

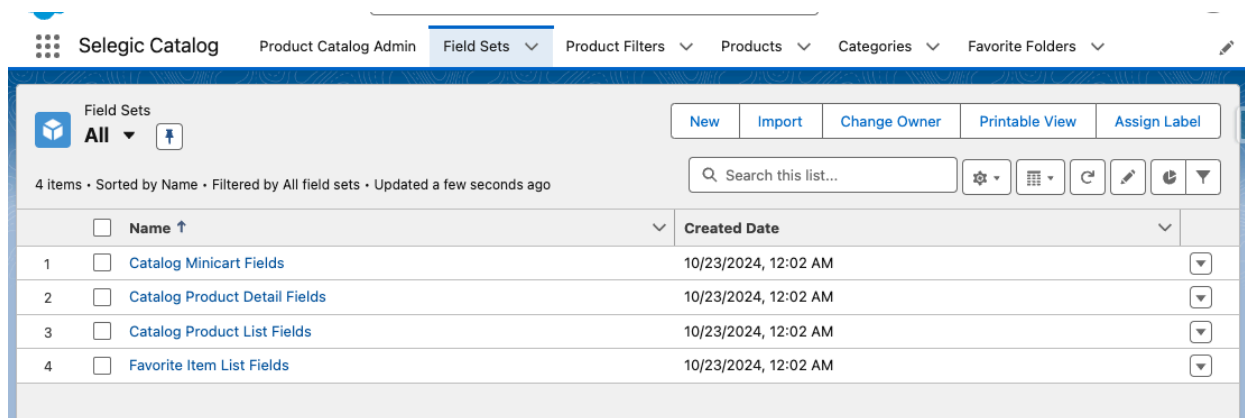
Getting Started

Welcome to the Selegic Product Catalog Admin Guide. This document provides comprehensive instructions for administrators on how to configure and manage the Selegic Product Catalog, a powerful Salesforce CPQ plugin. As an admin, you have the ability to create, edit, and delete various configurations such as Field Sets, Categories, Category Products, and Product Filters. This guide will walk you through these administrative tasks to ensure seamless management of the catalog.

Field Sets

Field Sets are collections of fields grouped together to control the information displayed in the user interface. They provide flexibility by allowing administrators to manage the visibility of fields dynamically in the Product Catalog.

In all field sets, the product name is always displayed by default on the left side and does not require a separate field configuration.



Field Sets		
All		
4 items • Sorted by Name • Filtered by All field sets • Updated a few seconds ago		
☐	Name ↑	Created Date
1	☐ Catalog Minicart Fields	10/23/2024, 12:02 AM
2	☐ Catalog Product Detail Fields	10/23/2024, 12:02 AM
3	☐ Catalog Product List Fields	10/23/2024, 12:02 AM
4	☐ Favorite Item List Fields	10/23/2024, 12:02 AM

We define field sets for the following list view (data table) of the product catalog user interfaces.

Mini Cart

Displays quote lines added to the cart and quote. Typically includes Product Name (left side), Quantity, and Net Price.

Product List

Displays available products in the catalog. Typically includes Product Name (left side), Product Code Description, List Price of that product.

Product Detail

Shows detailed information about a product. Typically includes Product Name (left side), Description, Product code and others.

Favorite Items

Displays products marked as favorites. Typically includes Product Name (left side), Quantity, Product Family and others.

The screenshot shows the 'Field Set' configuration page for 'Catalog Product List Fields' in the Selegic Catalog. The page has a top navigation bar with links: 'Selegic Catalog', 'Product Catalog Admin', 'Field Sets', 'Product Filters', 'Products', 'Categories', and 'Favorite Folders'. Below the navigation bar, there's a sub-header 'Field Set Catalog Product List Fields' with buttons for 'New Contact', 'Edit', and 'New Opportunity'. The main content area is divided into 'Related' and 'Details' tabs. The 'Related' tab is active, showing a table of fields. The table has columns: 'Name', 'IsHidden', 'Order Number', and 'Target Object'. There are four rows of fields, each with a 'New' button. Below the table is a 'View All' link.

