



GRIDBUDDY CLOUD TRIAL PROCESS

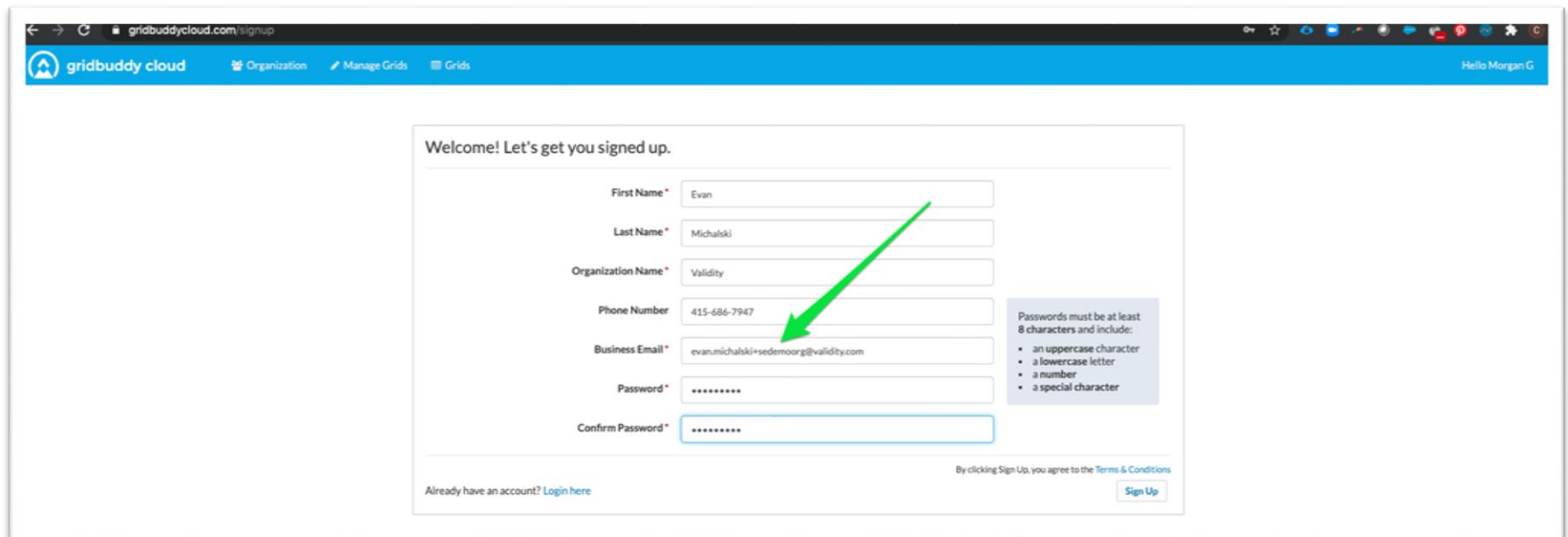
This guide will provide the step-by-step instructions for how to get your GridBuddy Cloud org set up for the first time, connect it to Salesforce, and embed a grid or tabbed page of grids onto a Salesforce record detail page.

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STEP 1 - Create Your GridBuddy Cloud Account

1. For the User that will be Administering the GridBuddy Cloud account, go to <https://www.gridbuddycloud.com/signup> and Sign Up for a new account
2. You will receive an email to Activate your Account, which will prompt you to set a password and log into GridBuddy Cloud



Welcome! Let's get you signed up.

