

User journey for Product Finder

Configuring the Product Finder UI for Pricebook Entries

To ensure the correct fields are displayed in the Product Finder UI, you need to configure a field set on the Pricebook Entry object. Since Salesforce does not allow you to include field sets in a package for the Pricebook Entry object, this step must be performed manually.

Steps to Create and Configure the Field Set:

1. Navigate to the Pricebook Entry Object:

- Go to Setup in Salesforce.
- In the Quick Find box, type "Objects" and select **Object Manager**.
- Search for and select **Pricebook Entry**.

2. Create the Field Set:

- In the Pricebook Entry object, find the **Field Sets** section.
- Click **New** to create a new field set.
- Name the field set **Product_Finder_Field_Set**.

3. Add Required Fields:

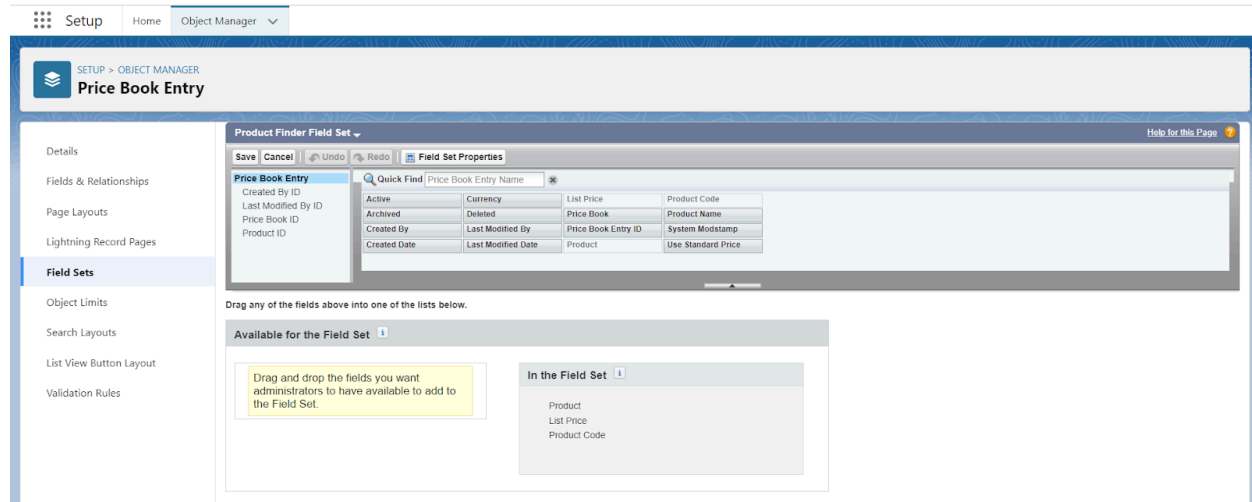
- Drag and drop the fields that should be displayed in the Product Finder UI into the field set.
- Ensure that all necessary fields are included to provide a comprehensive view of the pricebook entries.

4. Save the Field Set:

- Once you've added the required fields, click **Save**.

This configuration allows your Product Finder UI to dynamically display the fields specified in the **Product_Finder_Field_Set**, ensuring that users have access to the relevant information when selecting pricebook entries.

Refer to the image below for a visual representation of the field set creation process in Salesforce:



Configuring Custom Settings to Allow or Prevent Duplicate Products in Product Finder

Step 1: Navigate to Custom Settings

- **Log in to Salesforce:** Open your Salesforce org and log in with your credentials.
- **Go to Setup:** Click on the gear icon in the top right corner and select **Setup**.
- **Search for Custom Settings:** In the Quick Find box, type "Custom Settings" and select **Custom Settings** from the results.

Step 2: Locate the Product Finder Settings

- **Find ProductFinder__ProductFinderSettings__c:** Locate the custom setting named **ProductFinder__ProductFinderSettings__c**.
- **Click on Manage:** Next to the custom setting, click on **Manage** to manage individual user or profile settings.

Step 3: Create or Edit a Custom Setting Entry

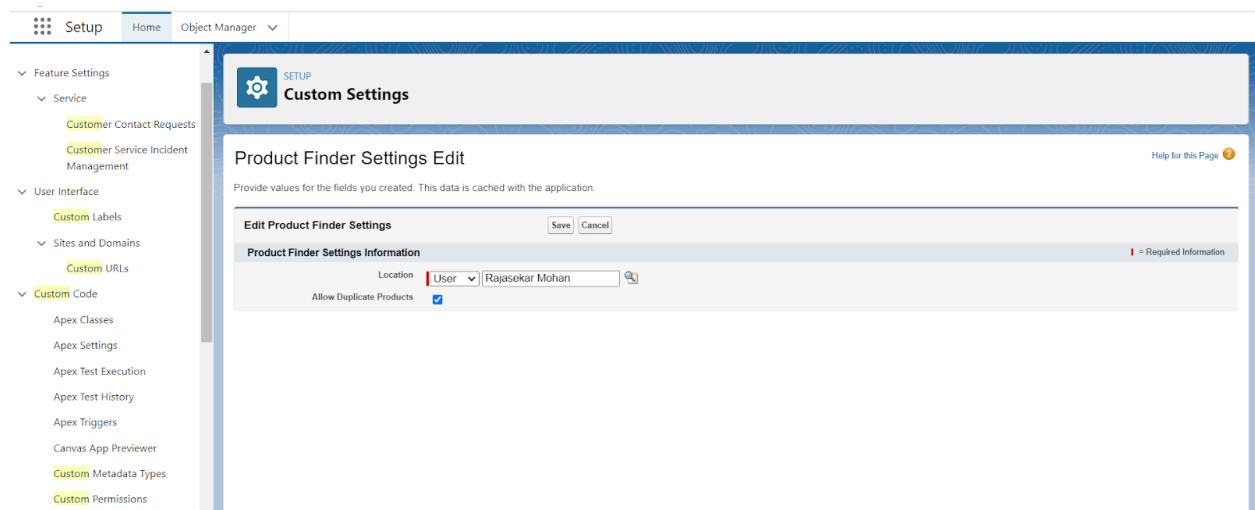
- **Select Location:** Click **New** to create a new setting or **Edit** if you're updating an existing one.
- **Choose User or Profile:**
 - **User:** Select the specific user who will have the setting applied.
 - **Profile:** Alternatively, select a profile to apply the setting to all users within that profile.
- **Set Duplicate Product Option:**
 - **Checkbox:** Locate the checkbox named **ProductFinder__Allow_Duplicate_Products__c**.

- **Enable or Disable:** Check the box if you want to allow the selected user or profile to add duplicate products in the Product Finder. Uncheck it to prevent duplicates.