Name	IsHidden	Order Number	Target Object
Product Code	☐	20	Product2
Description	☐	40	Product2
List Price	☐	60	Product2
Subscription Type	☐	55	Product2

[View All](#)

New Field

* = Required Information

Information

* Name

Owner
 Selegic Catalog Demo Org

* Field Set Id
 Catalog Product List Fields X

Currency
USD - U.S. Dollar ▼

* Target Object
--None-- ▼

* Target Field

IsHidden ⓘ
☐

Order Number

Cancel Save & New Save

Name (Required):

This is the unique name for the field. This name is displayed as a column header in the data table.

Field Set (Read-Only):

Field Set to which this field will belong. This is automatically populated.

Target Object (Required):

Select the data source object from the dropdown menu. This defines where the field's data originates.

Target Field (Required):

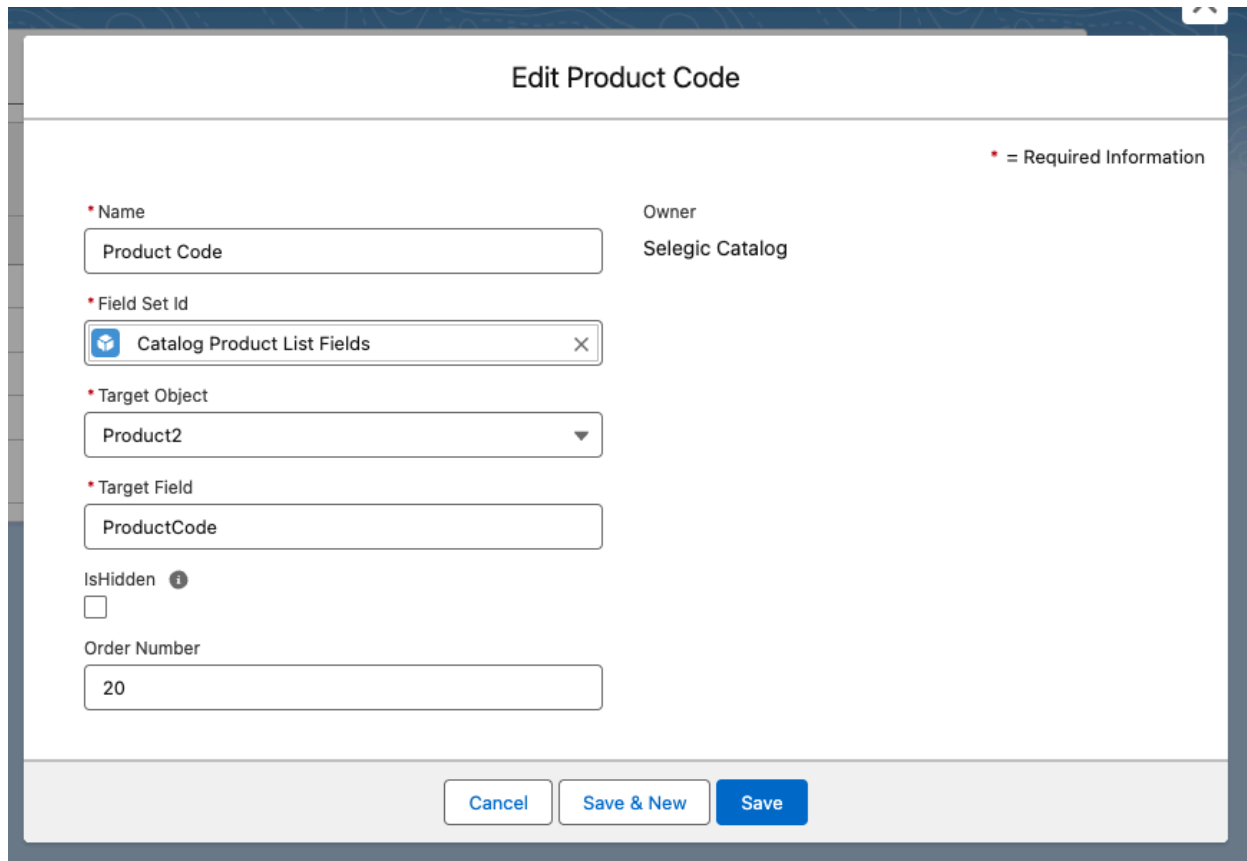
Field name (API name) from the selected Target Object.

Order Number:

Define the display sequence of the field. A lower number indicates earlier placement. (e.g., 1 appears first).

