



Ad Sales-In-A-Box

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Table of Contents

1.	Introduction -----	3
2.	Installing & Configuring Ad Sales-In-A-Box -----	3
	a. Ad Sales-In-A-Box Installation Steps: -----	3
	b. Post Installation Steps of Ad Sales-In-A-Box -----	3
	c. View Mode Definition -----	4
3.	Add Products -----	7
	Method 1: Traditional Page Layouts (Most Common) -----	7
	Method 2: Dynamic Actions (Lightning App Builder) -----	7
4.	Line Item View -----	9
	Step 1: Navigate to the Lightning Page -----	9
	Step 2: Activate the Page -----	9
	Step 3: Review and Save -----	9

1. Introduction

Streamline your advertising operations with **Ad Sales-In-A-Box**, the ultimate solution designed to empower sellers across diverse media landscapes. By providing a **converged view** for multiple media types, our platform eliminates silos and simplifies complex selling processes. Whether you are managing print, digital, or broadcast, you can easily **customise unique views** with specific fields tailored to your business needs, ensuring your team always has the right data at their fingertips to close deals faster.

2. Installing & Configuring Ad Sales-In-A-Box

a. Ad Sales-In-A-Box Installation Steps:

The following are the instructions for deploying the **Ad Sales-In-A-Box** package to your Salesforce Org. Please follow the steps and complete the configuration for seamless installation. Adhering to these steps ensures a seamless installation and proper configuration of all components.

1. Log in to the target Salesforce Org.
*(Note: To prevent session conflicts or installation errors, ensure no other Salesforce Orgs are open in the same browser session. Please ensure the **System Administrator** profile is used for installation.*
2. Open a fresh tab in the same browser window. This is for using the installation link.
3. Copy and paste the package installation link into the newly opened browser tab and initiate the download and deployment process.
4. Once prompted, enter the credentials for the target Org to authenticate the **Ad Sales-In-A-Box** installation.
5. You will be directed to the **Ad Sales-In-A-Box** installation page. Verify the package name and version number are accurate before proceeding.
6. Choose your User Base (e.g., Install for All Users).
7. Select "Acknowledgement" and click the "Install" button.
8. Once the installation process is completed, you will receive an email from Salesforce.

b. Post Installation Steps of Ad Sales-In-A-Box

With **Ad Sales-In-A-Box** successfully installed, the next step is to configure core components to align with your business requirements. To verify the deployment, navigate to **Object Manager** in the Salesforce Setup menu and confirm that the following base package objects are visible:

1. **Grid Administration** - This object serves as the core orchestrator of the 'One View' architecture. It enables administrators to define and manage distinct view modes tailored to specific media types, ensuring that display layouts and behaviors align with unique business needs.

2. **Grid Parameters** - This object manages the specific configurations for the grid's display logic. As child records of the Grid Administration, these parameters enable highly flexible layouts, including the definition of Line-Item Badges, field visibility, and localised labelling for different media types.

c. View Mode Definition

View Modes within the Line Item View are designed to showcase products by mapping predefined fields in **Grid Administration** records to specific product characteristics. This alignment ensures a presentation tailored to each product's nature, significantly enhancing both the user experience and data management efficiency.

To customise the UI, users can select specific fields, adjust column widths, and define the display sequence—all within their chosen View Mode. Users can toggle between these layouts using the labelled dropdown menu. To establish a new View Mode, a corresponding record must be created in **Grid Administration**, as detailed in the following section.

View Mode Setup

To set up a new View Mode, search for **Grid Administration** in the App Launcher. Click **New** to create a record and enter the configuration details for your specific view mode.

1. Basic Configuration Details:

- Record Type: Select record type as 'Line Item Display'.
- Grid Administration Name: Enter a unique name for this view mode configuration.
- Grid Administration Label: Define a label that will be displayed in the View Mode user interface (UI).
- Sequence: Specify the sequence number to control the order of view modes in the UI. If no sequence is set, this view mode will appear last after other configured view modes.

Grid Administration records can be configured as shown in the image below.

Grid Administration

All

New

Imp

5 items • Sorted by Grid Administration Name • Updated a few seconds ago

☐	Grid Administration Name ↑	Grid Administration Label	Record Type	Sequence	
1	☐ Digital	Digital View	Line Item Display	10	
2	☐ Linear	Linear View	Line Item Display	20	
3	☐ OOH	OOH View	Line Item Display	40	
4	☐ Print	Print View	Line Item Display	30	
5	☐ QuoteLineitemView	QLI View	Line Item Display	5	

2. Configuring Grid Parameters:

After creating the record, navigate to the Related tab (located next to the Details tab). Click New in this section to open a pop-up for configuring grid parameters. Here, you will set up details such as:

- **Parameter Name:** A picklist in which values will be used to indicate which field to query, which to display and so on.