First Name*

Last Name*

Organization Name*

Phone Number

Business Email*

Password*

Confirm Password*

By clicking Sign Up, you agree to the [Terms & Conditions](#)

Already have an account? [Login here](#)

Passwords must be at least 8 characters and include:

- an uppercase character
- a lowercase letter
- a number
- a special character

STEP 2 – Configure The Data Source & Create ReadyGrids

1. Clicking the activation link and setting a password will take you to the data source creation page. This is where you will configure the connection to your Salesforce org from GridBuddy Cloud
2. Make sure the “Active” checkbox is checked
3. Click the “Create ReadyGrids” checkbox to auto-create pre-defined ReadyGrids for our most popular use cases
4. Enter your Salesforce username, password, and security token to configure a connection to your Salesforce instance. If you don’t know your Security Token – you [can reset it](#) (and the new one will be sent to you via email)
5. Click Save

The screenshot shows the 'Edit Datasource' configuration page in the GridBuddy Cloud interface. The page has a blue header with the GridBuddy Cloud logo and navigation tabs for 'Organization', 'Manage Grids', and 'Grids'. A dark sidebar on the left contains navigation links: 'Application Setup', 'Datasources', 'Manage Organization', 'Profile', 'Security Settings', 'Groups', 'Users', and 'Login History'. The main content area is titled 'Edit Datasource' and includes a 'Cancel' and 'Save' button in the top right. The form fields are as follows:

- Datasource Name ***: Text input field containing 'Salesforce Data Source'.
- Datasource Description**: Text input field containing 'df2018@appbuddy.com'.
- Datasource Type**: Dropdown menu set to 'Salesforce'.
- Active**: Checkmark with an information icon.
- Create ReadyGrids**: Checkmark with an information icon.
- Use SSO**: Checkmark with an information icon.
- Shared User**: Checkmark with an information icon.
- Username ***: Text input field containing 'df2018@appbuddy.com'.
- Password ***: Password input field with masked characters '.....'.
- Security Token Required**: Checkmark with an information icon.
- Salesforce URI ***: Dropdown menu set to 'Production'.

At the bottom right of the form, there are two buttons: 'Test Connection' and 'Refresh Metadata'.


STEP 3 – Add Org Admin User(s) to GridBuddy Cloud

1. Go to Organization > Users to create any Users who will doing Org Admin or Grid Admin-level of configuration tasks
<https://www.gridbuddycloud.com/organization/users>
2. End Users viewing and editing the grid data in Salesforce that do NOT need Grid Wizard access will be seamlessly authenticated from Salesforce and auto created as “Grid Users” in GridBuddy Cloud

Email	First Name	Last Name	Role	Group	Status	Created Date	Last Login
<input type="checkbox"/>	Evan		Grid User		Pending	08/26/2019	
<input type="checkbox"/>	Evan		Grid Admin		Pending	08/26/2019	
<input type="checkbox"/>	Evan		Grid Admin		Pending	03/17/2020	
<input type="checkbox"/>	Matt		Organization Admin		Active	04/29/2019	07/16/2019 10:37 AM
<input type="checkbox"/>	Sindhura		Organization Admin		Active	07/02/2020	07/08/2020 2:23 PM
<input type="checkbox"/>	Petr		Organization Admin		Active	10/10/2019	11/06/2019 12:51 PM
<input type="checkbox"/>	Sean		Grid Admin		Active	04/29/2019	06/20/2019 10:13 AM
<input type="checkbox"/>	Morgan		Organization Admin		Active	02/07/2019	07/10/2020 1:01 AM

STEP 4 - Install the GridBuddy Cloud Managed Package Into Your Salesforce Org

1. To add GridBuddy Cloud to your Salesforce org, download the managed package from: <https://www.validity.com/downloads-gridbuddycloud/> into the Org of your choice.
2. Install for "All Users"

 **Upgrade GridBuddy Cloud**
By Validity

i An earlier version is installed. It can be upgraded while preserving the existing data.
Installed: July 2020 (1.3) New Version: July 2020 (1.4)

Install for Admins Only Install for All Users Install for Specific Profiles...

! You're installing a Non-Salesforce Application that is not authorized for distribution as part of Salesforce's AppExchange Partner Program.

I acknowledge that I'm installing a Non-Salesforce Application that is not authorized for distribution as part of Salesforce's AppExchange Partner Program.

