



**GridBuddy**

**Getting Started Guide**

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

<https://appexchange.salesforce.com/listingDetail?listingId=aON30000003IkInEAK>

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.

appexchange

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GridBuddy: Inline Editing, Filtering, & Sorting on a Single Grid By AppBuddy

Starting at \$24 USD per user per month **Get It Now**  
Discounts available for nonprofits

RATING: ★★★★★ (237) LISTED ON: 11/1/2010 LATEST RELEASE: 10/9/2019

CATEGORIES: Productivity **Watch Demo**

Spreadsheet-like grids to streamline any process  
Make updating data in Salesforce fast & easy. Save time & increase adoption by giving users a spreadsheet-like workspace where they can manage all of their data from one screen. Quickly configure grids for any user or process. Top-rated grid solution.

appbuddy

#1 Rated Grid App for Salesforce

Manage All Your Data in a Single Screen

Revenue Schedule 2018 Forecast

	JUN 2018	JUL 2018	AUG 2018	SEP 18	OCT 2018	NOV 2018
Revenue	\$10,000	\$10,000	\$10,000	\$10,000	\$10,000	\$10,000
Expenses	\$5,000	\$5,000	\$5,000	\$5,000	\$5,000	\$5,000
Profit	\$5,000	\$5,000	\$5,000	\$5,000	\$5,000	\$5,000

★★★★★  
200+ 5-Star Reviews!

## 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'.

### Approve Third-Party Access

This package may send or receive data from third-party websites. Make sure you trust these websites. [What if you are unsure?](#)

Website	SSL Encrypted
gridbuddy-meta-service.appbuddy.com	<input checked="" type="checkbox"/>


Yes, grant access to these third-party web sites

## 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'.



### Install GridBuddy: Inline Editing, Filtering, & Sorting on a Single Grid

By AppBuddy

Install for Admins Only

Install for All Users

Install for Specific Profiles...

App Name	Publisher	Version Name	Version Number
GridBuddy: Inline Editing, Filtering, & Sorting on a Single Grid	AppBuddy	August 2019 - 7.8	7.8 <a href="#">Release Notes</a>


**Description**  
Make updating data in Salesforce fast & easy. Save time & increase adoption by giving users a spreadsheet-like workspace where they can manage all of their data from one screen. Quickly configure grids for any user or process. Top-rated grid solution.

[Additional Details](#) [View Components](#)

## 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.



### Install GridBuddy: Inline Editing, Filtering, & Sorting on a Single Grid

By AppBuddy

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**This app is taking a long time to install.**

You will receive an email after the installation has completed.

---

App Name	Publisher	Version Name	Version Number
GridBuddy: Inline Editing, Filtering, & Sorting on a Single Grid	AppBuddy	August 2019 - 7.8	7.8

**Description**

Make updating data in Salesforce fast & easy. Save time & increase adoption by giving users a spreadsheet-like workspace where they can manage all of their data from one screen. Quickly configure grids for any user or process. Top-rated grid solution.

# 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.

The screenshot shows the Salesforce Setup interface. The left sidebar contains a navigation menu with categories like Apps, Feature Settings, and Einstein. The main content area is titled 'Installed Packages' and includes a table of installed packages. The 'GridBuddy' package is highlighted, and its version number '7.9' and the 'Uninstall | Manage Licenses' link are circled in orange.

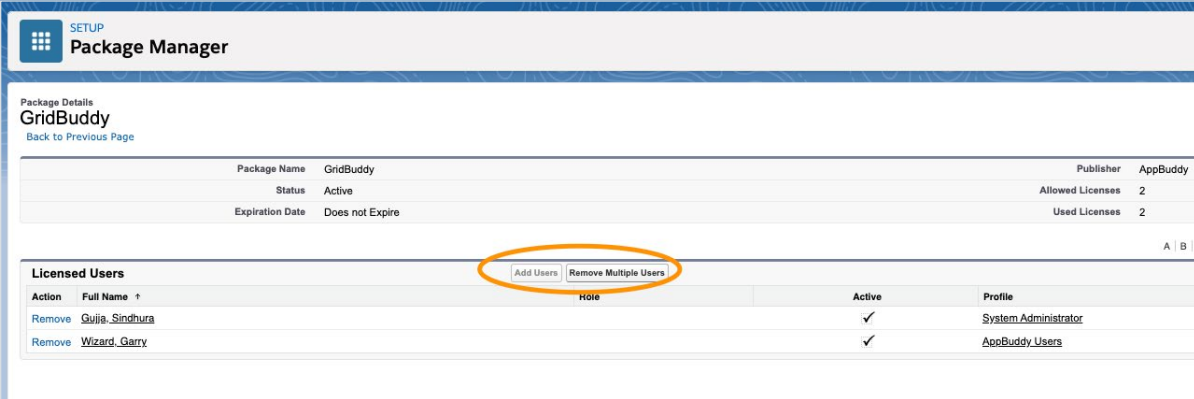
Action	Package Name	Publisher	Version Number	Namespace Prefix	Status
Uninstall	Salesforce and Chatter Apps	Salesforce.com	1.18	sf_chtr_apps	Fr
Uninstall   Manage Licenses	GridBuddy	AppBuddy	7.9	GBLite	Ac
Uninstall	GridBuddy Tracking	AppBuddy	1.6		N/
Uninstall	DF16VFpage	AppBuddy	1.0		N/
Uninstall	TrailforceOrgInstall	AppBuddy	1.0		N/

## 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.



The screenshot shows the Salesforce Package Manager interface for GridBuddy. The top section displays package details for GridBuddy, including its status (Active) and expiration date (Does not Expire). Below this, the 'Licensed Users' section is visible, featuring a table with columns for Action, Full Name, Role, Active, and Profile. Two users are listed: Gujja\_Sindhura (System Administrator) and Wizard\_Garry (AppBuddy Users). The 'Add Users' and 'Remove Multiple Users' buttons are circled in orange.

Package Name	GridBuddy	Publisher	AppBuddy
Status	Active	Allowed Licenses	2
Expiration Date	Does not Expire	Used Licenses	2

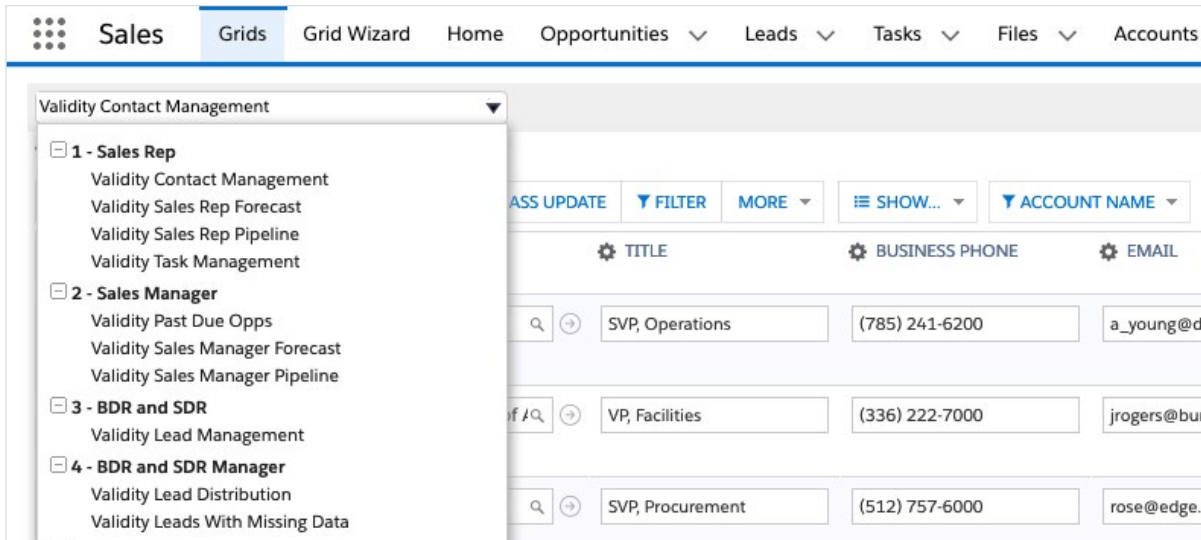
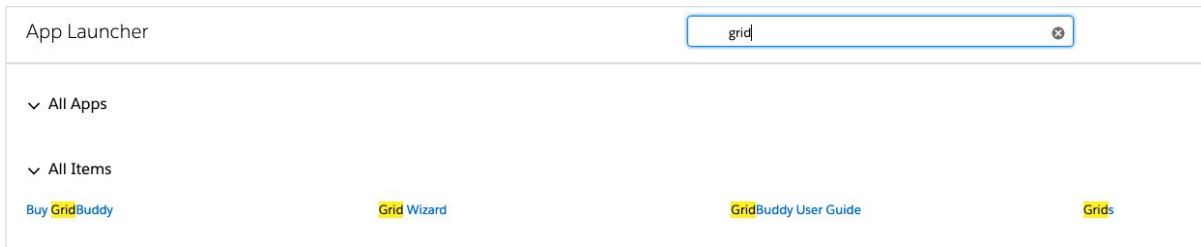
Action	Full Name	Role	Active	Profile
Remove	Gujja_Sindhura		✓	System Administrator
Remove	Wizard_Garry		✓	AppBuddy Users



