



Easy Sync

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Overview

The Easy Sync App enables syncing of custom Fields in Quotes and Quote Line Items back to Opportunities and Opportunity Line Items and vice versa.

Pre-requisites

You must have Quotes enabled in the Salesforce Org where the package is being installed.

Installation

First you must install the Package on your Salesforce Org from the AppExchange.



Install Easy Sync

By Coolhandcoders Ltd


☐ **Install for Admins Only**


☒ **Install for All Users**


☐ **Install for Specific Profiles...**

Install

Cancel

App Name	Publisher	Version Name	Version Number
Easy Sync	Coolhandcoders Ltd	Summer 2022	4.10

Additional Details [View Components](#)

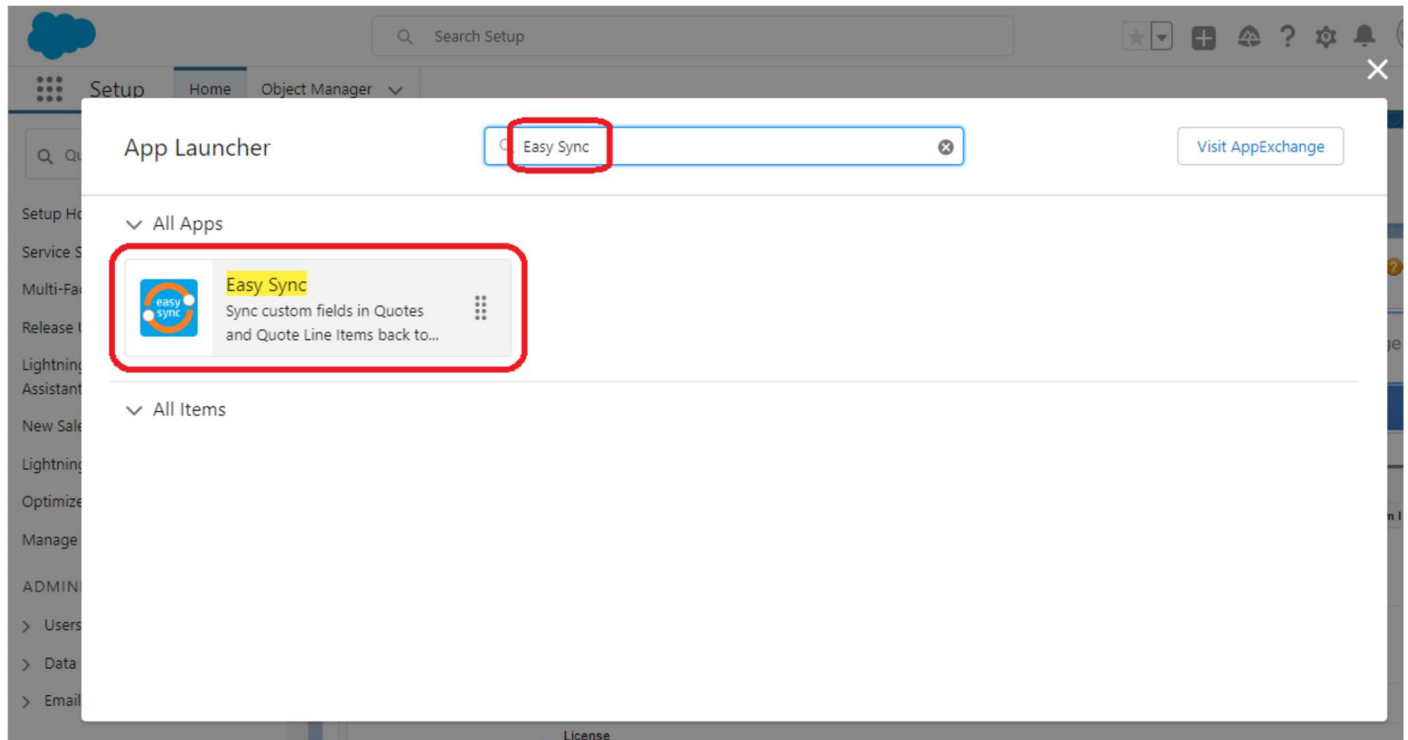


Post Installation Setup

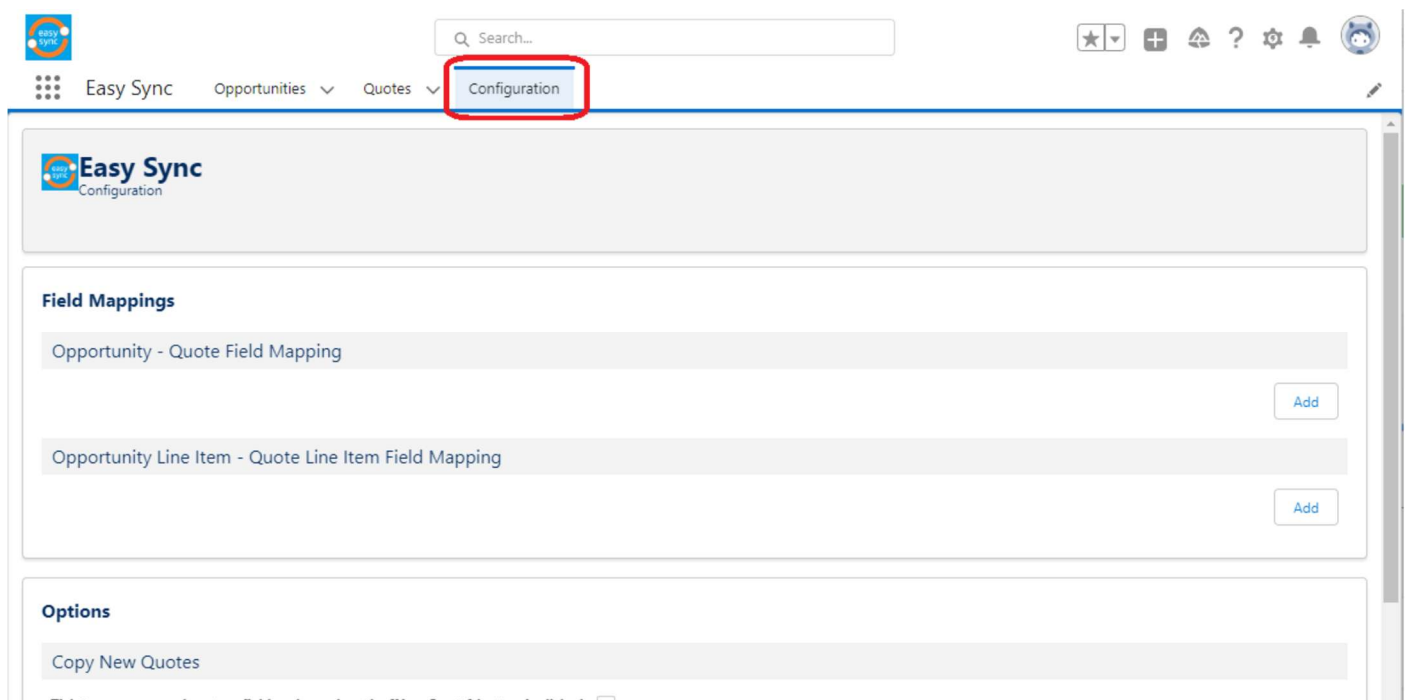
Configuring Custom Fields to be Synced

Use the [Configuration] Tab to set up the Custom Field mappings between the Opportunity & Quote Objects and the Opportunity Line Item and Quote Line Item Objects.

Use the App Launcher to navigate to the Easy Sync App...



Then once there, click on the [Configuration] Tab...





From here you can select Custom Fields from each Object to map for syncing. For example, below we are mapping Field [TestOpportunityTextField] in the Opportunity Object to the [TestQuoteTextField] Field in the Quote Object. The Field [TestOpportunityLineItemTextField] in the Opportunity Line Item Object is also being mapped to [TestQuoteLineItemTextField] Field in the Quote Line Item Object.

Click the [Add] button to add more Field Mappings as required.

Click the [Save] button to save the Mapping Configuration.

If you wish to remove a Mapping, just click the [Remove] button to the right of the Mapping to be removed, then click the [Save] button.