Step 4: Save the Setting

- **Save the Entry:** After making your selections, click **Save** to apply the settings. This will ensure that the user or profile has the correct access to allow or prevent duplicate products in the Product Finder.

Refer to the image below for a visual guide on how to create and configure the custom setting:



Configure Editable Fields and Required Fields

Editable Fields

In Product Finder, field behavior can be configured using metadata records in ProductFinderFields__mdt. This configuration allows users to determine which fields should be editable when creating or editing records.

Setting Up ProductFinderFields__mdt for Editable Fields:

1. **Navigate to Metadata Type:**
 - Access ProductFinderFields__mdt in Salesforce setup.

2. Manage and Create Fields:

- **Add New Records:**

Create new records in ProductFinderFields__mdt for each field you want to configure as editable or required.

- **Modify Existing Records:**

Edit existing records within ProductFinderFields__mdt to update the configuration of fields, such as changing their editability or required status.

Specify the following attributes:

- **Field API Name:** The API name of the field.
- **Object Name:** The name of the object where the field resides (e.g., Quote Line Item).
- **Editable Checkbox:** Mark this checkbox to make the field editable.

How It Works in Product Finder:

- **Editing Records:**

Fields marked as editable in ProductFinderFields__mdt will be modifiable when editing records in Product Finder.

- **Creating Records:**

During record creation, fields designated as editable in the metadata will be modifiable.

Configure Required Fields

Similarly, Product Finder allows for the configuration of required fields through metadata records, ensuring that essential data is captured when creating or editing records.

Setting Up ProductFinderFields__mdt for Required Fields:

1. **Access ProductFinderFields__mdt in Salesforce Setup:**

- Go to Salesforce Setup and navigate to the ProductFinderFields__mdt metadata type.

2. **Manage and Create Fields:**

- **Add New Records:**

Create new records in ProductFinderFields__mdt for each field you want to configure as required.

- **Modify Existing Records:**

Edit existing records within ProductFinderFields__mdt to update the required status of fields or make other necessary adjustments.

Specify the following attributes for each record:

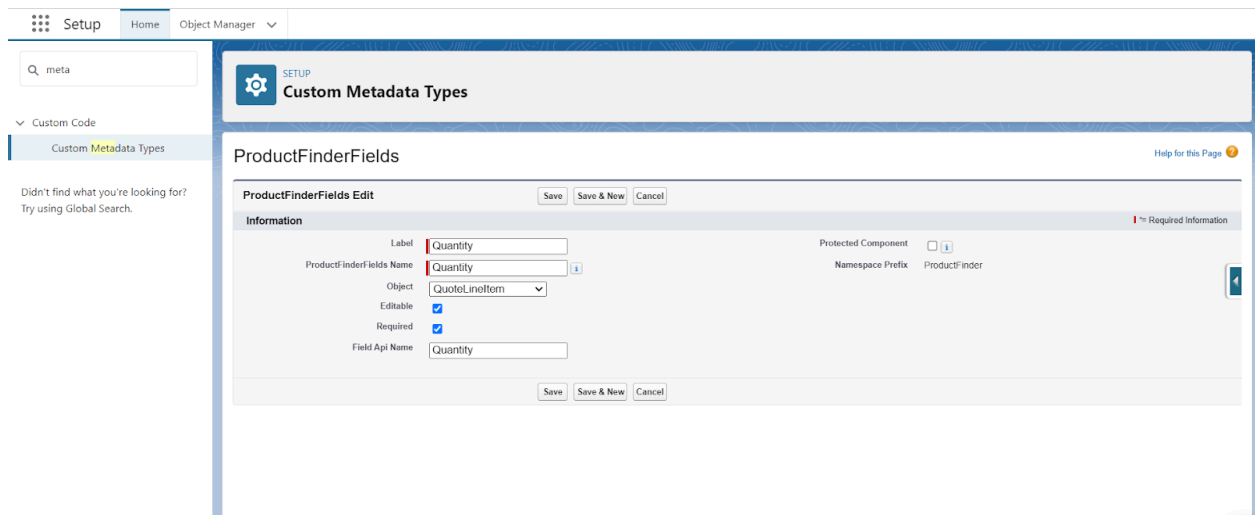
- **Field API Name:** The API name of the field.

- **Object Name:** The name of the object where the field resides (e.g., Opportunity, Quote).
- **Required Checkbox:** Mark this checkbox to make the field required.

How It Works in Product Finder:

- **Editing Records:**
Fields marked as required in ProductFinderFields__mdt must be filled out when editing records in Product Finder.
- **Creating Records:**
During record creation, fields designated as required in the metadata will be mandatory, ensuring data completeness.

Refer to the image below for a visual guide on how to create a record in **ProductFinderFields__mdt**:

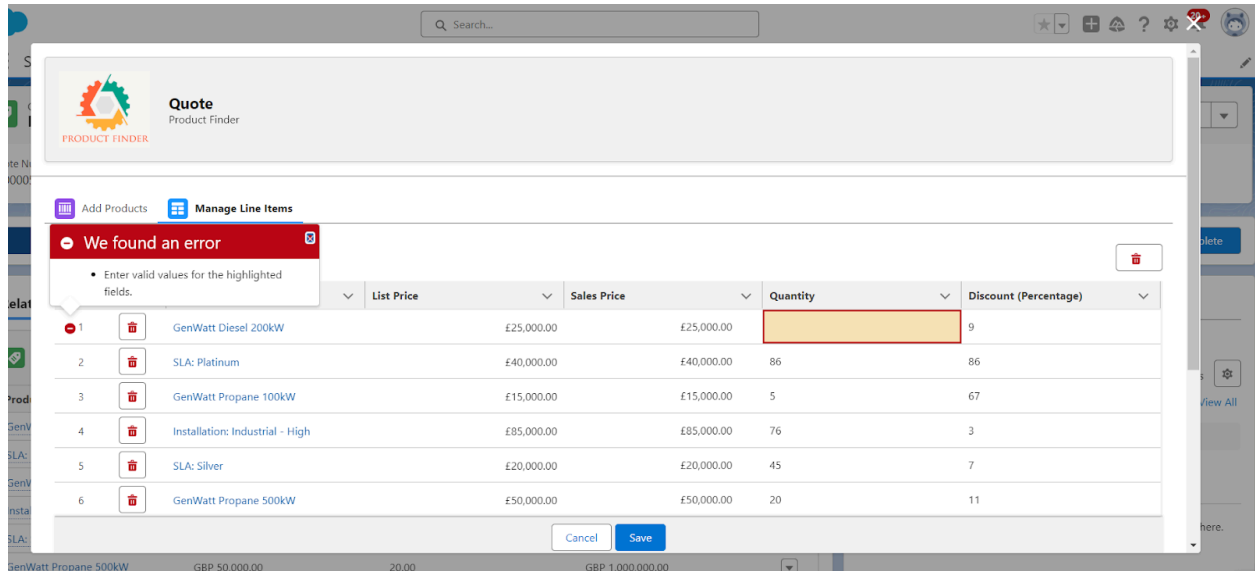


The screenshot shows the Salesforce Setup interface. On the left, the navigation menu includes 'Setup', 'Home', and 'Object Manager'. Below this, a search bar contains 'meta'. Under 'Custom Code', 'Custom Metadata Types' is selected. A message states: 'Didn't find what you're looking for? Try using Global Search.' The main content area is titled 'Custom Metadata Types' and shows the 'ProductFinderFields' record in edit mode. The record is titled 'ProductFinderFields Edit' with 'Save', 'Save & New', and 'Cancel' buttons. The 'Information' section contains the following fields:

- Label:** Quantity
- ProductFinderFields Name:** Quantity
- Object:** QuoteLineItem
- Editable:** ☒
- Required:** ☒
- Field Api Name:** Quantity
- Protected Component:** ☐
- Namespace Prefix:** ProductFinder

At the bottom of the form, there are 'Save', 'Save & New', and 'Cancel' buttons. A 'Help for this Page' link is visible in the top right corner of the form area.

How It Will Work in Product Finder:



Quick Actions: ProductFinder_Popup and ProductFinder_Tab

Product Finder offers two convenient quick actions: ProductFinder_Popup and ProductFinder_Tab. These allow you to add and manage products either in a popup window or in a new tab, based on your preference.

To configure these quick actions:

1. Navigate to Opportunity, Order, or Quote Layout:

Go to the layout settings for the Opportunity, Order, or Quote object where you want to add the quick action.

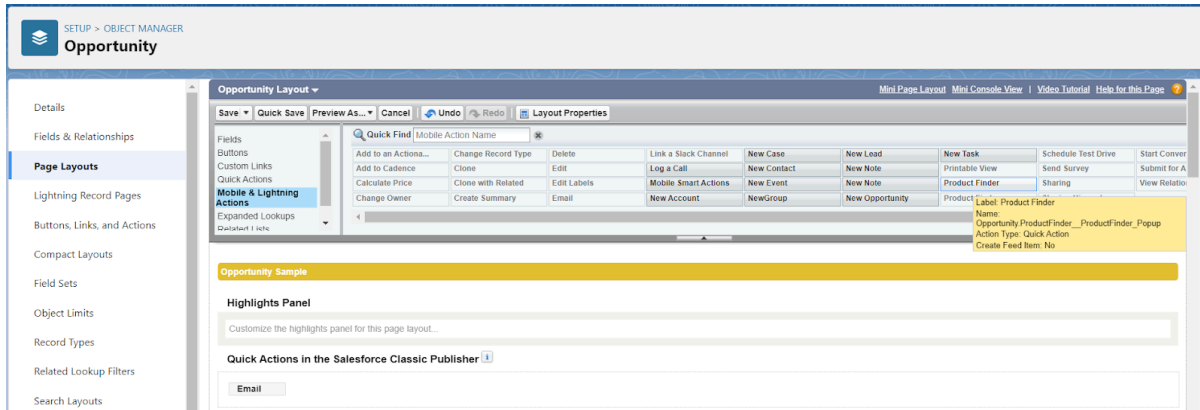
2. Add the Quick Actions:

For Popup Window:

Add the "ProductFinder_Popup" quick action to the layout.

For Tab View:

Add the "ProductFinder_Tab" quick action to the layout.

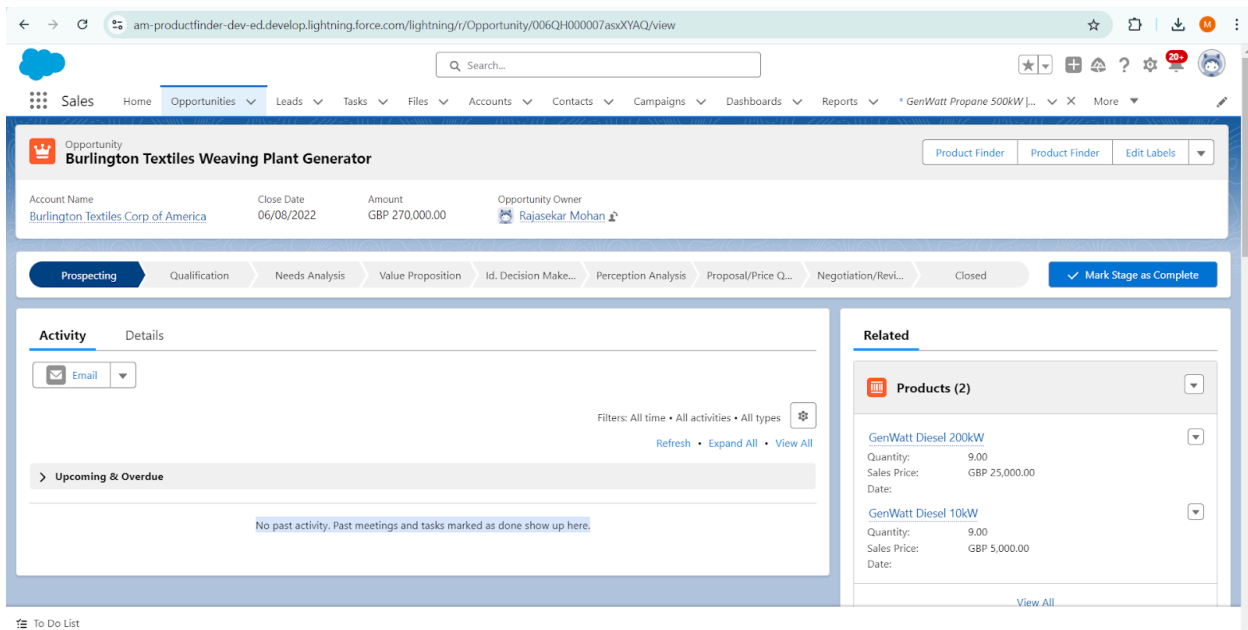


This flexibility ensures that users can choose the interface that best suits their workflow, providing a seamless and efficient product management experience.

