![SALES'UP]
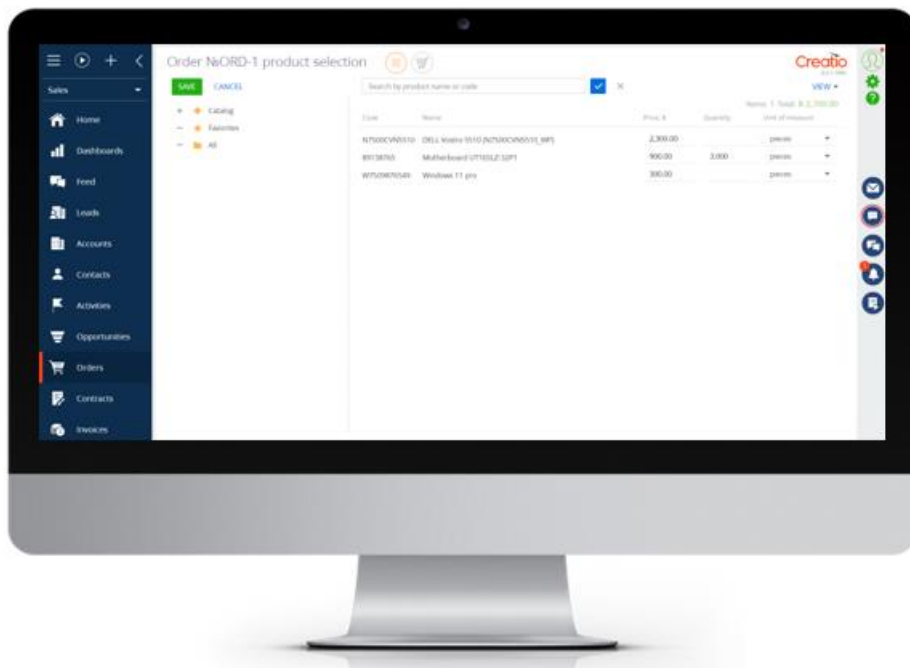
Catalog selection enhancements for Creatio

Guide to setup and utilization

1.08.2022

Module description

The selection module is designed to simplify the work with catalogues in the system. It helps to automatically filter the necessary records, set up a selection hierarchy, conveniently and quickly add the necessary records to the detail.
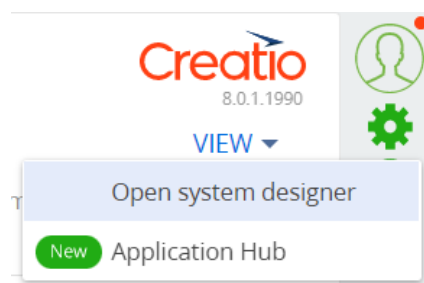
Use cases

- automatically filter the products in the assortment according to the terms of the contract, the client and their needs, so that the selection page does not display all the products in the system, but only those that meet the filter criteria;

- organize the list into a tree-like scheme and add all positions with one click;

- offer two ways of a product selection from the selection page to the part;

- sort products on the selection page by column;

- configure filtering not only for object records, but also for the list of products;

- setup price history filtering for parts depending on the conditions on the main object, contract;

- specify quick-search columns;

- set up automatic recalculation of the product price, depending on the contract currency;
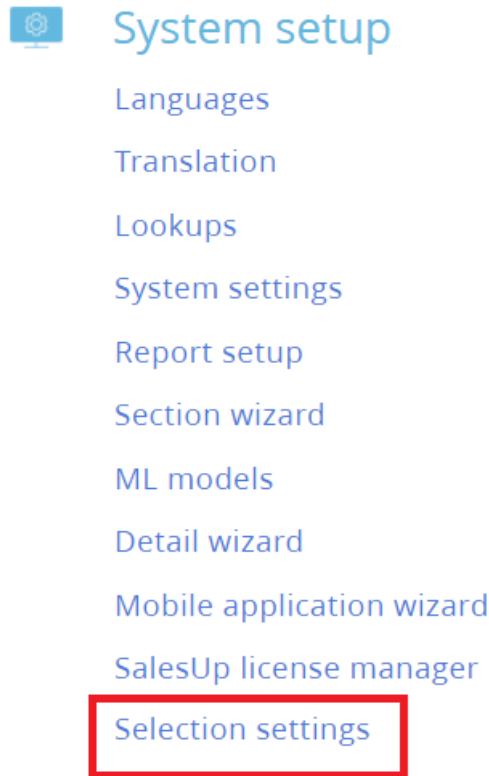
- and much more.

