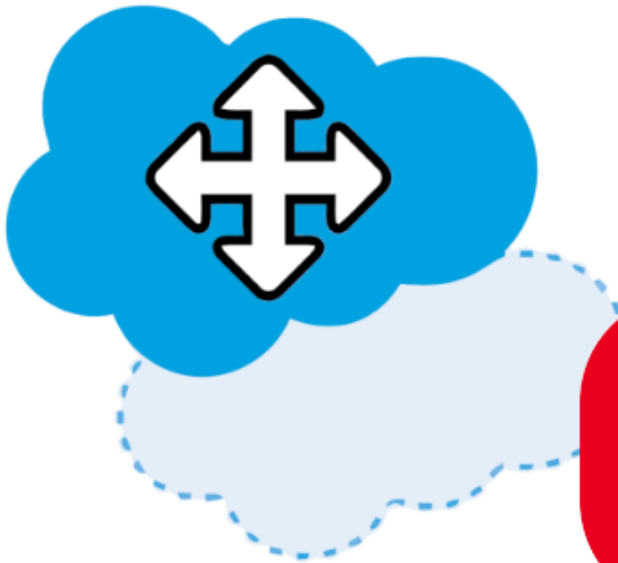


Product Selector



V2.8

for **Sales Cloud** 

**Post Install
Instructions**

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Adding the Component to the Opportunity, Quote or Order Record Page Layout

Go to Setup >> Lightning App Builder and select the Opportunity, Quote or Order Record Page you want to add the component into, and click Edit.

The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with "Lightning App Builder" entered. Below the search bar, the "User Interface" section is expanded, and "Lightning App Builder" is highlighted. The main content area shows the "Lightning App Builder" header with a gear icon and the text "SETUP Lightning App Builder". Below this, a description states: "The Lightning App Builder provides an easy to use graphical interface for creating custom Lightning pages for Salesforce Lightning Experience and mobile app. Lightning pages are built using Lightning components—compact, configurable, and reusable elements that you can drag and drop into regions of the page in the Lightning App Builder." Below the description, there is a "View:" dropdown set to "All" and a link "Create New View". A navigation bar shows letters A through Z and "Other", with "All" selected. Below this is a table titled "Lightning Pages" with a "New" button. The table has columns: Action, Label, Name, Namespace Prefix, Description, Type, Created By, and Last Modified By. The table contains three rows of data.

Action	Label	Name	Namespace Prefix	Description	Type	Created By	Last Modified By
Edit Clone Del	Opportunity Record Page	Opportunity_Record_Page			Record Page	DMoli, 7/10/2021, 7:43 AM	DMoli, 5/11/2023, 5:18 PM
Edit	Edit - Record 1 - Opportunity Record Page	der_Record_Page			Record Page	DMoli, 3/27/2022, 7:38 PM	DMoli, 5/9/2023, 11:49 PM
Edit Clone Del	Quote Record Page	Quote_Record_Page			Record Page	DMoli, 3/27/2022, 7:27 PM	DMoli, 5/9/2023, 11:49 PM

Once there, chose a place on the page of a reasonable size, on the Components Search field search for **Product Selector v2.8**, and drag and drop it to the chosen place. The component will show up in its default configuration.

The screenshot shows the Lightning App Builder interface for an "Opportunity Record Page". The left sidebar contains the "Components" panel with a search bar set to "Product Selector v2.0". Under the "Custom (1)" category, the "Product Selector V2.0 (by dougam...)" component is visible. The main canvas displays a preview of the component, which is a table of products. The table has columns for "Product Name", "List Price", and "Created Date". The table is titled "Products" and shows a list of Nintendo Switch products. The right sidebar shows the configuration for the selected product, "Mario Pro Controller - Nintendo Switch", including its COD, quantity, sales price, and total price.

Lightning App Builder | Pages | Opportunity Record Page

Components | Fields

Product Selector v2.0

Standard (0)

Custom (1)

Product Selector V2.0 (by dougam...)

Custom - Managed (0)

Details | Related | Products

Product Fa... | Product Name, Product Code, Product Description, ...