The following picklist values are available:

- ContextObject: To specify the object from which field metadata is to be drawn.
- CartContext: Used to filter view modes based on the sObject.
- LIField1- LIField20: Used to query fields directly from the context object

- **Parameter Type:** Defines the role or behaviour of the corresponding parameter, such as line-level, object-level, total display, badge, etc.

The following picklist values are available:

- Object Level: Specifies the Parameter Value to identify the context.
- Line Level: Specifies the fields to be displayed as line-level information in the line item view
- Line Level Badge: Defines the line-level fields to be displayed as badges within the Line Item View. This configuration highlights key information—such as **Product Family**—by rendering field values in a high-visibility badge format, ensuring essential data is immediately identifiable for the user.
- SelectedAttributes: Specifies which field holds the attribute definition in JSON format
- LineHierarchy: Specifies which field holds the hierarchy information of line items.

- **Parameter Value:** The actual API field or expression from the source object that supplies the data
- **Attribute1:** An additional configuration value used to control display or behaviour. In Line Item View, it typically defines the label of the fields queried to show in the line item view
- **Attribute2:** A secondary supporting configuration used for extended behaviour, UI handling, or feature-specific logic. In Line Item View, it typically defines the display sequence of the fields queried to show in the line item view. A field without a display sequence is not shown in the line item view
- **Default Value:** The value that is used automatically when no explicit value is provided. In Line Item View, it typically defines the width of the fields needs to be shown in the line item view.

The following **Grid Parameter** records have been defined for the '**Print**' Grid Administration.


[Grid Administration > Print](#)

Grid Parameters

13 items • Sorted by Parameter Name • Updated a few seconds ago

⚙️

	☐ Name ▾	Parameter Name ↑ ▾	Parameter Type ▾	ParameterValue ▾	Attribute1 ▾	Attribute2 ▾	Default Value ▾
1	☐ GP-0066	ContextObject	Object Level	QuoteLineItem			
2	☐ GP-0067	CartContext	Object Level	Quote			
3	☐ GP-0068	LIField1	SelectedAttributes	crma_appx__AttributeSelectedValues__c			
4	☐ GP-0069	LIField2	LineHierarchy	crma_appx__LineHierarchy__c			
5	☐ GP-0070	LIField3	Line Level	crma_appx__LineitemGroup__c			
6	☐ GP-0071	LIField4	Line Level	crma_appx__LineitemGroup__r.Name			
7	☐ GP-0072	LIField5	Line Level Badge	Product2.Family			
8	☐ GP-0073	LIField6	Line Level	crma_appx__Offer__c	Offer	10	200
9	☐ GP-0074	LIField7	Line Level	crma_appx__Edition__c	Edition	20	
10	☐ GP-0075	LIField8	Line Level	Quantity	Quantity	30	
11	☐ GP-0076	LIField9	Line Level	ListPrice	List Price	40	
12	☐ GP-0077	LIField10	Line Level	crma_appx__Section_Placement__c	Section / Placement	25	
13	☐ GP-0078	LIField11	Line Level	crma_appx__Color_Profile__c	Color Profile	28	

3. Add Products

The package includes a Lightning action button called "Add Products." We need to expose this button before we can begin adding products. Follow the steps to do so.

Method 1: Traditional Page Layouts (Most Common)

If the org is still using standard page layouts to control the buttons in the header, follow these steps:

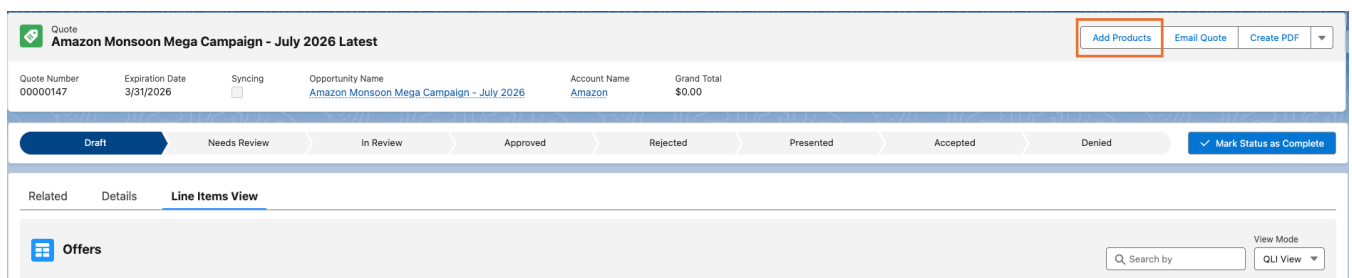
1. Go to **Setup > Object Manager**.
2. Search for and select the **Quote** object.
3. Click **Page Layouts** in the left sidebar and select the layout you want to update (e.g., *Quote Layout*).
4. In the palette at the top, click on **Mobile & Lightning Actions**.
5. Locate your packaged custom action "Add Products".
6. Drag the action down into the **Salesforce Mobile and Lightning Experience Actions** section. *(Note: If you see a link that says "override the predefined actions," you must click that first before you can drop the button in).*
7. Click **Save**.