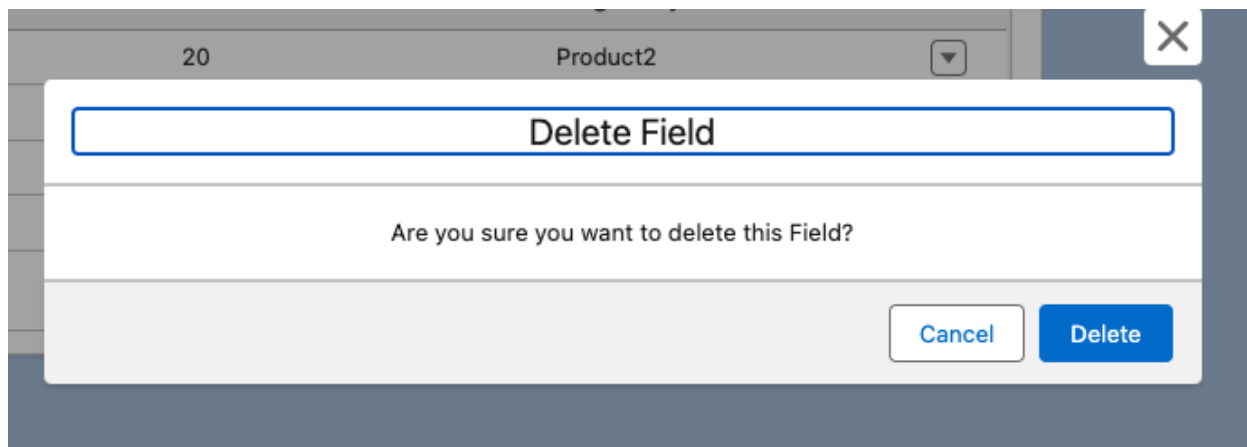
Hidden:

Checkbox to determine whether the field should be hidden.



The screenshot shows a web form titled "Edit Product Code". In the top right corner, there is a legend: a red asterisk followed by "= Required Information". The form contains several fields: "Name" with the value "Product Code"; "Owner" with the value "Selegic Catalog"; "Field Set Id" with a dropdown menu showing "Catalog Product List Fields"; "Target Object" with a dropdown menu showing "Product2"; "Target Field" with the value "ProductCode"; "IsHidden" with an unchecked checkbox and an information icon; and "Order Number" with the value "20". At the bottom of the form, there are three buttons: "Cancel", "Save & New", and "Save".

You have the flexibility to update any of these field details as needed, and you can also delete fields at your discretion.



The screenshot shows a modal dialog box titled "Delete Field". The dialog contains the question "Are you sure you want to delete this Field?". At the bottom right of the dialog, there are two buttons: "Cancel" and "Delete". The background of the application is visible through the dialog, showing the "Order Number" field with the value "20" and the "Target Object" dropdown menu with "Product2" selected.

Category and Category Product

Categories in the Selegic Product Catalog provide a structured framework for organizing products, simplifying catalog management and user navigation. Administrators can create, edit, and establish parent-child category relationships to build a clear hierarchical structure.

Selegic Catalog

Product Catalog Admin

Field Sets

Product Filters

Products

Categories

Favorite Folders

Categories

All

New

Import

Change Owner

Printable View

Assign Label

40 Items • Sorted by Name • Filtered by All categories • Updated a few seconds ago

Search this list...

☐	Name ↑	Parent Category Id	Is Active	Created Date	Order Number	
1	☐ AI Analytics	AI Solutions	☒	10/24/2024, 3:21 AM		
2	☐ AI Assistants	AI Solutions	☒	10/24/2024, 3:21 AM		
3	☐ AI Development Tools	AI Solutions	☒	10/24/2024, 3:21 AM		
4	☐ AI Solutions	Software	☒	10/24/2024, 3:04 AM		
5	☐ Analytics Platforms	Software Solutions	☒	10/24/2024, 3:21 AM		
6	☐ Analytics Solutions	Surveillance	☒	10/24/2024, 3:21 AM		
7	☐ Backup and Recovery	Storage	☒	10/24/2024, 3:21 AM		
8	☐ Cameras	Surveillance	☒	10/24/2024, 3:21 AM		
9	☐ Cloud Servers	Cloud Services	☒	10/24/2024, 3:21 AM		
10	☐ Cloud Services	Service	☒	11/7/2024, 1:00 AM		
11	☐ Cloud Storage	Cloud Services	☒	10/24/2024, 3:21 AM		
12	☐ Collaboration Tools	Communications	☒	10/24/2024, 3:21 AM		
13	☐ Communications	Service	☒	10/24/2024, 3:04 AM		
14	☐ Compliance Tools	Security	☒	10/24/2024, 3:21 AM		
15	☐ Data Management Tools	Software Solutions	☒	10/24/2024, 3:21 AM		
16	☐ Gateways	Networking	☒	10/24/2024, 3:21 AM		
17	☐ Hardware		☒	10/24/2024, 2:05 AM		
18	☐ Installation Services	Service Contracts	☒	10/24/2024, 3:21 AM		
19	☐ Local Storage	Storage	☒	10/24/2024, 3:21 AM		
20	☐ Media Servers	Servers	☒	10/24/2024, 3:21 AM		
21	☐ Miscellaneous Services	Service Contracts	☒	10/24/2024, 3:21 AM		
22	☐ Monitoring Tools	Security	☒	10/24/2024, 3:21 AM		

