

Synebo Advanced Product Selector Documentation

Introduction

The Synebo Advanced Product Selector is an enhanced tool designed to improve the user experience when associating products with opportunities in Salesforce.

Prerequisites

- Salesforce License
- Synebo Advanced Product Selector Package

Package Installation

Installing the Synebo Advanced Product Selector package is a straightforward process. Following these steps ensures that the package is correctly integrated into your Salesforce instance.

Pre-Installation Checklist:

1. Ensure you have administrator permissions in your Salesforce instance.
2. It's recommended to install the package first in a sandbox or developer environment to test and familiarize yourself with its features.

Installation Steps:

1. **Package Link:** Navigate to the link provided by Synebo for the Advanced Product Selector package.
2. **Login:** If you're not already logged in, Salesforce will prompt you to log in to the instance where you want to install the package.
3. **Installation Options:**



Install Synebo Advanced Product Selector

By Synebo

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.

Install

Cancel

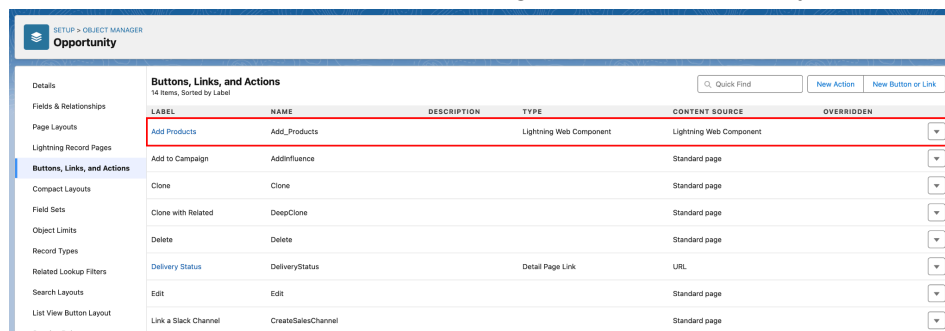
App Name	Publisher	Version Name	Version Number
Synebo Advanced Product Selector	Synebo	Oct 23	1.0 (Beta 1)

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

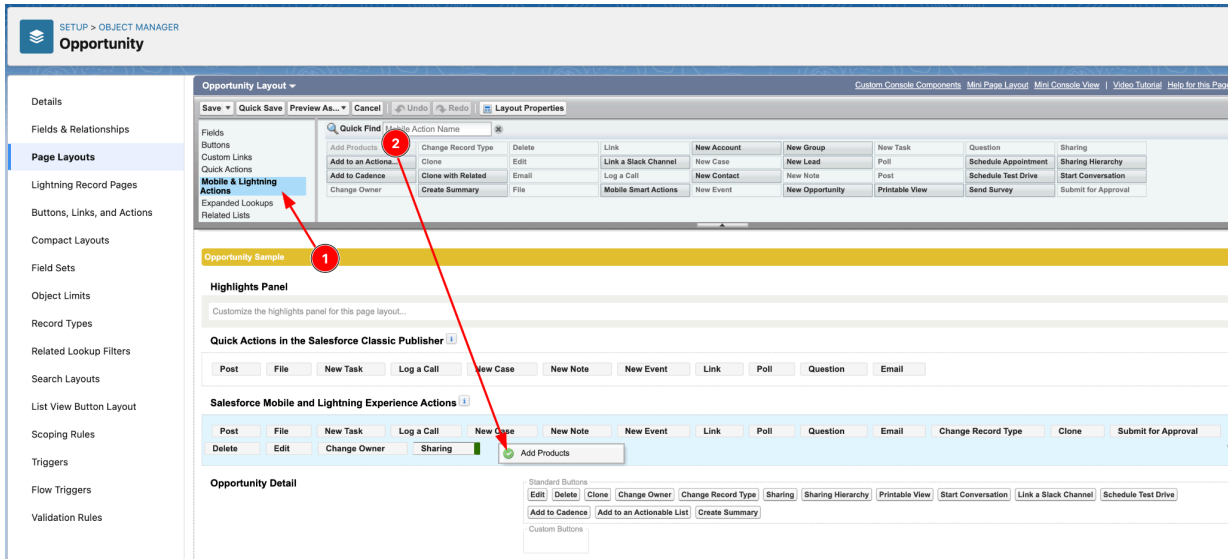
- **Install for Admins Only:** This will make the package available only for administrators.
 - **Install for All Users:** This makes the package available for all users, including standard and custom profiles.
 - **Install for Specific Profiles:** Choose this if you want to make the package available for specific user profiles.
4. Approve Third-party Access: There might be components in the package that require access to third-party websites or services. Check the box to grant this access.
 5. Click **Install**.
 6. **Installation Process:**
 - You might see a screen indicating that the installation is being processed.
 - Once the installation is complete, you'll receive a confirmation email.

Post Installation activities:

1. After Installation completes please navigate to the Opportunity setup.



2. Move to the Page Layout, and click to edit the selected layout:
 - Move to the 'Mobile & Lightning Actions' Tab
 - Drag and drop the 'Add Product' button on the section 'Salesforce Mobile and Lightning Experience Actions' of the Opportunity layout.
 - Click the **save** button.



Permission Set Configuration for the Synebo Advanced Product Selector

A permission set is a collection of settings and permissions that gives users access to various tools and functions. The **Synebo Advanced Product Selector** package comes with its permission set to facilitate specific access controls.

Assigning the Permission Set:

1. **Navigate to Setup:** Click on the gear icon (⚙️) in the top right corner and select Setup.
2. In the Quick Find box, type **Permission Sets**.
3. **Find the Permission Set:** Scroll through the list or use the search feature to find the permission set related to the **Advanced Product Selector by Synebo**.
4. Click on the name of the permission set.
5. **Manage Assignments:** On the permission set details page, click on the **Manage Assignments** button.
6. **Add Users:**
 - a. Click on the **Add Assignments** button.
 - b. Select the checkboxes next to the names of users you want to assign the permission set to.
 - c. Click **Assign**.
7. **Review:** Ensure the correct users have been added by reviewing the list on the Manage Assignments page.

Benefits of the Permission Set:

- **Flexibility:** Unlike profiles, which are a holistic approach to granting permissions, permission sets allow you to provide access on a more granular level.
- **Easy Management:** As users' roles or duties change, you can easily add or remove individual permission sets without modifying their profile.
- **Safety:** It ensures that only authorized personnel have access to the features of the Synebo Advanced Product Selector, safeguarding sensitive product-related data.

Removing the Permission Set:

If you need to revoke access:

1. Navigate back to the **Manage Assignments** page of the Synebo permission set.
2. Select the checkboxes next to the users you want to remove.
3. Click the **Remove Assignments** button.