Price Book: Standard Price Book

Product Name	List Price	Created Date
Legend of Zelda: Links Awakening - Ninte...	USD 60.00	2/28/2023, 10:09:24 AM
Mario Carring Case - Nintendo Switch	USD 16.91	2/28/2023, 10:09:24 AM
Mario Kart 8 Deluxe - Nintendo Switch	USD 60.00	2/28/2023, 10:09:24 AM
Mario Pro Controller - Nintendo Switch	USD 15.99	2/28/2023, 10:09:24 AM

1-4 of 24 Records, 6 Pages

Mario Pro Controller - Nintendo Switch

COD-000023

Quantity 1.00 | Sales Price USD 15.99 | Total Price USD 15.99

Product Info

Line Description Brand new.

System Info

Created Date 5/11/2023, 5:15:34 PM | Created By ID Douglas Molina

Customizing the Component by Changing its Attribute Values

You can customize the component by changing its attribute values, located on the Attributes panel of the App Builder.

The screenshot displays the App Builder interface for an 'Opportunity Record Page'. The main component, 'Product Selector V2.0', is shown in a desktop view. It features a search bar, a table of products, and a detailed view for the selected product, 'Mario Pro Controller - Nintendo Switch'. The table lists products with columns for Product Name, List Price, and Created Date. The detailed view shows product information, including line description, brand, system info, and created date.

The right sidebar contains the 'Attributes' panel for the 'Product Selector V2.0' component. It includes the following settings:

- Global > Record ID**: A text input field.
- Global > Lists Width Proportion**: A slider set to 50% 50%.
- Pricebook Entry > Search Field(s)**: A text input field containing 'PricebookEntry.Name,Product2.ProductCode'.
- Pricebook Entry > Min Height (in Px)**: A text input field containing '350'.
- Pricebook Entry > Records per line**: A slider set to 2 records.
- Pricebook Entry > Records per page**: A text input field containing '4'.

Every attribute brings an explanation about itself. To see it, hover the mouse cursor over the “i” icon.

Percentage of occupied horizontal space, from the total available, for both Pricebook Entries and Opportunity/Quote/Order Products lists, respectively.

* Global > Lists Width Proportion

50% 50%

Help

For attributes that asks for field lists, you can use empty strings or underscores between commas to create spaces between other fields. That helps keep things aligned.

* Sale Product > Header Field(s) ⓘ

Product2.Name

Sale Product > Subheader Field(s) ⓘ

Product2.ProductCode,_,Product2.Family

Sale Product > Highlight Field(s) ⓘ

Quantity,UnitPrice,_,TotalPrice

Mario Pro Controller - Nintendo Switch			
COD-000023			Acessory
Quantity ⓘ	Sales Price		Total Price
1.00	USD 15.99		USD 15.99
Product Info			
Line Description ⓘ			
Brand new.			
System Info			
Created Date		Created By ID	
5/11/2023, 5:15:34 PM		Douglas Molina	

When adding the component into an Order layout, you should create a custom number field in the Order Product object, and write its API Name into the **Sale Product > Sort Order Field** attribute, replacing its default value. This step is not necessary when working with Opportunities or Quotes.

Setup

Home

Object Manager

SETUP > OBJECT MANAGER

Order Product

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons and Links

Compact Layouts

Field Sets

Fields & Relationships

16 Items, Sorted by Field Name

Quick Find

New

Deleted F

FIELD LABEL	FIELD NAME	DATA TYPE
Unit Price	UnitPrice	Currency(16, 2)
Total Price	TotalPrice	Currency(16, 2)
SortOrder	SortOrder__c	Number(5, 0)
Start Date	ServiceDate	Date
Quote Line Item	QuoteLineItemId	Lookup(Quote Line Item)

Sale Product > Sort Order Field

SortOrder__c

Creating the Product Detail Section

There are **2 attributes** responsible to determine the fields and layout of the **details section**, for both Pricebook Products and Opportunity/Quote/Order Products, they are the **Pricebook Entry > Detail Field(s)** and **Sale Product > Detail Field(s)** respectively.

They are more flexible in terms of how you can specify the fields and layout. There are 2 ways you can do it:

1st Way: Using Custom-Made Layout.

Advantages of it:

You can create layouts with several fields in each row, as opposed to just two of the standard layouts.

You don't need to create any page layout or other kind of metadata in your Org, just fill this attribute.

You can generate this value dynamically, for example if you're using the component inside a Screen Flow.

