Selegic Product Catalog User Guide

Welcome to the Selegic Product Catalog User Guide. This document provides comprehensive instructions and information on how to effectively utilize Selegic Product Catalog, a powerful Salesforce CPQ plugin designed to streamline and enhance your product selection and quoting processes. This guide will walk you through the key features and functionalities, empowering you to maximize the benefits of Selegic Product Catalog for Salesforce CPQ.

Navigation and Product Search

The product search bar is at the top of the page. Users can search for products by entering Product Name or Product Code. As the user types in a few characters, the efficient type-ahead search displays the real time search results below the search entry box. Users can select a product from the drop down or click on the search icon (magnifying glass) to see the search result.

The filter next to the search box helps instantly refine the search result, displaying matching results in real-time.

At the top-left of the screen, the Quote Number represents the unique identifier of the Salesforce CPQ quote. The top-right corner of the interface provides access to the following action buttons:

Favorite

This button takes the user to the favorites section, where previously saved favorite folders and favorite items are displayed. The features of the favorite section are described in this document.

Reset

This button resets the quote to the previously saved catalog state. Newly added products to the cart that are not yet saved are removed.

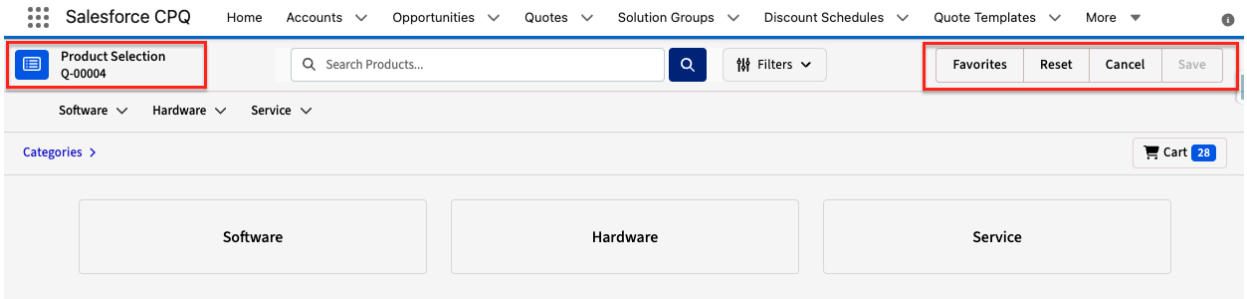
Cancel

This button cancels the current selection process and exits the product search screen without saving any changes.

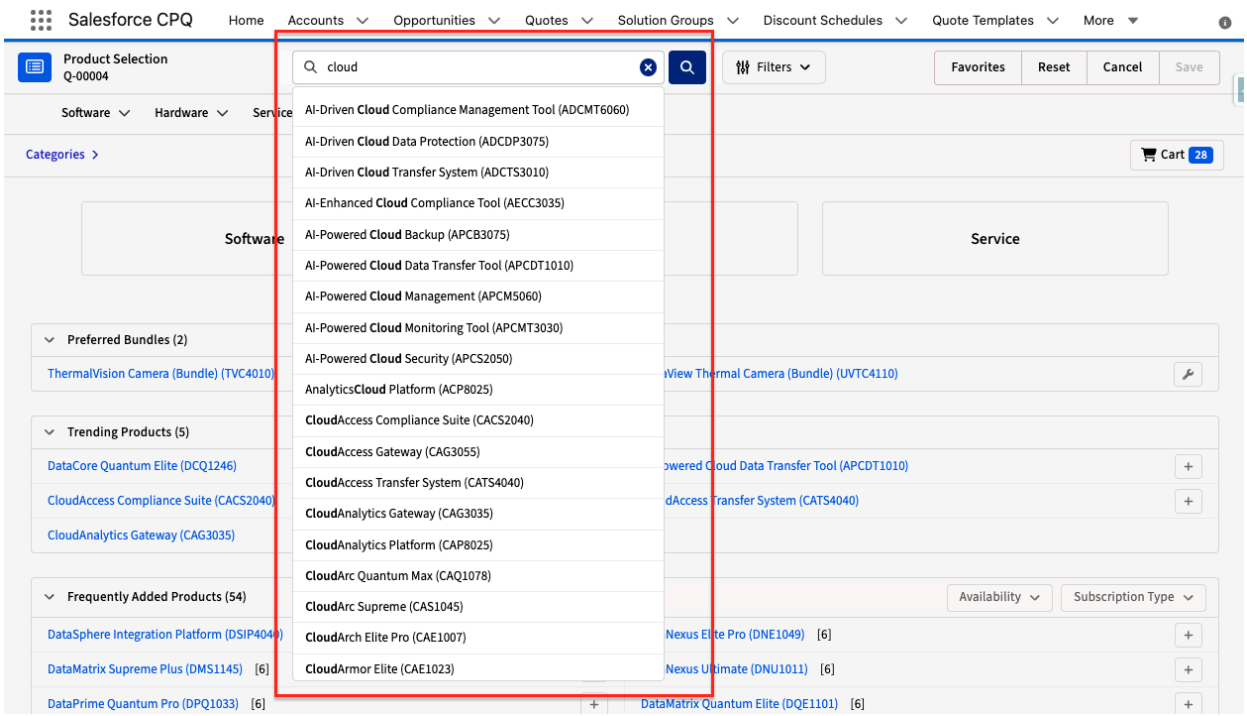
Save

Save button saves the selected products as the Quote Lines on the Quote and redirects the user to the QLE (Quote Line Editor). This button is initially disabled. It becomes active when a product is added by clicking on the plus icon beside the product name.

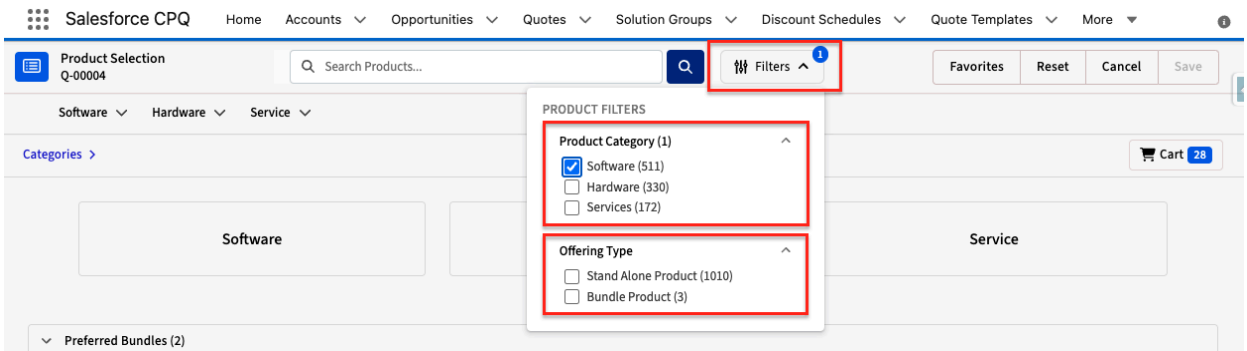
The following screen demonstrates the top bar with Quote Number, Search box, Filter and the Actions buttons.



The following screen demonstrates how type-ahead search displays all products that contain the word cloud.