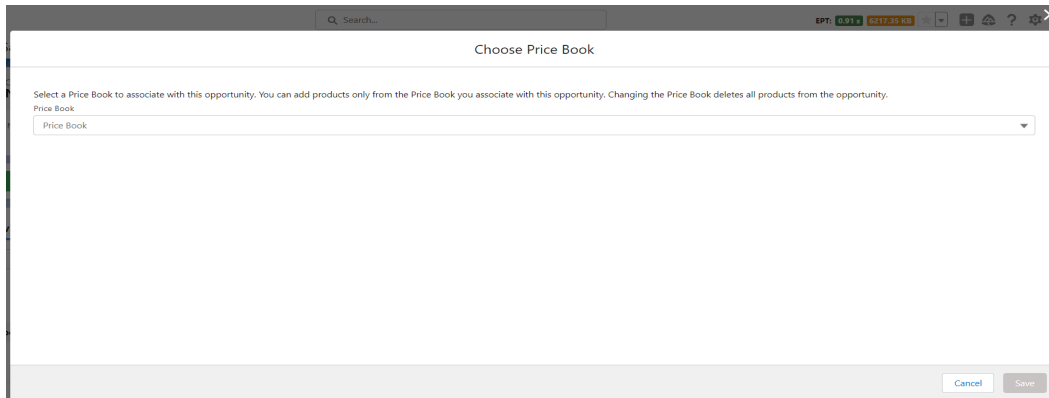
Troubleshooting:

If you face any issues during the installation:

- Ensure that you have the necessary permissions.
- Check if there's enough storage in your Salesforce instance.
- Try installing the package during off-peak hours.
- Reach out to Synebo's support or your Salesforce representative for assistance.

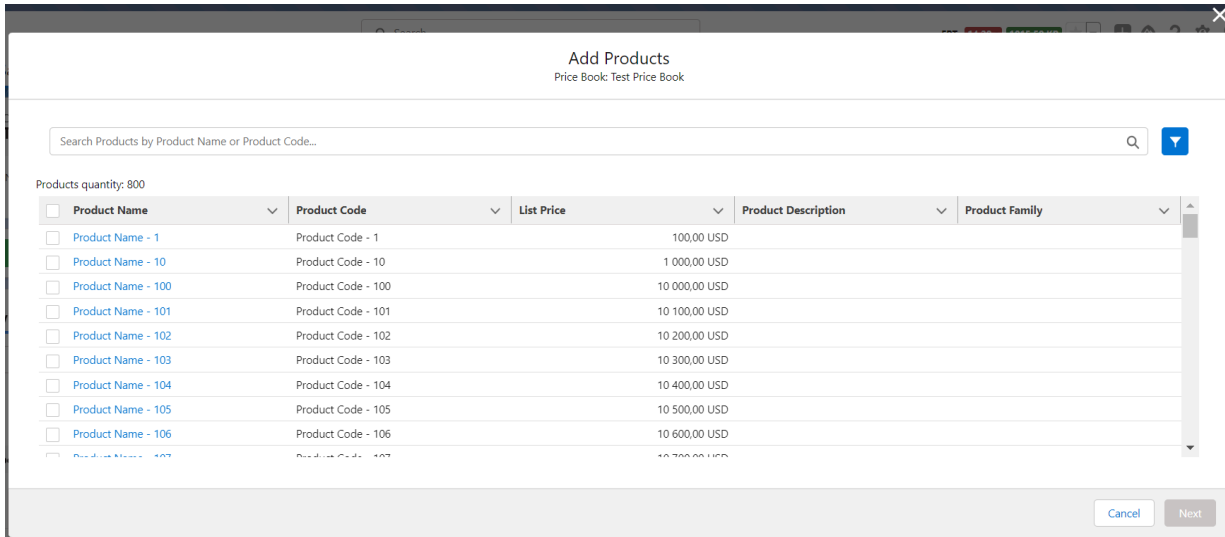
Features

1. Choose Price Book

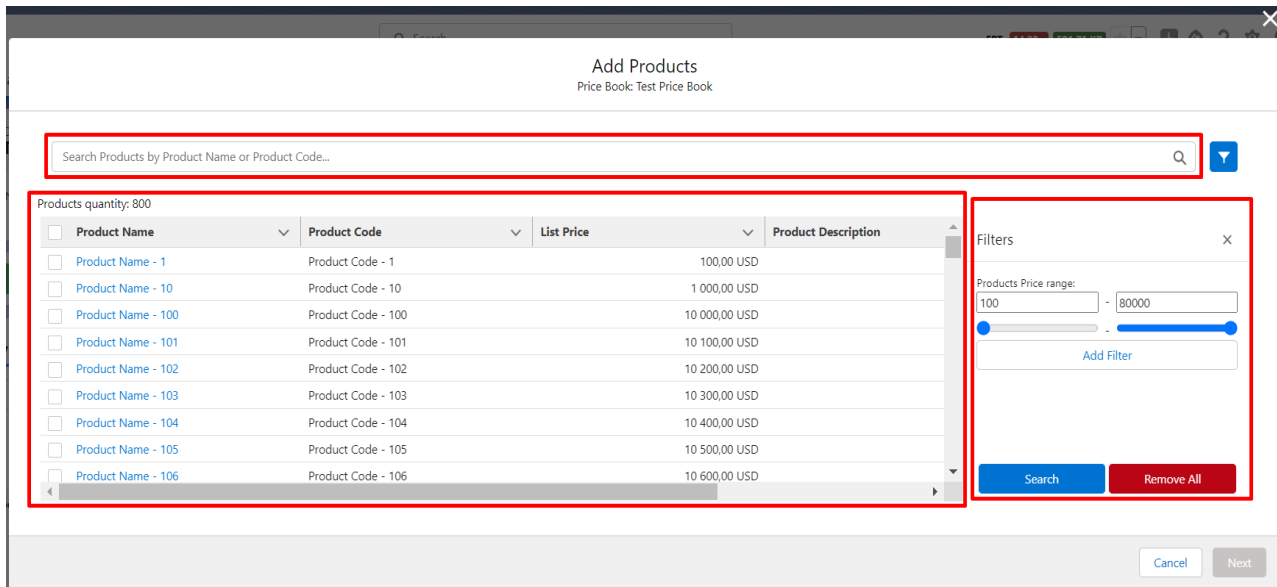


- Purpose: To associate a specific Price Book with an opportunity.
- Workflow:
 - If an opportunity lacks a selected Price Book, the "Choose Price Book" window appears.
 - The user must select a Price Book to proceed.
 - Once selected, the "Save" button becomes active.
 - After saving, the user is directed to the "Add Products" window.

