SnapShot Feature Release Notes

These release notes provides a first look at phase 1 of the Snapshot Studio. The Snapshot Studio is a new tool that allows users to make edits and changes to Objects Fields and Profile Metadata directly inside Snapshot. These release notes also discuss some enhancements made to the Object Picklist Value Report.

Contents:

- 1. Overview of Snapshot Studio
- 2. Overview of the Enhancements made to the Object Picklist Value Report
- 3. Product Support

1. Overview of the Snapshot Studio

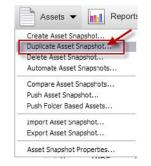
Snapshot has released the newest enhancement called the Snapshot Studio.



Located on the Asset Snapshot, the Snapshot Studio menu provides users with the ability to edit the following metadata:

- A. Edit Object Fields
- B. Edit Profiles

Prior to performing any edits, the asset snapshot allows users to either use an existing snapshot, or create a duplicate snapshot to make the edits to. The Duplicate Asset Snapshot option is located in the Asset Menu.



Duplicating an asset snapshot allows users to make edits to a copy of an existing snapshot without disturbing the original asset snapshot. Once the user selects the duplicate option, the new snapshot will have the word Copy added to the end of the naming convention. The name of the Snapshot is editable at this point as well.

This section provides additional details regarding each of options listed above.

A. Edit Object Fields – The Objects Fields option will allow users to create, update, copy and paste individual fields on existing objects in the selected snapshot. Once selected, the Edit Object Fields dialog will appear (see screen shot below). Here users can select the field from the desired Object by clicking on the black arrow immediately to the left of the Object.

| Objects & Custom Fields | Field Setup | Options |
|---------------------------|-------------|------------|
| Account | | |
| Account_c | | New |
| AccountContactRole | | |
| Accounting_c | | |
| Adam_Barc | | Сору |
| Addin_Bar_c | | |
| Asset | | Paste |
| Ben c | | rusic |
| bill_test_objectc | | |
| Campaign | | Clear |
| CampaignMember | | |
| Candidatec | | View As XM |
| Case | | |
| CaseContactRole | | |
| Collateral_Request_Object | | |
| Contact ContentVersion | | |
| Contract | | |
| ContractContactRole | | |
| DFAC_Shared_View_c | | |
| DFCS_Carouselc | | |

Once the arrow is clicked, a list of all of the fields in that Object will appear. To edit a particular field simply select the field from the box on the left. Once selected, the field attributes will appear in the box on the right.

Here users can do any of the following:

- 1. Edit the field attributes by adding a description or help text, or add picklist values
- 2. Users can modify the Field Type by clicking on the drop down menu next to Field Type
- 3. Users can also copy the field and paste it on a different Object
- 4. Lastly, users can click the New button on the right and create a completely new field on this object

| Objects & Custom Fields | | Field Setup | Options |
|--|--------------|---------------------------|-----------|
| Account | Field Label: | Account Depth | Ne# |
| Account_IDc Account_Rol_Up_Sumc Active_c | Field Name: | Account_Depthc | Спру |
| Adam_Test_c Area_Description_c Checksum c | Description: | | Feste |
| Company_Namec Complete Cost c Countries c | Lielp Text | | Clear |
| Current_Balancec CustomerPriorityc Customer_ListIDc | TIBID Text: | | VIEW AS X |
| Customer_Typec Exp_Datoc Expiration_Datec | Field Type: | Pit klisi | |
| Flagged_Accountc Lead_Lookupc Linked_to_QD_Customer_ | Values: | Deep Deeper Deepesi | |

Field attributes can be viewed in the current view, or if desired, users can also view the field attribute as XML by checking the box that says "View As XML" on the right side of the dialog. The "View As XML" option is currently read-only.

| Objects & Custom Fields | Field Selup | Options |
|---|--|---|
| Account Deth C Account Plag_C Account_Plag_C Account_Plag_C Account_Rlag_C Account_Rlag_C Account_Rlag_C Acdve_c Adam_lest_C Adam_lest_C Complete_Cost_c Complete_Cost_c Complete_Cost_c Countert_Balance_c CustomerHpony_c CustomerThpre c Frg_Date_c Expiration_Date_c Flagged_Account_c Lanked_tola_Customer_ Monday_c Monday_c | <fiilds> <fiilds> <fiilds> <fiilds> </fiilds></fiilds></fiilds></fiilds> | New Cooy Paste Liear View As MN |