You don't need to create lots of formula fields if you want to specify fields from more than 1 object.

2nd Way: Using Existing Page Layout.

Advantages of it:

It's simpler to write.

You **cannot** mix both ways at the same time inside a single attribute, but you **can** use one way in one attribute, and other way on the other attribute, for example:

Pricebook Entry > Detail Field(s) -> **1st Way** Custom-Made Layout

Sale Product > Detail Field(s) -> **2nd Way** Existing Page Layout

Using the 1st Way: Custom-Made Layout

It's basically a string made of several other concatenated strings, containing the fields, rows, section labels, layouts, and record type assignments, **all of them being optional**. The idea here is similar to the standard record layout + record type + their assignment.

Suppose a company that sells 2 types of products: **Hardware** and **Software**, so they created 2 record types for the Product Object: **Hardware Product** and **Software Product**, and several fields specific to each type of product.

You would like to show a different layout for each type of product when using this component, with those specific fields. Furthermore, you'd also like to separate all this info into labeled sections containing several rows each, with a different numbers of fields per row.

The way to solve this is to write down the layout you're thinking about just like the example below, where the first level represents the **record type names**, the second level represents the **section labels**, and the third level represents the **rows**:

```
1 Software Product
2   Software Specs
3       Product2.Soft_ver__c    Product2.Soft_size__c
4       Product2.Soft_AddList__c
5   Additional Info
6       Product2.Description
7   System Info
8       Product2.CreatedDate    Product2.CreatedById
9 Hardware Product
10  Hardware Config
11      Product2.Ram_Amount__c    Product2.Clock_speed__c    Product2.Board_ver__c
12  Gallery
13      Product2.Pic_1__c        Product2.Pic_2__c        Product2.Pic_3__c
14  Additional Info
15      Product2.Description
```

That being done, you need to join all this structure into a single line of text, concatenating the parts by using the following logic:

- 1) Place a **,** character between the field names, to create a **row**, like this:

```
1 Software Product
2   Software Specs
3     Product2.Soft_ver__c,Product2.Soft_size__c
4     Product2.Soft_AddList__c
5   Additional Info
6     Product2.Description
7   System Info
8     Product2.CreatedDate,Product2.CreatedById
9 Hardware Product
10  Hardware Config
11    Product2.Ram_Amount__c,Product2.Clock_speed__c,Product2.Board_ver__c
12  Gallery
13    Product2.Pic_1__c,Product2.Pic_2__c,Product2.Pic_3__c
14  Additional Info
15    Product2.Description
```

- 2) Place a **;** character between the rows, to create a **section content**, like this:

```
1 Software Product
2   Software Specs
3     Product2.Soft_ver__c,Product2.Soft_size__c;Product2.Soft_AddList__c
4   Additional Info
5     Product2.Description
6   System Info
7     Product2.CreatedDate,Product2.CreatedById
8 Hardware Product
9   Hardware Config
10    Product2.Ram_Amount__c,Product2.Clock_speed__c,Product2.Board_ver__c
11  Gallery
12    Product2.Pic_1__c,Product2.Pic_2__c,Product2.Pic_3__c
13  Additional Info
14    Product2.Description
```

- 3) Place a **:** character between a section label and its section content, to create a **full section**, like this:

```
1 Software Product
2   Software Specs:Product2.Soft_ver__c,Product2.Soft_size__c;Product2.Soft_AddList__c
3   Additional Info:Product2.Description
4   System Info:Product2.CreatedDate,Product2.CreatedById
5 Hardware Product
6   Hardware Config:Product2.Ram_Amount__c,Product2.Clock_speed__c,Product2.Board_ver__c
7   Gallery:Product2.Pic_1__c,Product2.Pic_2__c,Product2.Pic_3__c
8   Additional Info:Product2.Description
```

- 4) Place a **/** character between the full sections, to create a **layout** like this:

```
1 Software Product
2   Software Specs:Product2.Soft_ver__c,Product2.Soft_size__c;Product2.Soft_AddList__c/Additional
3   Info:Product2.Description/System Info:Product2.CreatedDate,Product2.CreatedById
4 Hardware Product
5   Hardware
6   Config:Product2.Ram_Amount__c,Product2.Clock_speed__c,Product2.Board_ver__c/Gallery:Product2.Pic_1__c
7   ,Product2.Pic_2__c,Product2.Pic_3__c/Additional Info:Product2.Description
```

