

# Order Search for Order Management (OMS) Documentation

## Set Up and User Guide



**Create. Innovate. Educate.**

### Introduction

\* [Salesforce Labs](#) provides free, open source solutions to the AppExchange.

A well-rounded order searching component that can be configured to fit different requirements/use cases with simple and intuitive UI. Your service agent will no longer be frustrated finding customer orders while answering a phone call. A must have for any Org that with Order Management enabled.

#### System requirements:

Available for use in Enterprise, Unlimited, Force.com, Developer, and Performance Editions of Salesforce.

**Order Search for Order Management (OMS)** is a free solution designed to optimize the user experience with the following Salesforce Products, and thus requires

- Order Management

## Highlights

- **Smart Search** - to help agents locate order quickly and accurately
  - user don't need to select which criteria to search, AI decide for you,
  - can use quick keywords to overwrite the AI decision
  - use multiple criteria to narrow down search results
  - can use quick keywords to define the multi criteria logic, to satisfy "all criteria" or "any criteria"
  - "fuzzy search", some tolerance of typo or phone format or name variation
  - find all details in "Smart Search" section in this document
- **Configurable** - to help admin in different companies to config the component to fit their own needs
- **User defined Bulk Action** - admin can expand the capability of this component indefinitely based on their needs
  - and we provided two "boilerplate flows" as a start point for users to expand
- **Use it anywhere, any app** - core of the solution is a LWC component that can be used almost anywhere accepts LWC

## Installation Guide

Login with your trailhead email and navigate to our listing on Appexchange <link>

Select "Get it Now" from the listing and select the org you want to install it in from the drop down

1. Agree to the terms and conditions
2. **Select "Get it Now" from the listing and select the org you want to install it in from the drop down**
3. Agree to the terms and conditions
4. Once you have redirected to the Salesforce login page, input the credentials for the Salesforce org you wish to install the solution in
5. Select the profiles you wish to access the solutions (Admins Only, Everyone, or Specific Profile>)

## Set Up and Customization Guide

To use the component, just simply drag the "Order Search" component to any page you like. You can even put on utility bar if you want so you can have quick access from any page. We do suggest to create an individual app page for order search so you can have a full page of spaces for your search box and results though.

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The screenshot displays the 'Advanced Order Search' component. The main area is a large blue rectangle representing the search results. To the right, a configuration panel is visible, showing various settings for the component. The configuration panel includes fields for Title, Description, Search Type (set to 'Both'), Show Smart Search Criteria Detail (checked), Show Columns, Max number of results (set to 200), Max height of result table (px) (set to 400), Action Buttons (Advanced) (set to 'Bulk Action, Email Contacts'), and Action Button Flows (Advanced) (set to 'Order\_Search\_Bulk\_Action\_Flow\_Sample,Orc').

Like the screenshot above, when you drag the components, you will have following configurable options:

- **Title:** The text Title of the component
- **Description:** optional, if you would like to add any extra info (some simple help texts or links) between the title and search box,
- **Search Type:** You get to choose from one of the following 3 options.
  - **Smart Only:** The default. Do not show the search criteria picklist, only use “Smart Search”, choose this if you want the simplest UI. In most cases, “Smart Search” could handle all your search needs.
  - **Individual Criteria Only:** Show picklist of all individual search criteria, no “Smart Search” option. if you want more precise search only on selected criterion, or if have a huge org with tons of orders and worry about the possible minor performance hit by “Smart search”
  - **Both:** Show picklist of all individual search criteria and “Smart Search”. You get convenient of both “Smart” and “Precise”
- **Show Smart Search Criteria Detail:** toggle on or off the extra hints on Smart Search
- **Show Columns:** You get to decide which columns and in what orders to show in the search result datatable, from following available columns. Leave blank to use all of them in default order: Order Number, Account, Contact, Order Date, Total, Email, Phone, Products, Status.
- **Max number of results:** default is 200, set to 0 if you don’t want to limit.
- **Max height of result table (px):** define the max height of the search result datatable. If you are using this component in a limited screen space such as utility bar dialog, this can help you. Set to 0 if you don’t want to limit.
- **Action Buttons (Advanced):** List the texts of action buttons for bulk actions, separated by comma, you will need to define related action button actions in the config below
- **Action Button Flows (Advanced):** List the action button actions (flows) for bulk actions to work with the buttons defined above, enter the flow api names here, separated by comma, and make sure the flow takes an input variable named 'orderNumbers', which will be a comma separated list of order summary order numbers.

