

Using Easy Sort in Salesforce Classic

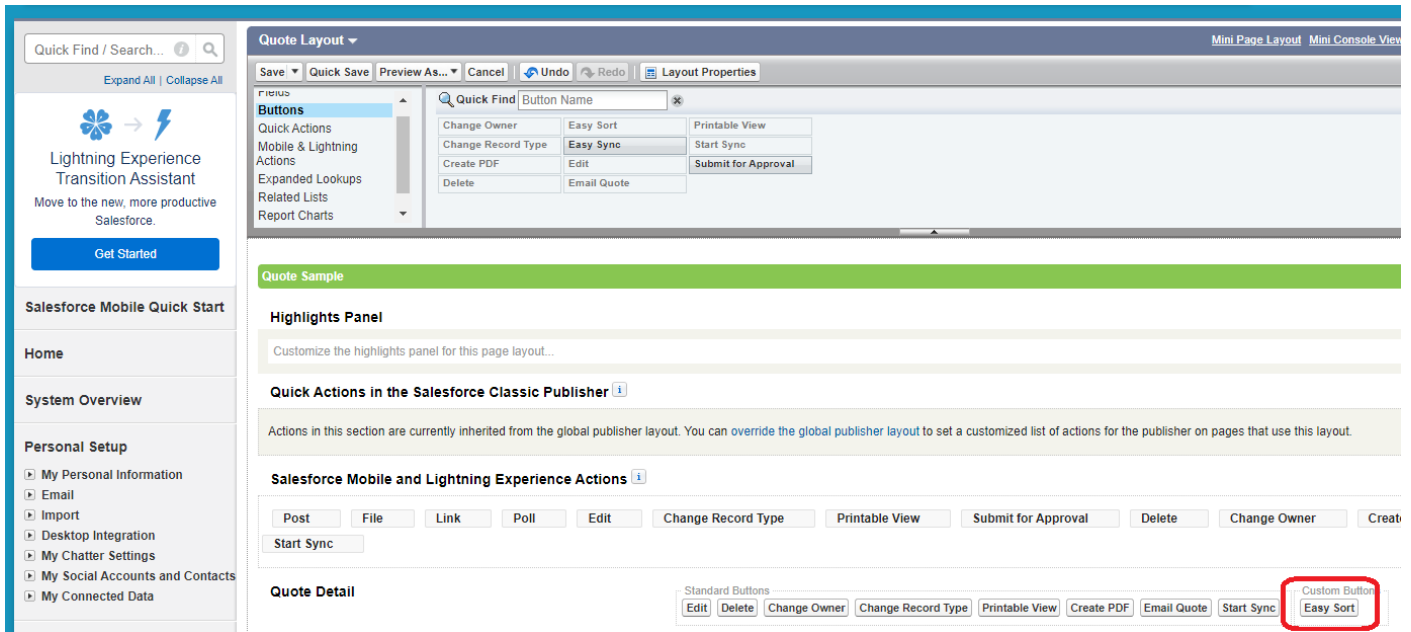
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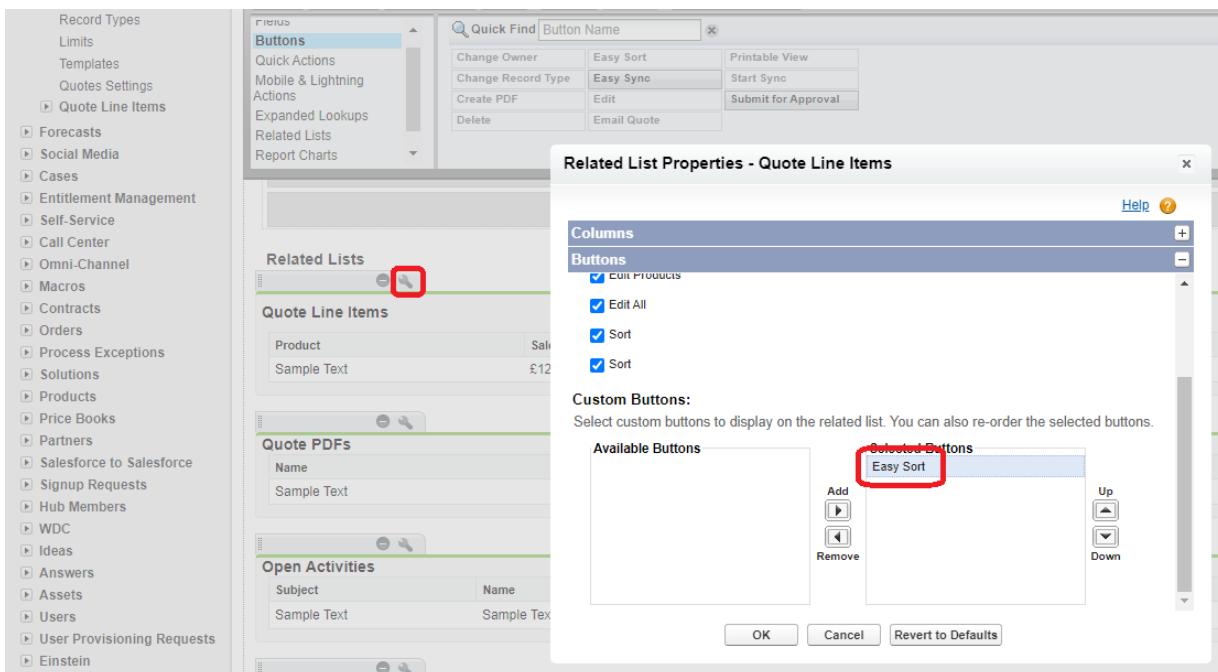
Adding Button to Quote or Opportunity Page Layout

