

Using Easy Sort in Salesforce Lightning

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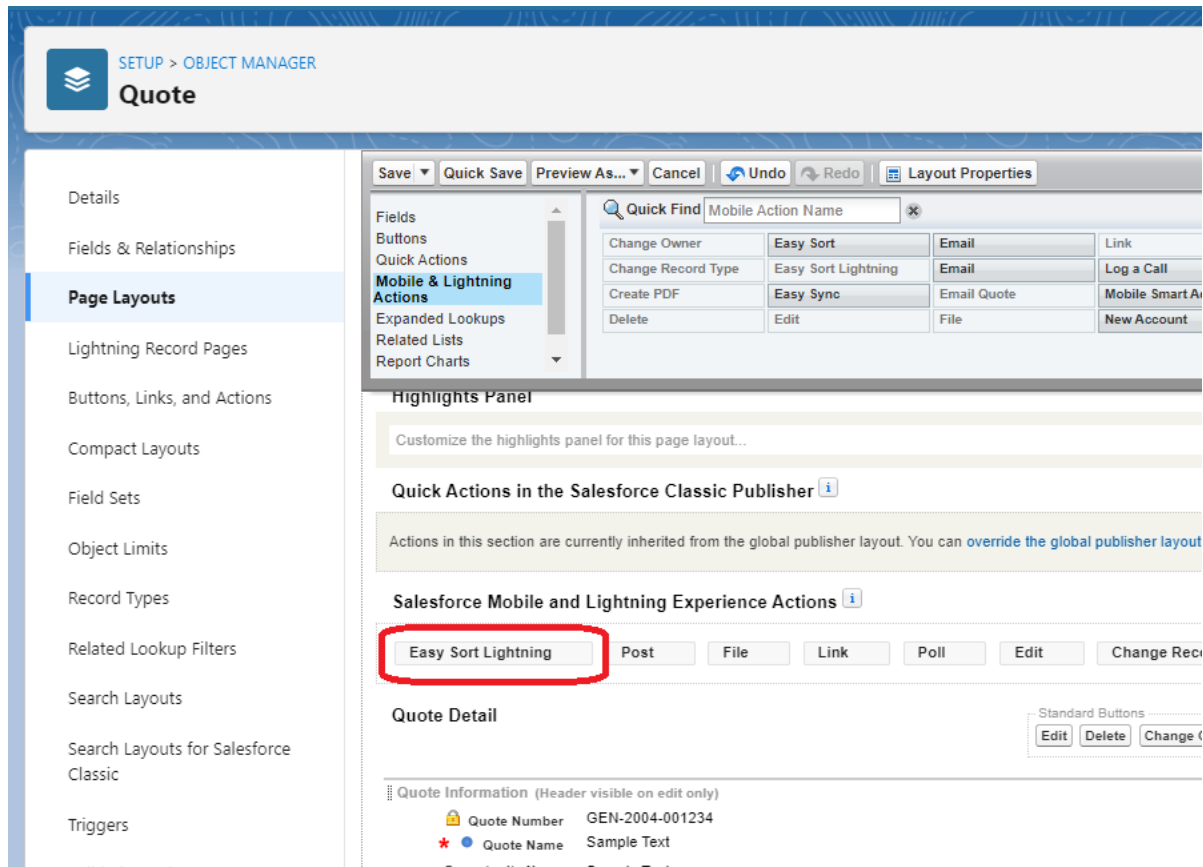
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Adding Action to Quote or Opportunity Page Layout

There is an 'Action' labelled [Easy Sort Lightning] which can be added to the Opportunity Page Layout or Quote Page Layout. When clicked, the Action will open the screen that is used to sort Opportunity Products or Quote Line Items depending on the page layout it resides on.

The [Easy Sort Lightning] 'Mobile & Lightning Actions' Action should be placed in the 'Salesforce Mobile and Lightning Experience Actions' section of the required Quote or Opportunity page layout (see below).



SETUP > OBJECT MANAGER
Quote

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
Search Layouts for Salesforce Classic
Triggers

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Quick Find Mobile Action Name

Change Owner	Easy Sort	Email	Link
Change Record Type	Easy Sort Lightning	Email	Log a Call
Create PDF	Easy Sync	Email Quote	Mobile Smart A
Delete	Edit	File	New Account

Highlights Panel
Customize the highlights panel for this page layout...

Quick Actions in the Salesforce Classic Publisher ⓘ
Actions in this section are currently inherited from the global publisher layout. You can [override the global publisher layout](#)

Salesforce Mobile and Lightning Experience Actions ⓘ

Easy Sort Lightning Post File Link Poll Edit Change Rec

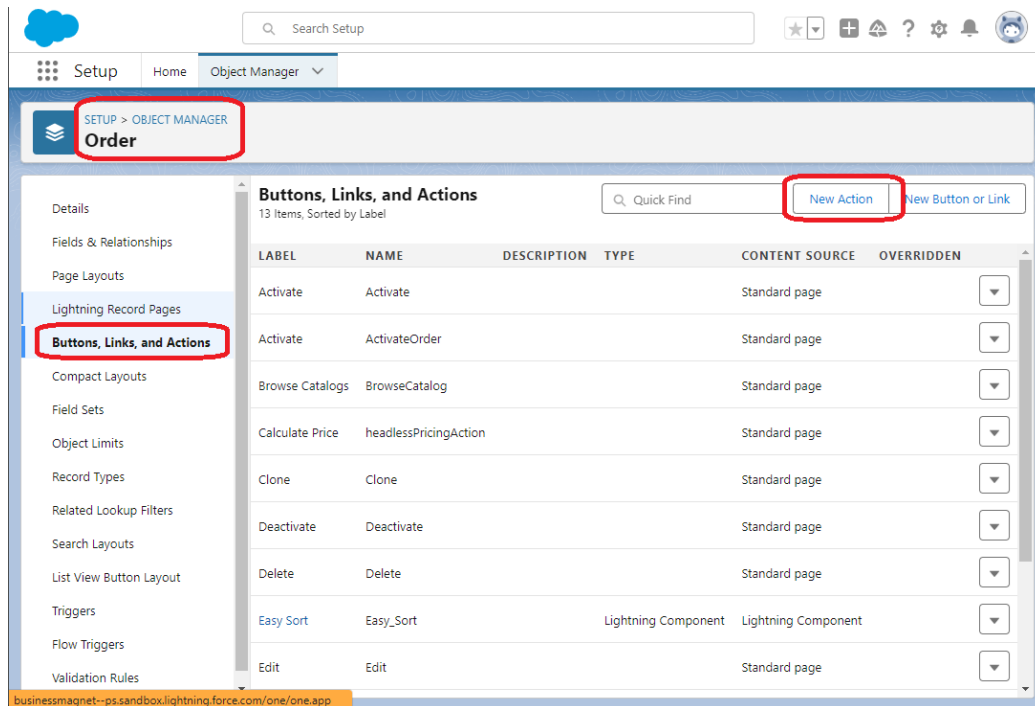
Quote Detail
Standard Buttons Edit Delete Change C