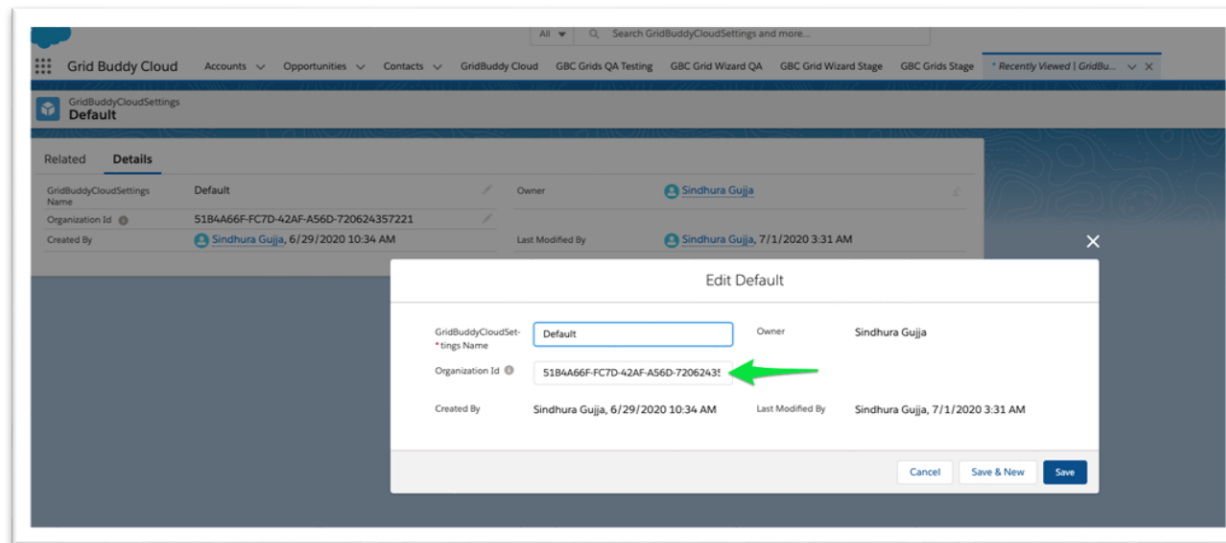
Upgrade **Cancel**

App Name	Publisher	Version Name	Version Number
GridBuddy Cloud	Validity	July 2020	1.4

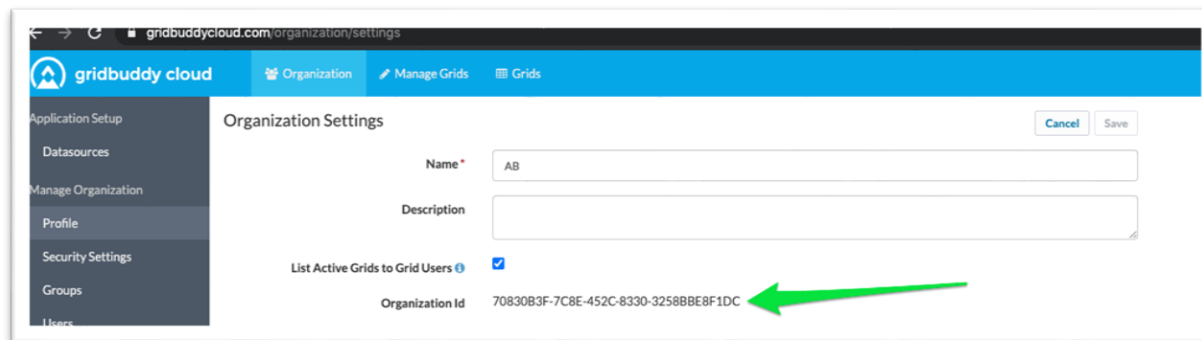
Additional Details [View Components](#)