The screenshot displays the 'Easy Sync Configuration' interface. At the top, there's a navigation bar with 'Easy Sync', 'Opportunities', 'Quotes', and 'Configuration' tabs. Below this, the 'Field Mappings' section is active, showing two mapping configurations. The first, 'Opportunity - Quote Field Mapping', maps 'TestCustomField_O' to 'TestCustomField_Q'. The second, 'Opportunity Line Item - Quote Line Item Field Mapping', maps 'TestCustomField_OLI' to 'TestCustomField_QLI'. Each mapping has a 'Remove' button. An 'Add' button is also present. Below the mappings, the 'Options' section contains three sections: 'Copy New Quotes' with a checkbox, 'Sync New Quotes' with a checked checkbox, and 'Auto Sync' with a checked checkbox. At the bottom, there are 'Save' and 'Cancel' buttons. Red boxes highlight the 'Remove' and 'Add' buttons in the mappings section, and the 'Save' button in the options section.

Configuring the App to copy Custom Fields for New Quotes

The App can be configured to copy mapped Custom Fields when the Salesforce [New Quote] button is clicked.

Tick the [Copy New Quotes] section in the [Configuration] tab and click the [Save] button.

Please note: The new Quote will NOT be made the synced Quote for the Opportunity. The [Easy Sync] button will be used to sync the required Quote.



Options

Copy New Quotes

Tick to copy mapped custom fields values when the [New Quote] button is clicked ☒

- Tick to enable the Salesforce [New Quote] button to copy mapped Custom Field values from the Opportunity (and its Line Items) to the new Quote (and its Line Items)

Sync New Quotes

Configuring the App to Sync New Quotes

The App can be configured to sync new Quotes created when the Salesforce [New Quote] button is clicked.

Tick the [Sync New Quotes] section in the [Configuration] tab and click the [Save] button.

NB: This will copy mapped Custom Fields and also flag the Quote as being synced to its Opportunity without the need to click the [Easy Sync] button.

Sync New Quotes

Tick if you want new Quotes to be synced without the need to initially click the [Easy Sync] button ☒

- Tick if any New Quote should be automatically made the synced Quote for its Opportunity

Auto Sync

Tick to automatically sync after the [Easy Sync] button is clicked for a Quote. ☐

- Tick if further edits to either an Opportunity or its synced Quote should be automatically re-synced without the need to click the [E

- Untick if you only want syncing done when the [Easy Sync] button is clicked for an Opportunity or its synced Quote

Save

Cancel

Configuring the App to Auto Sync

The App can be configured to automatically sync further edits without the need to click the [Easy Sync] button again.

Tick the [Auto Sync] section in the [Configuration] tab and click the [Save] button.

Auto Sync

Tick to automatically sync after the [Easy Sync] button is clicked for a Quote. ☒

- Tick if further edits to either an Opportunity or its synced Quote should be automatically re-synced without the need to click the [Easy Sync] button again

- Untick if you only want syncing done when the [Easy Sync] button is clicked for an Opportunity or its synced Quote

Save

Cancel



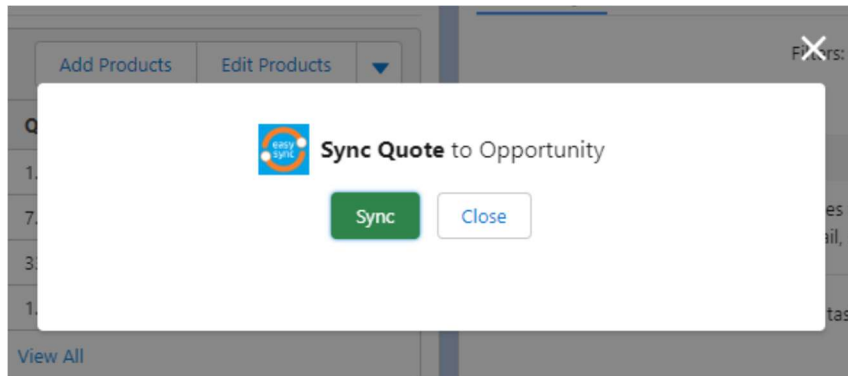
Adding Custom Button or Quick Action to Page Layouts

The [Easy Sync] Custom Button and Quick Action can be added to an Opportunity or Quote Page Layout.