The Filters besides search box is the base filter that is applied to the search result. When a filter is applied, it dynamically updates the displayed product list across all categories. This ensures that only relevant products matching the selected criteria are displayed, improving navigation and selection efficiency.

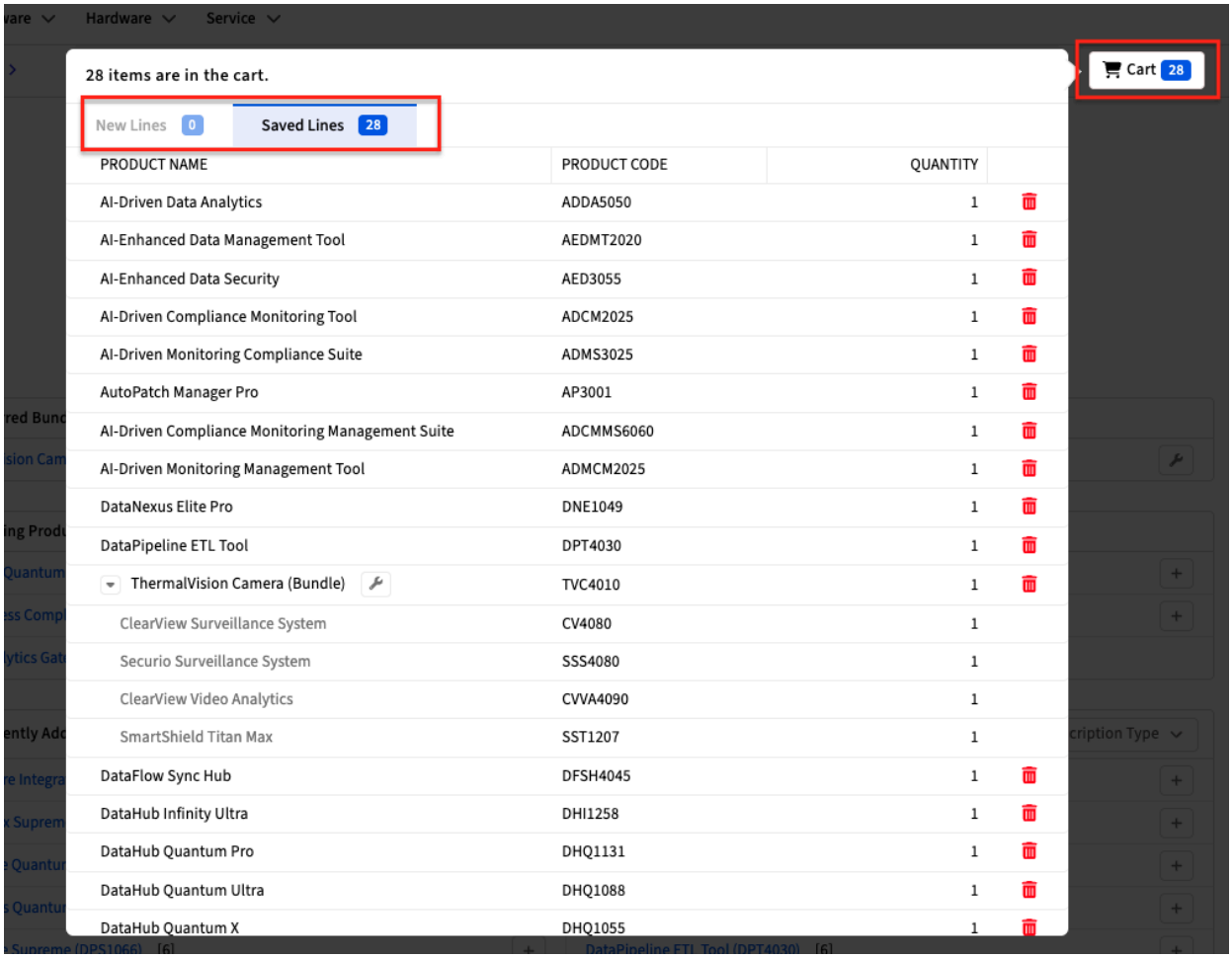


Mini Cart

The Mini Cart facilitates efficient product selection management through two distinct tabs, New Lines and Saved Lines. The New Lines tab presents products selected but not yet added to the Quote. The Saved Lines tab displays previously selected products and added to the Quote as Quote Lines. Users can delete items via the red delete icon. Delete action displays a confirmation dialog.

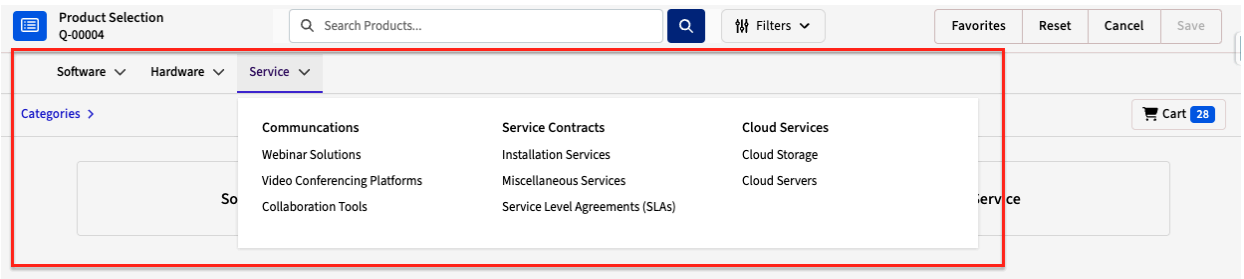
The Mini Cart table columns are dynamically populated from the Minicart Field Set. The Product Name column is always displayed on the left. Additional columns are configurable, reflecting fields from the Target Object and Target Field specified in the field set. While typically showcasing product-related fields, the configuration also allows inclusion of Quote Line fields (e.g., Start Date, Quantity) to meet specific business needs.

Users have the ability to modify column widths within the Mini Cart by dragging the borders between columns.



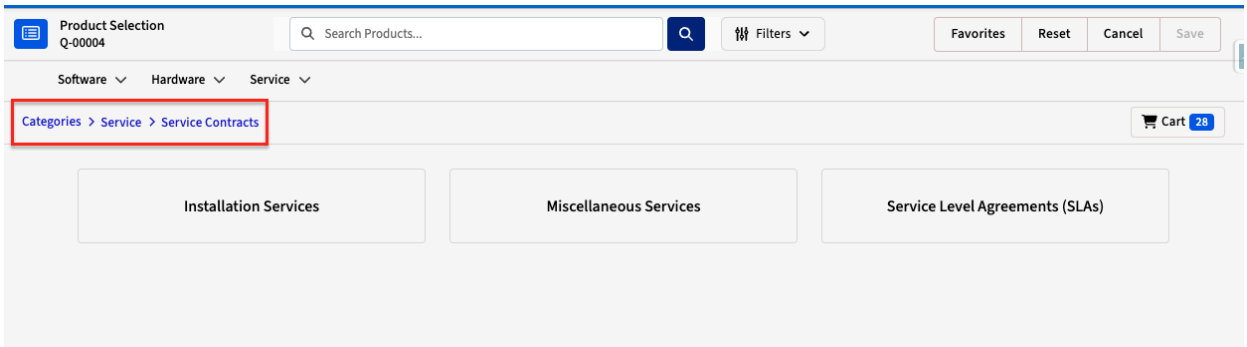
Category Browsing

The products are categorized in a hierarchical category structure. The top-level categories are displayed at the top as menu bar items.. Hovering over any main category displays an expanded drop down menu with its child categories. Users can click on any child category to navigate directly the products that belong to that category.