Product Finder for Opportunities – A Walkthrough

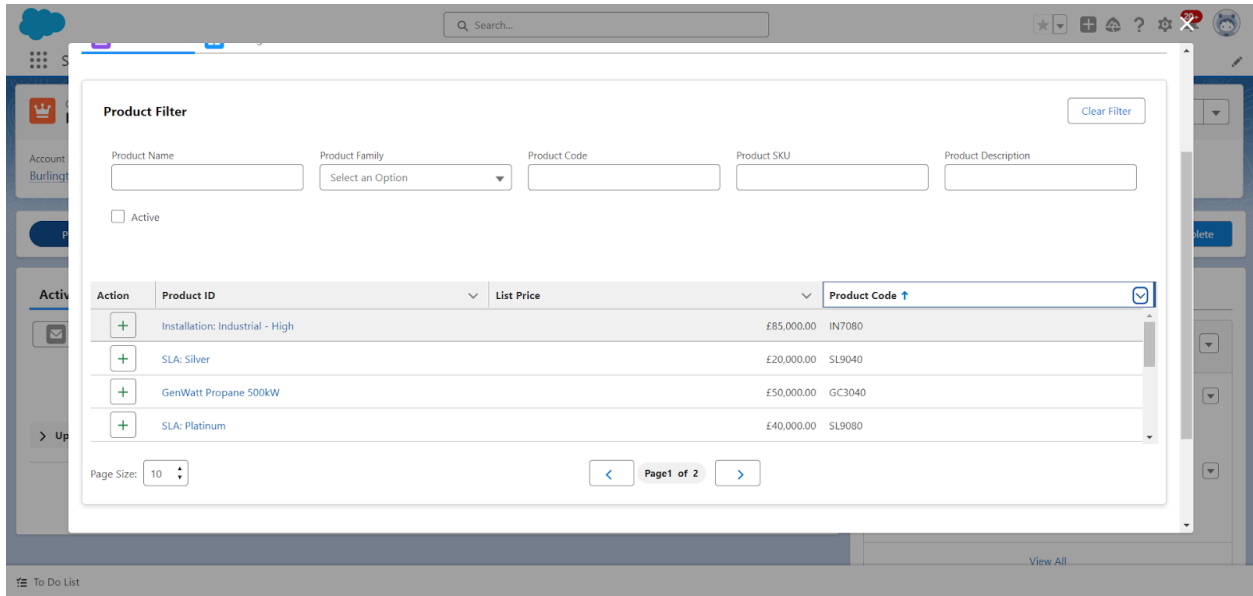
Step 1: Accessing the Opportunity Record

Log into Salesforce and navigate to the Opportunity record for a high-priority client deal. At the top of the page, you see the Product Finder tool, ready to streamline your product management tasks.

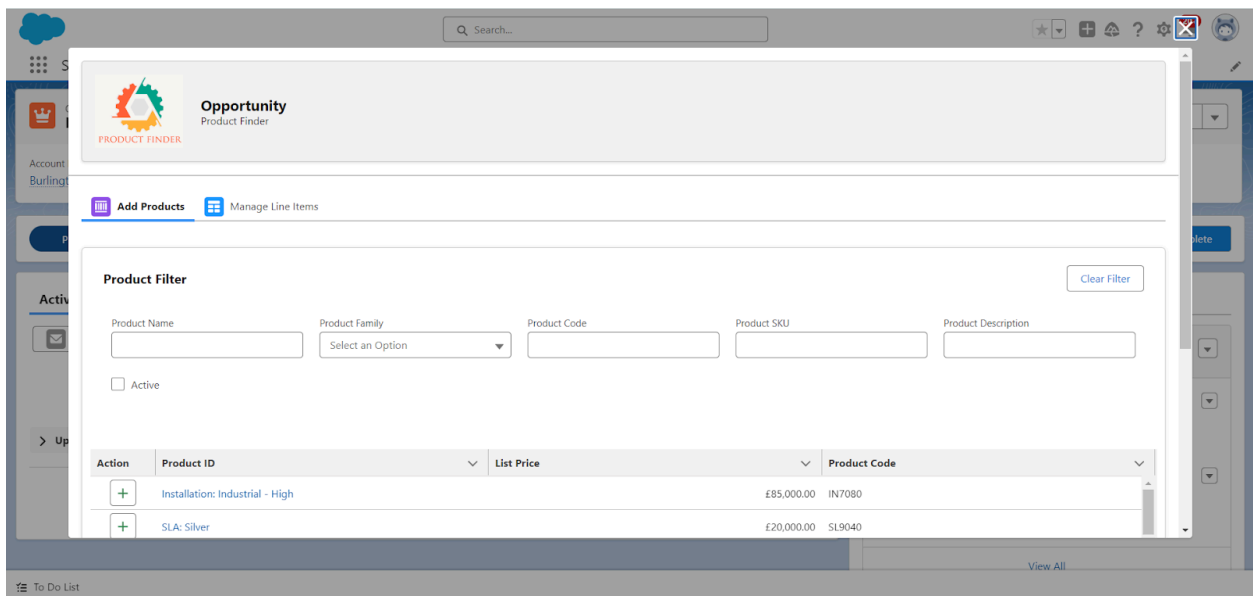


Step 2: Adding Products

Click on the 'Add Products' tab in Product Finder to begin adding products to the Opportunity. The tool displays a comprehensive list of all available products from your company's price book.