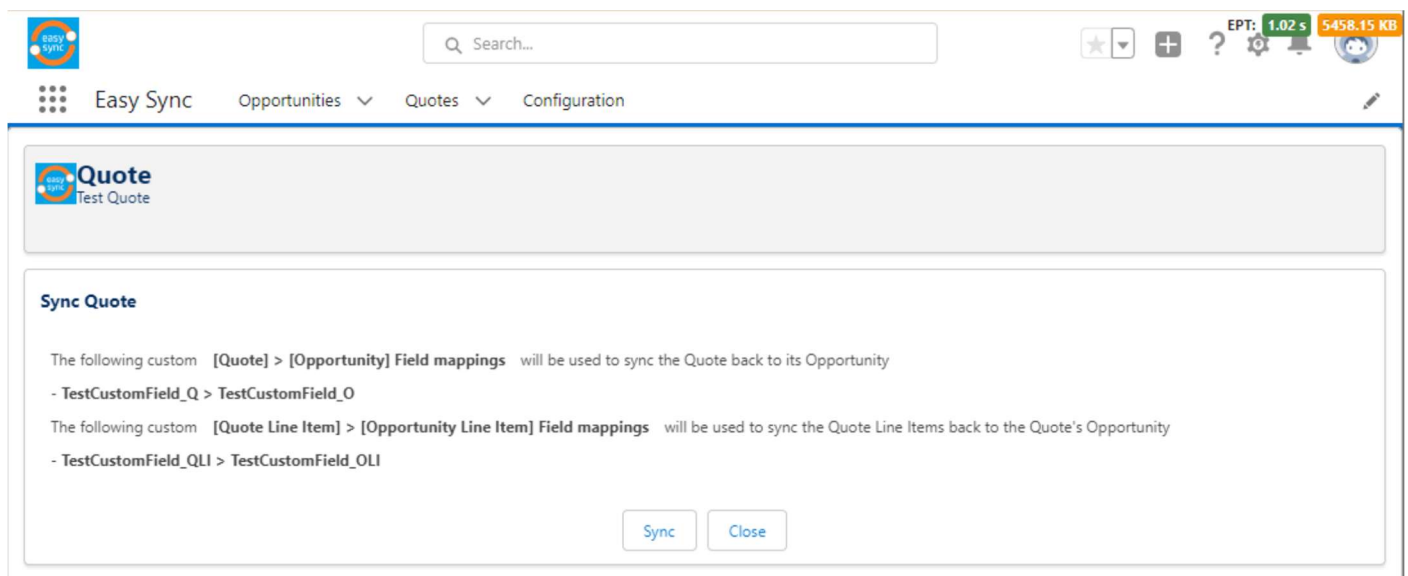
What's the difference between the Custom Button and the Custom Action?

Both do exactly the same tasks, but the Custom Button also shows the Fields that will be synced

Clicking the Custom Action opens up a popup (see below)



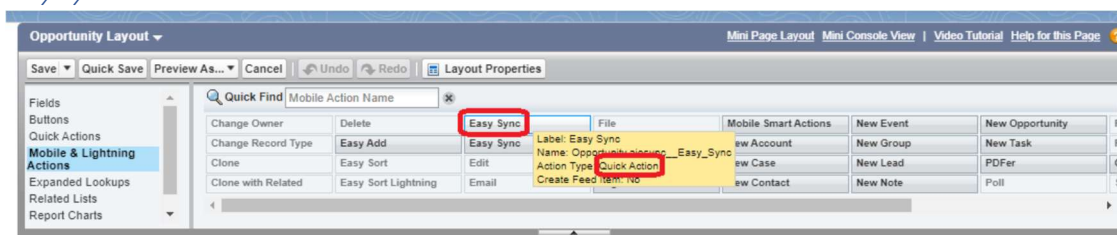
Whereas the Custom Button opens up a screen (see below) that additionally shows the Fields that will be synced



Adding [Easy Sync] Custom Button or Quick Action to the Quote or Opportunity Page Layouts