2. Add Products



- Window Components:
 - Displays the chosen Price Book's name.
 - Divided into three segments:
 - Product Table
 - Search Bar
 - Filters



2.1 Add Products Table

Products quantity: 800

<input type="checkbox"/>	Product Name	Product Code	List Price	Product Description	Product Family
<input type="checkbox"/>	Product Name - 1	Product Code - 1	100,00 USD		
<input type="checkbox"/>	Product Name - 10	Product Code - 10	1 000,00 USD		
<input type="checkbox"/>	Product Name - 100	Product Code - 100	10 000,00 USD		
<input type="checkbox"/>	Product Name - 101	Product Code - 101	10 100,00 USD		
<input type="checkbox"/>	Product Name - 102	Product Code - 102	10 200,00 USD		
<input type="checkbox"/>	Product Name - 103	Product Code - 103	10 300,00 USD		
<input type="checkbox"/>	Product Name - 104	Product Code - 104	10 400,00 USD		
<input type="checkbox"/>	Product Name - 105	Product Code - 105	10 500,00 USD		
<input type="checkbox"/>	Product Name - 106	Product Code - 106	10 600,00 USD		
<input type="checkbox"/>	Product Name - 107	Product Code - 107	10 700,00 USD		
<input type="checkbox"/>	Product Name - 108	Product Code - 108	10 800,00 USD		

- **Features:**

- Built on the lightning-datatable.
- Displays 50 Price Book entries by default. Infinite loading reveals 50 more products per load.
- Products can be manually selected by checkboxes.
- Multiple products can be selected, with a "Show selected" button revealing the number chosen.

Products quantity: 800

<input type="checkbox"/>	Product Name	Product Code	List Price	Product Description	Product Family
<input type="checkbox"/>	Product Name - 1	Product Code - 1	100,00 USD		
<input type="checkbox"/>	Product Name - 10	Product Code - 10	1 000,00 USD		
<input type="checkbox"/>	Product Name - 100	Product Code - 100	10 000,00 USD		
<input type="checkbox"/>	Product Name - 101	Product Code - 101	10 100,00 USD		
<input type="checkbox"/>	Product Name - 102	Product Code - 102	10 200,00 USD		
<input type="checkbox"/>	Product Name - 103	Product Code - 103	10 300,00 USD		
<input type="checkbox"/>	Product Name - 104	Product Code - 104	10 400,00 USD		
<input type="checkbox"/>	Product Name - 105	Product Code - 105	10 500,00 USD		
<input type="checkbox"/>	Product Name - 106	Product Code - 106	10 600,00 USD		
<input type="checkbox"/>	Product Name - 107	Product Code - 107	10 700,00 USD		
<input type="checkbox"/>	Product Name - 108	Product Code - 108	10 800,00 USD		

2.2 Table Column Sorting

- **Sorting Modes:**

Clicking on any column header toggles between ascending and descending order.

- **Available Columns:**

Product Name (URL type)
Product Code (Text type)
List Price (Currency type)
Product Description (Text type)
Product Family (Text type)

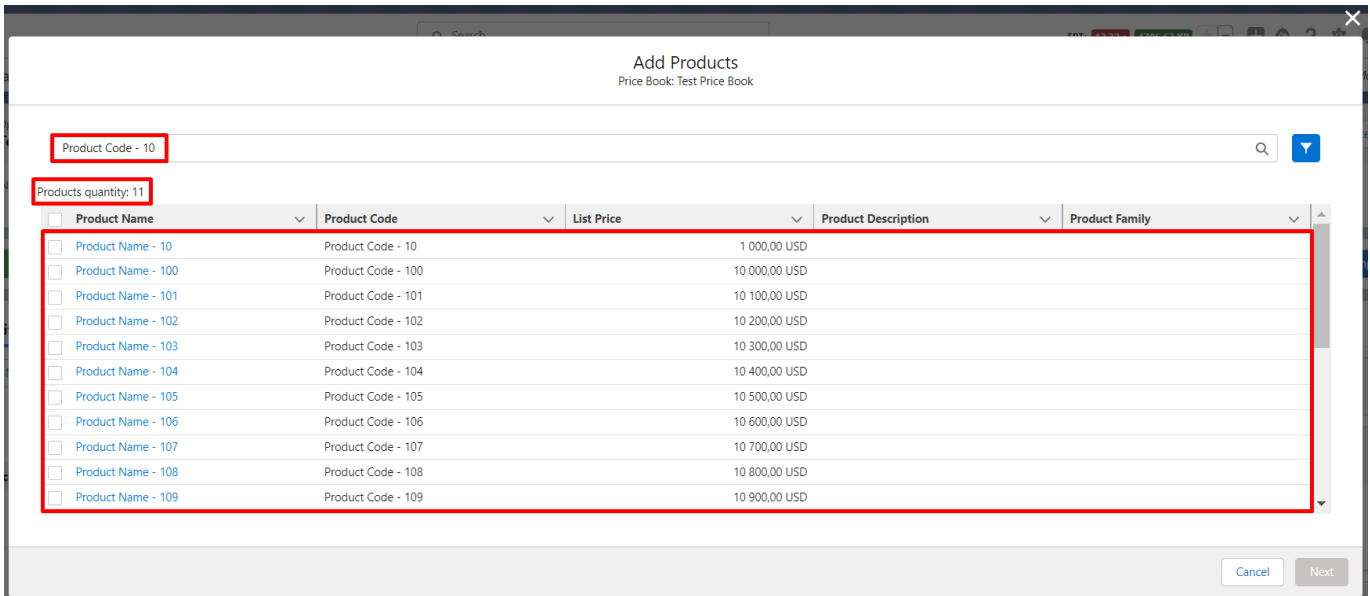
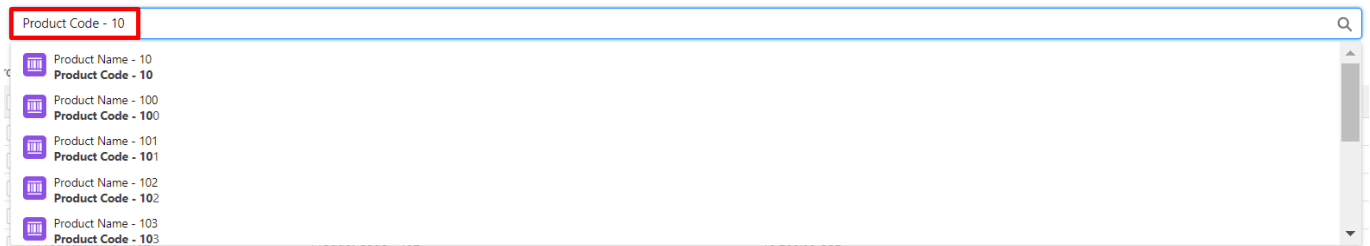
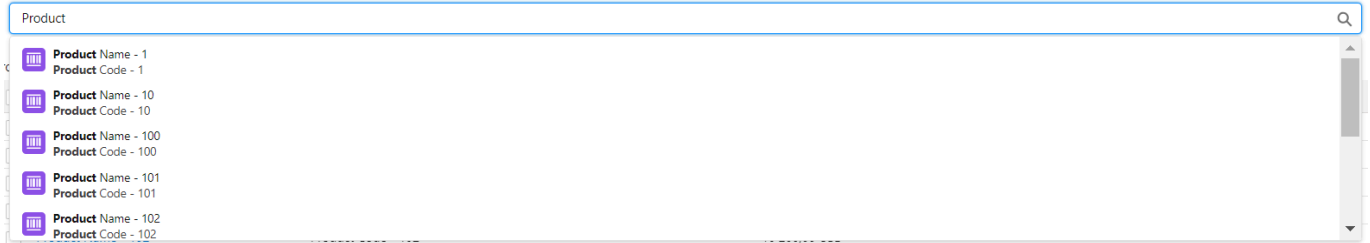
2.3 Add Products Search Bar

Search Products by Product Name or Product Code...