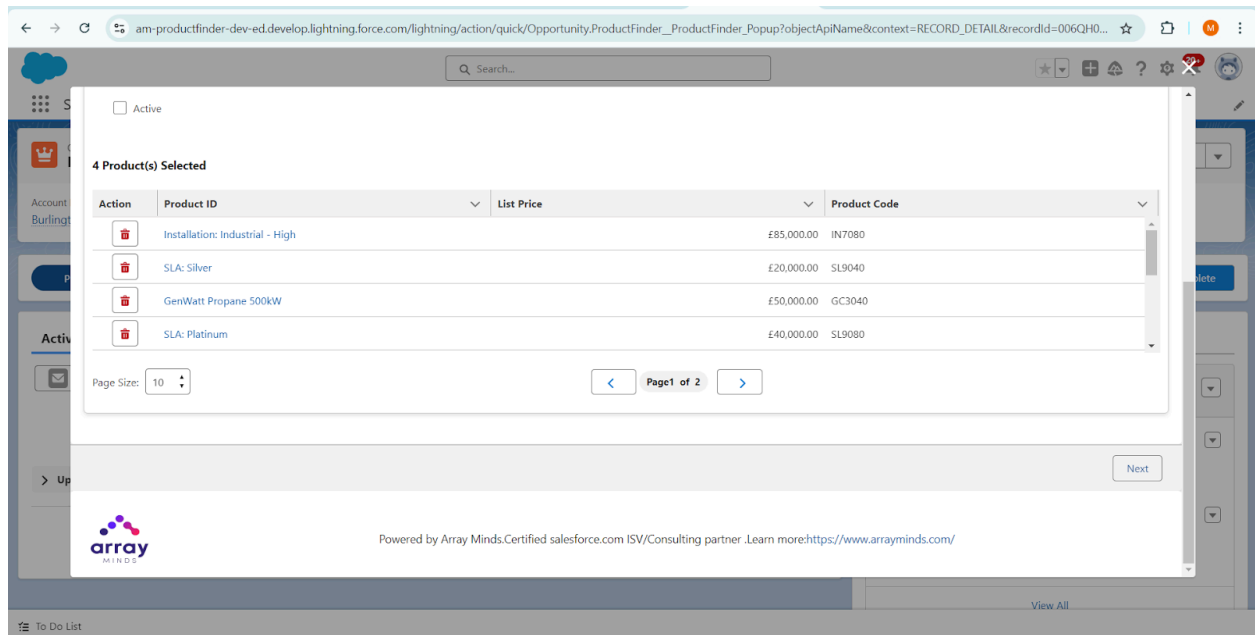


To quickly find the required items, use the customizable filter options. Filter by product category, manufacturer, and price range to narrow down the list.



Step 3: Using Filters & Selecting Products

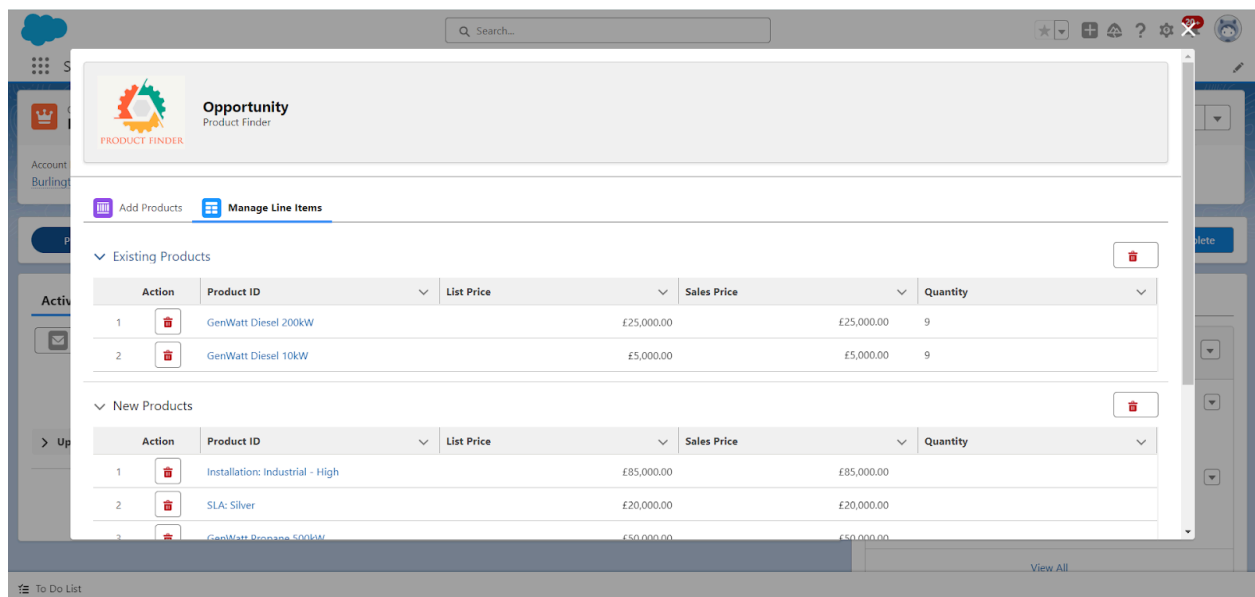
After filtering, locate the specific products that are needed. Select these items and click 'Next' to add them to the Opportunity.



Step 4: Managing Line Items

With the products added, move to the 'Manage Line Items' tab. Here, Product Finder displays two sections: Existing Items, which lists products already associated with the Opportunity, and New Items, which shows the products just added.

Fields like discount percentages and warranty options are automatically filled based on matching field names from the price book entry and line item fields, saving time and reducing errors.



Step 5: Editing & Submitting Changes

Review the details, adjust quantities, and apply any necessary discounts. Once everything is accurate and complete, click the 'Submit' button to finalize your changes.

Search...

Add Products Manage Line Items

Existing Products

Action	Product ID	List Price	Sales Price	Quantity
1	GenWatt Diesel 200kW	£25,000.00	£25,000.00	9
2	GenWatt Diesel 10kW	£5,000.00	£5,000.00	9

Cancel Save

New Products

Action	Product ID	List Price	Quantity
1	Installation: Industrial - High	£85,000.00	85000
2	SLA: Silver	£20,000.00	
3	GenWatt Propane 500kW	£50,000.00	
4	SLA: Platinum	£40,000.00	

View All

Step 6: Success Confirmation

A success message confirms that all product updates have been saved to the database, ensuring that the Opportunity is ready for the next steps.

And with that, Product Finder has helped you efficiently manage and finalize the product list, ensuring accuracy and saving valuable time. For more tips and tutorials, check out our other guides.

The screenshot displays a CRM interface with a top navigation bar containing a search bar and various menu items: Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Calendar, Cases, Forecasts, and More. A success message at the top states 'Success Record(s) Saved successfully'. The main header for the opportunity is 'Burlington Textiles Weaving Plant Generator'. Below this, key details are listed: Account Name (Burlington Textiles Corp of America), Close Date (06/08/2022), Amount (GBP 14,820,000.00), and Opportunity Owner (Rajasekar Mohan). A stage progression bar shows stages from Prospecting to Closed, with a 'Mark Stage as Complete' button. The 'Activity' section on the left shows a filter for 'Email' and a message: 'No activities to show. Get started by sending an email, scheduling a task, and more.' The 'Related' section on the right lists products: 'GenWatt Diesel 200kW' and 'GenWatt Diesel 10kW', each with details on quantity, sales price, and date. A 'To Do List' icon is visible at the bottom left.

Error Handling

If any required fields are missing, an error message will be displayed. These errors are also logged in the ProductFinder__Error_Log__c object for further review.

am-productfinder-dev-ed.develop.lightning.force.com/lightning/r/Opportunity/006QH000007asXYAQ/view

Search...

☆

+

🔍

?

🔔

20+

👤

Sales

Home

Opportunities

Leads

Tasks

Files

Accounts

Contacts

Campaigns

Dashboards

Reports

GenWatt Propane 500kW [...]