There is a 'Button' labelled [Easy Sort] which can be added to the Opportunity Page Layout or Quote Page Layout as a Custom Button. When clicked, the Button will open the screen that is used to sort Opportunity Products or Quote Line Items.



Adding Button above Quote Line Item Related List

Click on the Spanner icon in the Related Lists tab on the Quote page layout. Then on the pop-up screen add the [Easy Sort] button to the Selected Buttons list (see below) and click [OK].

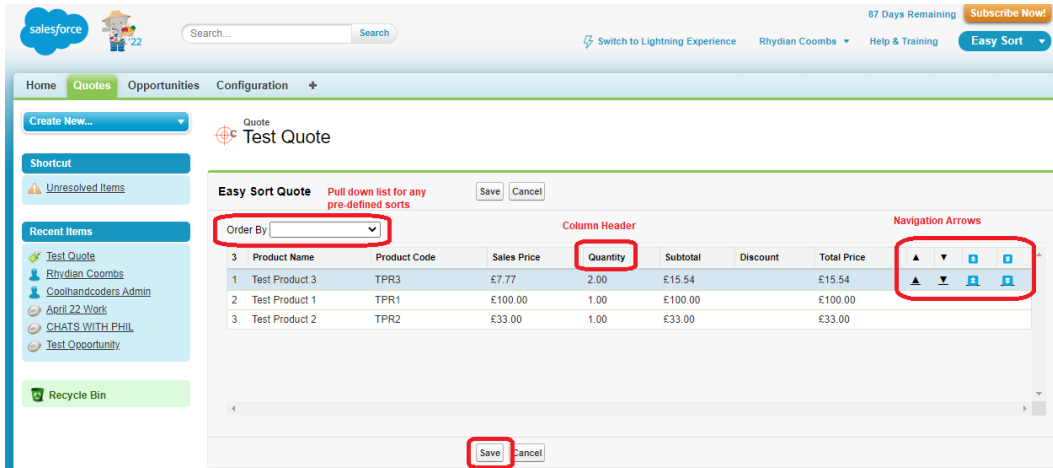


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Using the App

Sorting Quote line items or Opportunity Products using a list

If the App is configured to allow custom sorting (*tick [Allow Custom Sorting] on the [Quote] or [Opportunity] tabs on the [Configuration] tab*), then the following screen will appear when the [Easy Sort] button is clicked. NB: Using a Quote as an example...



The Navigation arrows can be used to move line items up and down to the desired order. Clicking on a column header will order the list by that column in ascending order and then descending if clicked again.