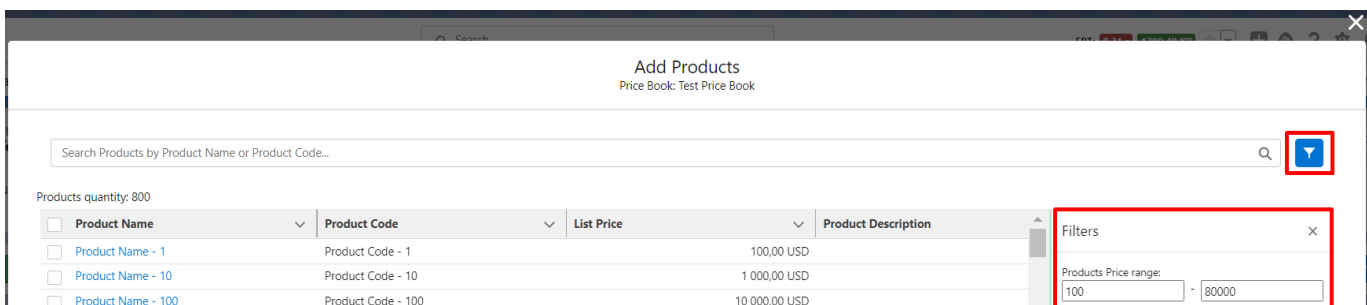


- **Functionality:**

- Allows users to search by "Product Name" or "Product Code".
- Displays the first ten matches. To narrow down results, users should provide a unique value.



2.4 Add Products Filters

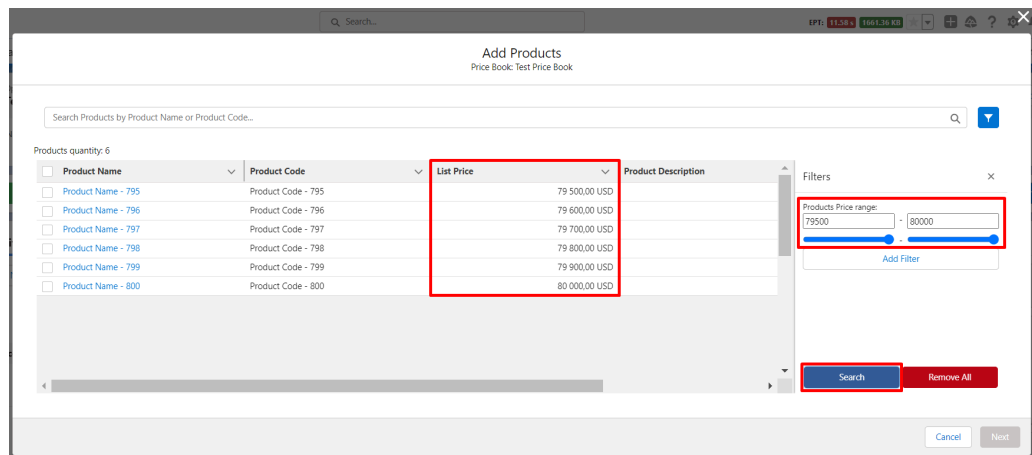


- Access: Click the filter toggle to reveal filters.
- Filter Types:
 - **Price Filter:** Filters products based on a specified price range.

Products Price range:

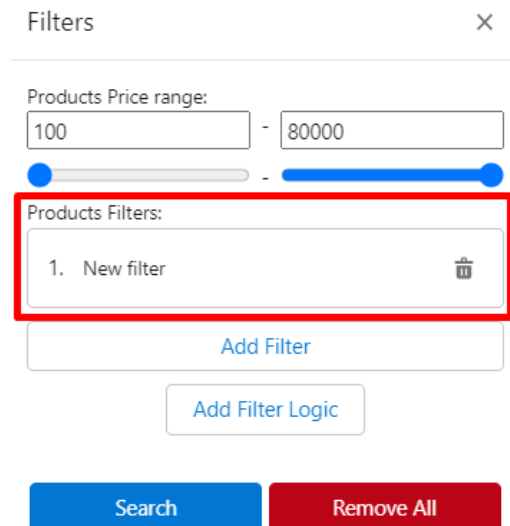
100 - 80000

After the user chose min. and/or max. price then he should press on 'Search' button to apply this filter:



- **Filter by Product Fields:** Allows detailed filtering based on specific product fields.

Filter by product fields – a filter that makes search by product fields values. To make a search by Product field, the user should click on the 'Add filter' button, and then blank filter will be created (to delete the filter user should press on basket icon):



Filters ×

Products Price range:

-

After the user creates a blank filter the user can fill it with data. To fill the filter user should click on the filter area, after that filter popup will be shown:

The screenshot shows the 'Add Products' application interface. At the top, there is a search bar and a 'Filters' popup. The 'Filters' popup is currently open, showing a 'Products Price range' section with input fields for '100' and '80000', and a range slider. Below this, there is a 'Products Filters' section with a list containing '1. New filter'. A 'Done' button is visible at the bottom of the popup. The background shows a table of products with columns for Product Name, Product Code, List Price, and Product Description. The table lists products with codes from 1 to 107 and prices ranging from 100.00 USD to 10 700.00 USD. At the bottom of the application, there are 'Search' and 'Remove All' buttons, and a 'Cancel' button.

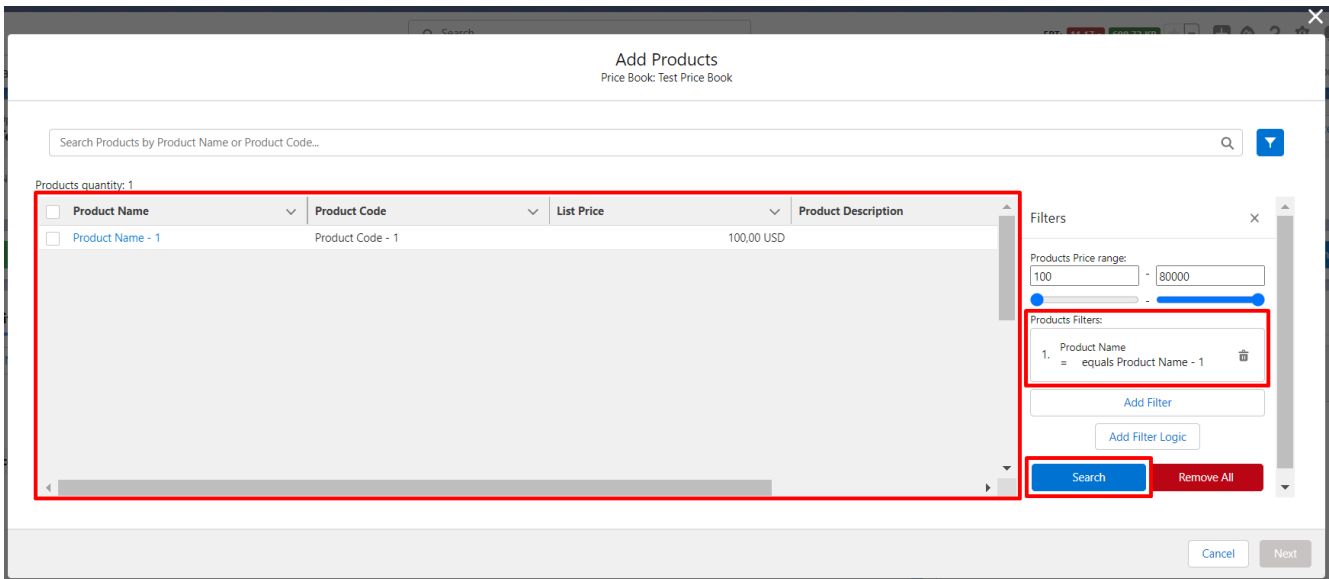
If the user fills fields and clicks outside the filter popup, the popup will be closed and data will not be saved. To save the filter, the user should press on 'Done' button (for correct work all fields should be filled):