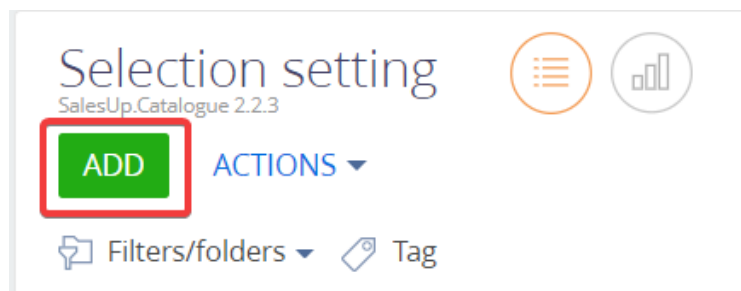# Module setup

Creating a new selection setting

After installing the module, to create a new selection setting, go to the "System Designer" (Picture 1.1). Then, in the "System setup" menu, select "Selection Setting" (Picture 1.2) and click "Add" (Picture 1.3):
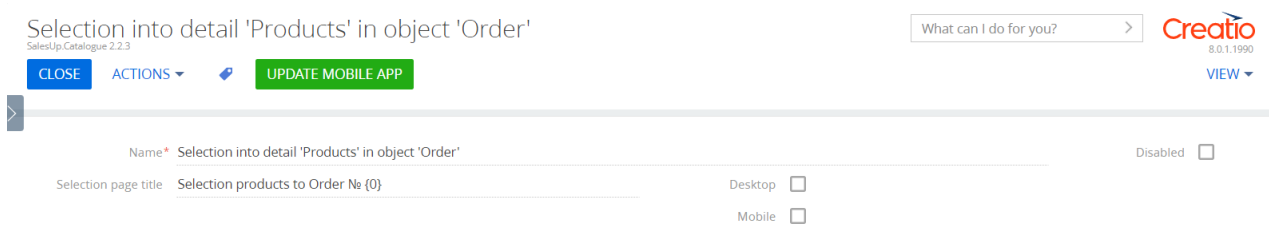

Picture 1.1

Picture 1.2

Picture 1.3

Filling in a page profile

On the setting page, there are following fields: (Picture 1.4):

Picture 1.4

Name – filled in automatically based on the basic settings.

Selection page title – a text field, the value of which will be displayed on the selection page. On Picture 1.4, this field contains the value "Selection products to Order № {0}", where "Selection products to Order № " is the printed text, and {0} is the object record number, in our example, the Order number.

Object – lookup field, select the object on which the setting is being created (Picture 1.7);

Detail – lookup field, select a detail on the object on which selection will be applied;

Selection object – lookup field, select the selection object that will be configured.

| < | MAIN INFO | COLUMNS | FILTRATION | CALCULATIONS | CURRENCIES | TAXES | ADDITIONAL SETTINGS | ATTACHMENTS AND NOTES | MOBILE APP | SUMMARY | FEI > |

Main settings

Object	Order
Detail	Products
Selection object	Product

Picture 1.7

In our example (Picture 1.7), the object on which the setting is created is Order. The setting is applied to the details of the Products, on the Product selection page (Picture 1.8).

| < | CHECKLIST | PRODUCTS | ORDER DETAILS | DELIVERY | SUMMARY | HISTORY | APPROVALS | GENERAL INFORMATION | ATTACHMENTS AND NOTES | FEED | > |

Products + ⋮   Items: 1 Total: $ 2,700.00

Product	Price	Quantity	Unit of measure	Discount, %	Total ⌄
Motherboard UT165LZ-32P1	900.00	3.000	pieces	0.00	2,700.00

Picture 1.8

To configure the display of the pick list as a hierarchy, you must specify the desired hierarchy on the "Selection hierarchy columns" detail. Be sure to add the "Id" column last (Picture 1.9). After that, activate the box "Show as hierarchy".