Quote Information (Header visible on edit only)
 Quote Number GEN-2004-001234
 Quote Name Sample Text
 Opportunity Name Sample Text

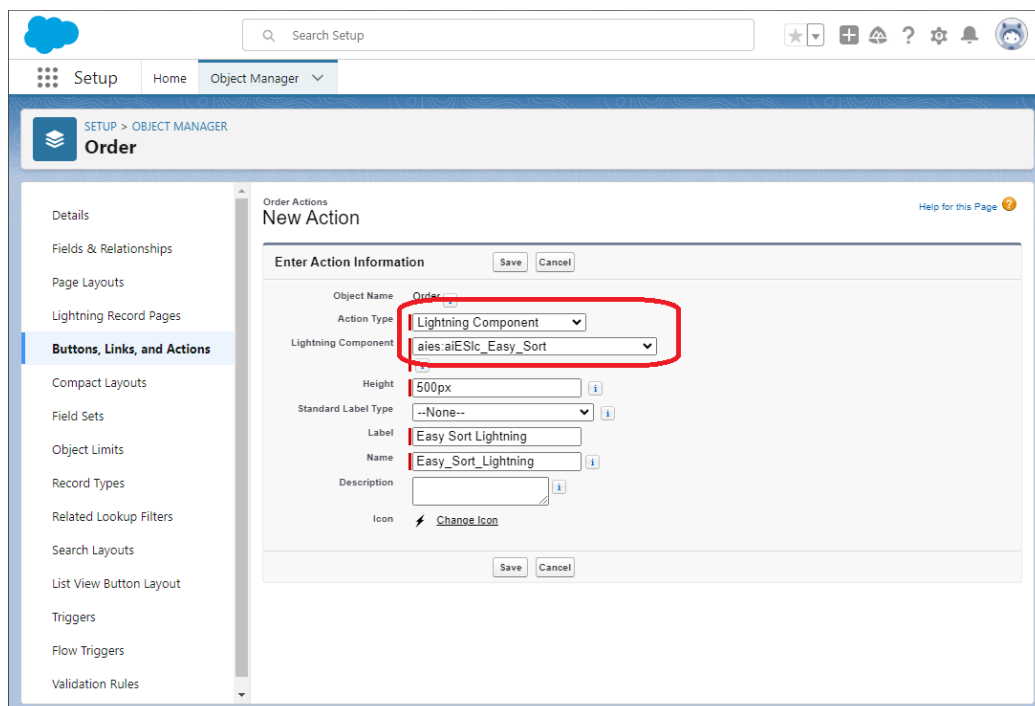
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Adding Action to Order Page Layout

There is no pre-defined Action in Easy Sort to use for sorting Order Products, so you must create your own 'Action'.



Choose [Action Type] of 'Lightning Component' and [Lightning Component] 'aies:aiESlc_Easy_Sort'...



Once saved, the Action should then be placed in the 'Salesforce Mobile and Lightning Experience Actions' section of the required Order page layout.

Using Easy Sort in Salesforce Lightning

Using the App

Clicking the [Easy Sort Lightning] Action on a Quote, Opportunity or Order opens a popup showing a list of Quote Line Items, Opportunity Products or Order Products.

IMPORTANT: If Order Products are being sorted, then a Field is required in the Order Product for the Easy Sort App to populate with the sort order. The API Name of the Field to be used should be entered in the [Sort Order Value Field] on the [Order] Tab on the [Configuration] tab.