- 5) Place a **=** character between a record type name and its layout, to create an **assignment**, like this:

```
1 Software Product=Software
2   Specs:Product2.Soft_ver__c,Product2.Soft_size__c;Product2.Soft_AddList__c/Additional
3   Info:Product2.Description/System Info:Product2.CreatedDate,Product2.CreatedById
4 Hardware Product=Hardware
5   Config:Product2.Ram_Amount__c,Product2.Clock_speed__c,Product2.Board_ver__c/Gallery:Product2.Pic_1__c,Pro
6   duct2.Pic_2__c,Product2.Pic_3__c/Additional Info:Product2.Description
```

6) Place a | character between the assignments, to create the **final attribute value**, like this:

```
1 Software Product=Software
  Specs:Product2.Soft_ver__c,Product2.Soft_size__c;Product2.Soft_AddList__c/Additional
  Info:Product2.Description/System Info:Product2.CreatedDate,Product2.CreatedById|Hardware
  Product=Hardware
  Config:Product2.Ram_Amount__c,Product2.Clock_speed__c,Product2.Board_ver__c/Gallery:Product2.Pic_1__c,Pro
  duct2.Pic_2__c,Product2.Pic_3__c/Additional Info:Product2.Description
```

That being done, just copy and paste this string into one of the details attributes of the component, and you should get results like this:

Pricebook Entry > Detail Field(s) ⓘ

Software Product=Software Specs:Product2.Soft_ver__c,Pr

Product Fa...

Q

Product Name, Product Code, Product Description, ...

✕

Product Name

List Price

Created Date

▲

▼

50-200

200

Arduino Standard Edition

Hardware Config

Ram Amount

Clock Speed

Board Version

2GB

1.5GHz

v12.3 r8

Gallery

Picture 1

Picture 2

Picture 3

Additional Info

Product Description ⓘ

Open-source electronic prototyping platform enabling users to create interactive electronic objects.

Microsoft Office 2021 Full

Software Specs

Software Version

Software Size

2021

9.86GB

Software AddOn List

Word, Excel, PowerPoint

Additional Info

Product Description ⓘ

Create content, stay organized, and work together with this updated versions of Microsoft Office.

System Info

Created Date

Created By ID

5/11/2023, 10:00:00 PM

Douglas Molina

<<

<

1

>

>>

1-2 of 2 Records, 1 Page

You can skip any of those components (ex: assignments, record types, section labels, rows) and apply only the concatenations that actually make sense to the remaining components.


```

1 [pl]
2   Software Product
3     Product2-Software Product Layout
4   Hardware Product
5     Product2-Hardware Product Layout

```

That being done, you need to join all this structure into a single line of text, concatenating the parts by using the following logic:

- 1) Place a **=** character between a record type name and its page layout full name, to create an **assignment**, like this:

```

1 [pl]
2   Software Product=Product2-Software Product Layout
3   Hardware Product=Product2-Hardware Product Layout

```

- 2) Place a **|** character between the assignments, to create the **pre-final value**, like this:

```

1 [pl]
2   Software Product=Product2-Software Product Layout|Hardware Product=Product2-Hardware Product Layout

```

- 3) Put together the string “[pl]” and the pre-final value, to create the **final attribute value**, like this:

```

1 [pl]Software Product=Product2-Software Product Layout|Hardware Product=Product2-Hardware Product Layout

```

That being done, just copy and paste this string into one of the details attributes of the component, and you should get results like this:

Pricebook Entry > Detail Field(s) ⓘ

[pl]Software Product=Product2-Software Product Layout|l

Product Fa...

Q Product Name, Product Code, Product Description, ...

Product Name

List Price

Created Date

▲▼

50-200

200

Arduino Standard Edition

Product Name
Arduino Standard Edition

Hardware Config

Ram Amount
2GB

Clock Speed
1.5GHz

Board Version
v12.3 r8

Gallery

Picture 1

Picture 2

Picture 3

Additional Info

Product Description ⓘ
Open-source electronic prototyping platform enabling users to create interactive electronic objects.