B. Edit Profiles – The Edit Profiles option allows users to edit profile metadata directly within Snapshot. Once selected, users can edit profile metadata from any of the following metadata options:

Apex Class Accesses Apex Page Accesses Application Visibility Field Level Security Layout Assignments Object Permissions Record Type Visibility Tab Visibility

| Select Profile Section: | Select cells below, use shi | ift click or control click | to select multip | le cells. | |
|---|-----------------------------|----------------------------|--------------------|-----------------------|---|
| Apex Class Accesses Apex Page Accesses Application Visibility | Field Level Security | Account AccountNumber | Account Activec | Account AnnualReve | |
| Field Level Security | Authenticated Website | Hidden | Hidden | Hidden | |
| Layout Assignments Object Permissions | Chatter Free User | Editable | Editable | Editable | |
| Record Type Visibility | Chatter Moderator User | Editable | Editable | Editable | |
| Tab Visibility | Contract Manager | Editable | Editable | Editable | |
| Select Cell Values: | Custom: Marketing Profile | Editable | Editable | Editable | |
| | Custom: Sales Profile | Editable | Editable | Editable | |
| Hidden | Custom: Support Profile | Editable | Editable | Editable | L |
| OLocked | Customer Portal Manager | Hidden | Hidden | Hidden | |
| | DT User | Editable | Editable | Editable | |
| Editable | Force.com - Free User | Editable | Editable | Editable | |
| | High Volume Customer Portal | Hidden | Hidden | Hidden | ~ |
| Apply | < | | | > | Ť |

Below is a description of the editing capabilities for each of the Profile Metadata options listed above.

Apex Class & Apex Page Accesses – For both Apex Class and Apex Page Accessed, users will be able to either Disable or Enable the listed Apex Class or Page.

| Select Profile Section: | Select cells below, use shi | ift click or control click to select | multiple cells. | |
|--|-----------------------------|--------------------------------------|-----------------|-----|
| Apex Class Accesses Apex Page Accesses | Apex Class Accesses | DreamTeamTriggerTest | DreamTeamTrig | c - |
| Application Visibility | Authenticated Website | Disabled | Disabled | |
| Field Level Security Lavout Assignments | Chatter Free User | Disabled | Disabled | |
| Object Permissions | Chatter Moderator User | Disabled | Disabled | |
| Record Type Visibility Tab Visibilitv | Contract Manager | Disabled | Disabled | - |
| | Custom: Marketing Profile | Disabled | Disabled | |
| elect Cell Values: | Custom: Sales Profile | Disabled | Disabled | |
| | Custom: Support Profile | Disabled | Disabled | |
| O Disabled | Customer Portal Manager | Disabled | Disabled | L |
| C Enabled | DT User | Disabled | Disabled | |
| N. There is a second second | Force.com - Free User | Disabled | Disabled | |
| | High Volume Customer Portal | Disabled | Disabled | |
| | Marketing User | Disabled | Disabled | |
| Apply | < | | > | 1 |

| Select Profile Section: | Select cells below, use s | hift click or control click to select n | nultiple cells. |
|--|----------------------------|---|-----------------|
| Apex Class Accesses | Apex Page Accesses | Page_Experiment | |
| Apex Page Accesses Application Visibility | Chatter Free User | Disabled | |
| Field Level Security Layout Assignments | Chatter Moderator User | Disabled | |
| Object Permissions | Contract Manager | Disabled | |
| Record Type Visibility Tab Visibility | Custom Apex User | Disabled | |
| | Custom Profile | Disabled | |
| Select Cell Values: | Custom: Support VP Profile | Disabled | |
| | Custom: Cannot Delete | Disabled | |
| Disabled | Custom: Channel Manager | Disabled | |
| ○ Enabled | Custom: Marketing Profile | Disabled | |
| | Custom: Partner | Disabled | |
| | Custom: qsadmin | Enabled | |
| Apply | Custom: Sales Profile | Disabled | • |

Application Visibility – For Application Visibility, users will be able to edit which Applications are hidden or visible for all profiles. Users can also set the value as a default if they want to. This matrix is only for Custom Applications.