A dialog box for configuring a filter. It contains three sections: 'Field' with a dropdown menu showing 'Product Name', 'Operator' with a dropdown menu showing '=', and 'Value' with a text input field containing 'Product Name - 1'. A red rectangular box highlights a 'Done' button at the bottom center of the dialog.

After filter was saved, it will be filled with entered data:

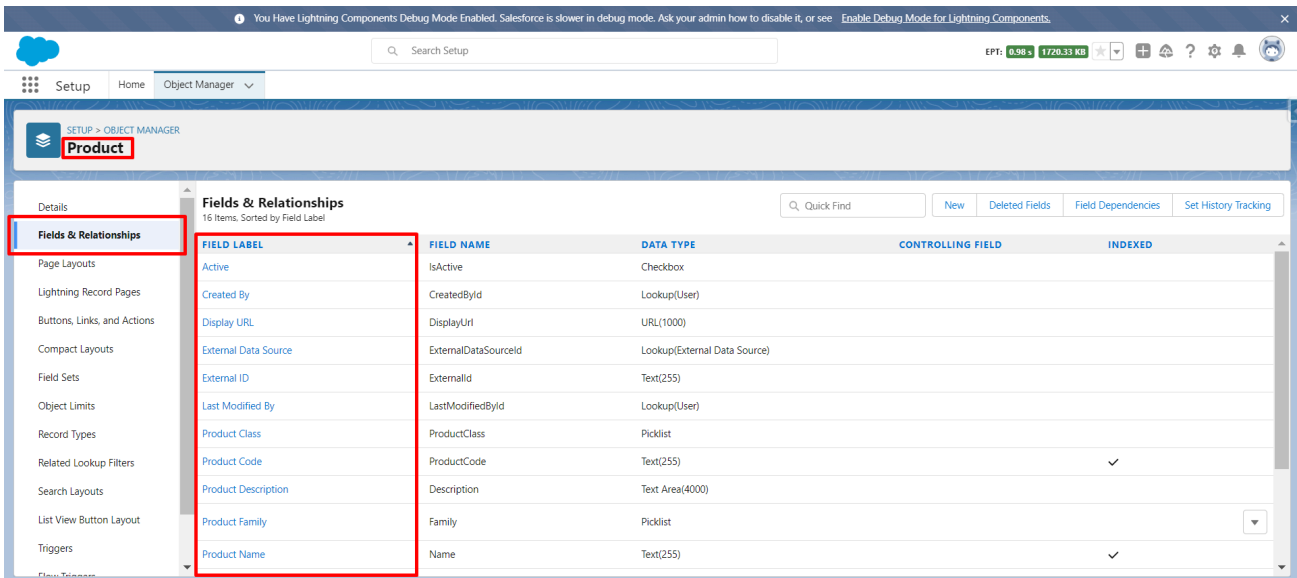
A 'Filters' panel with a close button (X) in the top right. It features a 'Products Price range' section with two input boxes containing '100' and '80000', and a slider below. The 'Products Filters' section is highlighted with a red box and contains a single filter entry: '1. Product Name = equals Product Name - 1' with a trash icon to its right. Below this section are three buttons: 'Add Filter', 'Add Filter Logic', and 'Search' (a blue button), and a 'Remove All' button (a red button).

After the filter is created, it does not automatically make filtering, the user should press the 'Search' button and after pressing the table will display filtered products:



So the filter popup has 3 important fields: 'Field', 'Operator' and 'Value'. But depending on which type 'Field' field value will have a quantity of 'Operator' list and the type of 'Value' field can be changed. Type of 'Field' field depending.

Filter field – contains a full list of 'Product' object fields (default and custom fields):



To select the 'Field' value, the user should click on the 'Field' field and select a value from the dropdown. After selecting a value dropdown will be closed and the user should be prepared for that the quantity of 'Operator' field options and type of the

'Value' field can be changed. This change depends on which 'Data Type' the selected 'Field' value has:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Active	IsActive	Checkbox		
Created By	CreatedById	Lookup(User)		
Display URL	DisplayUrl	URL(1000)		
External Data Source	ExternalDataSourceId	Lookup(External Data Source)		
External ID	ExternalId	Text(255)		
Last Modified By	LastModifiedById	Lookup(User)		
Product Class	ProductClass	Picklist		
Product Code	ProductCode	Text(255)		✓
Product Description	Description	Text Area(4000)		
Product Family	Family	Picklist		
Product Name	Name	Text(255)		✓

So every of these 'Data Type' has its own 'Schema.DisplayType' equivalent value, so after selecting the object field at 'Field' field, a user also selects a type with it, which could be:

- DOUBLE – represents double numeric fields;
- BOOLEAN – represents checkbox fields;
- DATE/DATETIME - represents date fields;
- REFERENCE - Represents reference fields (lookup and master-detail relationships);
- ID - Represents ID fields;
- STRING - Represents text fields. Every type that is not equal to one of these types: 'DOUBLE', 'BOOLEAN', 'DATE/DATETIME', 'REFERENCE', or 'ID', will have a 'STRING' type.

•

Operator field – contains a list of operators, which depends on what 'Data Type' the selected 'Field' field has. If the user already selected the value and after that, he changed the value of the 'Field' field, then the 'Operator' field will be cleared.