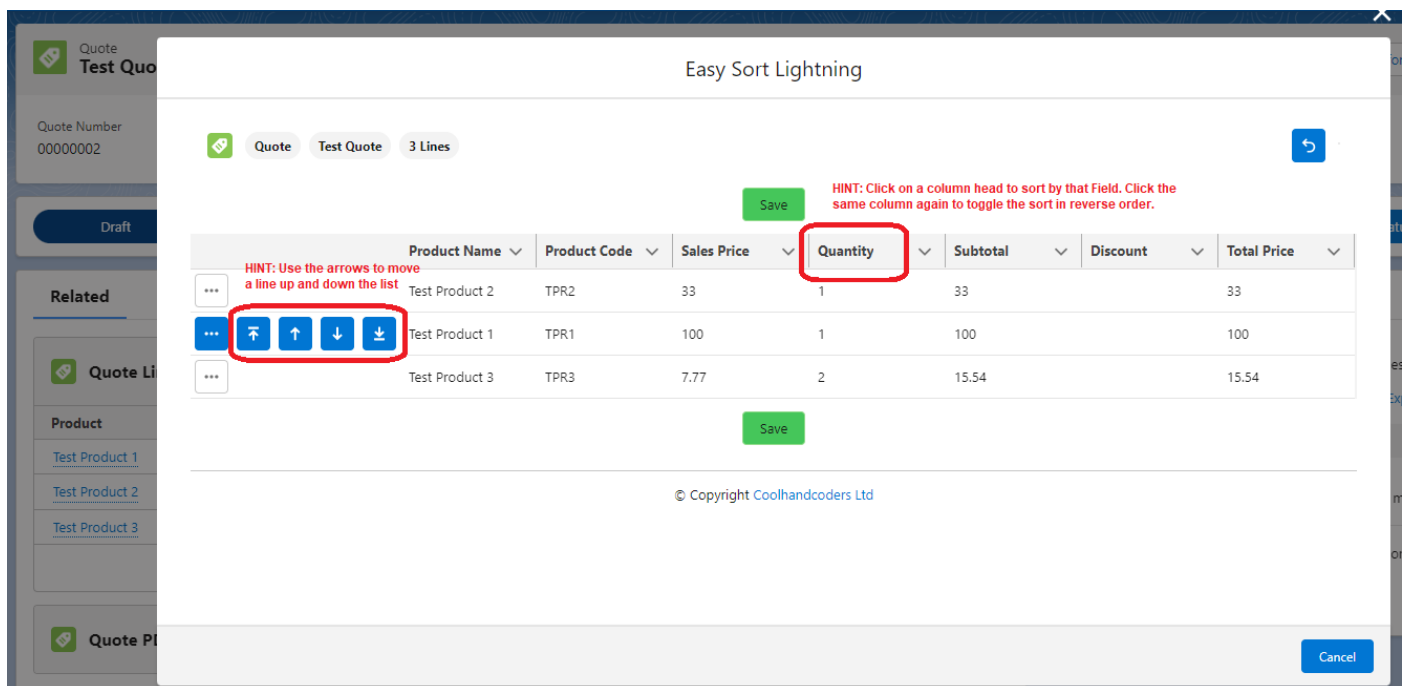
Sorting using the list

If the App is configured to allow custom sorting*, the list columns can be clicked to sort the list. A row can also be selected and arrows used to move the row up and down the list.

If [Allow Custom Sorting] is not ticked, then the list cannot be used to change the sorting.

Clicking the [Save] button will save the sort.

* Tick [Allow Custom Sorting] on the [Quote], [Opportunity] or [Order] tabs on the [Configuration] tab



The screenshot shows the 'Easy Sort Lightning' application window. At the top, there's a header with 'Quote', 'Test Quote', and '3 Lines'. Below this is a table with the following data:

Product Name	Product Code	Sales Price	Quantity	Subtotal	Discount	Total Price
Test Product 2	TPR2	33	1	33		33
Test Product 1	TPR1	100	1	100		100
Test Product 3	TPR3	7.77	2	15.54		15.54

Below the table, there are four arrows (up, down, left, right) used for moving rows, also highlighted with a red box. A hint says: 'HINT: Use the arrows to move a line up and down the list'. The interface includes a 'Save' button and a 'Cancel' button.

Sorting using a pre-defined sort

If the App is configured with a [Default Sort Order]** or one or more [Optional Sort Orders]***, then any will appear in the top right of the screen.

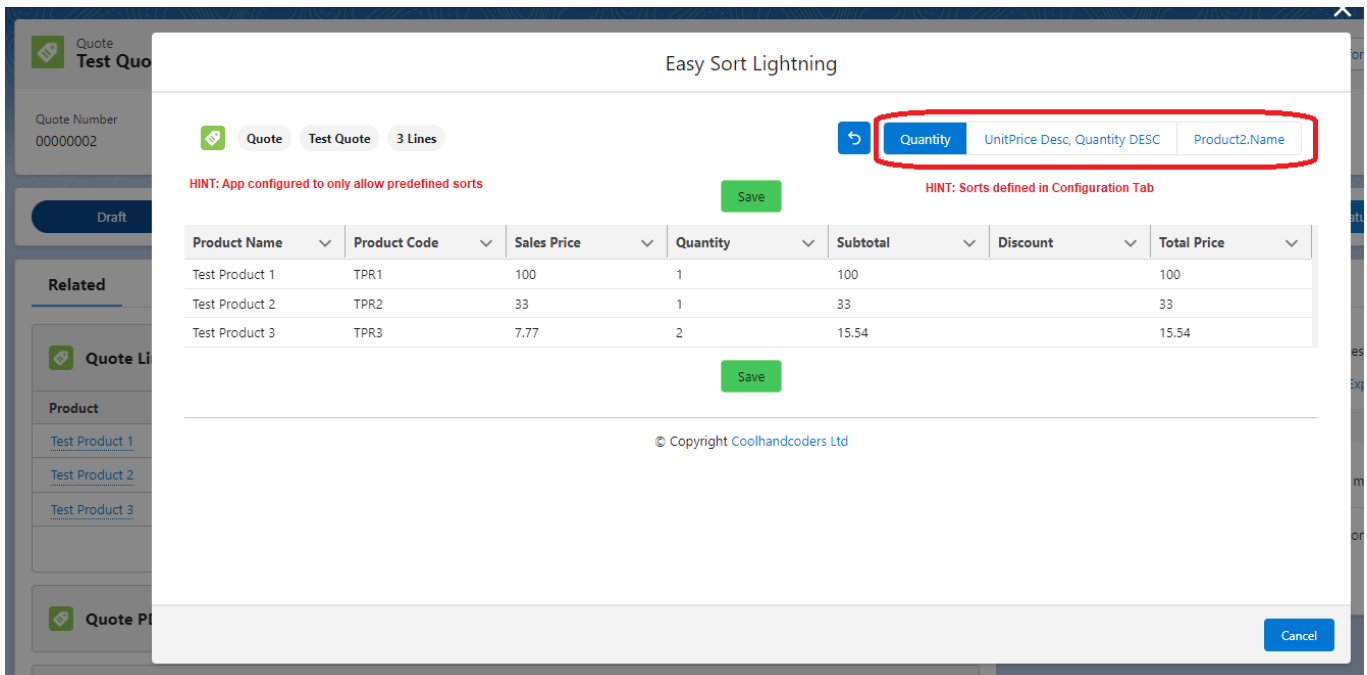
By default, when first installed, the App is configured to sort by 'Quantity' (see 'App Configuration' Section to change this). Clicking [Quantity] will sort the list by the [Quantity] Field.

Clicking the [Save] button will save the sort.