| Select Profile Section: | Select cells below, use shi | ft click or control click to s | elect multiple cells. | |
|--|-----------------------------|--------------------------------|-----------------------|---|
| Apex Class Accesses Apex Page Accesses | Application Visibility | BLND_DreamTeam | Force_com | ^ |
| Application Visibility | Authenticated Website | Visible | Hidden | |
| Field Level Security Layout Assignments | Chatter Free User | Hidden | Hidden | |
| Object Permissions | Chatter Moderator User | Hidden | Hidden | |
| Record Type Visibility Tab Visibility | Contract Manager | Visible | Visible | = |
| | Custom: Marketing Profile | Visible | Visible | |
| Select Cell Values: | Custom: Sales Profile | Visible | Visible | |
| OHidden | Custom: Support Profile | Visible | Visible | |
| | Customer Portal Manager | Visible | Hidden | _ |
| () Visible | DT User | Visible - Default | Hidden | |
| Default | Force.com - Free User | Hidden | Hidden | |
| | High Volume Customer Portal | Visible | Hidden | |
| Apply | Marketing User | Visible | Visible | ~ |

Field Level Security – For Field Level Security, users will be able to edit all fields and dictate whether they are hidden, locked or editable.

| Select Profile Section: | Select cells below, use shi | ift click or control click | to select multip | le cells. |
|---|-----------------------------|----------------------------|--------------------|-----------------------|
| Apex Class Accesses Apex Page Accesses Application Visibility | Field Level Security | Account AccountNumber | Account Activec | Account AnnualReve |
| Field Level Security | Authenticated Website | Hidden | Hidden | Hidden |
| Layout Assignments Object Permissions | Chatter Free User | Editable | Editable | Editable |
| Record Type Visibility | Chatter Moderator User | Editable | Editable | Editable |
| Tab Visibility | Contract Manager | Editable | Editable | Editable |
| Select Cell Values: | Custom: Marketing Profile | Editable | Editable | Editable |
| | Custom: Sales Profile | Editable | Editable | Editable |
| ◯ Hidden | Custom: Support Profile | Editable | Editable | Editable |
| ○ Locked | Customer Portal Manager | Hidden | Hidden | Hidden |
| 0 | DT User | Editable | Editable | Editable |
| ○ Editable | Force.com - Free User | Editable | Editable | Editable |
| | High Volume Customer Portal | Hidden | Hidden | Hidden |
| Apply | | | 2. | > |

Layout Assignments – For Layout Assignments, users will be able to edit the existing layout assignments by assigning or un-assigning profiles to certain page layouts.

| Select Profile Section: | Select cells below, use s | hift click or control click to select multiple cells. | |
|--|----------------------------|---|---|
| Apex Class Accesses | Layout Assignments | Account-Account (Channel Manager) Layout | ^ |
| Apex Page Accesses Application Visibility | Chatter Free User | | |
| Field Level Security Layout Assignments | Chatter Moderator User | | |
| Object Permissions | Contract Manager | | 1 |
| Record Type Visibility Tab Visibility | Custom Apex User | | |
| | Custom Profile | | |
| Select Cell Values: | Custom: Support VP Profile | | |
| | Custom: Cannot Delete | | |
| O Unassigned | Custom: Channel Manager | Assigned | |
| ○ Assigned | Custom: Marketing Profile | | |
| | Custom: Partner | | |
| | Custom: qsadmin | | |
| | Custom: Sales Profile | | ~ |
| Apply | | > | 1 |

Object Permissions – For Object Permissions, users will be able to modify the CRUD rights for selected profiles. Users can select from Read, Edit, Create, Delete, View All and Modify All.

| Select Profile Section: | Select cells below, use shift click or control click to select multiple cells. | | | | |
|--|--|---|--|--|--|
| Apex Class Accesses | Object Permissions | Account | | | |
| Apex Page Accesses Application Visibility | Authenticated Website | No Access | | | |
| Field Level Security Layout Assignments | Challer Free User | No Access | | | |
| Object Permissions | Chatter Moderator User | No Access | | | |
| Record Type Visibility Tab Visibility | Contract Manager | Alow Create, Read, Edit and Delete; View All and M | | | |
| Tab visionity | Custom Marketing Profile | Alow Create, Read, Edit and Delete; View All and M | | | |
| Select Cell Values: | Custom: Sales Profile | Allow Create, Read, Edit and Delete; View All and M | | | |
| Read | Custom: Support Profile | Allow Create, Read, Edit and Delete; View All and M | | | |
| Create View All | Customer Portal Manager | Allow Read | | | |
| Edit Modify All | DT User | Allow Create, Read, Edit and Delete | | | |
| Delete | Force.com - Free User | No Access | | | |
| | High Volume Customer Portal | Allow Read | | | |
| Apply | Marketing User | Allow Create, Read, Edit and Delete | | | |