X

More

Opportunity

Burlington Textiles Weaving Plant Generator

Error

Some error occurred. Please contact your System Administrator

Product Finder

Product Finder

Edit Labels

Account Name

Burlington Textiles Corp of America

Close Date

06/08/2022

Amount

GBP 270,000.00

Opportunity Owner

Rajasekar Mohan

Prospecting

Qualification

Needs Analysis

Value Proposition

Id. Decision Make...

Perception Analysis

Proposal/Price Q...

Negotiation/Rev...

Closed

Mark Stage as Complete

Activity

Details

Email

Filters: All time • All activities • All types

Refresh • Expand All • View All

Upcoming & Overdue

No past activity. Past meetings and tasks marked as done show up here.

Related

Products (2)

GenWatt Diesel 200kW

Quantity: 9.00

Sales Price: GBP 25,000.00

Date:

GenWatt Diesel 10kW

Quantity: 9.00

Sales Price: GBP 5,000.00

Date:

View All

To Do List

productpicker-dev-ed.develop.lightning.force.com/lightning/r/ProductPicker_Error_Log__c/a01QH00001JYPADYA5/view

Search...

☆

+

🔍

?

🔔

👤

Sales

Home

Opportunities

Leads

Tasks

Files

Accounts

Contacts

Campaigns

Dashboards

Reports

Calendar

Cases

Error Logs

More

Error Log

EL-0114

Edit

Delete

Clone

Related

Details

Error Log Id

EL-0114

Owner

Rajasekar Mohan

Opportunity

Burlington Text OPPORTUNITY

Currency

GBP - British Pound

Order

Quote

Error Message

Required fields are missing: [Quantity]

Error Type

System.DmlException

Operation

INSERT

Created By

Rajasekar Mohan, 19/07/2024, 11:36

Last Modified By

Rajasekar Mohan, 19/07/2024, 11:36

To Do List

Product Finder for Quotes – Edit and Delete Feature

Step-by-Step Walkthrough:

Step 1: Accessing the Quote Record

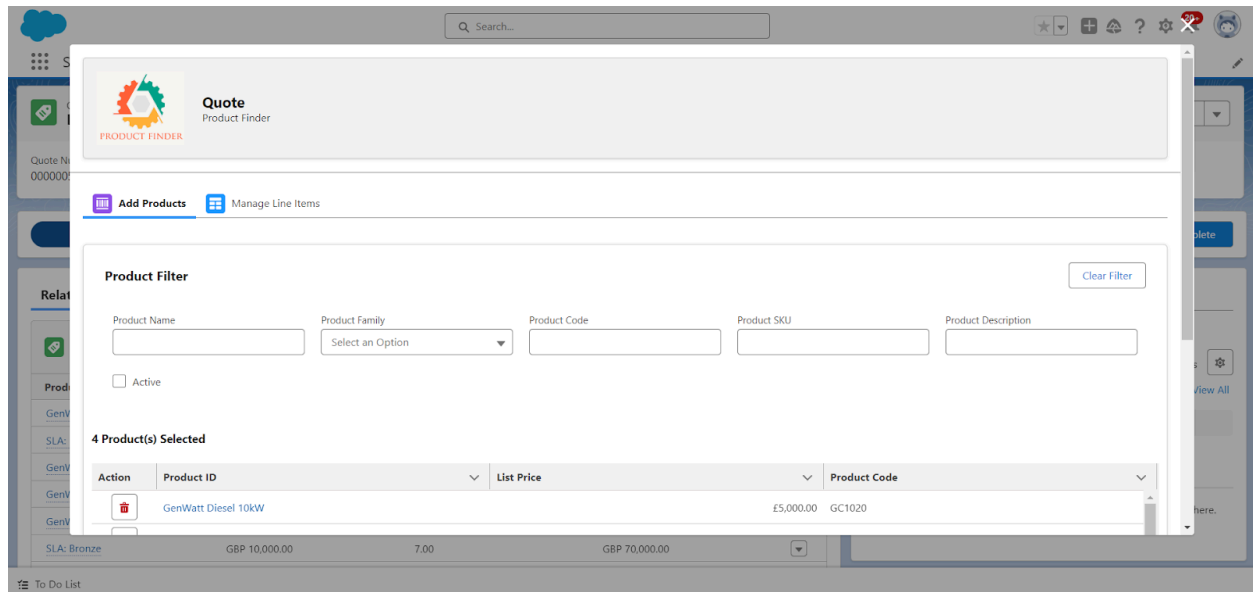
Begin by accessing the Quote record where you want to manage your products. At the top of the page, find the Product Finder tool and click to open it.

The screenshot displays the Salesforce interface for a Quote record titled "Burlington Textiles Weaving Plant Generator Quote". The top navigation bar includes a search bar and various menu items. The quote header shows the Quote Number (00000053), Expiration Date, Syncing status, Opportunity Name (Burlington Textiles Weaving Plant Generator), Account Name (Burlington Textiles Corp of America), and Grand Total (GBP 4,830,000.00). Below the header is a status bar with stages: Draft, Needs Review, In Review, Approved, Rejected, Presented, Accepted, and Denied. The main content area is divided into two sections: "Related" and "Details". The "Related" section shows "Quote Line Items (6)" with a table of products, sales prices, quantities, and subtotals. The "Details" section shows an "Activity" log with filters and a message indicating no activities to show.

Product	Sales Price	Quantity	Subtotal
GenWatt Diesel 200kW	GBP 25,000.00	9.00	GBP 225,000.00
SLA: Platinum	GBP 40,000.00	86.00	GBP 3,440,000.00
GenWatt Propane 100kW	GBP 15,000.00	5.00	GBP 75,000.00
GenWatt Propane 1500kW	GBP 120,000.00	6.00	GBP 720,000.00
GenWatt Diesel 1000kW	GBP 100,000.00	3.00	GBP 300,000.00
SLA: Bronze	GBP 10,000.00	7.00	GBP 70,000.00