** Enter a [Default Sort Order] on the [Quote], [Opportunity] or [Order] tabs on the [Configuration] tab

*** Enter one or more [Optional Sort Order(s)] on the [Quote], [Opportunity] or [Order] tabs on the [Configuration] tab

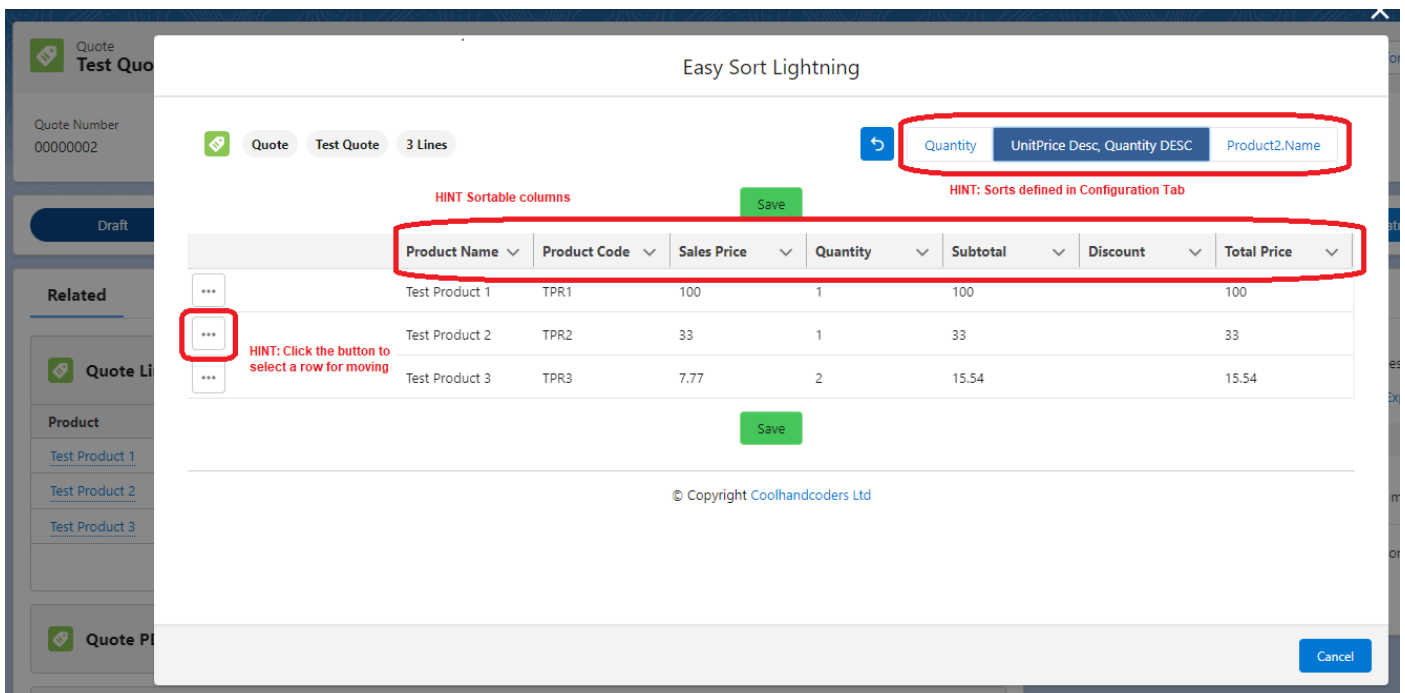
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The screenshot shows the 'Easy Sort Lightning' modal window. At the top, there are tabs for 'Quote', 'Test Quote', and '3 Lines'. A red box highlights the sort dropdown menu, which currently shows 'Quantity'. Other options in the menu are 'UnitPrice Desc, Quantity DESC' and 'Product2.Name'. Below the menu, a hint states: 'HINT: App configured to only allow predefined sorts'. The main table lists three products: 'Test Product 1', 'Test Product 2', and 'Test Product 3'. The table has columns for Product Name, Product Code, Sales Price, Quantity, Subtotal, Discount, and Total Price. A 'Save' button is located below the table. Another hint at the bottom right says: 'HINT: Sorts defined in Configuration Tab'.

Sorting using the list or using a pre-defined sort

Follow the instructions in the two sections above and both the list or a pre-defined sort can be used to sort.



This screenshot shows the same 'Easy Sort Lightning' modal window, but with additional annotations. A red box highlights the table headers: 'Product Name', 'Product Code', 'Sales Price', 'Quantity', 'Subtotal', 'Discount', and 'Total Price'. A hint above the table says: 'HINT: Sortable columns'. Another red box highlights a button with three dots (***), and a hint next to it says: 'HINT: Click the button to select a row for moving'. The table data remains the same as in the previous screenshot. The 'Save' button is still present below the table. The hint 'HINT: Sorts defined in Configuration Tab' is also visible.

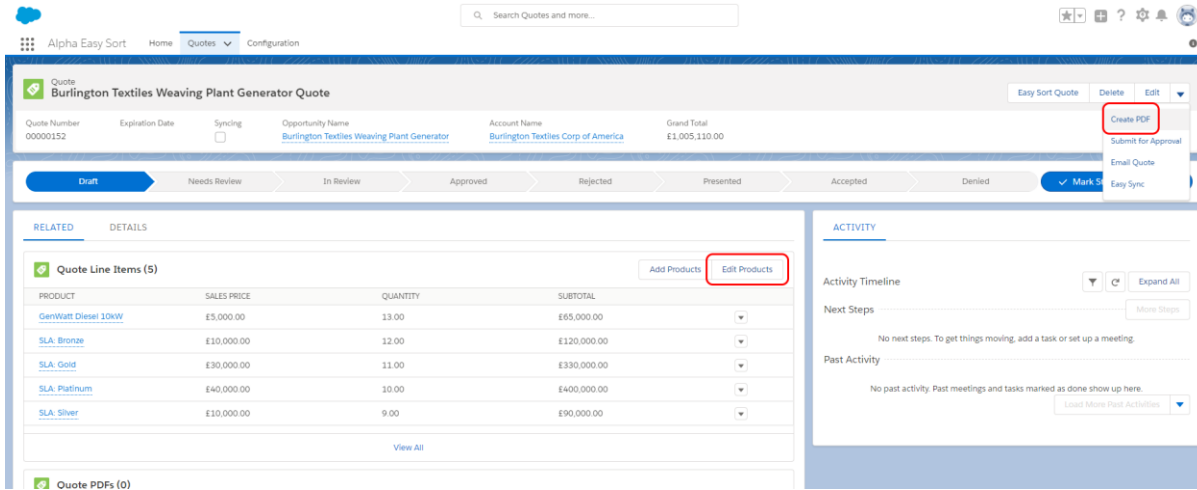
IMPORTANT

The Quote Line Item & Opportunity Product Related Lists in Salesforce lightning should show the correct sort order, but sometimes a reload of the screen in the browser is required.