STEP 5 – Configure the GridBuddy Cloud Managed Package

1. To create a connection from the GridBuddy Cloud managed package in Salesforce to your GridBuddy Cloud org, launch the GridBuddy Cloud app in Salesforce and click on the “GridBuddyCloudSettings” tab
2. Create a new record where the Name = “Default” and paste the org ID copied from your GridBuddy Cloud org (see step 3 below)

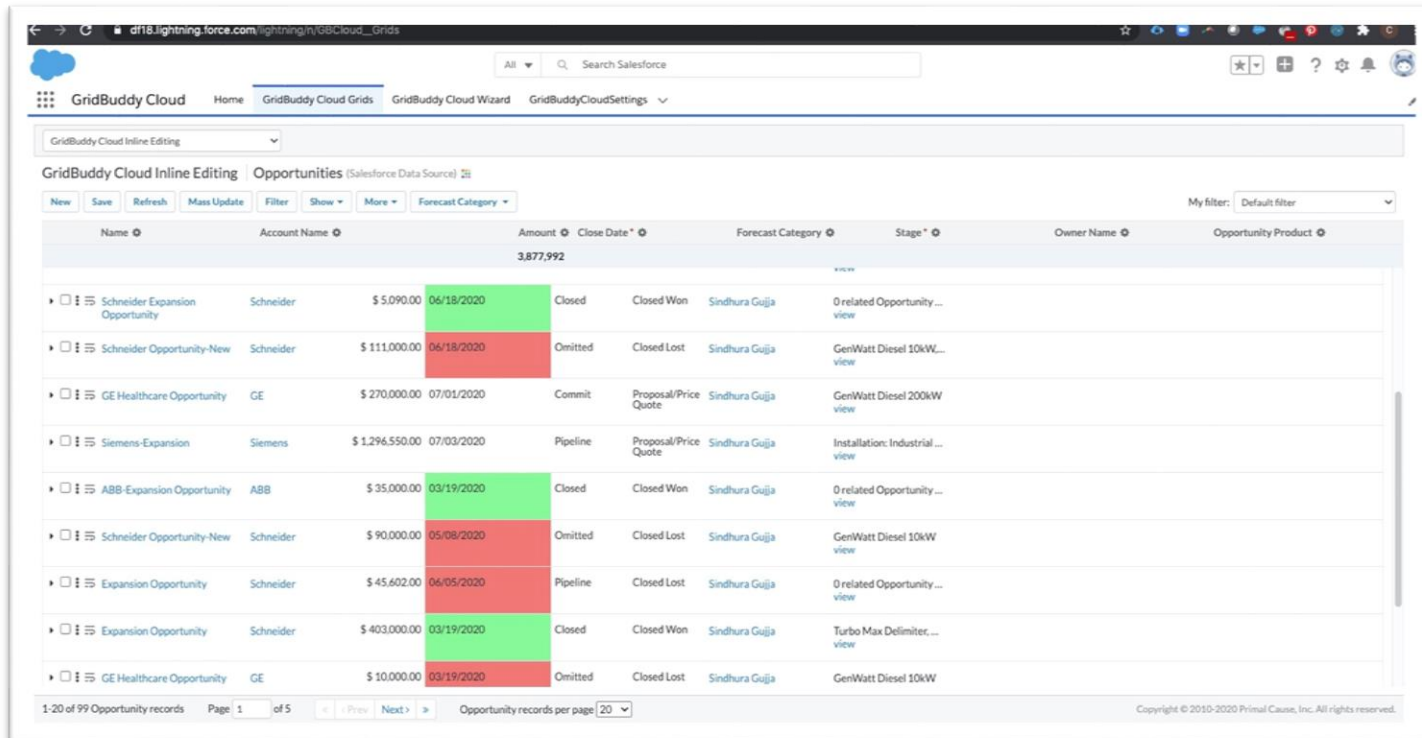


3. The GridBuddy Cloud org ID can be found in GridBuddy Cloud, under gridbuddycloud.com/organization/settings



STEP 6 – Use GridBuddy Cloud

1. In the “GridBuddy Cloud” app, select the “GridBuddy Cloud Grids” Tab.
 - a. You will see the ReadyGrids and any other grids you’ve created in your GBC org.
 - b. You can select grids from the dropdown menu and manipulate the data.