Drill Down Category

The top level product categories are displayed as clickable buttons. Users can navigate through categories step by step—clicking a top level category and then its subcategories, and subsequent clicks drill down through the hierarchy until a final, or leaf, category is reached. Once a leaf category is selected, the product list for that category is displayed.

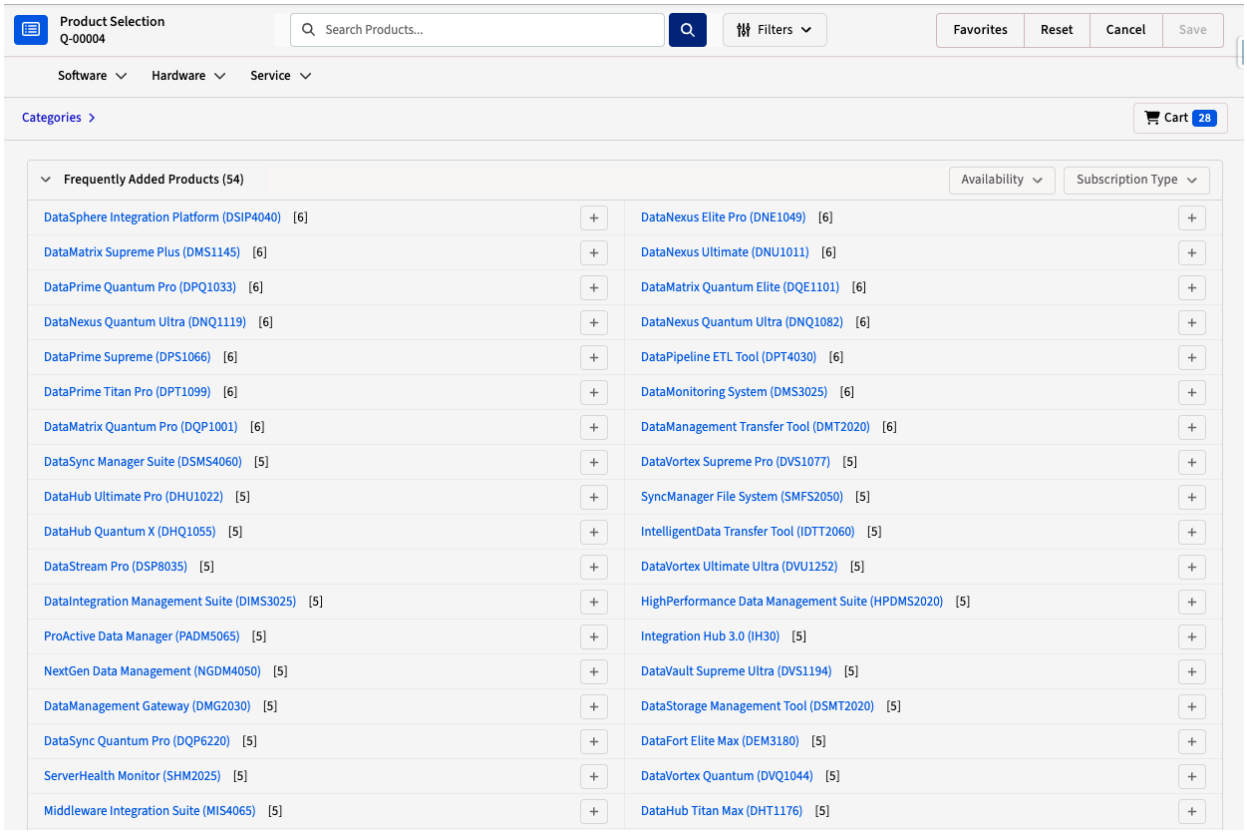


Frequently Added Products

The Frequently Added Products section displays products that have been added to quote multiple times in the whole organization. This feature helps users quickly identify and access popular products based on historical usage.

Each product is listed with its name, product code, and a count indicating how many times it has been frequently added. Users can add products to their quote by clicking the + button next to each product.

Additionally, this section includes product filters allowing users to refine the product list based on their specific requirements. These filters enhance the user experience by enabling efficient product selection.

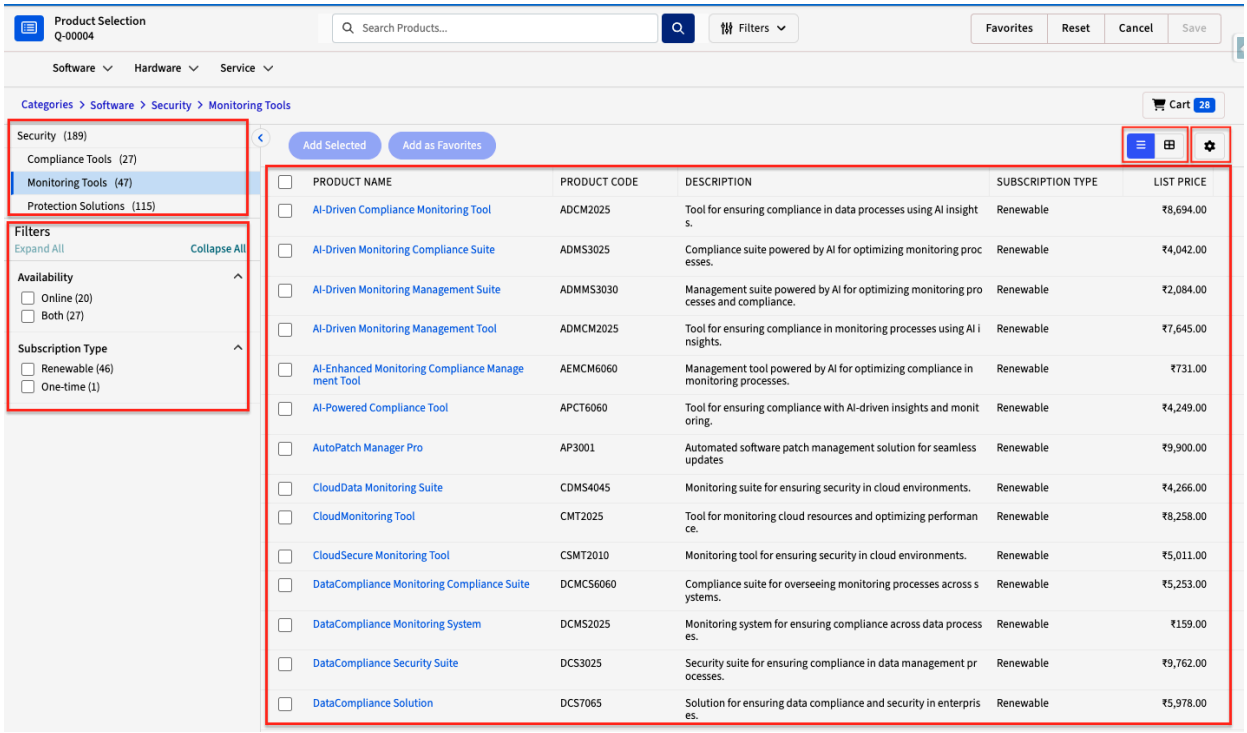


Product List Layout and Column Configuration

The left pane of the user interface displays a list of categories with products. The Refine Filters below the category list allows users to refine product lists. These filters are dynamically adjusted based on the selected category, ensuring only relevant filter options are presented.