It seems that when you click the [Edit Products] button, Quote Line Items and Opportunity Products are NOT shown in the sorted order. One to 'discuss' with Salesforce 😊

Using Easy Sort in Salesforce Lightning

Clicking the [Create PDF] button will always show the Quote Line Items in their sorted order.



The screenshot displays the Salesforce Lightning interface for a quote titled "Burlington Textiles Weaving Plant Generator Quote". The top navigation bar includes the "Alpha Easy Sort" logo, a search bar, and user icons. The quote details section shows the quote number (00000152), expiration date, syncing status, opportunity name, account name, and grand total (£1,005,110.00). A progress bar indicates the quote's status: Draft, Needs Review, In Review, Approved, Rejected, Presented, Accepted, Denied, and Marked. The "Create PDF" button is highlighted in the top right corner. Below the progress bar, the "RELATED" section shows "Quote Line Items (5)" with a table of products, sales prices, quantities, and subtotals. The "Edit Products" button is highlighted in the table's header. The "ACTIVITY" section on the right shows the activity timeline, next steps, and past activity.

PRODUCT	SALES PRICE	QUANTITY	SUBTOTAL
GenWatt Diesel 10kW	£5,000.00	13.00	£65,000.00
SLA: Bronze	£10,000.00	12.00	£120,000.00
SLA: Gold	£30,000.00	11.00	£330,000.00
SLA: Platinum	£40,000.00	10.00	£400,000.00
SLA: Silver	£10,000.00	9.00	£90,000.00

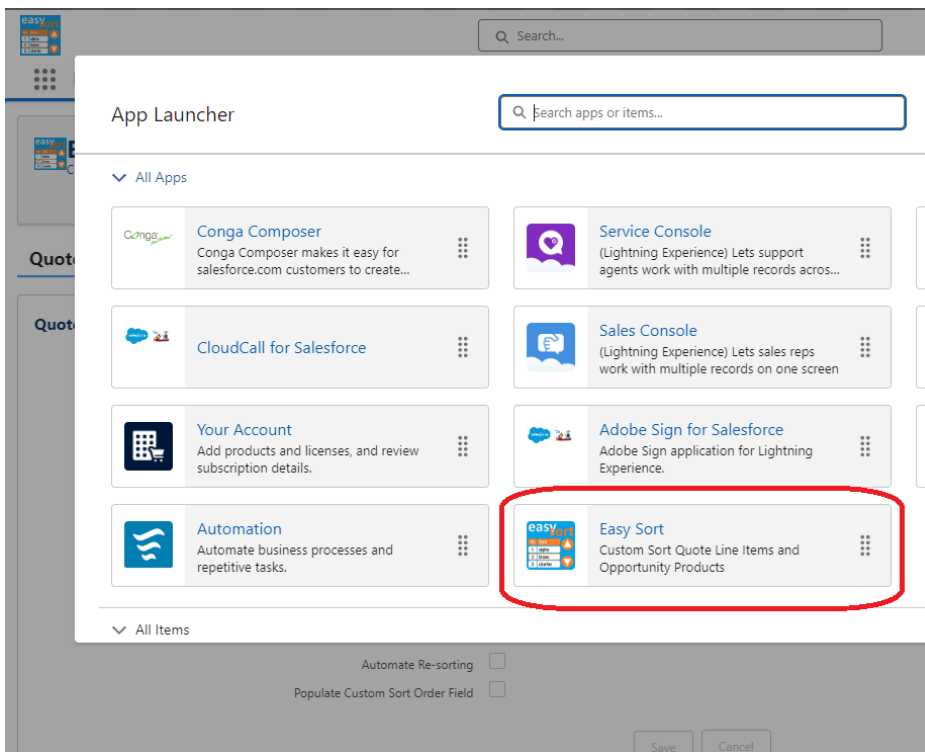
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App Configuration

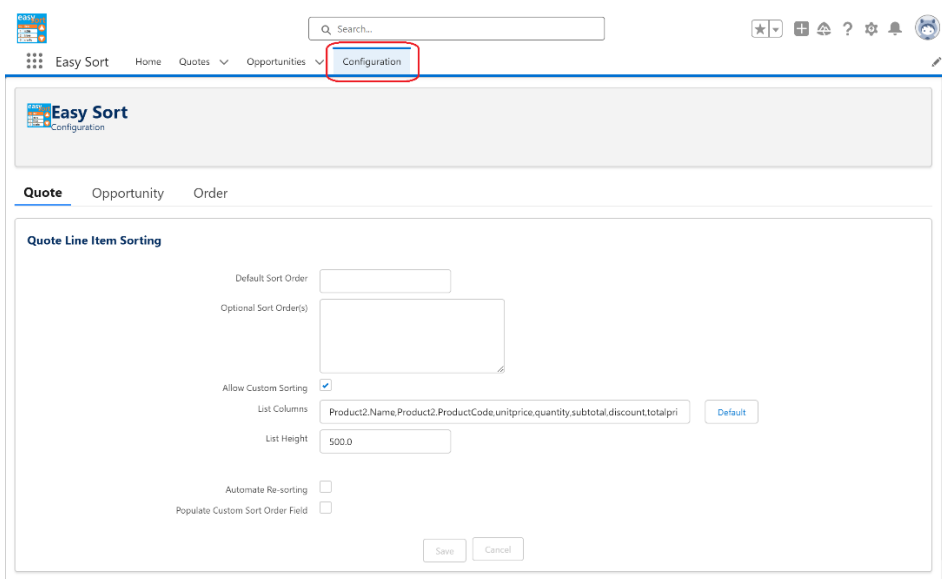
Overview

Use the Configuration Tab to configure the App to sort by one or more other Fields, allow custom sorting and automate re-sorting for Quote Line Items & Opportunity Products.