## 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.

App Name	Visible	Default
Analytics Studio (standard__Insights)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
App Launcher (standard__AppLauncher)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Bolt Solutions (standard__LightningBolt)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Community (standard__Community)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Content (standard__Content)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<b>GridBuddy (GBLite_GridBuddy)</b>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Lightning Usage App (standard__LightningInstrumentation)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Marketing (standard__Marketing)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Sales (standard__LightningSales)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Sales (standard__Sales)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Sales Console (standard__LightningSalesConsole)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Salesforce Chatter (standard__Chatter)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Sample Console (standard__ServiceConsole)	<input type="checkbox"/>	<input type="checkbox"/>
Service (standard__Service)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Service Console (standard__LightningService)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Site.com (standard__Sites)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Work.com (standard__Work)	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Tab Name	Default On
Buy GridBuddy	<input checked="" type="checkbox"/>
Getting Started	<input checked="" type="checkbox"/>
GridBuddy User Guide	<input checked="" type="checkbox"/>
Grids	<input checked="" type="checkbox"/>
Grid Wizard	<input checked="" type="checkbox"/>

## 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'.

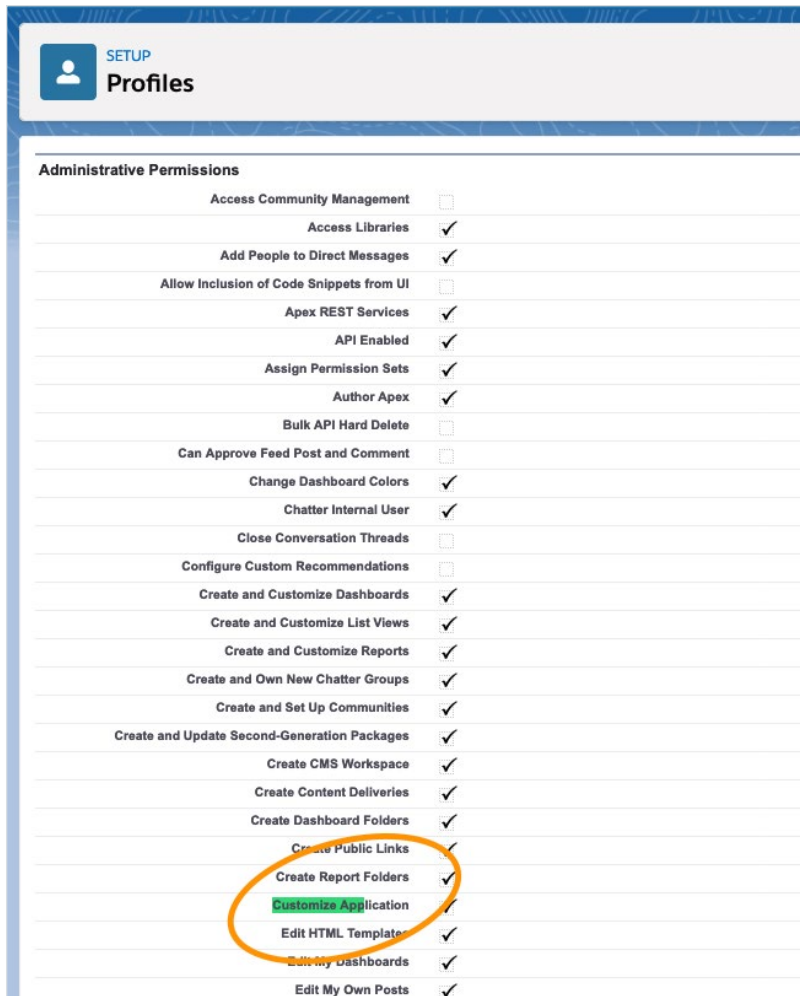
To enable access:

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

SETUP Profiles	
Manage Categories	✓
Manage Certificates	✓
Manage Chatter Messages and Direct Messages	<input type="checkbox"/>
Manage Communities	<input type="checkbox"/>
Manage Custom Permissions	✓
Manage Custom Report Types	✓
Manage Dashboards in Public Folders	✓
Manage Data Categories	✓