New Category

* = Required Information

Information

* Name

Owner Selegic Catalog Demo Org

Parent Category Id

Is Active ☒

Order Number

[Cancel](#) [Save & New](#) [Save](#)

Name

The category name (required).

Active

A checkbox to indicate if the category is active.

Parent Category

A field to assign a parent category for hierarchical structure.

Order Number:

A field to define the display order of the category.

Edit AI Solutions

* = Required Information

Name

AI Solutions

Owner

Selegic Catalog Demo Org

Parent Category Id

Software

×

Is Active

☒

Order Number

Cancel

Save & New

Save

Category details are fully editable, allowing you to make adjustments as needed. If a category is no longer required, it can be deleted. Alternatively, you can make a category inactive, which will effectively remove it from the application's active category list.

AI Solutions	☒	10/24/2024, 3:21 AM
Software	☒	10/24/2024, 3:21 AM
Delete Category Are you sure you want to delete this Category? Cancel Delete		
Cloud Services	☒	10/24/2024, 3:21 AM
Communications	☒	10/24/2024, 3:21 AM

Selegic Catalog

Product Catalog Admin

Field Sets

Product Filters

Products

Categories

Favorite Folders

Category

Service Level Agreements (SLAs)

Related

Details

Categories (0)

New

Category Products (6)

New

Name	Product	Order Number	
CP-000003	SLA: Silver	795	▼
CP-000005	SLA: Platinum	794	▼
CP-000008	SLA: Bronze	791	▼
CP-000011	SLA: Gold	792	▼
CP-000720	SLA: Infinite	793	▼
CP-000748	SLA: Ultimate Plus	796	▼

View All

Category-Product records serve as the foundation for the category browsing experience. By connecting products to their respective leaf-level categories, these records enable users to navigate the product catalog intuitively.

New Category Product

* = Required Information

Information

Name

Owner

* Category

Selegic Catalog Demo Org

Currency

Service Level Agreements (SLAs)

USD - U.S. Dollar

Product

Search Products...

Order Number

Cancel

Save & New

Save

Category

A searchable field to assign a category for hierarchical organization.

Product

A searchable field to assign a product for hierarchical organization.

Order Number

A field to define the display order of the category product record.

Edit CP-000005

* = Required Information

Name
CP-000005

Owner
 Selegic Catalog Demo Org

* **Category**

Service Level Agreements (SLAs)
 X

Product

SLA: Platinum
 X

Order Number

794

Cancel

Save & New

Save

Category-Product details, including category and product associations, as well as order numbers, can be updated at any time. You can also delete Category-Product records if an association is no longer valid. Deletion will immediately remove the association from the user interface.

Product Filter

Product Filters enhance the user experience within the Product Catalog by offering targeted product filtering. Users can quickly locate desired products by applying various criteria. Filters can be configured to apply either globally, affecting all categories, or specifically at category level. This allows for flexible customization to meet diverse business requirements.