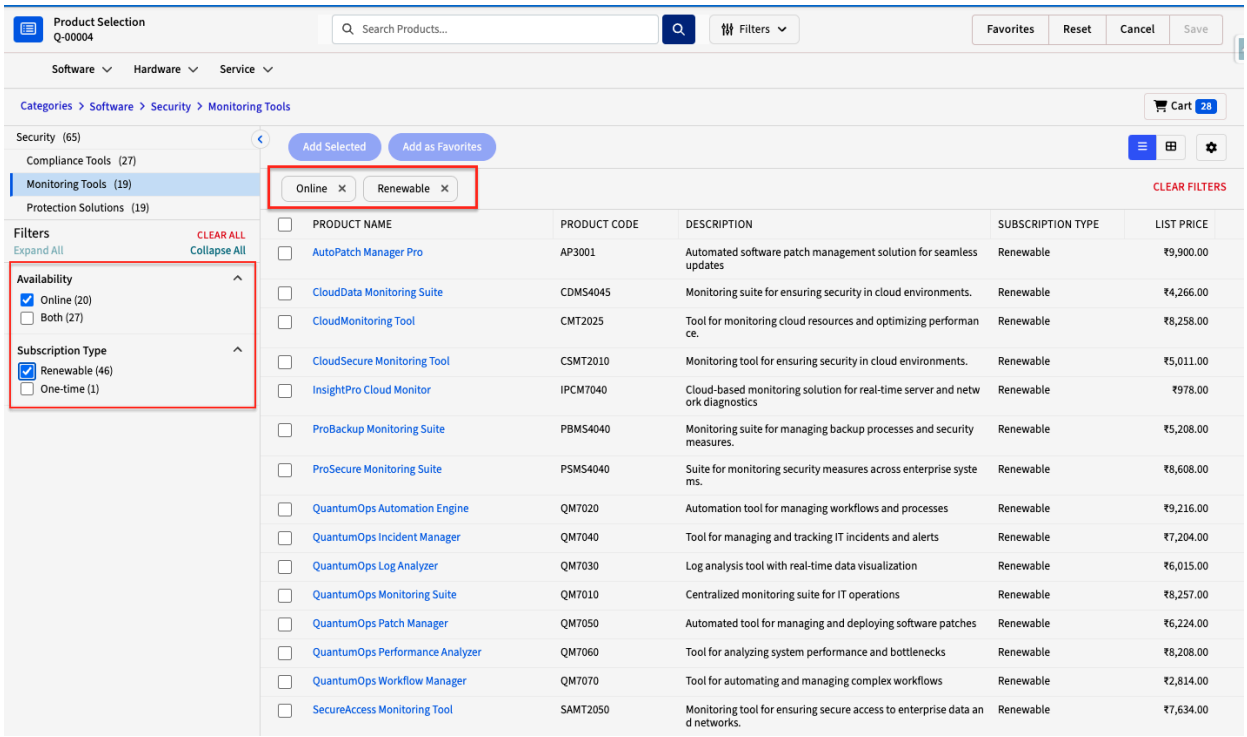
For example, within a Monitoring Tools category, you might find filters for Availability and Subscription Type. The Availability filter, offering options like Online, Offline, and Both, will only display values that have associated products within the current category. In this instance, if no Offline products exist, that option will be hidden, while Online and Both will be visible, each showing the corresponding product count.

Similarly, the Subscription Type filter might offer Renewable and One-time options. Users can apply combinations of these filters to precisely narrow down the product list. For example, selecting Online from the Availability filter and Renewable from the Subscription Type filter will display only monitoring tools that are renewable. This allows for quick and efficient product selection based on specific criteria.



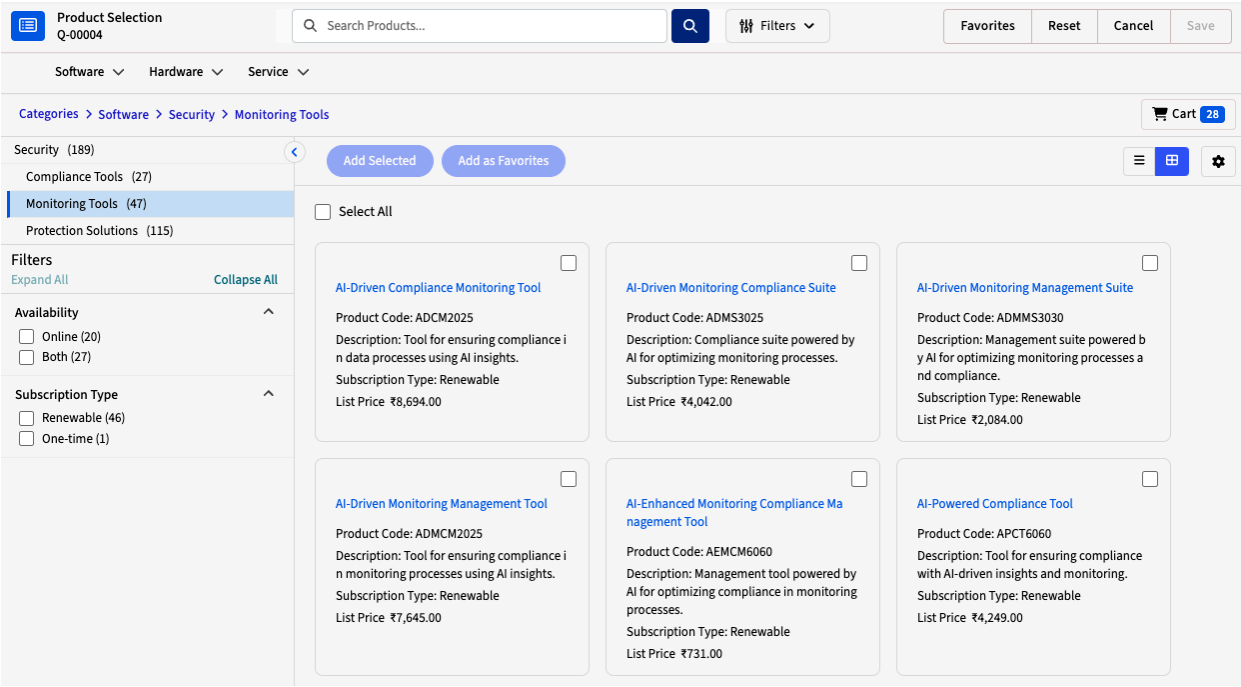
Once a filter is selected, the filter criteria appears at the top of the product list, making it easy to view the applied filters. The product list updates dynamically based on the selected filters, displaying only relevant products. If a user clears any filter, the product list is refreshed with remaining filter criteria. The CLEAR FILTERS and CLEAR ALL options provide a quick way to remove all active filters and reset the product list.