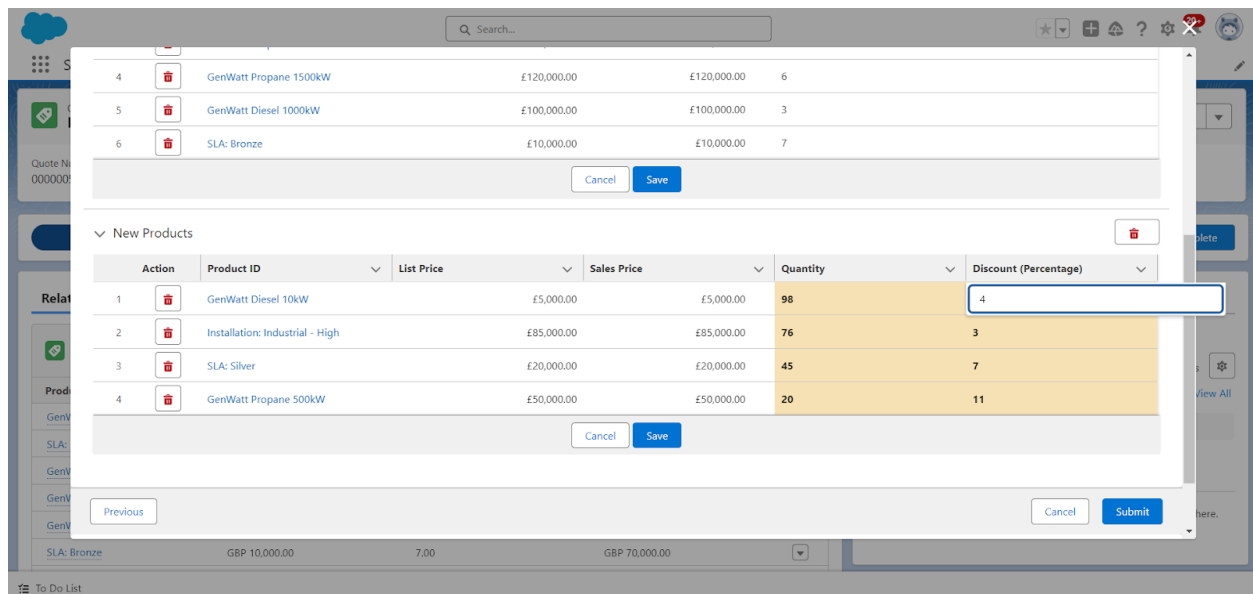
Step 2: Navigating to Manage Line Items

In the Product Finder, go to the 'Manage Line Items' tab. Here, you will see all the products associated with this Quote.



Step 3: Editing Products

To edit a product, click on the field you wish to change. Adjust the quantity, price, or any other necessary details directly within the field.



Step 4: Deleting Products

To remove a product, click the delete icon next to the item. You have the option to delete products individually or select multiple items to delete them in bulk.

Existing Products

Action	Product ID	List Price	Sales Price	Quantity	Discount (Percentage)
1	GenWatt Diesel 200kW	£25,000.00	£25,000.00	9	4
2	SLA: Platinum	£40,000.00	£40,000.00	86	
3	GenWatt Propane 100kW	£15,000.00	£15,000.00	5	
4	GenWatt Propane 1500kW	£120,000.00	£120,000.00	6	

New Products

Action	Product ID	List Price	Sales Price	Quantity	Discount (Percentage)
1	GenWatt Gasoline 750kW	£75,000.00	£75,000.00	2	
2	Installation: Portable	£5,000.00	£5,000.00	6	
3	SLA: Gold	£30,000.00	£30,000.00	8	

Step 5: Submitting Changes

After making all necessary changes, click 'Submit' to save your updates. A success message will confirm that everything is updated.

Product Finder makes managing Quotes quick and easy.

Quote: Burlington Textiles Weaving Plant Generator Quote

Success
Record(s) Saved successfully

Quote Number: 00000053 | Expiration Date: | Syncing: ☐ | Opportunity Name: Burlington Textiles Weaving Plant Generator | Account Name: Burlington Textiles Corp of America | Grand Total: GBP 4,830,000.00

Progress: Draft | Needs Review | In Review | Approved | Rejected | Presented | Accepted | Denied | [Mark Status as Complete](#)

Related | Details

Quote Line Items (6)

Product	Sales Price	Quantity	Subtotal
GenWatt Diesel 200kW	GBP 25,000.00	9.00	GBP 225,000.00
SLA: Platinum	GBP 40,000.00	86.00	GBP 3,440,000.00
GenWatt Propane 100kW	GBP 15,000.00	5.00	GBP 75,000.00
GenWatt Propane 1500kW	GBP 120,000.00	6.00	GBP 720,000.00
GenWatt Diesel 1000kW	GBP 100,000.00	3.00	GBP 300,000.00
SLA: Bronze	GBP 10,000.00	7.00	GBP 70,000.00

Activity

Filters: All time • All activities • All types

Upcoming & Overdue

No activities to show.
Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

Product Finder for Orders – Step-by-Step Guide

Step 1: Accessing the Product Finder

Navigate to the Order record where you want to manage products. Locate the Product Finder quick action at the top of the page and click to open it.

The screenshot shows the Salesforce interface for an Order record (00000153). The top navigation bar includes a search bar and various tabs like Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Calendar, Cases, Orders, and More. The Order record header displays the Order ID, Account Name (Edge Communications), Contract Number, Order Start Date (28/08/2024), Status (Draft), and Order Amount (GBP 225,000.00). Below the header, there are tabs for 'Draft' and 'Activated', and a 'Mark Status as Complete' button. The main content area is divided into 'Related' and 'Details' sections. The 'Related' section shows 'Order Products (1)' and 'Order History (1)'. The 'Order Products' table lists one product: GenWatt Diesel 200kW with Product Code GC1040, Quantity 9.00, and Unit Price GBP 25,000.00. The 'Order History' table shows one entry: 28/08/2024, 12:44, Created by Rajasekar Mohan. The 'Details' section shows 'Activity' with filters for All time, All activities, and All types. There are buttons for 'Add Products' and 'Edit Products' in the 'Order Products' section.

