SnapShot Feature Release Notes

These release notes support the new Record Type Picklist Matrix.

Contents:

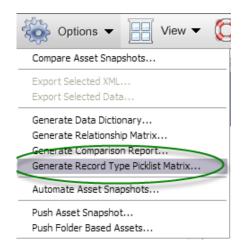
- 1. Overview of the Record Type Picklist Matrix
- 2. Product Support

1. Overview of the Record Type Picklist Matrix

SnapShot has just added the Record Type Picklist Matrix which allows users to view a Record Type vs. Picklist matrix for selected objects in the Asset SnapShot. This matrix can be saved in a CSV format.

To access the Record Type Picklist Matrix, follow the instructions below:

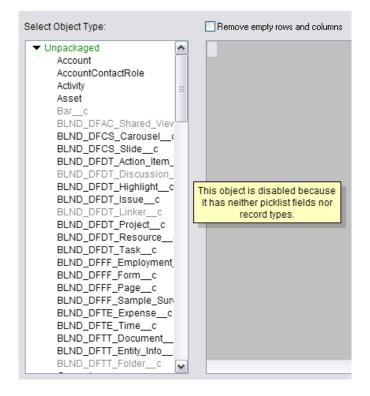
- A. Go to the Asset Snapshot
- B. Click on the Options Menu
- C. Select the Record Type Picklist Matrix option



Select Object Type:		Remove empty rows and columns		** denotes default valu	
 Unpackaged 	<u>^</u>	Account	All Values	CustomAccount	1
Account AccountContactRole Activity		Customer_Typec	For Profit Non-Profit	For Profit Non-Profit	
Asset BarC BLND_DFAC_Shared BLND_DFCS_Carous BLND_DFCS_Carous BLND_DFCS_Slide_ BLND_DFDT_Action_ BLND_DFDT_Discus BLND_DFDT_Issue_ BLND_DFDT_Issue_ BLND_DFDT_Issue_ BLND_DFDT_Resou BLND_DFDT_Resou BLND_DFFF_Employ BLND_DFFF_Employ BLND_DFFF_Form_ BLND_DFFF_Sample BLND_DFFF_Sample BLND_DFFF_Sample BLND_DFFT_Sample BLND_DFTT_Time_ BLND_DFTT_Docum BLND_DFTT_Entity_I	sel_(_c _ttem_ ssion_ _htt_c _c _c _c _c _c _c _c _c _c _c _c _c _	Industry	Agriculture Apparel Banking Biotechnology Chemicals Communications Construction Consulting Data Provider Education Electronics Energy Engineering Entertainment Environmental Finance Food & Beverage Government Healthcare Hospitality Insurance ISV Machinery	Agriculture Apparel Banking Biotechnology Chemicals Communications Construction Construction Electronics Energy Engineering Entertainment Environmental Finance Food & Beverage Government Healthcare Hospitality Insurance	
BLND DFTT Folder	_	1 w		>	1.15

D. Once selected, the Generate Record Type Picklist Report dialog box will appear.

E. To use the matrix, first select an object from the list on the left side of the dialog box. Note: if an object is not highlighted, it means that it has neither a picklist nor a record type tied to it.



F. To populate the matrix, simply select an Object from the left hand box. Once selected, a list of Object fields will populate the first column, followed by the picklist values in the other columns. The record types are displayed across the top of the matrix.

Note: ** denotes the default value. Also, if you see red, it means that there are picklist values present for the specific record type.

Select Object Type:		Remove empty rows and columns		** denotes default valu	
 Unpackaged 	^	Account	All Values	CustomAccount	1
Account AccountContactRole		Customer_Typec	For Profit Non-Profit	For Profit Non-Profit	
Activity Asset Bar_c BLND_DFAC_Shared_Vie BLND_DFCS_Carousel_ BLND_DFCS_Slide_c BLND_DFDT_Action_Item BLND_DFDT_Discussion BLND_DFDT_Highlight BLND_DFDT_Highlight BLND_DFDT_Issue_c BLND_DFDT_Resource_ BLND_DFDT_Resource_ BLND_DFFF_Resource_ BLND_DFFF_Resource_ BLND_DFFF_Sample_Su BLND_DFFF_Sample_Su BLND_DFFF_Sample_Su BLND_DFFT_Sample_Su BLND_DFTT_Socument_ BLND_DFTT_Document_ BLND_DFTT_Ocument_ BLND_DFTT_Ocument_	- - - t	Industry	Agriculture Apparel Banking Biotechnology Chemicals Communications Consulting Data Provider Education Electronics Energy Engineering Entertainment Environmental Finance Food & Beverage Government Healthcare Hospitality Insurance ISV	Agriculture Apparel Banking Biotechnology Chemicalis Communications Construction Consulting Education Electronics Energy Engineering Entertainment Environmental Finance Food & Beverage Government Healthcare Hospitality Insurance	
BLND_DFTT_Entity_Info_ BLND_DFTT_Folder_c	-		Machinery	Machinery	1
BLND_DFTT_Folderc	~	<		>	P

G. You can also export the results out to a CSV file by clicking on the Export To CSV button on the bottom of the dialog box.



2. Product Support:

The purpose of this document is to highlight the new Asset Comparison 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.