The right side of the user interface displays products under specific categories or product search terms. Categories with products are considered leaf categories, and all products under them are shown dynamically in the table. The displayed product fields are dynamic. The list is defined in a field set named Catalog Product List Fields. The Field Set is configured by the administrator. Users can refine the field set by hiding and resequencing for their own view.



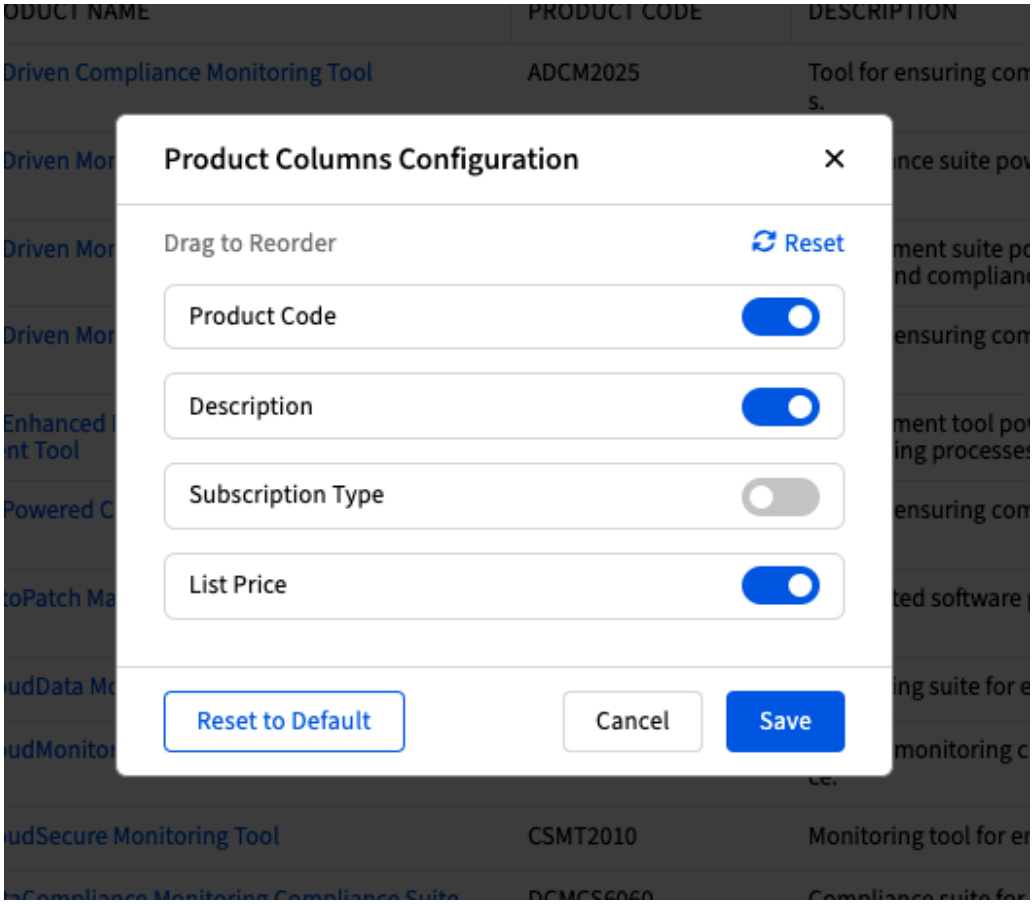
Product List as Grid Layout

The list view can be switched to grid view by using the grid icon. The tile in a grid view displays product fields based on the field set for Catalog Product List Fields, which users can change for their convenience.



Product List Field Configuration

Column configuration allows users to customize the table layout. Users can hide or adjust the width of any column, and these settings apply only to the specific user, ensuring a personalized view without affecting others. By clicking the settings icon, a pop-up opens where users can hide or reset column configurations as needed.



The Column Configuration pop-up appears when a user clicks the settings icon on the right side of the product table. This pop-up allows users to customize their table view by:

1. Hiding or showing specific columns using toggle switches.
2. Reordering columns by dragging them into a preferred order.
3. Resetting the configuration back to the default setup using the Reset to Default button.

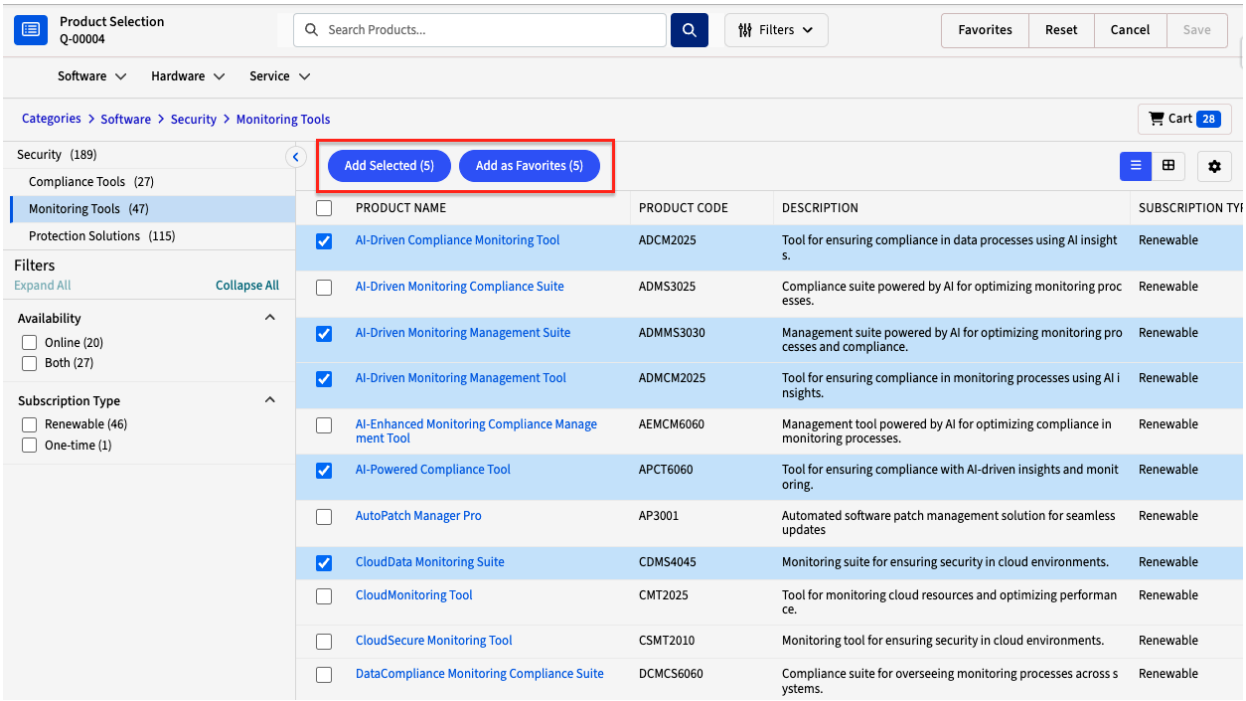
Any changes made to column visibility, order, or width are User-specific and do not affect other users. Once the desired adjustments are made, clicking Save applies the changes, while Cancel discards them.