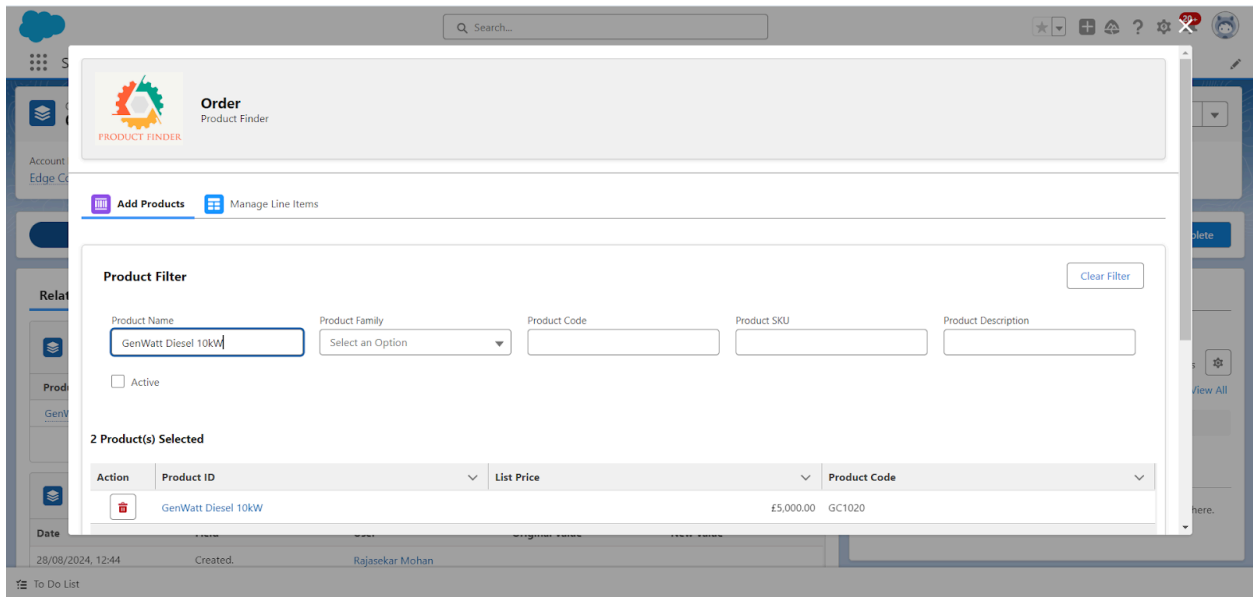
Step 2: Filtering Products

In the Product Finder, go to the 'Add Products' tab. Use the available filters to find the specific products you need for your Order.

The screenshot shows the Salesforce Product Finder interface. The top navigation bar includes a search bar and various tabs like Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Calendar, Cases, Orders, and More. The Product Finder header displays the Order ID (00000153) and the Product Finder title. Below the header, there are tabs for 'Add Products' and 'Manage Line Items'. The 'Add Products' tab is active, showing a 'Product Filter' section with input fields for Product Name, Product Family (Select an Option), Product Code, Product SKU, and Product Description. There is a 'Clear Filter' button. Below the filter section, there is a table with columns: Action, Product ID, List Price, and Product Code. The table lists two products: GenWatt Diesel 10kW with List Price £5,000.00 and Product Code GC1020, and Installation: Industrial - High with List Price £85,000.00 and Product Code IN7080. There are buttons for 'Add' and 'Remove' next to each product.

Step 3: Adding Products to Your Order

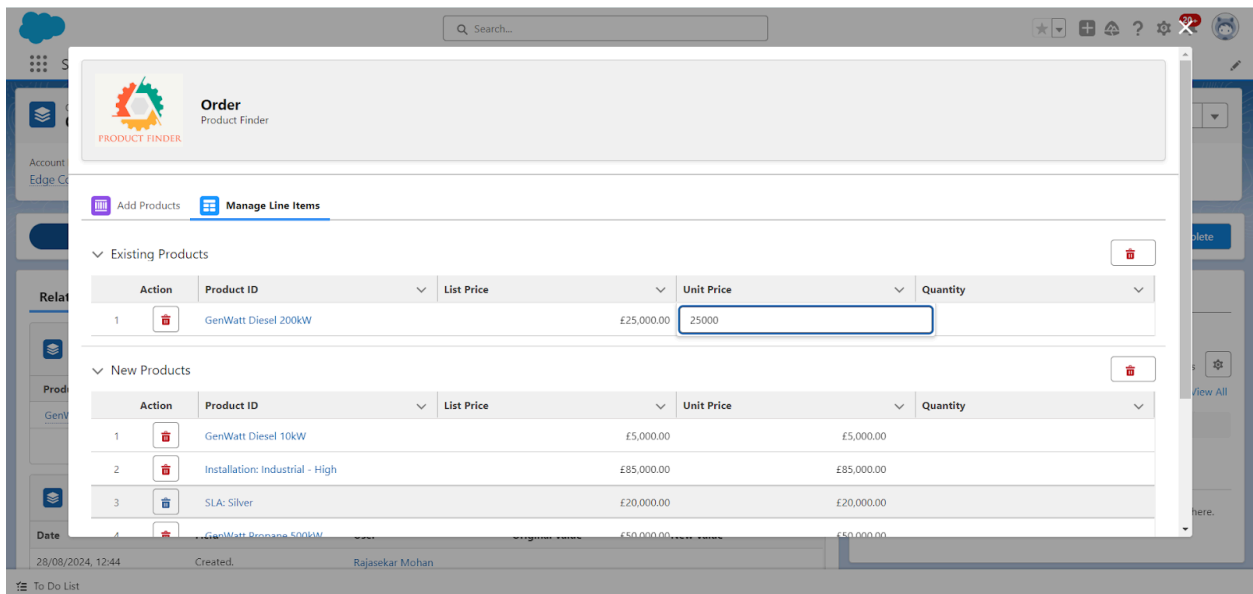
Select the products from the filtered list that you want to add. Click 'Next' to proceed with adding these products to your Order.



Step 4: Editing or Removing Products

In the 'Manage Line Items' tab, modify product details by clicking on the desired field, or remove products by clicking the delete icon. You can also delete multiple products at once by selecting them in bulk.

Editing



Removing Products

The screenshot shows the 'PRODUCT FINDER' modal with two tabs: 'Add Products' and 'Manage Line Items'. The 'Manage Line Items' tab is active, displaying two tables: 'Existing Products' and 'New Products'.

Existing Products

Action	Product ID	List Price	Unit Price	Quantity
1	GenWatt Diesel 200kW		£25,000.00	9

Buttons: Cancel, Save

New Products

Action	Product ID	List Price	Unit Price	Quantity
1	GenWatt Diesel 10kW		£5,000.00	£5,000.00
2	Installation: Industrial - High		£85,000.00	£85,000.00
3	SLA: Silver		£20,000.00	£20,000.00
4	GenWatt Propane 500kW		£50,000.00	£50,000.00

Step 5: Finalizing Changes

After completing your edits or deletions, click 'Submit' to save all changes. A confirmation message will appear to indicate that the updates were successful.

Product Finder makes it simple and efficient to manage products within your Orders.

The screenshot shows the 'Orders' section of the application. A green success message is displayed: 'Success Record(s) Saved successfully'. The order details are as follows:

Order 00000153

Account Name: Edge Communications
Contract Number: 28/08/2024
Order Start Date: 28/08/2024
Status: Draft
Order Amount: GBP 225,000.00

The order is currently in 'Draft' status. A button 'Mark Status as Complete' is available.

Related

Order Products (1)

Product	Product Code	Quantity	Unit Price
GenWatt Diesel 200kW	GC1040	9.00	GBP 25,000.00

Buttons: Add Products, Edit Products, View All

Order History (1)

Date	Field	User	Original Value	New Value
28/08/2024, 12:44	Created.	Rajasekar Mohan		

Activity

Filters: All time • All activities • All types
Buttons: Refresh, Expand All, View All

Upcoming & Overdue

No activities to show.
Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