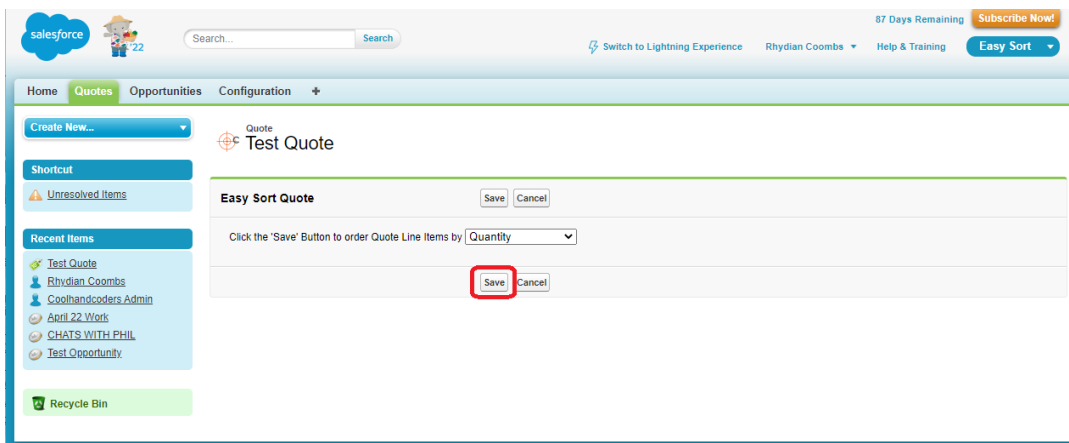
If there are any pre-defined sorts, then they can be chosen from the 'Order By' pull down list and used to sort the list.

Clicking the [Save] button will save the sort.

Sorting Quote line items or Opportunity Products using a pre-defined sort

If the App is *not* configured to allow custom sorting (*untick [Allow Custom Sorting] on the [Quote] or [Opportunity] tabs on the [Configuration] tab*), then the following screen will appear.

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



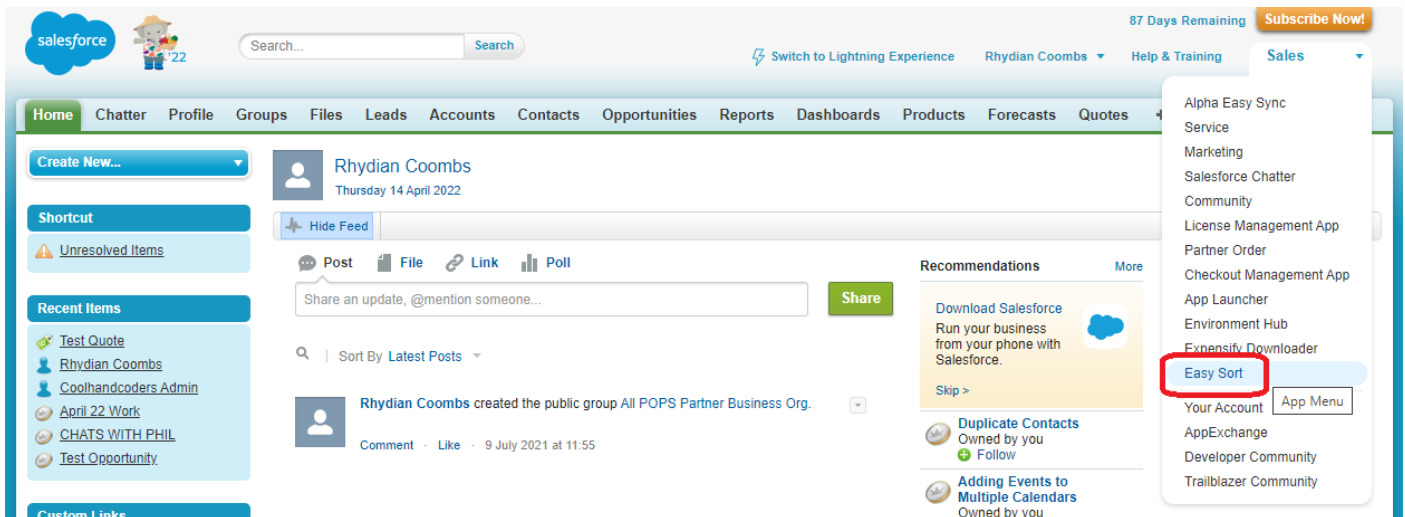
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App Configuration