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



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



Select the [Quote] Tab to edit the Configuration settings for Quote Line Item sorting.

Using Easy Sort in Salesforce Lightning

Select the [Opportunity] Tab to edit the Configuration settings for Opportunity Products sorting.

Select the [Order] Tab to edit the Configuration settings for Order Products sorting.

Changing the App Configuration

Default & Optional Sort Orders

Edit the [Default Sort Order] to the field (or Fields) you want Quote Line Items, Opportunity Products or Order Products to sort by.

Important: Please note that you should use the API Name of a Field and NOT the Field Label. So, if you want to sort by the 'Line Item Description' of a Quote Line Item, enter 'Description' which is the Field's API Name.

Here are some examples:

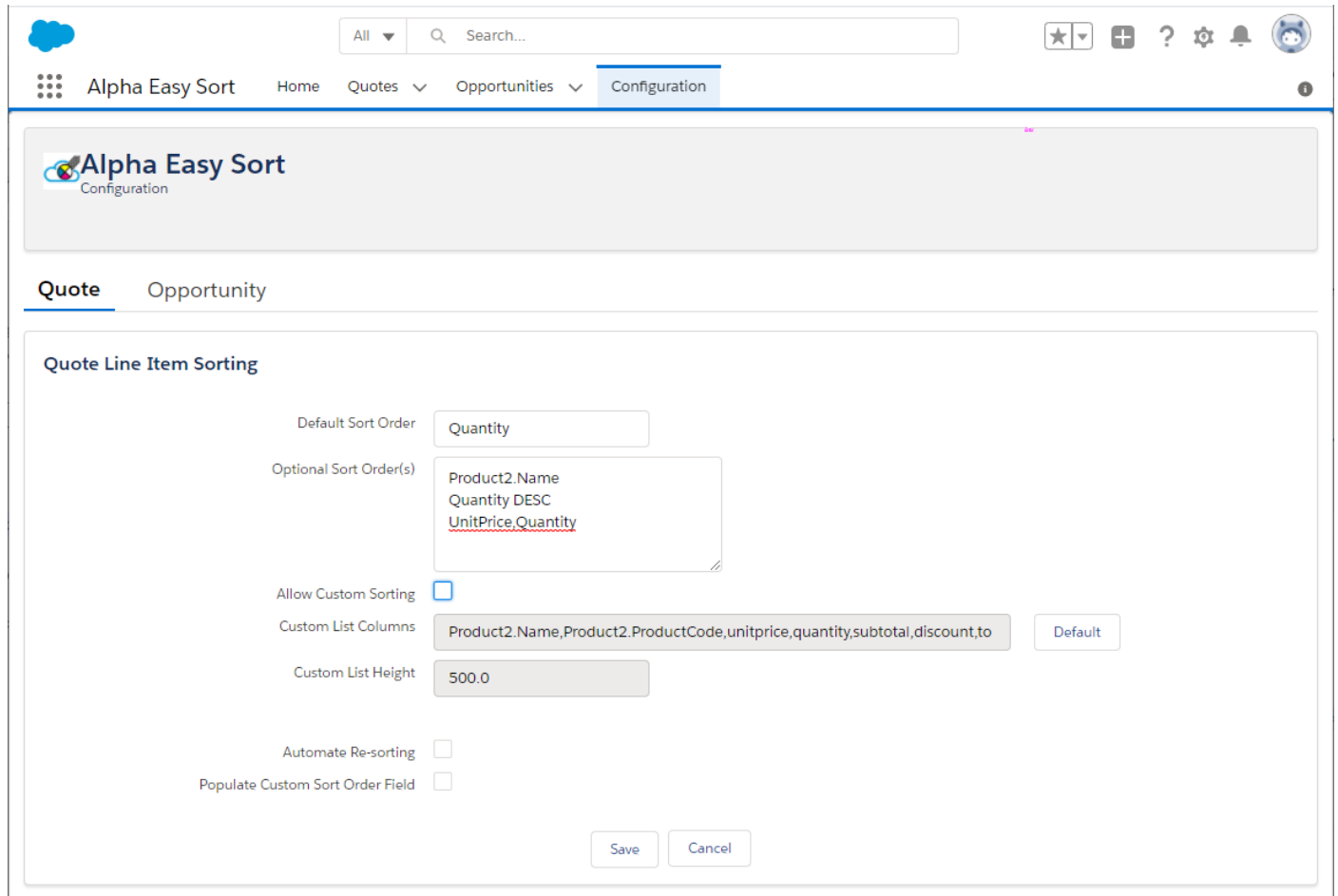
"I want to sort by Line Item Description". Enter 'Description'.

"I want to sort by Sales Price". Enter 'UnitPrice'.

"I want to sort by Sales Price and Quantity". Enter 'UnitPrice,Quantity'.

"I want to sort by descending Quantity and the Product name". Enter 'Quantity DESC, Product2.Name'.