## Extra Guide: Smart Search

### SMART SEARCH FEATURES

You might wonder how “Smart” the “Smart Search” is, here are some explanation of its smartness

- **Multiple search string in one go:** You can enter multiple, comma separated (,) search strings, just make sure each string has at least 3 chars. Such as “404 555 0199, a cool trailhead cap, 30052”
- **AI defined search criteria:** For each search string, the “AI” will help decide which fields to search, see examples below:
  - if string is “(404) 555 0199”, it will search Phone only
  - if string is “omega” or “bailey” or “batter”, it will search both Account, Contact and Product Name
  - if string is a regular plain number, it will search most of the fields that likely contain numbers such as Order Number, Tracking Number, Phone, SKU and etc
- **Explicitly defined search criteria:** For each search string, if you do NOT want AI to decide the fields to search, you can add some prefix (in format of “prefix:”, for example, you can do “account: omega” to only search account but nothing else) to help deciding the fields, here are the list of all available prefixes and the field(s) will be searched:
  - “on:”, “order:”, “order number”, “ordernumber:” - **order number**
  - “acc:”, “account:” - **account**
  - “contact” - **contact**
  - “name” - **account or contact**
  - “prod name”, “prodname”, “product name”, “productname” - **product name**
  - “sku”, “prod sku”, “prodsku”, “product sku”, “productsku” - **product sku**
  - “prod”, “product”, “products” - **product name or product sku**
  - “track”, “tracking”, “tracking number”, “trackingnumber” - **tracking number**
  - “postal”, “postal code”, “zip”, “shipping zip” - **shipping zip**
  - “last 4”, “last4”, “credit”, “card”, “cc”, “last 4 of credit card”, “creditcard” - **last 4 of credit card**
  - “phone” - **phone**
  - “email” - **email**
- **Fuzzy search on certain criteria:** When you are searching by Account, Contact, Product name and phone number, you will get benefit of fuzzy search since these are the fields that you can easily get typo or format issue. Some examples below:
  - When type in “Billy”, it will find all “Billy”, “Bill” and even “William” for you.
  - When type in “blue jean”, it will find all “blue jean”, “ocean blue jean” or “jean, blue” for you.
  - When you type in “404 555 0199”, it will find “(404) 555-0199” for you, and vise versa
- **Your choice of ALL/ANY logic:** By default, if you have multiple search strings, it will find the results that satisfy **ALL** of the criteria, but you can change this behavior and get results that satisfy **ANY** of the criteria by using “**any**” or “**or**” as the very first search string, for example, use “any,prod:battery,prod,generator” to find all orders that have batter OR generator in prod

### SMART SEARCH EXAMPLES

Here are a few examples of how you can enjoy the full super power of the Smart Search (the bold strings within the <> are the ones typed into the search box):

- **<Jean>**: it will search string “Jean” in both account, contact and product names, so you get orders by any one called “Jean”, or any one ordered a “Jean”

- **<404 555 0199>**: finds any orders by accounts or contacts that have [404 555 0199](#) as phone number. Since this is a very classic phone format, it will only search phone fields, not any other number fields
- **<Jean, 404 555 0199>**: find all the order by “Jean” or has “Jean”, and the phone number need to be [404 555 0199](#) in any commonly seen format.
- **<contact:Jean, 404 555 0199>**, Since “Jean” could likely be a name of a person or a name of a product, we could give the Smart Search a little bit help by telling it only search “Jean” in contact, but not account or product, we still need to have phone number to be [404 555 0199](#) though.
- **<acc:Avenger, zip: 30052, sku: IRNS-MK3>**, you want to find the orders by account Avengers, ordered Ironman Suit Mark 3 (IRNS-MK3) and shipped to zip code 30052.
- **<any,Tony Stark, Steve Rogers, Bruce Banner>**, Sometimes, you want your search results to satisfy any of your condition rather than all of your condition, put an “any” or “or” as the very first search string. So this search will give you all orders by any of those 3 super heros. And since my company does sell any products that named 3 of them, so I just won’t bother adding the “prod name:” prefix to those 3 names.

## Extra Guide: Other Tools and Resources

### FLOW FOR BULK ACTION

You might have noticed, in the [“How to Use and Configurations”](#) section, we mentioned that you can define bulk actions on selected search results. For example, email all the contacts of the orders. You will need/want to create your own flows based on your needs.

When you are creating the bulk action flows, please make sure read these first :

- It needs to be a **screen flow**. (You need something to display your action results anyway).
- It needs to have a text variable called **“orderNumbers”** defined in the flow that can take input
- When you selected some results and click on the bulk action buttons, a string will be passed to that orderNumbers variable in the flow, it will be a comma separated list of order numbers. (looks like “00000624,00000625”).
- In current salesforce flow (Winter 23), it does not treat that comma separated string as collection, so it’s hard to use that string directly to query order records, you need to break it into text collection. We prepared a Flow Action called **“OMSToolsFlowStringToArray”** for you to do this job.
- Or, there is an even better solution. We provided two boilerplate flows in the package that you can clone from and use as starting point
  - **“Order\_Search\_Bulk\_Action\_Flow\_Sample”**: a plain boilerplate flow that just takes the input of order numbers and convert them into collection, you can just start using them to build your solution
  - **“Order\_Search\_Bulk\_Action\_Email\_Contacts”**: a more “real world ish” flow, that created from the sample flow above, sends some simple emails to the contacts of the selected orders.

### “ORDER SEARCH” APP PAGE

In the package, there is an app page called “Order Search” which you can add to any of your app.