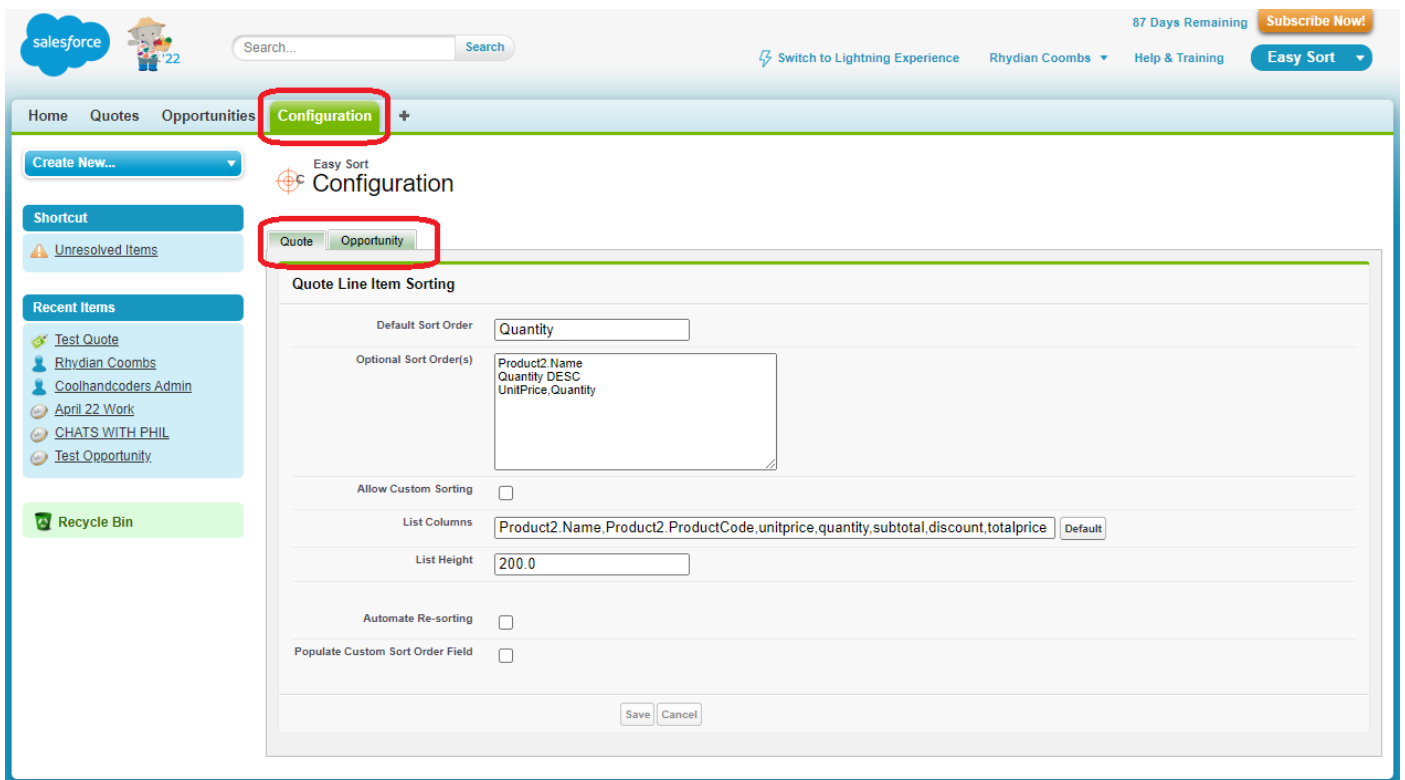
Overview

Use the Configuration page 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.

Navigate to the 'Easy Sort' App.