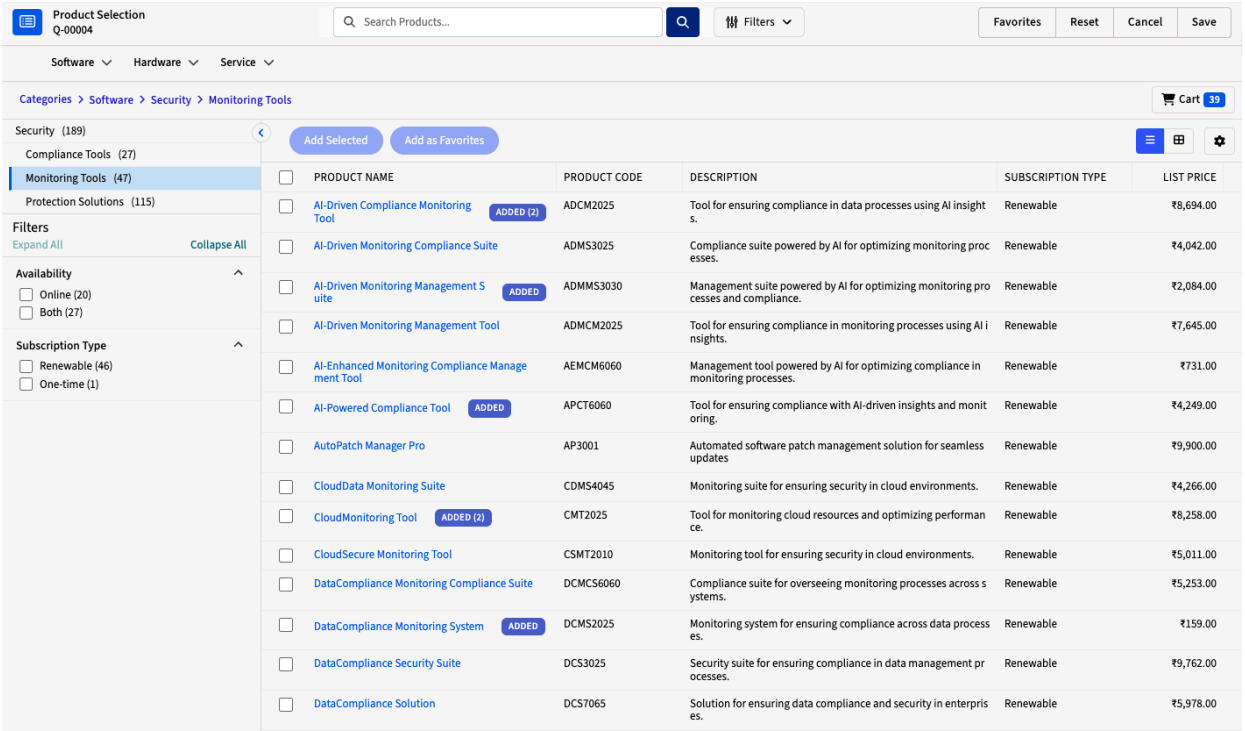
Product Selection

To add products to the Quote, users can select them by clicking on the checkboxes next to the product names. To select multiple products or all at once the checkbox in the column header can be used. Once products are selected, the count will appear next to the Add Selected and Add as Favorites button. The Add Selected action adds the products to the Mini Cart, where they are listed under the New Lines tab.

The Save button on the top right corner of the screen becomes active when products are in the Mini Cart. The Save button is used to finalize the addition of products to the Quote.

The Add as Favorites button is used to add products to the favorites list. This button displays a pop-up where users can create a new folder or select an existing folder to store the selected products as favorites.

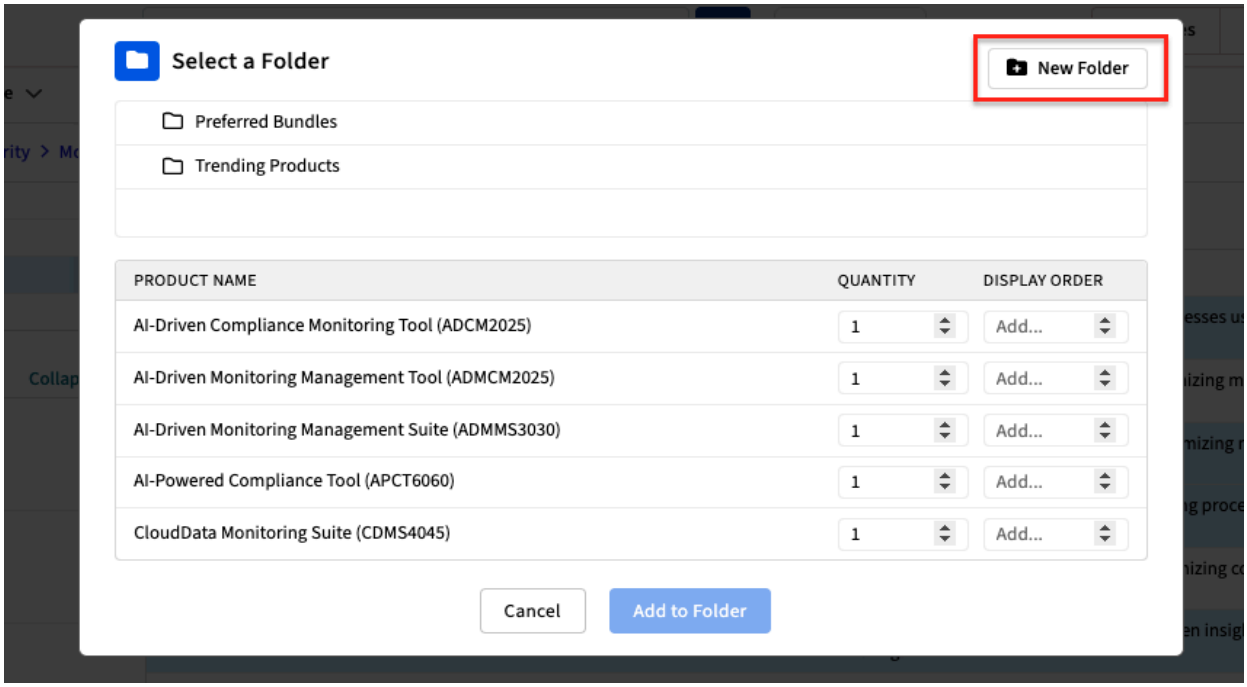




Favorites Feature

The Selegic Product Catalog has a rich favorite folder feature. Users can create favorite folders for their own use or share with others as a global folder. Sales Ops can manage global folders to be displayed as home screen products.

The Add as Favorites button displays the following popup screen. Users can create a new folder or select an existing folder. All the selected products are displayed in the lower section of the interface, showing details like product name, quantity, and display order. Users can adjust the quantity of each product and modify the display order before adding them to the folder. The Add to Folder button remains inactive until a folder is selected; once a folder is chosen, the button becomes active. Clicking on the Add to Folder button saves all selected products into the chosen folder as favorite items.



