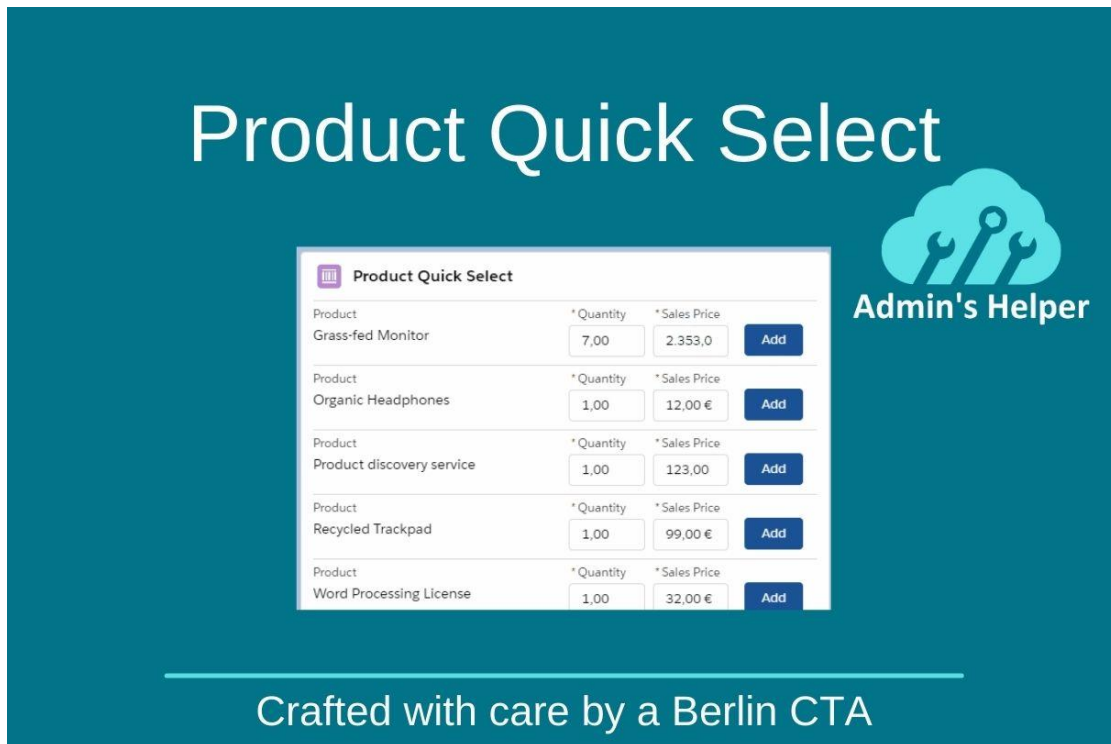


Product Quick Select Installation Manual

11.05. 2021

Version 1.10



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30-minute Setup Guarantee

We want to make the installation as easy as possible. If you have any issues installing or setting up the Package “Product Quick Select” don’t hesitate to write an email and we will come back as fast as possible. We only stop when you are up and running!

Email: johann@cloudjohann.com

Pre-Requisites:

Editions:

The App supports Enterprise Edition, Unlimited Edition, and Performance Edition.

Lightning Knowledge:

This App only supports Lightning Experience.

Multi-Currency

This App supports Multi-Currency

Installation

Get the AppExchange Package on AppExchange and Click “Get It Now”.

Select “Install for Admins only” and click “Install”.





Install Product Quick Select

By Admin's Helper

Install for Admins Only

Install for All Users

Install for Specific Profiles...

I acknowledge that I'm installing a Non-Salesforce Application that is not authorized for distribution as part of Salesforce's AppExchange Partner Program.

Install

Cancel

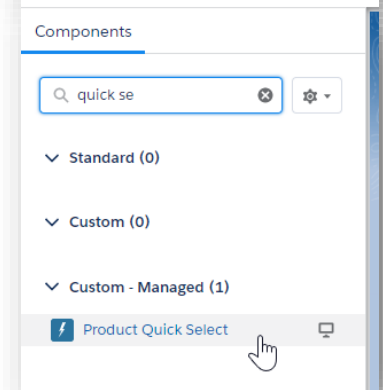
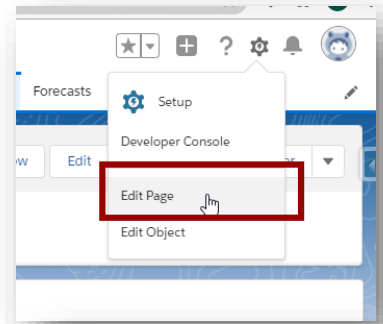
App Name	Publisher	Version Name	Version Number
Product Quick Select	Admin's Helper	Spring 21 PQS	1.2