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



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From here, you can edit and save the App settings. Select the [Quote] Tab to edit the Configuration settings for Quote Line Item sorting. Select the [Opportunity] Tab to edit the Configuration settings for Opportunity 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 or Opportunity Products to sort by.

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

Here are some examples:

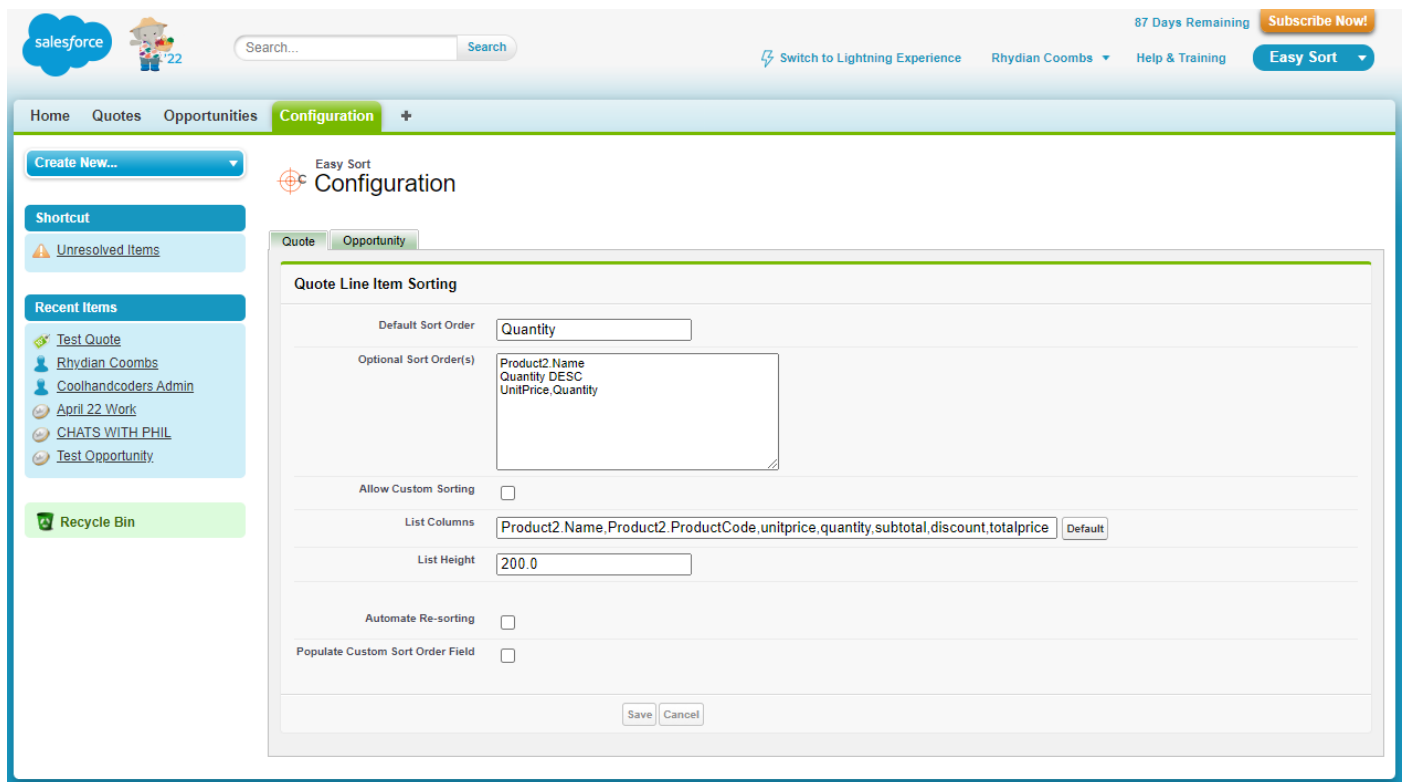
"I want to sort by Line Item Description". Enter 'Description'.

"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...