Microsoft Office 2021 Full

Product Name
Microsoft Office 2021 Full

Software Specs

Software Version
2021

Software Size
9.86GB

Software AddOn List
Word, Excel, PowerPoint

Additional Info

Product Description ⓘ
Create content, stay organized, and work together with this updated versions of Microsoft Office.

System Info

Created By ID
Douglas Molina

«<1>>»

1-2 of 2 Records, 1 Page

Creating the Field Mapping for the Product Import Tool

The tools **Import Products from parent Opportunity** (available for Quotes and Orders) and **Import Products from parent Quote** (available for Orders) both utilize the same attribute **Sale Product > Import Tool Mapping** to determine how the Product fields are going to be mapped when cloning them to the current Quote or Order. The component already brings some standard fields mapped, but you can always add your specific/custom ones to the list as well.

To do so, just write down the desired mapping like the example below, where the fields on the left are the **target fields** (of the products that will be created), and the fields on the right are the **source fields** (of the original products). In this example we are configuring the clone from the Opportunity Products (source) to the Quote Products (target), but the idea is the same for all the other scenarios, just be sure to use the appropriate Object name:

```
1 QuoteLineItem.Quantity      OpportunityLineItem.Quantity
2 QuoteLineItem.UnitPrice     OpportunityLineItem.UnitPrice
3 QuoteLineItem.My_txt__c     OpportunityLineItem.My_add_descr__c
```

That being done, you need to join all this structure into a single line of text, concatenating the parts by using the following logic:

- 1) Place a **=** character between a target field and its source field, to create a **field mapping**, like this:

```
1 QuoteLineItem.Quantity=OpportunityLineItem.Quantity
2 QuoteLineItem.UnitPrice=OpportunityLineItem.UnitPrice
3 QuoteLineItem.My_txt__c=OpportunityLineItem.My_add_descr__c
```

2) Place a , character between the **field mappings**, to create the **final value**, like this:

```
1 QuoteLineItem.Quantity=OpportunityLineItem.Quantity,QuoteLineItem.UnitPrice=OpportunityLineItem.UnitPrice,QuoteLineItem.My_txt__c=OpportunityLineItem.My_add_descr__c
```

And then just copy and paste this string in the corresponding attribute of the component:

Sale Product > Import Tool Mapping ⓘ

QuoteLineItem.Quantity=OpportunityLineItem.Quantity,QuoteLineItem.Uni

Please note that when creating the field mapping for Orders(target), you can put all the field mappings for both Opportunity(source) and Quote(source) in the same field at the same time, the component will identify the correct ones based on the object names. For example, this would be a valid mapping:

1	OrderItem.Quantity	OpportunityLineItem.Quantity
2	OrderItem.UnitPrice	OpportunityLineItem.UnitPrice
3	OrderItem.Special_desc__c	OpportunityLineItem.My_notes__c
4	OrderItem.Quantity	QuoteLineItem.Quantity
5	OrderItem.UnitPrice	QuoteLineItem.UnitPrice
6	OrderItem.Special_desc__c	QuoteLineItem.Memo_2__c

```
1 OrderItem.Quantity=OpportunityLineItem.Quantity,OrderItem.UnitPrice=OpportunityLineItem.UnitPrice,OrderItem.Special_desc__c=OpportunityLineItem.My_notes__c,OrderItem.Quantity=QuoteLineItem.Quantity,OrderItem.UnitPrice=QuoteLineItem.UnitPrice,OrderItem.Special_desc__c=QuoteLineItem.Memo_2__c
```

Also note that the **sort order** is not mapped by default, but it can be mapped just like any other field. Just keep in mind that when mapped, **it will only replicate the original sort values, rather than recalculate the values to match any already existing Product on the current Quote or Order**. You can however resort them to your taste after the import has been completed.

One last note, now about mapping the Unit Price of the **Order Product (target)** object. This object **does not have the default Discount field**, so if you use the Discount field of the Opportunity or Quote Products, in order to keep the values consistent, you may want to first create a formula field on those objects calculating the unit price considering the discount, and then you can use this formula to map with the Unit Price of the Order Product.

Using the Component Inside Lightning Communities

This component **can be added to Lightning Community pages** using the Experience Builder, in the same way you would add it internally using the App Builder. The only difference is that **you have to specify the record id expression** (not the value) at the moment you add the component to the page, by typing the fixed expression **{!recordId}** into the **Global > Record ID** attribute, like this:

