Any Visualforce pages created in GridBuddy > Grid Wizard > Manage Tabbed Pages

Upgrading GridBuddy

You can get the latest version of GridBuddy from the GridBuddy AppExchange listing:

https://appexchange.salesforce.com/listingDetail?listingId=a0N30000003IkInEAK

Click the **Get it Now** button and follow the install instructions. DO NOT UNINSTALL the app to upgrade, just upgrade on top of your existing GridBuddy app. Your existing grids will remain intact after installing the new version.

Uninstalling GridBuddy

No additional steps aside from the normal package uninstall are required to uninstall GridBuddy. When you uninstall GridBuddy, your organization's data will not be affected. You will, however, lose all your grids (the definition data GridBuddy generated used only for rendering GridBuddy Grids).

Contact Us

Have questions about how to do something in GridBuddy?

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