The 'Operator' field can contain these operators:

- Equals – return records whose values are exactly the same as with the entered 'Value' field value;
- Not equals – return records whose values are exactly different with entered 'Value' field value;
- Like – return records whose values may match with the entered 'Value' field value;

- Not like – return records whose values may not match with the entered ‘Value’ field value;
- Null – return records whose values are empty;
- Not null – return records whose values are not empty;
- Greater – return records whose values are greater than the entered ‘Value’ field value;
- Greater or equal – return records whose values are greater or equal to the entered ‘Value’ field value;
- Less – return records whose values are less than the entered ‘Value’ field value;;
- Less or equal – return records whose values are less or equal to the entered ‘Value’ field value;

As already was mentioned list of ‘Operators’ can be different and it depends on what field at ‘Field’ field does user selected and what ‘Data Type’ it has:

- If the selected ‘Field’ field value has a ‘DOUBLE’ type, then the ‘Operator’ list will contain: ‘Equals’, ‘Not equals’, ‘Greater’, ‘Greater or equal’, ‘Less’, ‘Less or equal’ ‘Null’, ‘Not null’;
- If the selected ‘Field’ field value has a ‘BOOLEAN’ type, then the ‘Operator’ list will contain: ‘Equals’, ‘Not equals’;
- If the selected ‘Field’ field value has the ‘DATE/DATETIME’ type, then the ‘Operator’ list will contain: ‘Equals’, ‘Not equals’, ‘Greater’, ‘Greater or equal’, ‘Less’, ‘Less or equal’ ‘Null’, ‘Not null’;
- If the selected ‘Field’ field value has an ‘ID’ type, then the ‘Operator’ list will contain: ‘Equals’, ‘Not equals’, ‘Null’, ‘Not null’;
- If the selected ‘Field’ field value has a ‘REFERENCE’ type, then the ‘Operator’ list will contain: ‘Equals’, ‘Not equals’, ‘Greater’, ‘Greater or equal’, ‘Less’, ‘Less or equal’ ‘Null’, ‘Not null’;
- If the selected ‘Field’ field value has a ‘STRING’ type, then the ‘Operator’ list will contain: ‘Equals’, ‘Not equals’, ‘Like’, ‘Not like’, ‘Null’, ‘Not null’;

Value field – contains a value, by which filtering will take place. The type of the ‘Value’ field depends on what ‘Data Type’ the selected ‘Field’ field has and what operator at the ‘Operator’ field is selected. If the user already selected the value and after that, he changed the value of the ‘Field’ field or ‘Operator’ field, then the ‘Value’ field will be cleared.

Let's look at what type of field can have a ‘Value’ field depending on selected values at the ‘Field’ field and ‘Operator’ field:

- If the selected ‘Field’ value has a ‘DOUBLE’ type and the ‘Operator’ value is not equal to ‘null’ or ‘not null’ – input with number type will be displayed;

A configuration dialog box with three sections: 'Field' containing a dropdown menu with 'Number' selected, 'Operator' containing a dropdown menu with 'Operator' selected, and 'Value' containing a text input field with '0' entered. A 'Done' button is located at the bottom center.

- If selected 'Field' value has 'DOUBLE' type and 'Operator' value is equal to 'null' or 'not null' – no field will be displayed;

A configuration dialog box with 'Field' set to 'Number' and 'Operator' set to 'null' (indicated by a circle with a slash). A 'Done' button is at the bottom.

A configuration dialog box with 'Field' set to 'Number' and 'Operator' set to 'not null' (indicated by a circle with an 'X'). A 'Done' button is at the bottom.

- If selected 'Field' value has 'BOOLEAN' – checkbox will be displayed;

A configuration dialog box with 'Field' set to 'Active' and 'Operator' set to 'Operator'. The 'Value' section features a toggle switch currently in the 'Inactive' position. A 'Done' button is at the bottom.

- If selected 'Field' value has 'DATE/DATETIME' – input with date type will be displayed;

Field
Created Date ▼

Operator
Operator ▼

Value
[Empty field with calendar icon]

Done

- If selected 'Field' value has 'DATE/DATETIME' type and 'Operator' value is equal to 'null' or 'not null' – no field will be displayed;

Field
Created Date ▼

Operator
∅ null ▼

Done

Field
Created Date ▼

Operator
∃ not null ▼

Done

- In all other variants (if 'Operator' value is not equal to 'null' or 'not null') – input with text type will be displayed.

Field
Product Name ▼

Operator
Operator ▼

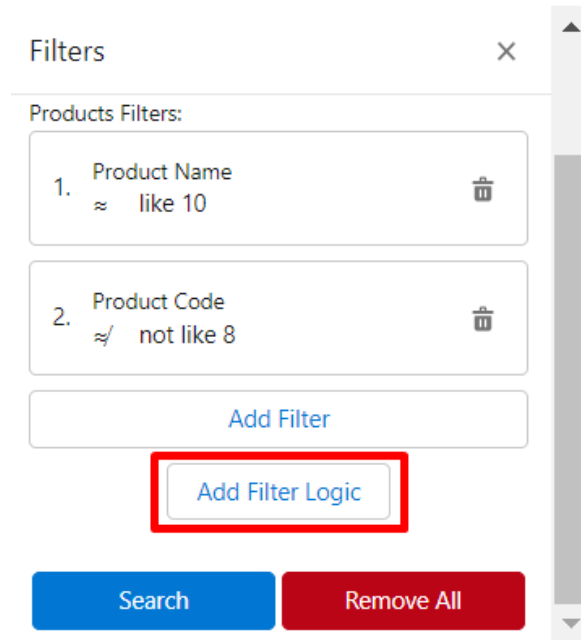
Value
[Empty text field]

Done

2.5 Filter logic (CPQ) or conditional search

Filter logic (CPQ) or conditional search – this logic provides the user with more specific filtering.

To gain access to building filter logic, the user should create at least one filter, and then the 'Add Filter Logic' button will be shown.

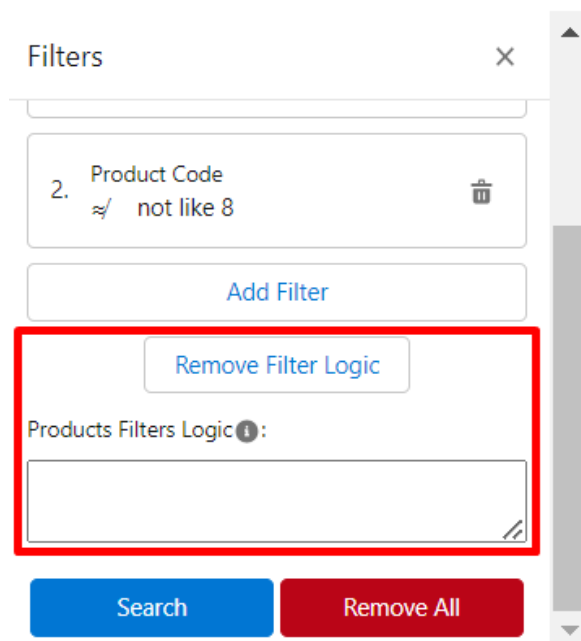


The screenshot shows a 'Filters' dialog box with a close button (X) in the top right corner. Under the heading 'Products Filters:', there are two filter items:

- 1. Product Name ≈ like 10
- 2. Product Code ≈ not like 8

Each filter item has a trash icon to its right. Below the filters is an 'Add Filter' button. Below that is the 'Add Filter Logic' button, which is highlighted with a red rectangular box. At the bottom of the dialog are two buttons: 'Search' (blue) and 'Remove All' (red).

To build filter logic user should press on the 'Add Filter Logic' button after that blank textarea will be shown, and the 'Add Filter Logic' button will be replaced with 'Remove Filter Logic', pressing which removes all filter logic entered data and close textarea.