Manage Data Integrations	✓
Manage Dynamic Dashboards	✓
Manage Email Client Configurations	✓
Manage Encryption Keys	<input type="checkbox"/>
Manage Health Check	✓
Manage Internal Users	✓
Manage IP Addresses	✓
Manage Knowledge Article Import/Export	✓
Manage Letterheads	✓
Manage Lightning Sync	✓
Manage Login Access Policies	✓
Subscribe to Reports: Send to Groups and Roles	✓
Subscribe to Reports: Set Running User	✓
Transfer Record	✓
Use Identify Features	<input type="checkbox"/>
Use Team Reassignment Wizards	✓
Verify Answers to Chatter Questions	✓
View All Custom Settings	<input type="checkbox"/>
View All Data	✓
View All Users	✓
View and Edit Converted Leads	<input type="checkbox"/>
View Dashboards in Public Folders	✓
View Data Categories in Setup	✓
View Flow Usage and Flow Event Data	✓
View Health Check	✓
View Help Link	✓
View Reports in Public Folders	✓
View Role and Role Hierarchy	✓
View Setup and Configuration	✓
Weekly Data Export	✓

SETUP Profiles																			
Contact Requests	✓	✓	✓	✓	✓	✓	Orders	✓	✓	✓	✓	✓	✓	✓					
Contracts	✓	✓	✓	✓	✓	✓	Performance Cycles	✓	✓	✓	✓	✓	✓	✓					
D&B Companies	✓	✓	✓	✓	✓	✓	Price Books	✓	✓	✓	✓	✓	✓	✓					
Data Use Legal Basis	✓	✓	✓	✓	✓	✓	Products	✓	✓	✓	✓	✓	✓	✓					
Data Use Purposes	✓	✓	✓	✓	✓	✓	Push Topics	✓	✓	✓	✓	✓	✓	✓					
Documents	✓	✓	✓	✓	✓	✓	Quick Text	✓	✓	✓	✓	✓	✓	✓					
Duplicate Record Sets	✓	✓	✓	✓	✓	✓	Scorecards	✓	✓	✓	✓	✓	✓	✓					
Feedback	✓	✓	✓	✓	✓	✓	Scorecard Associations	✓	✓	✓	✓	✓	✓	✓					
Feedback Questions	✓	✓	✓	✓	✓	✓	Scorecard Metrics	✓	✓	✓	✓	✓	✓	✓					
Feedback Question Sets	✓	✓	✓	✓	✓	✓	Solutions	✓	✓	✓	✓	✓	✓	✓					
Feedback Requests	✓	✓	✓	✓	✓	✓	Streaming Channels	✓	✓	✓	✓	✓	✓	✓					
Custom Object Permissions		Basic Access					Data Administration				Basic Access					Data Administration			
		Read	Create	Edit	Delete	View All	Modify All	Read	Create	Edit	Delete	View All	Modify All	Read	Create	Edit	Delete	View All	Modify All
GB Grid Folders		✓	✓	✓	✓	✓	✓	GB User Field Settings	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
GB Global Meta		✓	✓	✓	✓	✓	✓	GB User Filter Settings	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
GB Load Caches		✓	✓	✓	✓	✓	✓	GridBuddy Settings	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
GB Save Caches		✓	✓	✓	✓	✓	✓	GridBuddy Usage Analytics	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓

Sales Grids **Grid Wizard** Home Opportunities Leads Tasks Files Accounts Contacts Campaigns

### GridBuddy Home

**Grid Management**

Create a New Grid

Edit a Grid: --Select Option--

Manage Actions

Manage Extensions

Manage Themes

**Grid Access**

Manage Folders

Manage Tabbed Pages

**Global Settings**

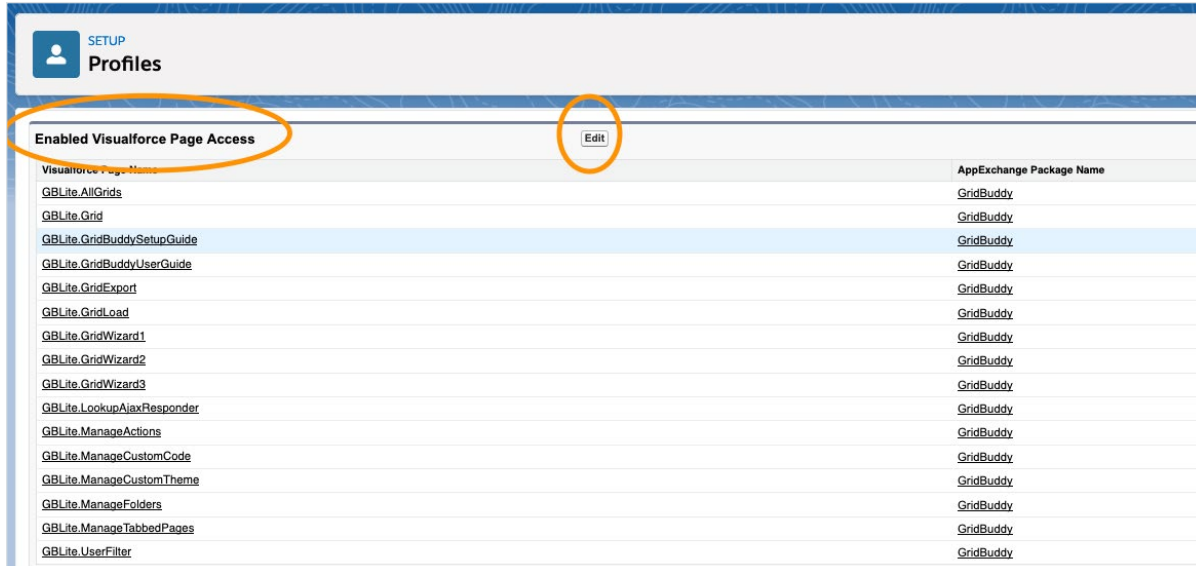
GridBuddy Edition: Unlimited

Allow non-admin users to configure grids

Disable record locking for all grids

## 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?**

[support@validity.com](mailto:support@validity.com)

1-800-961-8205

[validity.com](http://validity.com)

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