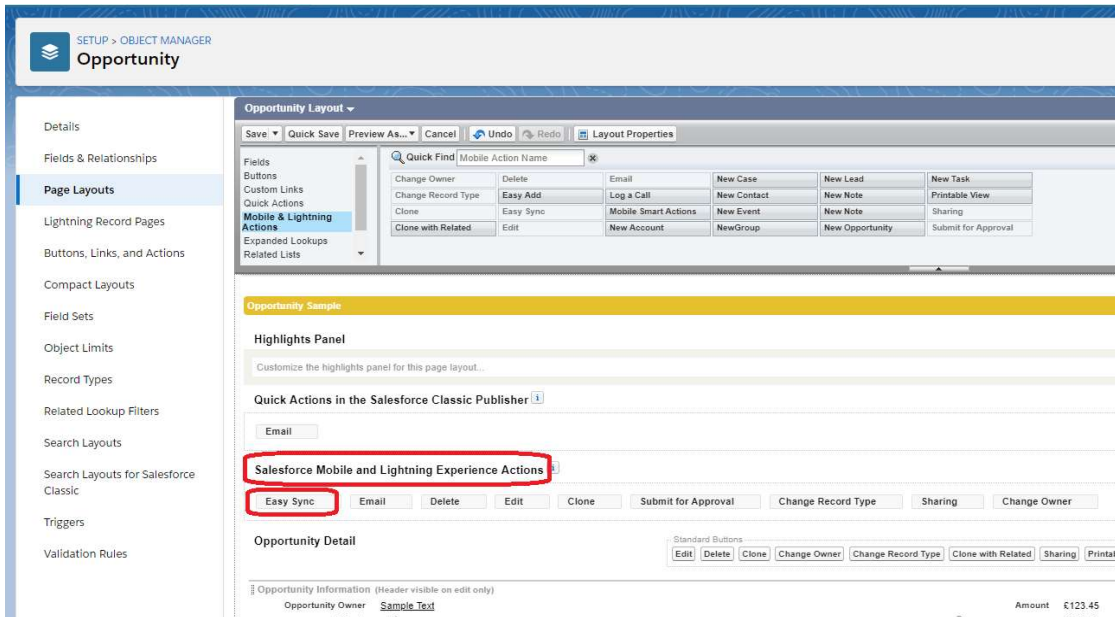
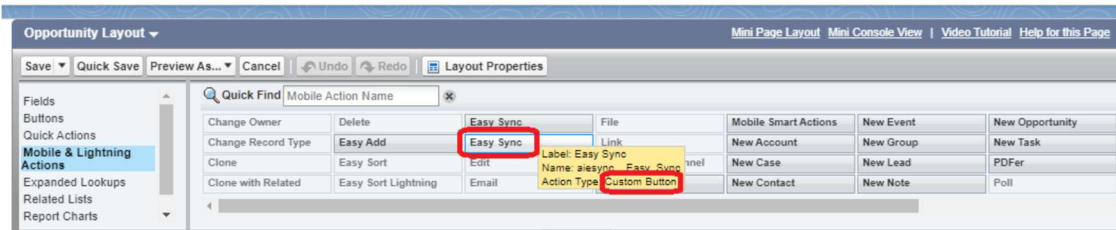
When using lightning, the [Easy Sync] 'Mobile & Lightning Actions' Custom Button or Quick Action should be placed in the 'Salesforce Mobile and Lightning Experience Actions' section of the required Quote or Opportunity page layout (see below).

Easy Sync Custom Action





Easy Sync Custom Button



Using the App

Start Syncing a Quote

Click the [Easy Sync] button on the Quote to sync all mapped Custom Field values of the Quote (and its Line Items) to its Opportunity (and its Line Items).

Note: If the App has been configured to Auto Sync, then any further edits to the Quote (and its Line Items) will automatically be synced back to the Opportunity (and its Line Items) automatically.

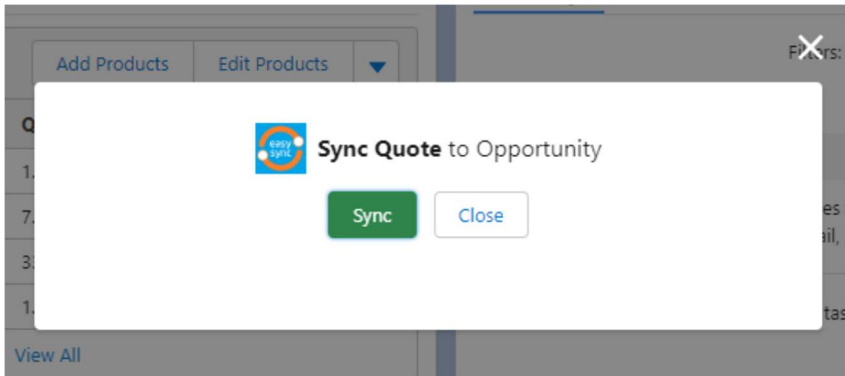
If the App is NOT configured to Auto Sync, then the [Easy Sync] button will need to be clicked again to manually sync any further edits back to the Opportunity (and its Line Items).