Favorites Folder Management

You can edit any folder by clicking on the pencil (edit) icon and update its details as needed.

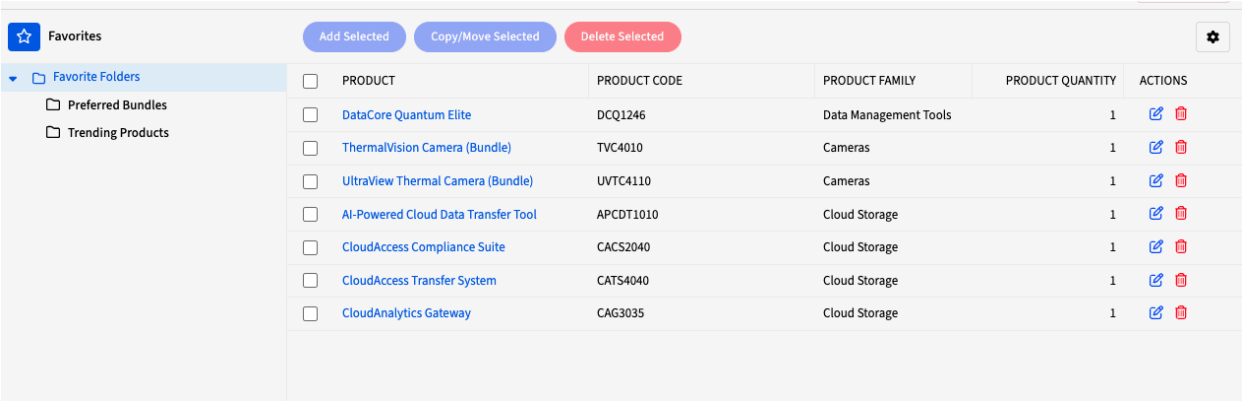
A folder can be set as visible on the home screen by selecting the Show in Home Screen checkbox. This feature helps users organize mostly used products efficiently, making it easier to access them when needed.

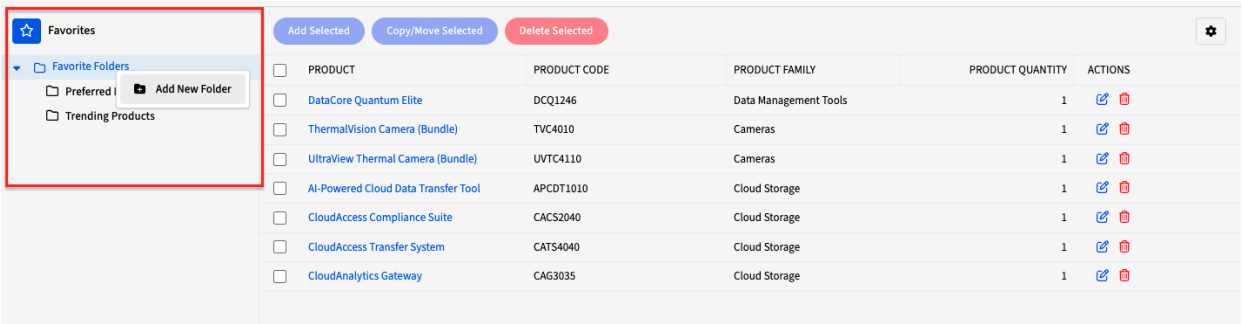
To access this Favorites UI, click on the Favorite button at the top. This will display all the favorite folders along with their Favorite Items.

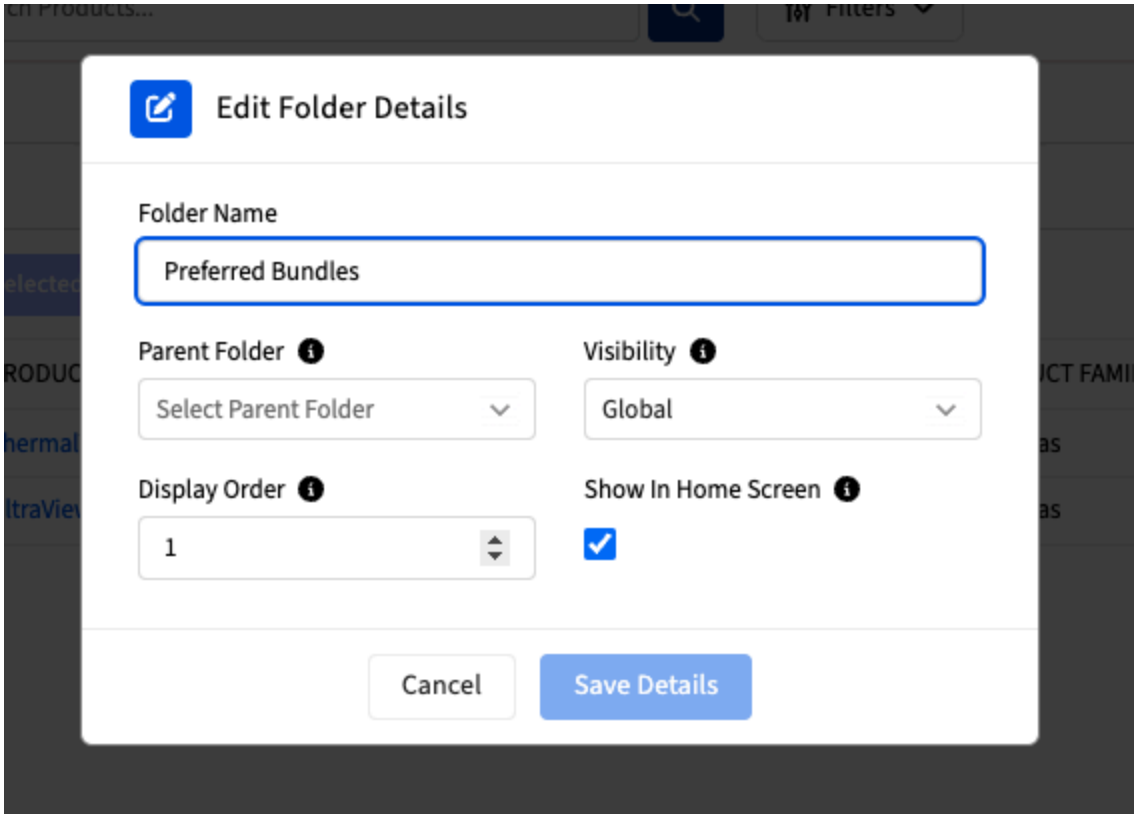
You can add a new folder by right-clicking on the favorite folders section. A small pop-up interface will appear with an option to create a new folder. It is possible to create nested folders (parent-child relationship), allowing better structure of favorite items. Right-clicking on any folder provides options to edit and delete the folder, such as changing its parent folder or renaming it.