The screenshot displays the Salesforce GridBuddy Cloud interface. At the top, there is a navigation bar with the GridBuddy Cloud logo and several tabs: Home, GridBuddy Cloud Grids, GridBuddy Cloud Wizard, and GridBuddyCloudSettings. Below the navigation bar, there is a search bar and a dropdown menu for "GridBuddy Cloud Online Editing". The main content area is titled "GridBuddy Cloud Online Editing Opportunities (Salesforce Data Source)". It features a toolbar with buttons for New, Save, Refresh, Mass Update, Filter, Show, More, and Forecast Category. A "My filter: Default filter" dropdown is also present. The table below lists various opportunities with columns for Name, Account Name, Amount, Close Date, Stage, Forecast Category, Owner Name, and Opportunity Product. The total amount for all opportunities is \$3,877,992. The table contains 9 records, with the first record being a "Schneider Expansion Opportunity" for \$5,090.00, closed on 06/18/2020. The second record is a "Schneider Opportunity-New" for \$111,000.00, omitted on 06/18/2020. The third record is a "GE Healthcare Opportunity" for \$270,000.00, committed on 07/01/2020. The fourth record is a "Siemens-Expansion" for \$1,296,550.00, in the pipeline stage on 07/03/2020. The fifth record is an "ABB-Expansion Opportunity" for \$35,000.00, closed on 03/19/2020. The sixth record is a "Schneider Opportunity-New" for \$90,000.00, omitted on 05/08/2020. The seventh record is an "Expansion Opportunity" for \$45,602.00, in the pipeline stage on 06/05/2020. The eighth record is an "Expansion Opportunity" for \$403,000.00, closed on 03/19/2020. The ninth record is a "GE Healthcare Opportunity" for \$10,000.00, omitted on 03/19/2020. The table footer shows "1-20 of 99 Opportunity records", "Page 1 of 5", and "Opportunity records per page 20". A copyright notice for Primal Cause, Inc. is visible at the bottom right.

Name	Account Name	Amount	Close Date	Stage	Forecast Category	Owner Name	Opportunity Product
		3,877,992					
Schneider Expansion Opportunity	Schneider	\$ 5,090.00	06/18/2020	Closed	Closed Won	Sindhura Gujja	0 related Opportunity...
Schneider Opportunity-New	Schneider	\$ 111,000.00	06/18/2020	Omitted	Closed Lost	Sindhura Gujja	GenWatt Diesel 10kW...
GE Healthcare Opportunity	GE	\$ 270,000.00	07/01/2020	Commit	Proposal/Price Quote	Sindhura Gujja	GenWatt Diesel 200kW
Siemens-Expansion	Siemens	\$ 1,296,550.00	07/03/2020	Pipeline	Proposal/Price Quote	Sindhura Gujja	Installation: Industrial ...
ABB-Expansion Opportunity	ABB	\$ 35,000.00	03/19/2020	Closed	Closed Won	Sindhura Gujja	0 related Opportunity...
Schneider Opportunity-New	Schneider	\$ 90,000.00	05/08/2020	Omitted	Closed Lost	Sindhura Gujja	GenWatt Diesel 10kW
Expansion Opportunity	Schneider	\$ 45,602.00	06/05/2020	Pipeline	Closed Lost	Sindhura Gujja	0 related Opportunity...
Expansion Opportunity	Schneider	\$ 403,000.00	03/19/2020	Closed	Closed Won	Sindhura Gujja	Turbo Max Delimiter...
GE Healthcare Opportunity	GE	\$ 10,000.00	03/19/2020	Omitted	Closed Lost	Sindhura Gujja	GenWatt Diesel 10kW