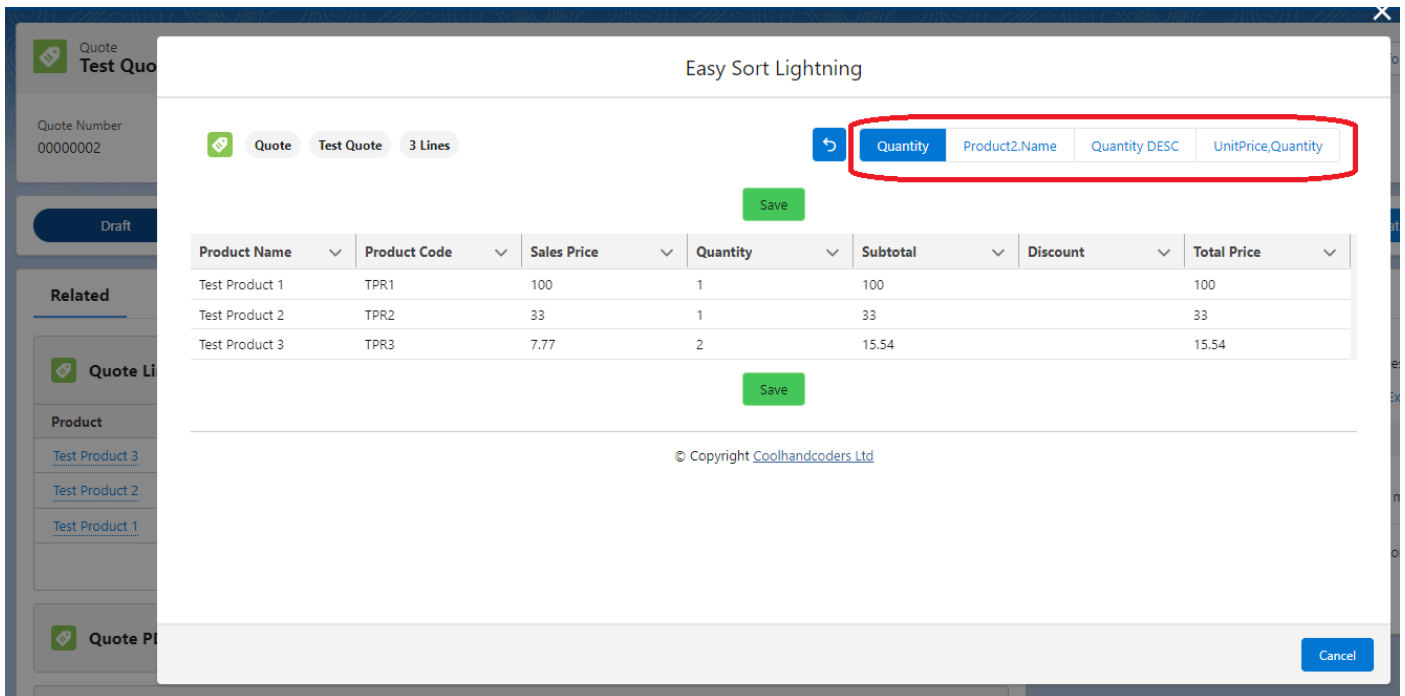
The 'Optional Sort Order' Fields can be used to include alternative Sort Order that can be selected. For example, the following configuration...



The screenshot displays the 'Alpha Easy Sort Configuration' interface. At the top, there's a navigation bar with 'Alpha Easy Sort' and tabs for 'Home', 'Quotes', 'Opportunities', and 'Configuration'. Below this, the 'Quote' tab is selected, showing 'Quote Line Item Sorting' settings. The 'Default Sort Order' is 'Quantity'. The 'Optional Sort Order(s)' field lists 'Product2.Name', 'Quantity DESC', and 'UnitPrice,Quantity'. The 'Allow Custom Sorting' checkbox is unchecked. The 'Custom List Columns' field contains 'Product2.Name,Product2.ProductCode,unitprice,quantity,subtotal,discount,to'. The 'Custom List Height' is '500.0'. There are checkboxes for 'Automate Re-sorting' and 'Populate Custom Sort Order Field', both of which are unchecked. 'Save' and 'Cancel' buttons are at the bottom.

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Will appear as follows on the Easy Sort Quote screen...



The screenshot shows the 'Easy Sort Lightning' window. At the top, there are tabs for 'Quote', 'Test Quote', and '3 Lines'. To the right, a row of buttons is highlighted with a red box: 'Quantity', 'Product2.Name', 'Quantity DESC', and 'UnitPrice,Quantity'. Below this is a table with the following data:

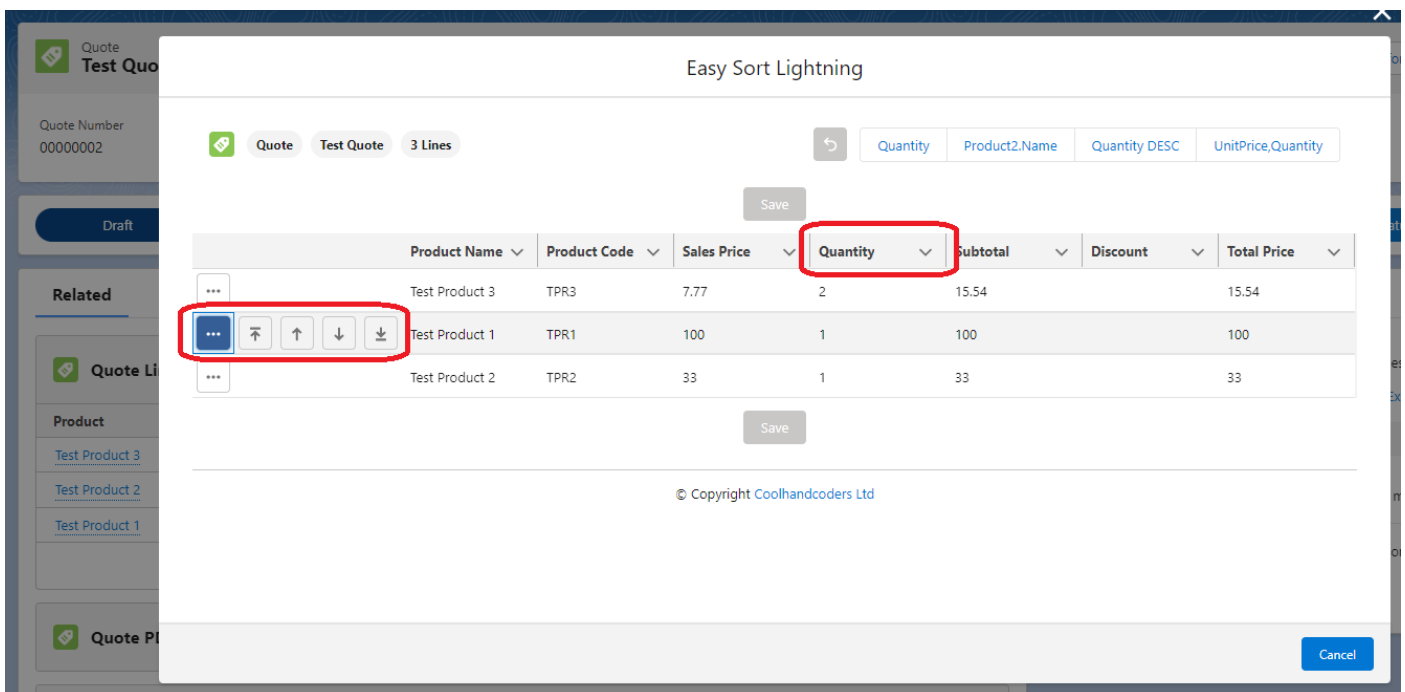
Product Name	Product Code	Sales Price	Quantity	Subtotal	Discount	Total Price
Test Product 1	TPR1	100	1	100		100
Test Product 2	TPR2	33	1	33		33
Test Product 3	TPR3	7.77	2	15.54		15.54

Below the table, there is a 'Save' button and a copyright notice: '© Copyright Coolhandcoders Ltd'.