Selegic Catalog
Product Catalog Admin
Field Sets ▾
Product Filters ▾
Products ▾
Categories ▾
Favorite Folders ▾

Product Filters

All ▾

New

Import

Change Owner

Printable View

Assign Label

6 Items • Sorted by Name • Filtered by All product filters • Updated a few seconds ago

⚙

📄

🔄

✎

🗑

🔍

	☐ Name ↑ ▾	FilterLabel ▾	Display Location ▾	DisplayOrder ▾	FieldType ▾	ReadOnly ▾	TargetField ▾	Source... ▾	Source... ▾
1	☐ Pricing Model	Pricing Model	Category	15	Picklist	☐	Pricing Model		
2	☐ Product Availability	Availability	Category	5	Picklist	☐	Availability		
3	☐ Product Category	Product Category	Global	20	Picklist	☐	Product Genre		
4	☐ Product Family	Product Family	Global	10	Picklist	☐	Family		
5	☐ Product Selling Type	Offering Type	Global	25	Picklist	☐	Product Selling Type		
6	☐ Product Subscription Type	Subscription Type	Category	18	Picklist	☐	Subscription Type		

New Product Filter

* = Required Information

Information

* Name

* FilterLabel

FieldType

--None--

TargetField

--None--

FilterValues

SourceObject

--None--

SourceValue

Custom Permissions To Apply ⓘ

Owner

Selegic Catalog Demo Org

IsActive

☒

* Display Location

--None--

* DisplayOrder

ReadOnly

☐

SourceField

--None--

ExcludePermissions

Cancel

Save & New

Save

Name

This is the unique identifier for the filter. It helps users understand what the filter does, such as filtered by "Product Family" or "Brand" etc.

Filter Label

The user-friendly name visible to users. This allows the filter API name to be different from the name displayed to the user.

Display Location

This field determines where the filter will be displayed in the UI. When the value is "Global", the filter is displayed next to the global search bar. When the value is "Category" the filter is displayed on the left side of the user interface. The primary difference between Global and Category filters is their placement and scope. Global filters apply to the entire catalog, while Category filters apply specifically to the actively selected category or current search results.

Field Type

Specifies the type of input the filter will use. Available types include, Picklist (for dropdown selection), Text (manual input), Checkbox (true/false values). This field determines how users will interact with the filter in the user interface.

Target Field

Defines the field in the product record that the filter is linked to. For example, if the filter is set to "Family," it means users can filter products based on their assigned product family.

Filter Values

Stores predefined values that users can select from when applying the filter. This is applicable when the filter type is a picklist, providing users with a dropdown list of choices.

Display Order

Defines the sequence in which the filters appear in the UI. A lower number means the filter appears higher in the list, while a higher number pushes it lower.

Is Active

A checkbox field that determines whether the filter is currently in use. If checked, the filter is available in the Product Catalog; if unchecked, it is disabled.

Source Object

Defines the object from which the filter retrieves its values. Typically, this would be the Product object, but it can be customized as per business needs.

Source Field

Specifies the field from the Source Object that the filter pulls its values from. For example, if the source object is "Product," the source field can be "Product Family."

Source Value

This field sets the default value for the product filter. When users open the Product Catalog, this default value will be pre-selected for the filter unless they change it manually. This is useful for setting commonly used filters by default, improving efficiency and user experience.

Example: If the Product Family filter has a Source Value of Electronics, then when users access the catalog, the filter will automatically be set to Electronics, and they can refine their search further if needed.

This helps in guiding users to the most relevant product selections while still allowing customization.

Read Only

A checkbox that determines if users can modify the filter. If checked, users can only use the filter without changing its configuration.

Custom Permissions to Apply

This field restricts the visibility of the filter based on custom permissions. Only users who have the specified custom permissions will be able to see and apply the filter in the Product Catalog. This ensures that only authorized users can use certain filters, preventing unnecessary access for users who do not need them.

Example: If this field contains View_Premium_Products, then only users with the View_Premium_Products permission can see and use this filter. Other users will not use the filter in the catalog. This is particularly useful for businesses that offer different product views based on user roles, such as showing exclusive product categories only to sales managers or premium customers.

Exclude Permissions

This field contains a comma-separated list of permissions. If a user has any of the permissions listed in this field, the Product Filter will not be applied for that user. This is useful for cases where certain users should not see or apply specific filters based on their permission set.

Example: If the Exclude Permissions field contains Manage_Products, Admin_Access, then an user with either of these permissions will not be affected by this filter.

This helps in implementing role-based visibility and ensures that filters apply only to the intended users.

You can update product filter fields as needed. Just remember to double-check any configuration changes, as they can affect how the catalog appears to users. If a product filter is no longer useful, you can also remove it.

As an administrator of the Selegic Product Catalog, you possess the tools to create a tailored and efficient product selection experience for your users. From managing dynamic layouts using field sets and organizing product categories to implementing targeted product filters, your configurations directly impact the usability and effectiveness of the catalog.