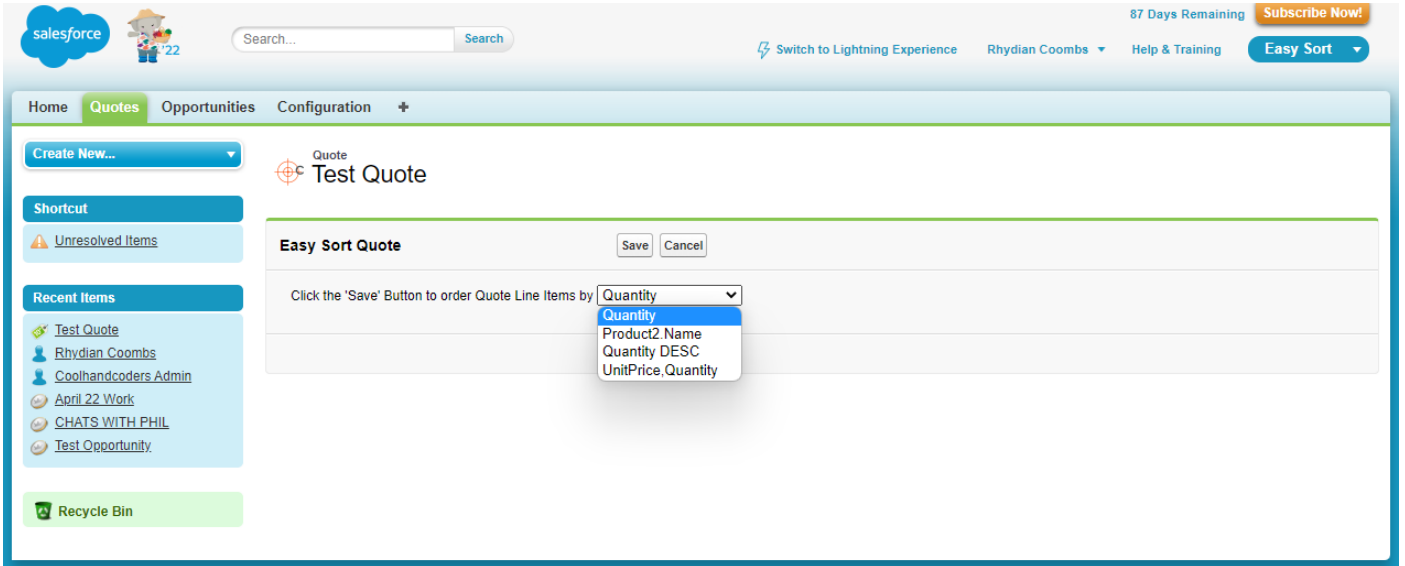
The screenshot shows the Salesforce Classic interface with the 'Easy Sort Configuration' modal open for 'Quote Line Item Sorting'. The 'Quote' tab is selected. The configuration includes:

- Default Sort Order:** A text input field containing 'Quantity'.
- Optional Sort Order(s):** A text area containing 'Product2.Name', 'Quantity DESC', and 'UnitPrice,Quantity'.
- Allow Custom Sorting:** An unchecked checkbox.
- List Columns:** A text input field containing 'Product2.Name,Product2.ProductCode,unitprice,quantity,subtotal,discount,totalprice' and a 'Default' button.
- List Height:** A text input field containing '200.0'.
- Automate Re-sorting:** An unchecked checkbox.
- Populate Custom Sort Order Field:** An unchecked checkbox.
- Buttons:** 'Save' and 'Cancel' buttons at the bottom.

The left sidebar shows the 'Configuration' tab selected, and the top navigation bar includes 'Home', 'Quotes', 'Opportunities', and 'Configuration'.

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Will appear as follows on the Easy Sort Quote screen