The screenshot shows the 'Filters' dialog box after the 'Add Filter Logic' button was pressed. The 'Add Filter Logic' button has been replaced by a 'Remove Filter Logic' button, which is highlighted with a red rectangular box. Below this button is a new section titled 'Products Filters Logic ⓘ' with a small information icon. Underneath this title is a large, empty text area for entering logic. The other elements of the dialog, including the filters and the 'Search' and 'Remove All' buttons, remain the same.

By default filter logic filter field is empty, but if the user creates and fills more than 1 filter, then they will be implicitly connected through 'AND' with each other (filter logic would look like this: `1 AND 2 AND 3...`).

The screenshot shows a window titled "Add Products" with the subtitle "Price Book: Test Price Book". At the top, there is a search bar with the placeholder text "Search Products by Product Name or Product Code...". Below the search bar, a table lists 17 products. The table has columns for "Product Name", "Product Code", "List Price", and "Product Description". The "Product Name" column contains entries like "Product Name - 10", "Product Name - 100", etc. The "List Price" column shows values like "1 000,00 USD", "10 000,00 USD", etc. To the right of the table is a "Filters" panel. It contains a section titled "Products Filters:" with two filter cards. The first card is "1. Product Name ≈ like 10" and the second is "2. Product Code ≈/ not like 8". Below the filter cards are buttons for "Add Filter", "Add Filter Logic", "Search", and "Remove All". At the bottom right of the window are "Cancel" and "Next" buttons.

Product Name	Product Code	List Price	Product Description
Product Name - 10	Product Code - 10	1 000,00 USD	
Product Name - 100	Product Code - 100	10 000,00 USD	
Product Name - 101	Product Code - 101	10 100,00 USD	
Product Name - 102	Product Code - 102	10 200,00 USD	
Product Name - 103	Product Code - 103	10 300,00 USD	
Product Name - 104	Product Code - 104	10 400,00 USD	
Product Name - 105	Product Code - 105	10 500,00 USD	
Product Name - 106	Product Code - 106	10 600,00 USD	
Product Name - 107	Product Code - 107	10 700,00 USD	
Product Name - 109	Product Code - 109	10 900,00 USD	

To make correct custom filter logic user should use this operator: 'AND', 'OR' and filter indexes, filter index displaying on the filter card (to make order between operators user can use round brackets).

This is a close-up view of the "Filters" panel. It shows a section titled "Products Filters:" containing two filter cards. The first card is labeled "1." and contains the text "Product Name ≈ like 10". The second card is labeled "2." and contains the text "Product Code ≈/ not like 8". Below the filter cards are buttons for "Add Filter", "Add Filter Logic", "Search", and "Remove All".

2.6 Edit Selected Products Table

The screenshot shows the 'Add Products' dialog box. At the top, it says 'Add Products' and 'Price Book: Test Price Book'. Below that is a search bar with the text 'Search Products by Product Name or Product Code...'. Underneath, it says 'Products quantity: 800 · Show selected: 4'. The main area is a table with columns: Product Name, Product Code, List Price, Product Description, and Product Family. The first four rows are selected, indicated by checkmarks in a column on the left. The 'Next' button at the bottom right is highlighted with a red box.

Product Name	Product Code	List Price	Product Description	Product Family
<input checked="" type="checkbox"/> Product Name - 1	Product Code - 1	100,00 USD		
<input checked="" type="checkbox"/> Product Name - 10	Product Code - 10	1 000,00 USD		
<input checked="" type="checkbox"/> Product Name - 100	Product Code - 100	10 000,00 USD		
<input checked="" type="checkbox"/> Product Name - 101	Product Code - 101	10 100,00 USD		
<input type="checkbox"/> Product Name - 102	Product Code - 102	10 200,00 USD		
<input type="checkbox"/> Product Name - 103	Product Code - 103	10 300,00 USD		
<input type="checkbox"/> Product Name - 104	Product Code - 104	10 400,00 USD		
<input type="checkbox"/> Product Name - 105	Product Code - 105	10 500,00 USD		
<input type="checkbox"/> Product Name - 106	Product Code - 106	10 600,00 USD		
<input type="checkbox"/> Product Name - 107	Product Code - 107	10 700,00 USD		
<input type="checkbox"/> Product Name - 108	Product Code - 108	10 800,00 USD		

The screenshot shows the 'Edit Selected Products' dialog box. At the top, it says 'Edit Selected Products'. Below that is a search bar with the text 'Search...'. The main area is a table with columns: Product, Quantity, Sales Price, Date, and Description Line. The first four rows are visible, and the 'Quantity' and 'Sales Price' columns are highlighted with a red box. The 'Back' button is at the bottom left, and 'Cancel' and 'Save' buttons are at the bottom right.

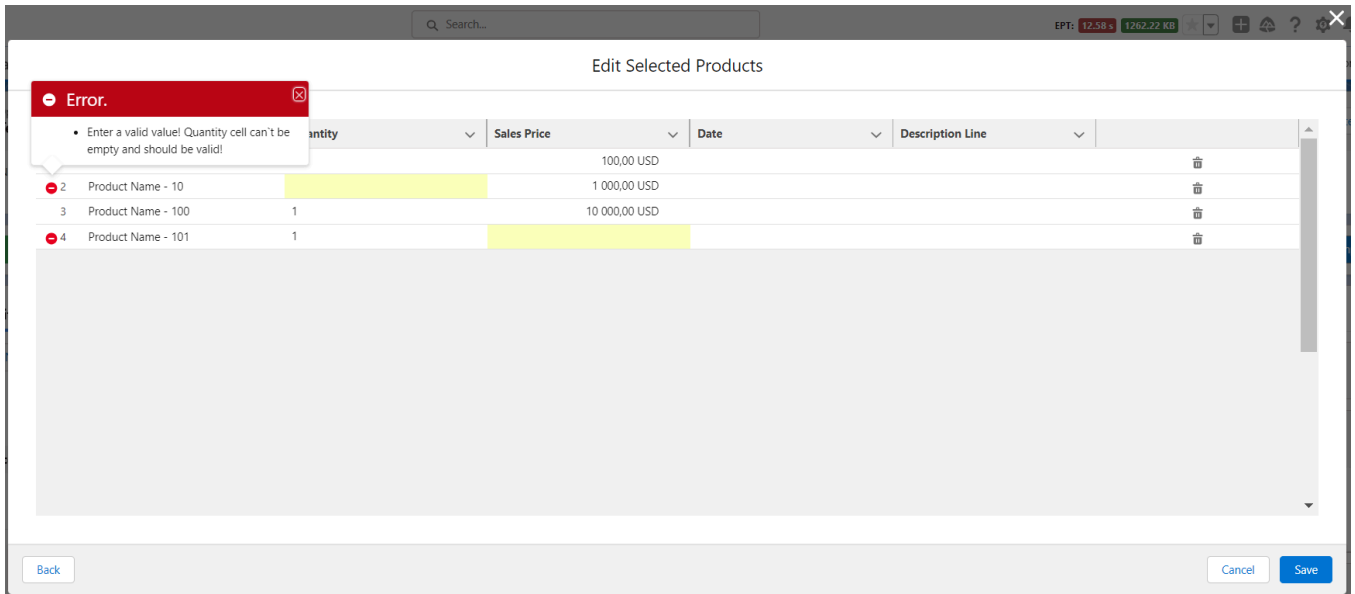
Product	Quantity	Sales Price	Date	Description Line
1 Product Name - 1	1	100,00 USD		
2 Product Name - 10	1	1 000,00 USD		
3 Product Name - 100	1	10 000,00 USD		
4 Product Name - 101	1	10 100,00 USD		

- Editing Fields:
 - Quantity
 - Sales Price
 - Date
 - Description Line
- Validation:
 - Only "Quantity" and "Sales Price" undergo validation.
 - Both fields must contain valid numbers.
 - Errors are marked, and a tooltip provides specifics.