The Visibility field on a favorite folder determines its access level, with two options: Private and Global. Folders marked Private are accessible only to the user who created them. If a user does not have the SelegicCatalogAdminUser custom permission, they will only be able to create private folders. Folders marked Global are visible to all users within the organization. Global option is

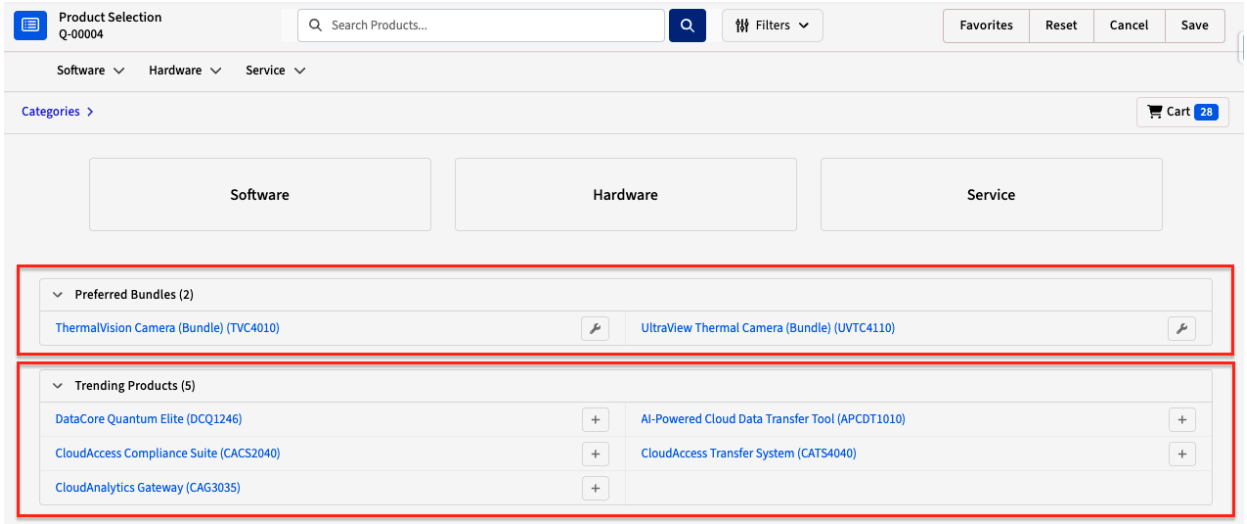
exclusively available to users who have been assigned the SelegicCatalogAdminUser custom permission.



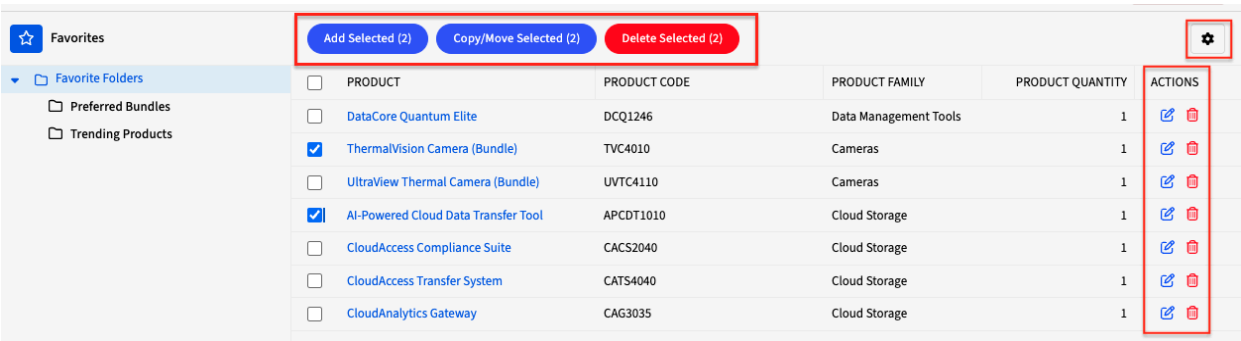




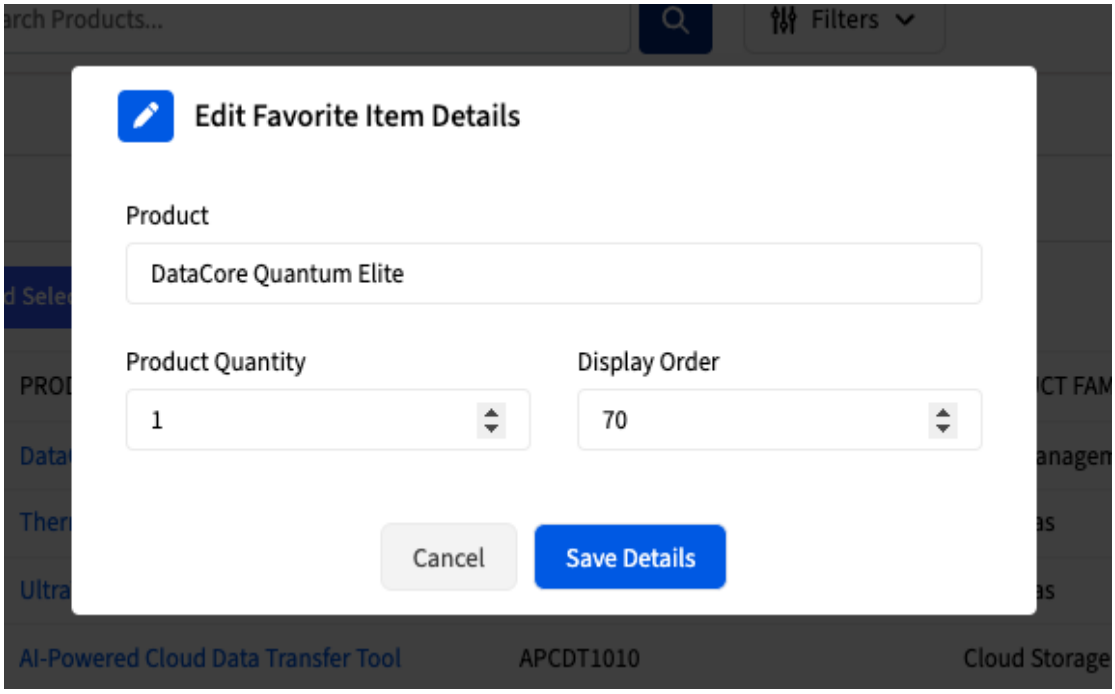
To make a folder readily available on the home screen UI, simply activate the ShowInHomeScreen field for that specific folder. Once enabled, the folder will appear on the home screen, providing quick access for all users within your organization.



Favorite Items can be easily managed through copy and move operations between folders, providing flexible organizational control. Individual Favorite Items can also be deleted when no longer needed. **Please note: Deleted Favorite Items cannot be recovered.** To prevent accidental data loss, a warning modal will appear each time you attempt to delete an item, confirming your action.



Favorite Items are fully editable, allowing users to modify the associated product, quantity, or display order to meet specific requirements.



The Favorite Items table utilizes a dynamic column structure defined by the 'Favorite Item List Fields' Field Set. As illustrated, the layout currently displays fields such as Product Code, Product Family, and Product Quantity.

The Selegic Product Catalog streamlines product selection and quoting within Salesforce CPQ. By leveraging features such as dynamic field sets, category hierarchies, and customizable product filters, users can quickly locate and add products to quotes, ensuring accuracy and efficiency. The ability to personalize column configurations and manage favorite items further enhances productivity and user satisfaction. We encourage you to explore these tools to optimize your workflow and achieve successful outcomes.