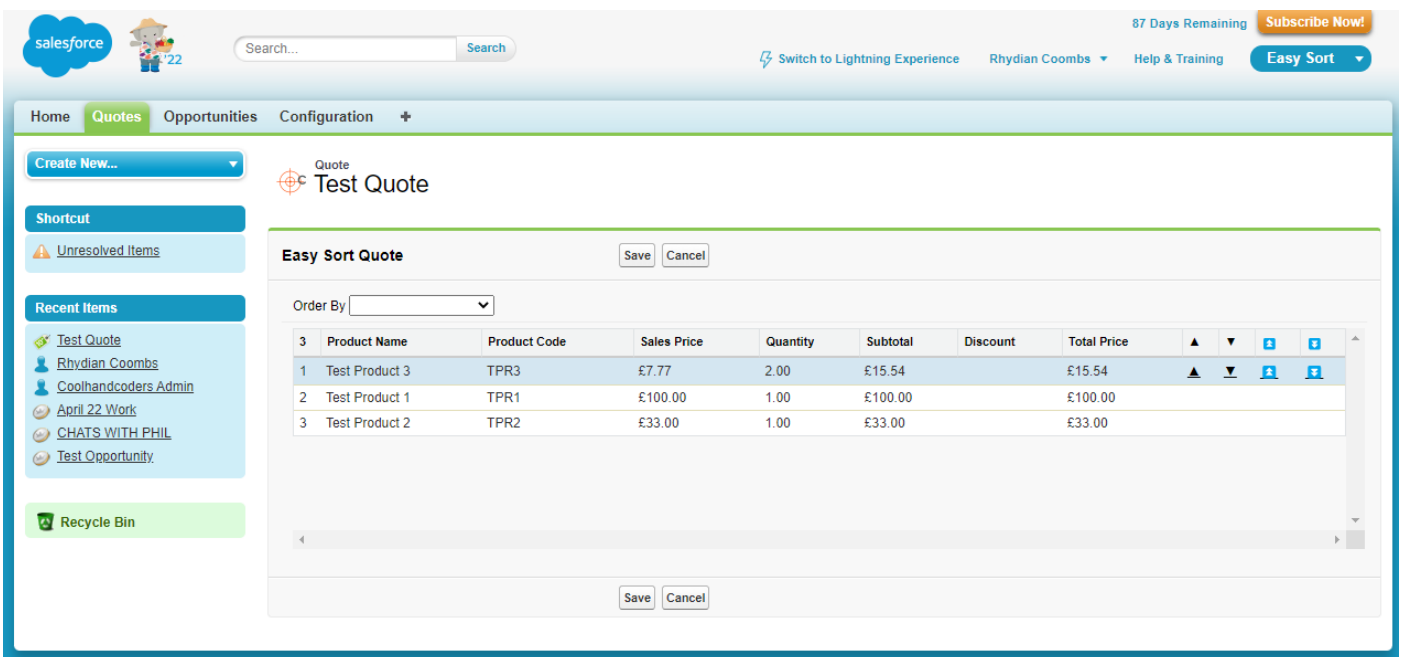


Allow Custom Sorting

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

When this option is ticked, the Sort screen appears as below. Users can then use the navigation arrows to move Line Items up and down the list to the desired sort order.

NB: If any Default or Optional Sort Orders exist, then they can be selected from the 'Order By' pull down list and used to sort the list.



	Product Name	Product Code	Sales Price	Quantity	Subtotal	Discount	Total Price				
3	Test Product 3	TPR3	£7.77	2.00	£15.54		£15.54	▲	▼	ⓘ	ⓘ
1	Test Product 1	TPR1	£100.00	1.00	£100.00		£100.00	▲	▼	ⓘ	ⓘ
2	Test Product 2	TPR2	£33.00	1.00	£33.00		£33.00				

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Custom List Columns

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

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

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

Custom List Height

The maximum height in pixels of the list. Vertical Scroll bars will appear if the content of the list is higher than this value. Set it to 0 if there should be no maximum height.

Automate Re-sorting

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] 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 (*NOT available on the Opportunity 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 Object and the mirroring would cause these to fire. If you do have triggers on the QuoteLineItem Object, just sort a Quote with this option ticked to check for any unexpected issues.

Problems

Insufficient Privileges

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

Insufficient Privileges

You do not have the level of access necessary to perform the operation you requested. Please contact the owner of the record or your administrator if access is necessary. For more information, see [Insufficient Privileges Errors](#).

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.

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

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

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

Error is in expression '{!if(pEasyQuoteSortSettings.CustomSortListHeight__c>0,'block','none')}' in component <apex:pageBlockSectionItem> in component aies:aicmp_easy_sort_quote

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.