Method 2: Dynamic Actions (Lightning App Builder)

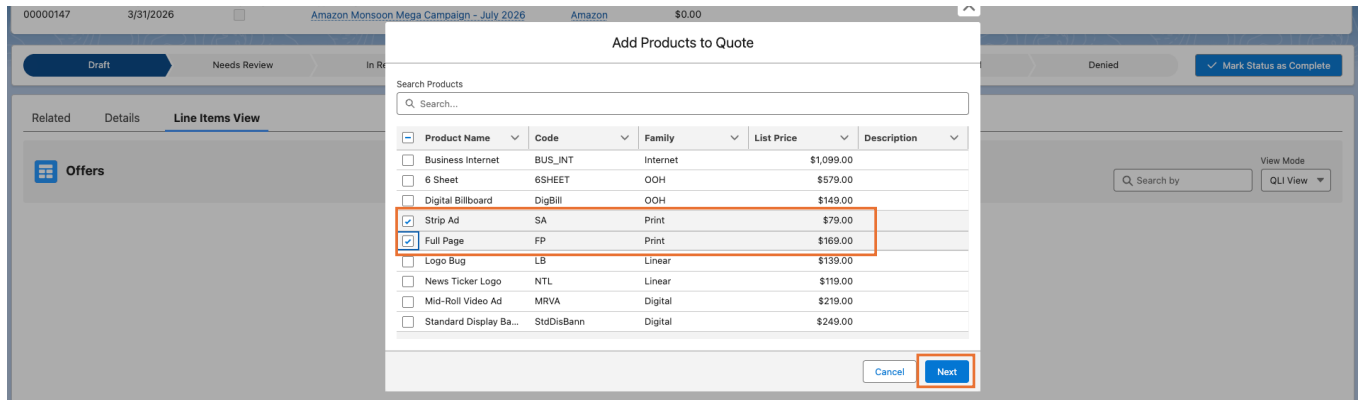
If the org has upgraded their Quote Lightning Record Page to use "Dynamic Actions," modifying the Page Layout won't work. The buttons are controlled directly within the App Builder.

1. Navigate to a Quote record in the actual Salesforce app.
2. Click the **Gear Icon** in the top right and select **Edit Page**. (This opens the Lightning App Builder).
3. Click directly on the **Highlights Panel** at the top of the canvas (where the buttons usually live).
4. In the right-hand properties pane, look for the **Actions** section.
5. Click **Add Action**.
6. Search for your packaged custom action "Add Products", select it, and click **Done**.
7. Click **Save** in the top right corner.

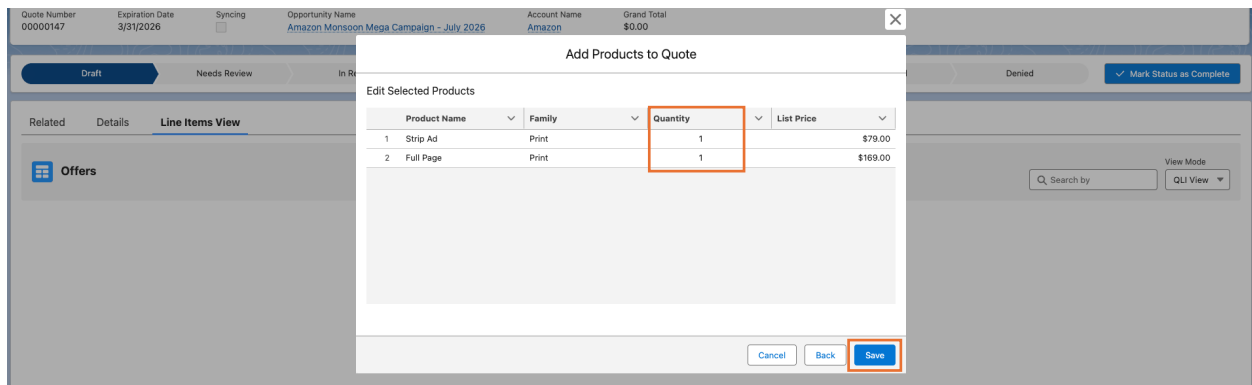
At the header of a Quote, we have just exposed a button called "Add Products". Clicking this button will launch a pop-up of products catalog.