Record Type Visibility – For Record Type Visibility, users will be able to edit whether a record type is hidden or visible for selected profiles. Users can also dictate a default value if they want to.

| Select Profile Section: | Select cells below, use shi | ift click or control click to select multiple | cells. |
|---|-----------------------------|---|--------|
| Apex Class Accesses Apex Page Accesses Application Visibility | Record Type Visibility | Idea InternalideasIdeaRecordType | ^ |
| Field Level Security | Authenticated Website | Hidden | |
| Layout Assignments Object Permissions | Chatter Free User | Hidden | |
| Record Type Visibility | Chatter Moderator User | Hidden | |
| Tab Visibility | Contract Manager | Hidden | |
| Select Cell Values: | Custom: Marketing Profile | Hidden | |
| | Custom: Sales Profile | Hidden | |
| ○ Hidden | Custom: Support Profile | Hidden | |
| 0 | Customer Portal Manager | Visible - Default | |
| O Visible | DT User | Hidden | |
| Default | Force.com - Free User | Hidden | |
| | High Volume Customer Portal | Hidden | ~ |
| Apply | | | ~ |

Tab Visibility – For Tab Visibility, users will be able to edit whether the tab is Hidden, Default On or Default Off for selected profiles.

| Select Profile Section: | Select cells below, use shi | ft click or control click to select mult | iple cells. |
|--|-----------------------------|--|-------------|
| Apex Class Accesses Apex Page Accesses | Tab Visibility | BLND_DFDT_Project_c | BLND_Dream |
| Application Visibility | Authenticated Website | Default Off | Default O |
| Field Level Security Lavout Assignments | Chatter Free User | lidden | llidden |
| Object Permissions | Chatter Moderator User | Hidden | Hidden |
| Record Type Visibility Tab Visibility | Contract Manager | Default Off | Default O |
| rearranty | Custom: Marketing Profile | Default Off | Default O |
| Select Cell Values: | Custom: Sales Profile | Default Off | Default O |
| Out | Custom: Support Profile | Default Off | Default O |
| Hidden | Customer Portal Manager | Default Off | Default O |
| O Default On | DT User | Default Off | Default O |
| O Default Off | Force.com - Free User | Default Off | Hidden |
| | High Volume Customer Porta | Default Off | Default O |
| | Marketing User | Default Off | Default O |
| Apply | < III | | > |

To make a change, the user must select the profiles and values that they want to change. The selected values will be highlighted in black. Selecting the row or column header selects the whole row or column.

| Select Profile Section: | Select cells below, use shi | ft click or control click | to select multip | le cel s. | |
|--|-----------------------------|---------------------------|--------------------|-----------------------|------|
| Apex Class Accesses Apex Page Accesses Applicaton Vis bility | Field Level Security | Account AccountNumber | Account Activec | Account AnnualReve | |
| Field Level Security Layout Assignments Object Permissions Record Type Visibility Tab Visibility | Authenticated Website | Hidden | Hidden | Hidden | |
| | Chatter Free User | Editable | Editable | Edtable | |
| | Chatter Moderator User | Ecitable | Editable | Edtable | = |
| | Contract Manager | Editable | Editable | Fdtable | |
| Select Cell Values: | Custom: Marketing Profile | Ecitable | Editable | Fditable | |
| | Custom: Sales Profile | Ecitable | Editable | Editable | |
| O Hidden | Custom: Support Profile | Ecitable | Editable | Edtable | _ |
| CLocked | Customer Portal Manager | Hiddon | Hiddon | Hiddon | |
| Editable | DT User | Ecitable | Editable | Editable | |
| | Force.com - Free User | Editable | Editable | Edtable | |
| | High Volume Customer Portal | Hidden | Hidden | Hidden | v |
| Apply | 3 | | | > | bitt |