Allow Custom Sorting

Tick this option if you want users to be able to custom sort using the list.

When this option is ticked, the list appears as below. Users can then use the navigation arrows to move lines up and down the list to the desired sort. Column heads can also be clicked to order the list.



The screenshot shows the 'Easy Sort Lightning' window with the 'Allow Custom Sorting' option enabled. The table now includes navigation arrows on the left side of each row. The 'Quantity' column header is highlighted with a red box. The table data is as follows:

	Product Name	Product Code	Sales Price	Quantity	Subtotal	Discount	Total Price
...	Test Product 3	TPR3	7.77	2	15.54		15.54
...	Test Product 1	TPR1	100	1	100		100
...	Test Product 2	TPR2	33	1	33		33

Below the table, there is a 'Save' button and a copyright notice: '© Copyright Coolhandcoders Ltd'.

Using Easy Sort in Salesforce Lightning

Custom List Columns

The list of Fields that will appear as columns in the list. Edit this to add or remove columns you want appearing in the list.

NB: The list should be comma delimited and only include the API Field Names (not Field Labels) from the Quote Line Item Object, Opportunity Product Object or Order Product Object.

Click the [Default] button to return to using the default columns in the list.

Custom List Height

NOT USED WITH THE [EASY SORT LIGHTNING] Action.

Automate Re-sorting (NOT available on the Order Tab on the Configuration Tab)

Tick this option if you want Quote Line Items & Opportunity Products to be re-sorted automatically without the need for the user to click the [Easy Sort Lightning] button again.

For example, if a user initially sorts Quote Line Items on Quantity using the [Easy Sort] button, any further edits to the Quantity in its Line Items will re-sort Quote Line Items automatically, with no need to click the [Easy Sort] button again.

Populate Custom Sort Order Field (ONLY available on the Quote Tab on the Configuration Tab)

Tick to make the custom field [aies__CustomSortOrder__c] in the QuoteLineItem Object mirror the value of the native Salesforce [SortOrder] Field.

This can be used to display the Sort Order in a Page Layout or Related List as the native Salesforce [SortOrder] Field is not available for this purpose.

NB: The reason this mirroring is not done by default is that your Salesforce Org may have some custom triggers on the QuoteLineItem or OpportunityLineItem Objects and the mirroring would cause these to fire. If you do have triggers on either of these Objects, just sort a Quote or Opportunity with this option ticked to check for any unexpected issues.

Sort Order Value Field (ONLY available on the Order Tab on the Configuration Tab)

Enter the API Name of the Field that will store the sort order for an Order Product.

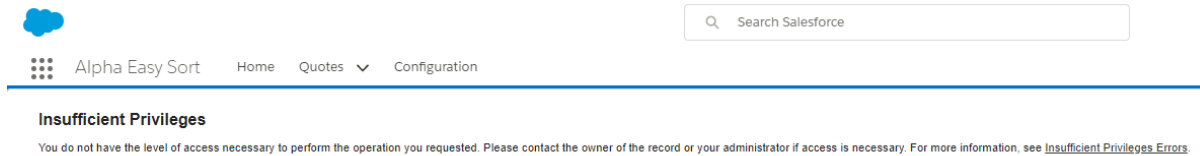
For example add a number Field called [CustomSortOrder] to the Order Product Object, then enter 'CustomSortOrder__c' into the [Sort Order Value Field] on the Order Tab.

Using Easy Sort in Salesforce Lightning

Problems

Insufficient Privileges

The following screen may appear when a User clicks the [Easy Sort] button or the [Configuration] tab.

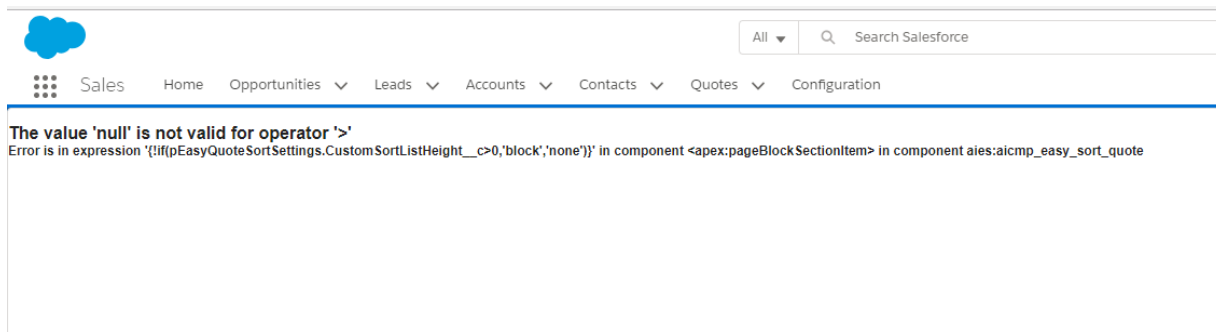


This occurs when the App has not been installed for all users and the User's Profile does not have the relevant permissions.

Please refer to the 'Post Installation Setup > App Permissions' section earlier to remedy this.

The value 'null' is not valid for operator '>'

The following screen may appear when a User clicks the [Easy Sort] button.



This occurs when the 'Custom Sort List Height' is empty in the [Quote] or [Opportunity] Tab on the [Configuration] Tab. To remedy this, enter a value of 0 or more for the 'Custom Sort List Height', then click the [Save] button.