Manually Syncing a Quote

Click the [Easy Sync] button on the Quote to sync all mapped Custom Field values of the Quote (and its Line Items) to its Opportunity (and its Line Items).

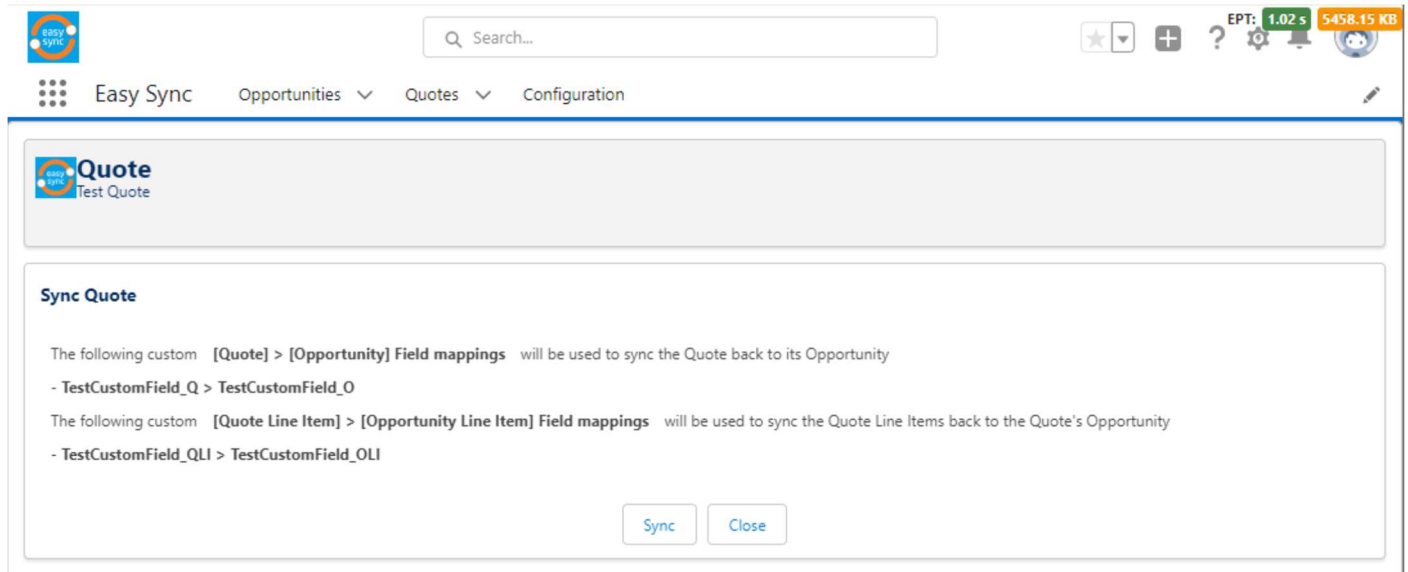


Screen that appears when using the Custom Action...





Screen that appears when using the Custom Button...

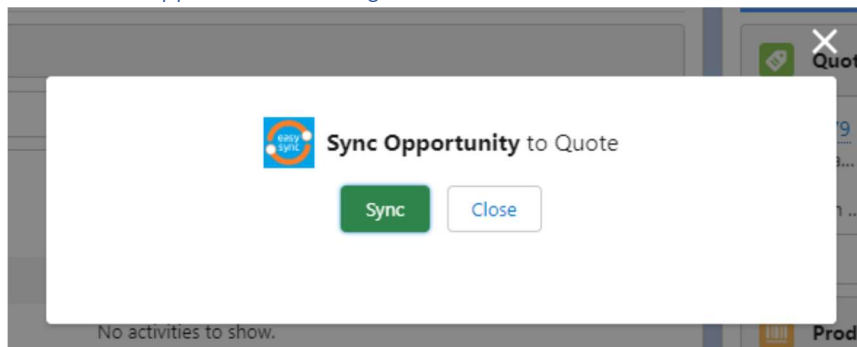


Manually Syncing an Opportunity to its synced Quote

Click the [Easy Sync] button on the Opportunity to sync all mapped Custom Field values of the Opportunity (and its Line Items) to its synced Quote (and its Line Items).