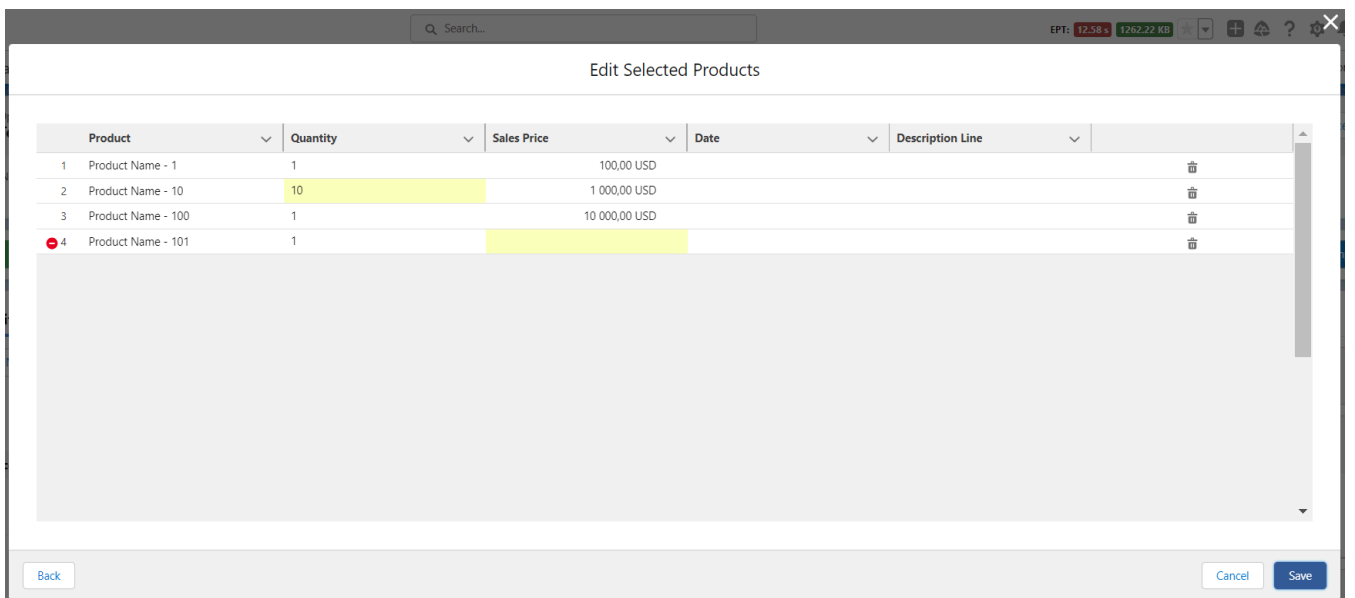
3. Notifications

- Error and success notifications ensure users are aware of any actions required or successful operations.

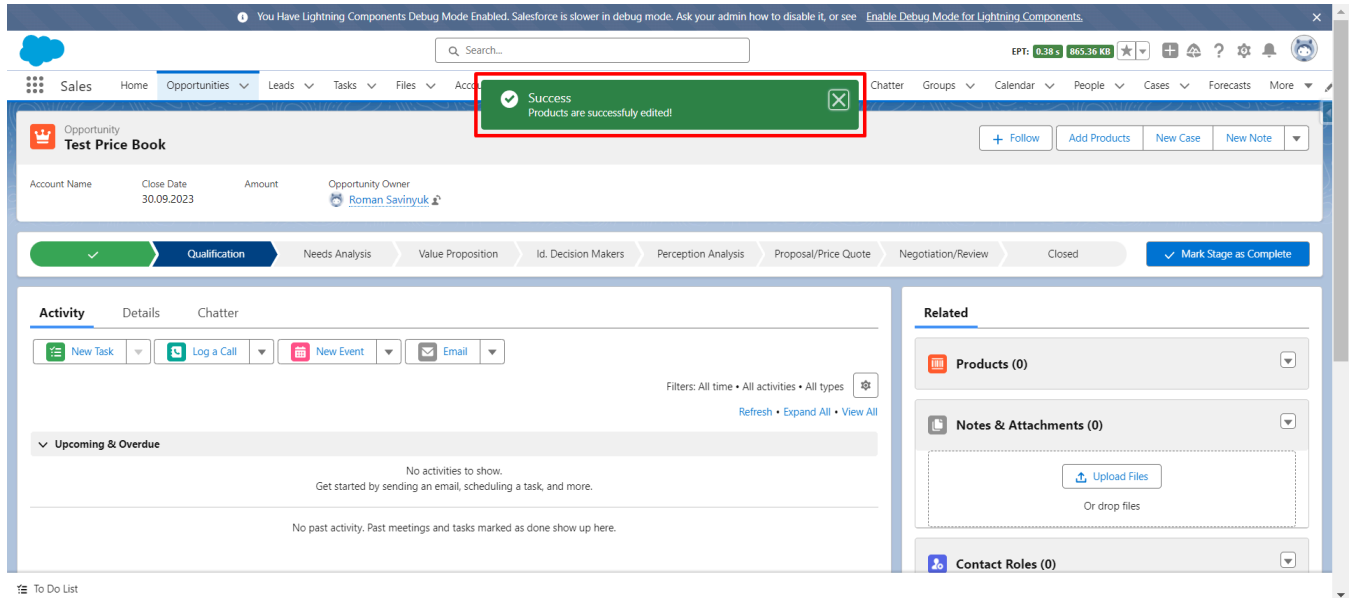
Note: Only the 'Quantity' and 'Sales Price' cells are important and will pass through validation after pressing on 'Save' button. So for correct validation passing, values at 'Quantity' and 'Sales Price' cells should be non-empty numbers (0 is a valid value also). If the user entered a non-valid value on one of the imported cells, then the opposite edit row will display an error mark, pressing on which will explain exactly what error the user made.



The error mark we are displaying till the user doesn't resolve an error. If an error is resolved, then after pressing the 'Save' button it will disappear.



for successful saving, the user should resolve all errors. If all errors are resolved and the user presses 'Save', then a success toast will be shown.



Conclusion

The Synebo Advanced Product Selector optimizes the product selection process, ensuring seamless association of products with opportunities in Salesforce. Proper usage ensures accurate and efficient product management within opportunities.