From here, we can choose multiple products to be added at once. Click next to configure the selected items.



We can configure the quantity to the desired value. The default value will be "1". Click "Save" so that the products get added and they are reflected in the Line Items View tab.



4. Line Item View

A Lightning Record Page configured for Line-Item View is bundled with the package. We need to activate that to start using them. Follow the steps to do so.

Step 1: Navigate to the Lightning Page

1. Click the **Gear Icon** in the top right corner and select **Setup**.
2. Click on the **Object Manager** tab.
3. Search for and select the object the page is built for (e.g., **Quote**).
4. In the left-hand menu, click **Lightning Record Pages**.
5. Click the name of the custom page that came with your managed package.
6. Click the **Edit** button to open the page in the Lightning App Builder.

Step 2: Activate the Page

1. In the upper-right corner of the Lightning App Builder, click the **Activation...** button.
2. A modal window will appear with three tabs for assignment options. The admin must choose the level of access that best fits their org:
 - **Org Default:** Makes this page the default for all users in the organization viewing this object. *(Note: Advise admins to use this cautiously if they already have a highly customized Quote page).*
 - **App Default:** Assigns the page as the default only when users are working within a specific Lightning App (e.g., your custom "Ad Sales" App, if you packaged one).
 - **App, Record Type, and Profile:** The most granular option. This allows the admin to assign the page to specific user profiles (e.g., Sales Reps), specific record types, and specific apps. This is usually the safest and most common choice for deploying managed package features.

Step 3: Review and Save

1. After selecting the appropriate assignment level, follow the prompts to choose the specific Apps, Record Types, or Profiles.
2. Click **Next** to review the assignments.
3. Click **Save** on the activation modal.
4. Click **Save** again in the top right corner of the Lightning App Builder.
5. Click the **Back** (arrow) button to exit the App Builder.

The **Line-Item View** offers a streamlined, 'One View' interface for managing cart items. It provides a superior user experience by consolidating item names, quantities, service accounts, financial metrics, etc., into a single, intuitive view. Designed for high-volume operations, **Ad Sales-In-A-Box** ensures total scalability while allowing for metadata-driven layouts via the Line-Item View Admin.

Sample Line-Item view with different view modes defined, shown with images as follows.

Related

Details

Line Items View

Offers (7)

View Mode

QLI View

Q Search by

No group				
Offer	Line Number	Quantity	List Price	OOH
Digital Billboard	00000272	1	149	< >
Offer	Line Number	Quantity	List Price	Print
Full Page	00000269	1	169	< >
Offer	Line Number	Quantity	List Price	Print
Full Page	00000271	4	169	< >
Offer	Line Number	Quantity	List Price	Linear
Logo Bug	00000273	1	139	< >
Offer	Line Number	Quantity	List Price	Linear
News Ticker Logo	00000274	1	119	< >

Fig 1: Line Item View with some line items in a Quote

Related

Details

Line Items View

Offers (7)

View Mode

QLI View

✓ QLI View

Digital View

Linear View

Print View

OOH View

Search by

No group			
Offer Digital Billboard	Line Number 00000272	Quantity 1	List Price 149
Offer Full Page	Line Number 00000269	Quantity 1	List Price 169
Offer Full Page	Line Number 00000271	Quantity 4	List Price 169
Offer Logo Bug	Line Number 00000273	Quantity 1	List Price 139
Offer News Ticker Logo	Line Number 00000274	Quantity 1	List Price 119

Fig 2: Different view modes available for selection

Related
Details
Line Items View

Offers (7)

View Mode

Search by

Print View

No group						
Offer Digital Billboard	Edition --	Section / Placement --	Color Profile --	Quantity 1	List Price 149	OOH
Offer Full Page	Edition Mumbai	Section / Placement C1 (Front Cover)	Color Profile CMYK	Quantity 1	List Price 169	Print
Offer Full Page	Edition Hyderabad	Section / Placement C4 (Back Cover)	Color Profile CMYK	Quantity 4	List Price 169	Print
Offer Logo Bug	Edition --	Section / Placement --	Color Profile --	Quantity 1	List Price 139	Linear
Offer News Ticker Logo	Edition	Section / Placement	Color Profile	Quantity 1	List Price 110	Linear

Fig 3: Line Item view changes when Selected View Mode changes to “Print View”