Initial Setup



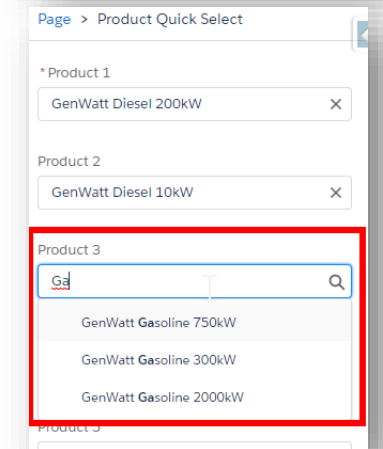
The App “Product Quick Select” has one Lightning Web Component which needs to be added to the respective Opportunity Lightning Page Layout and configured.

1. Select an Opportunity record you want to enable “Product Quick Select”.
2. Click the gear Icon at the top right and select “Edit Page”
3. In the Components pane on the left side search for “Quick”
4. Drag & Drop the component anywhere on the Lightning Page Layout
5. Configure Settings, save and Lightning Record Page.



Configuration Options:

You can pre-define up to 5 Products for Quick select. Click in the component and start searching for the Product. Only active products are shown.

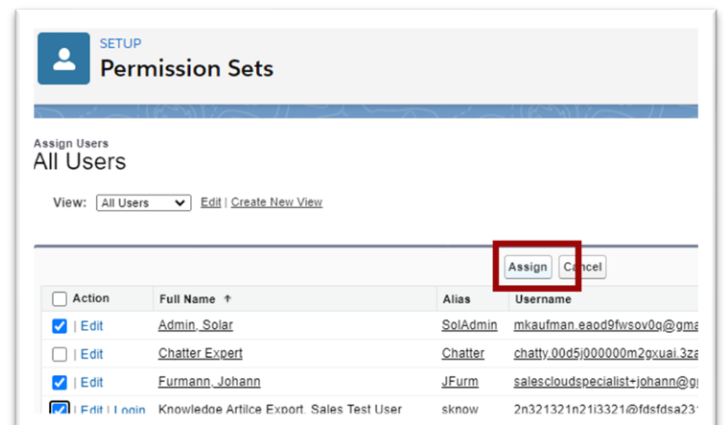
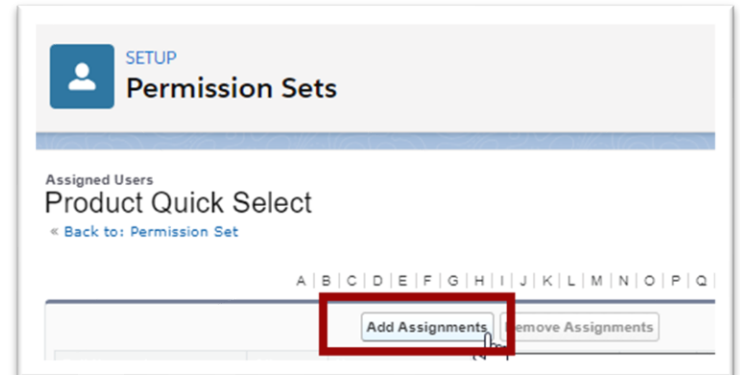
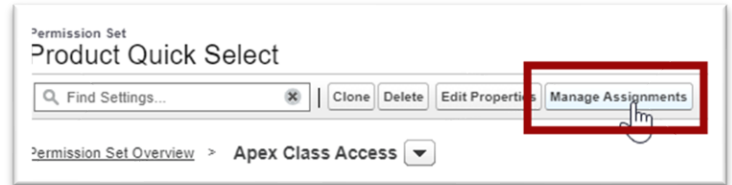


Permission Set

This Permission Set “Product Quick Select” controls the access to the App. Assign the Permission Set to Users to allow the use of the App. System Administrators can use the App without Permission set.



1. Click Setup -> Home
2. Search for "Permission Sets" and open Permission Sets
3. Select the Permission Set "Product Quick Select".
4. Click "Manage Assignments"
5. Click "Add Assignments"
6. Select all the Users you want the App to be using and Click "Assign"
7. Check if all Users are assigned to Permission Set.



FAQ

Experience support

Question: Does Product Quick Select work in Experience (Communities)?



Answer: No, Product Quick Select does not support Experience (Communities) yet.

Mobile support

Question: Does Product Quick Select work in Salesforce Mobile?

Answer: No, Product Quick Select does not support Mobile yet.

Credits

The following people all helped me out tremendously, thank you so much!

Code Review: Neha Nagori

AppExchange Listing: Kerry Holsinger