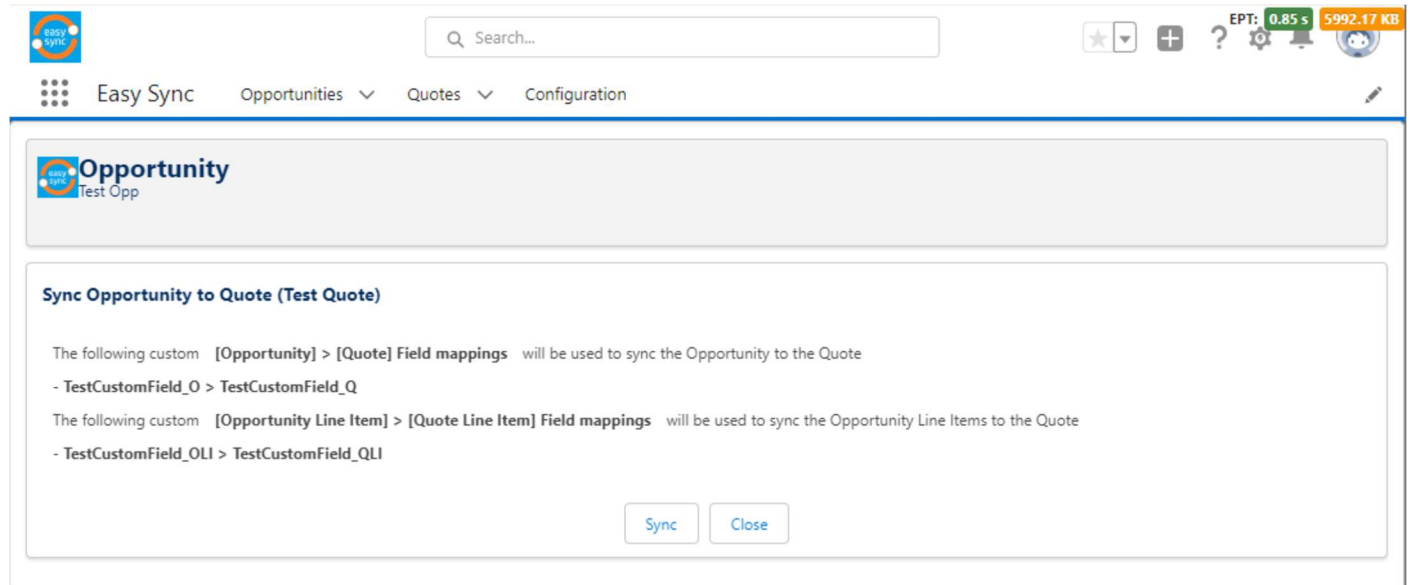
Note: If the App has been configured to Auto Sync, then any edits to the Opportunity (and its Line Items) will automatically be synced back to the synced Quote (and its Line Items) automatically.

Screen that appears when using the Custom Action...





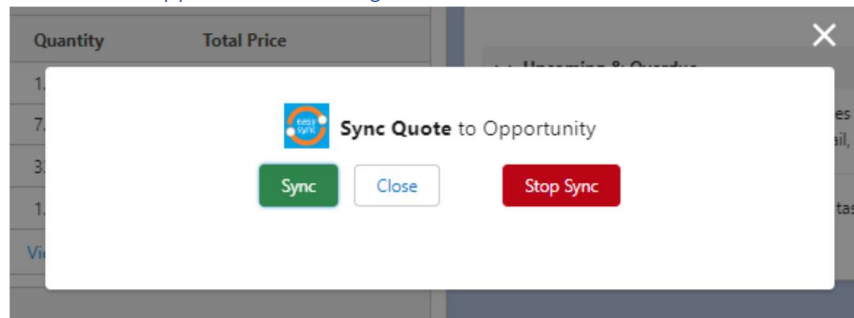
Screen that appears when using the Custom Button...



Stop Syncing a Quote

Click the [Easy Sync] button for the Quote that is being synced, then click the [Stop] button. This will stop any further syncing between the Quote and its Opportunity.

Screen that appears when using the Custom Action...





Screen that appears when using the Custom Button...

The screenshot shows the Easy Sync interface. At the top, there's a search bar and navigation tabs for 'Easy Sync', 'Opportunities', 'Quotes', and 'Configuration'. The main content area is titled 'Quote' and 'Test Quote'. It contains two sections: 'Sync Quote' and 'Stop Syncing Quote'. The 'Sync Quote' section lists field mappings: '[Quote] > [Opportunity] Field mappings' and '[Quote Line Item] > [Opportunity Line Item] Field mappings'. Below these are 'Sync' and 'Close' buttons. The 'Stop Syncing Quote' section has a 'Stop' button, which is highlighted with a red box.