Once a user makes a change, they must click the Apply button to apply the temporary changes. The metadata that was changed will be highlighted.

| Select Profile Section: | Select cells below, use s | hift click or control click to se | lect multiple cells. | |
|---|----------------------------|-----------------------------------|-------------------------|-----|
| Apex Class Accesses Apex Page Accesses Application Visibility | Field Level Securty | Account Account_Depthc | Account Account_Flag | c ^ |
| Field Level Security | Chatter Free User | Editable | Editable | |
| Layout Assignments Object Fermissions | Chatter Moderator User | Locked | Locked | |
| Record Type Visibility Tab Visibility | Contract Manager | Locked | Locked | = |
| | Custom Apex User | Locked | l ocked | |
| Select Cell Values: | Custom Profile | Locked | Locked | |
| | Custom: Support VP Profile | Locked | Locked | |
| Hidden | Custom: Cannot Delete | Editable | Editable | |
| Locked | Custom: Channel Manager | Editable | Editable | |
| CEditable | Custom: Marketing Profile | Editable | Editable | |
| | Custom: Partner | Editable | Editable | |
| | Custom: qsadmin | Editable | Editable | ~ |
| Apply | < | | | > |

Once the user is finished making all edits, all user has to do is simply click the 'Done' button which will write the changes back to the snapshot that they are working with. Selecting the 'Cancel' button throws all current changes in the dialog away.

If an edit has been made, the snapshot that the changes were made on will be bolded in the Select Asset Snapshot box. If the user hovers over the selected snapshot, they can see that there are unsaved Studio edits in the yellow dialog box. These edits can be used for deployment but are not officially saved to the snapshot.

| ack_4_18_2011 ack_4_18_2011_dt | 1 | Back_5_19_2011_dts (unsaved Studio e 5/19/2011 9:37 AM dreamteamdemo@gmail.com | | | |
|-----------------------------------|---|--|--|--|--|
| | | Unpackaged | | | |
| Back_4_14_2011 | = | Back_5_19_2011_dts | | | |
| Back_4_18_2011 | | (unsaved Studio edits) | | | |
| Back_4_18_2011_dt | | 5/19/2011 9:37 AM | | | |
| Back_4_20_2011_adam | | dreamteamdemo@gmail.com | | | |
| Back_5_19_2011_dts | | BLND_DFAC_Shared_Viewc | | | |
| Back 5 2 2011 rcase | | BLND_DFCS_Carouselc | | | |
| Meta 3 17 2011 rcase | ~ | BLND_DFCS_Slidec | | | |
| | | BLND_DFDT_Action_Itemc | | | |

All changes made in either the Edit Object Fields or the Edit Profiles options are temporarily made to the selected Snapshot. The user has the ability to either save the changes made or clear all changes.

| 100 | Stud | io 🔻 | E | |
|-----|----------------------|-------|---|---|
| | t Profile t Objec | | s | / |
| Sav | ve All C | hange | s | |

To save these changes, the user must click on the Studio Menu and select Save All Changes before exiting Snapshot. Users can also clear all changes from this menu as well.

2. Overview of the Enhancements made to the Object Picklist Value Report

Enhancements have been made to the Object Picklist Usage Report. Now, users can choose to see All Values, Values with No Usage or Values Not In Picklist.

| Choose objects, then select 'Generate': | Display: 💿 All Values | ○ Values With No Usage ○ V | alues Not Ir | 1 Picklist | |
|---|-----------------------|----------------------------|--------------|------------|---|
| ⊖ All Objects | Name | Value | Count | Percentage | ~ |
| 🔾 Standard Objects | Туре | 1 | | | |
| O Custom Objects | | Empty | 233 | 50% | |
| Choose From List | | Prospect | 50 | 11% | |
| - | - | Customer - Direct | 14 | 3% | |
| Account AccountContactRole | | Customer - Channel | 8 | 2% | |
| AccountTeamMember | | Channel Partner / Reseller | 0 | 0% | |
| AccountTerritoryAssignmentRule | | Installation Partner | 0 | 0% | |
| AccountTerritoryAssignmentRuleItem | | Technology Partner | 0 | 0% | |
| Account_Custom_Settingsc Adam_Barc AdditionalNumber AggregateResult ApexClass | | Other | 1 | 0% | |
| | | Former Customer | 15 | 3% | |
| | | Customer | 140 | 30% | |
| | | Partner | 4 | 1% | |
| ApexClassIdentifier ApexClassIdentifierRelationship | | Integrator | 1 | 0% | 1 |
| ApexComponent | | Partner - Reseller | 3 | 1% | |
| ApexLog | | Partner - AppExchange | 1 | 0% | ~ |
| ApexPage | | | | | |