Adding a new Quote with Mapped Fields from Opportunity populated

Click the [Easy Add] button on the Opportunity to create a Quote including all mapped Custom Field values in the Opportunity and Opportunity Line Item Objects.

Visually show which Quote is being synced

In the Opportunity Object there is a Field called [Easy Sync Quote] API Name: aiesync__Easy_Sync_Quote__c. This is a lookup to the Quote that is being synced.

Add this Field to the Page Layout or Compact Layout of an Opportunity to indicate to a User which Quote is currently being synced.

Visually show if a Quote is being synced

In the Quote Object there is a checkbox Field called [Easy Synced] API Name: aiesync__Easy_Synced__c which is ticked for the Quote that is currently being synced.

Add this Field to the Page Layout or Compact Layout of a Quote to indicate to a User if a Quote is being synced.



Use Cases

New Quotes have Custom Fields populated

"I want new Quotes to have Custom Fields populated, but don't want it synced as that will be done using the [Easy Sync] button."

Under the Configuration Tab, tick the [Copy New Quotes] section then click the [Save] button.

New Quotes are synced

"I want new Quotes synced without the need to click the [Easy Sync] button"

Under the Configuration Tab, tick the [Sync New Quotes] section then click the [Save] button.

Edits are automatically synced

"I want to have edits automatically synced, once a Quote has been synced using the [Easy Sync] button."

Under the Configuration Tab, tick the [Auto Sync] section then click the [Save] button.

New Quotes synced and edits synced automatically

"I want to have New Quotes synced and further edits automatically synced without needing to click the [Easy Sync] button"

Under the Configuration Tab, tick the [Sync New Quotes] section and the [Auto Sync] sections, then click the [Save] button.

Problems

Most errors occur when the App has not been installed for all users and the User's Profile does not have the relevant permissions.

Insufficient Visualforce Page Privileges

Error

Insufficient Privileges

You do not have the level of access necessary to perform the operation you requested. Please contact the owner of the record or your administrator if access is necessary. For more information, see [Insufficient Privileges Errors](#).

Solutions

- 1) Assign the User to the Permission Set 'Easy Sync Permission Set'
- 2) Assign the Users's Profile to the following Visualforce Pages:-

The screenshot shows the Salesforce Setup interface. The left sidebar contains navigation links: Setup Home, Lightning Experience Transition Assistant, New Salesforce Mobile App QuickStart, Lightning Usage, ADMINISTRATION, Users, Permission Sets, Profiles, Public Groups, and Chatter. The main content area is titled 'Profiles' and shows the 'Standard User' profile. Under the 'Visualforce Page Access' tab, a table lists the following Visualforce Page Names: aiesync.aivfp_AddQuote, aiesync.aivfp_AddQuoteFromList, aiesync.aivfp_Configuration, aiesync.aivfp_SyncOpportunity, and aiesync.aivfp_SyncQuote. An 'Edit' button is visible next to the table.



Insufficient Apex class Privileges

Error

Resync
You do not have access to the Apex class named 'aictl_SyncQuote'.

Sync
You do not have access to the Apex class named 'aictl_SyncOpportunity'.

Solutions

- 3) Assign the User to the Permission Set 'Easy Sync Permission Set'
- 4) Assign the Users's Profile to the following Apex Classes:-

aictl_SyncOpportunity
aictl_SyncQuote

Insufficient Custom Setting Permissions

Error

Sync
ERROR IN METHOD [mSyncOpportunityButtonClicked], TYPE: System.QueryException, LINE NUMBER: 690, MESSAGE: Insufficient permissions: secure query included inaccessible field

Resync
ERROR IN METHOD [mSyncQuoteButtonClicked], TYPE: System.QueryException, LINE NUMBER: 690, MESSAGE: Insufficient permissions: secure query included inaccessible field

Solutions

- 1) Assign the User to the Permission Set 'Easy Sync Permission Set'
- 2) Assign the Users's Profile to the following Custom Setting Definitions:-

Easy Sync.aiessync.Alpha_Easy_Sync_Child_Mapping
Easy Sync.aiessync.Alpha_Easy_Sync_Parent_Mapping
Easy Sync.aiessync.Alpha_Easy_Sync_Settings