These three options are all color coded with all values that are being used displayed in black, values with no usage displayed in red and values no longer in the picklist displayed in organge. Below are screen shots of the two new options.

| Choose objects, then select 'Generate': | | Display: 🔿 All Values | O Values With No Usage O V | alues Not Ir | I FILMER | |
|--|---|-----------------------|--------------------------------|--------------|------------|------------|
| ○ All Objects | | Name | Value | Count | Percentage | ^ |
| ◯ Standard Objects | | | North America | 0 | 0% | |
| O Custom Objects | | | South America | 0 | 0% | |
| Choose From List | | | Carribean | 0 | 0% | |
| Account | ~ | | Western Africa | 0 | 0% | |
| AccountContactRole | - | | Sahara | 0 | 0% | |
| AccountTeamMember | | | Mediterrenean | 0 | 0% | |
| AccountTerritoryAssignmentRule | | | South Africa | 0 | 0% | |
| AccountTerritoryAssignmentRuleItem Account_Custom_Settingsc | | | Northeastern Africa | 0 | 0% | |
| Adam_Barc | | Ту | pe | | | |
| AdditionalNumber | | | Channel Partner / Reseller | 0 | 0% | |
| AggregateResult ApexClass | | | Installation Partner | 0 | 0% | ſ |
| ApexClassIdentifier | | | Technology Partner | 0 | 0% | State: 100 |
| ApexClassIdentifierRelationship | | UpsellOpportunity_c | | | | 1 |
| ApexComponent | | | Absolutely not | 0 | 0% | |
| ApexLog ApexPage | ~ | | I can't think why I should | 0 | 0% | ~ |

Red – Values displayed in red indicate values that are not being used.

Orange – Values displayed in orange indicate values that are no longer in the picklist.

| Choose objects, then select 'Generate': | Display: O All Values (| Values With No Usage 💿 | Values Not Ir | | |
|---|-------------------------|------------------------|---------------|------------|----|
| ○ All Objects | Name | Value | Count | Percentage | 1 |
| ◯ Standard Objects | | Web Services | 1 | 0% | |
| O Custom Objects | Multi_select_Picklistc | | | | |
| ⊙ Choose From List | Ownership | | | | 1 |
| Account | Rating | | | | 1 |
| AccountContactRole | Region_c | | | | |
| AccountTeamMember | SLA_c | | | | |
| AccountTerritoryAssignmentRule | Subregionsc | | | | |
| AccountTerritoryAssignmentRuleItem Account Custom Settings c | Туре | | | | |
| Adam_Bar_c | _ | Former Customer | 15 | 3% | |
| AdditionalNumber | | Customer | 140 | 30% | |
| AggregateResult | | Partner | 4 | 1% | 11 |
| ApexClass ApexClassIdentifier | | Integrator | 1 | 0% | |
| ApexClassIdentifierRelationship | | Partner - Reseller | 3 | 1% | |
| ApexComponent | | Partner - AppExchange | 1 | 0% | |
| ApexLog ApexPage | UpsellOpportunity_c | | 2 | | ~ |

3. Product Support:

The purpose of this document is to highlight the new Snapshot Studio which will be released soon as well as the enhancements made to the Object Picklist Usage Report. Please direct all questions to DreamFactory Support at one of the following Support Options.

Live Chat – You can initiate a Live Chat with one of our Success Engineers by simply clicking on the Support Menu and selecting the Live Chat option.

Phone Support – You can contact our Support Engineers by phone at 1-877-577-3453 or by selecting the Phone Support option from the Support Menu.

Email Support – You can also email DreamFactory Support at support@dreamfactory.com.

Support Wiki – You can access additional information by accessing the DreamFactory Support Wiki online at <u>http://dreamfactory.pbworks.com/SnapShot</u>.

DreamFactory Support is available 5:00 AM until 5:00 PM PST (8:00 AM – 8:00PM EST) M-F.