Selection hierarchy columns + ⋮

Position	Selection setting	Column name	Column caption
0	Selection into detail 'Products' in object 'Order'	Id	Id

Other settings

Show as hierarchy ☐	Hierarchical selection object ☑	Save only checked ✓ ☑	Identification code
Parent column in hierarchy		Only first level enabled ☐	Only last level enabled ☐
Sort by other column ☐			

Picture 1.9

Separately, for a hierarchical object in the group of fields "Other settings" the hierarchical display is set up (Picture 1.10):

Other settings

Show as hierarchy ☐	Hierarchical selection object ☑	Save only checked ✓ ☑	Identification code
Parent column in hierarchy		Only first level enabled ☐	Only last level enabled ☐
Sort by other column ☐			

Picture 1.10

Together with the selection of the "Hierarchical selection object" setting, you can limit the selection of records to only the first or last levels of the hierarchy (Picture 1.11):
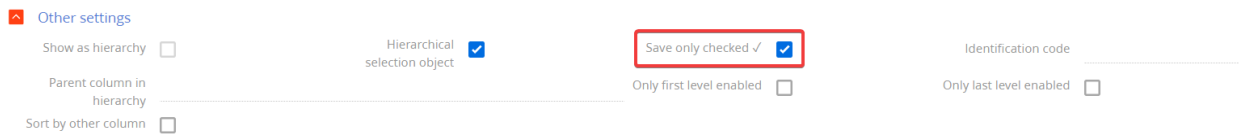
Picture 1.11

The methods of adding a position on a detail

Save only checked:

The «Save only checked √» function allows you to add the positions to the detail using the checkbox on the selection page. (Picture 1.12).
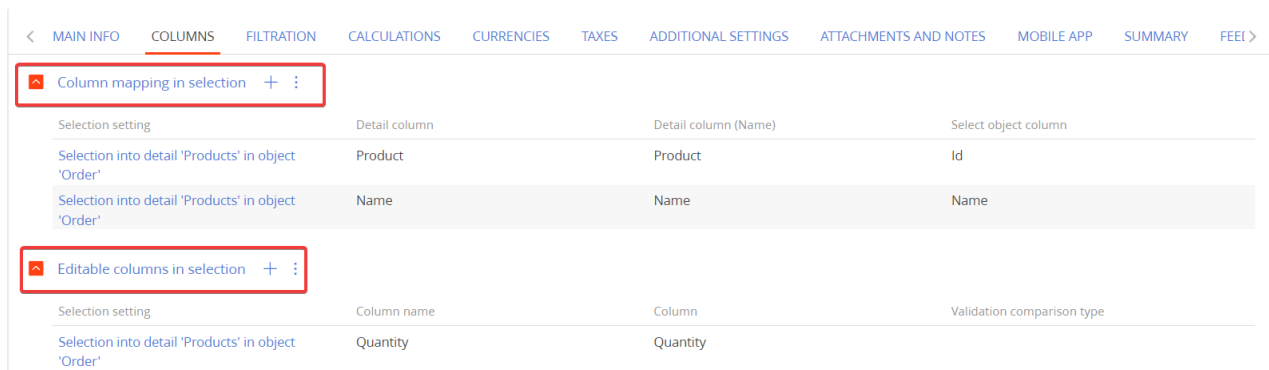

Picture 1.12

Using this function, you can add to a part of those positions that have a check mark in the box opposite, regardless of whether the position has a quantity or not. On the selection page, the "Select" column will appear.
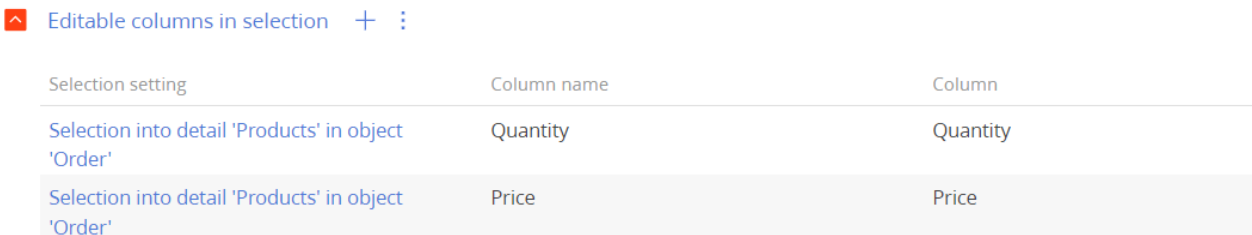
Save edited

On the COLUMNS tab, adding a position to a part is setup by editing a column (Picture 1.15).

Picture 1.15

The following items are used for customization:

Columns in the selection available for editing – a detail that indicates the list of columns on which editing is available (Picture 1.16).

Picture 1.16

Value validation function is available for columns of this part. For example, it is necessary that the price set by the manager is not less than the price list (Picture 1.17). Then, for the Price column, set the

validation for the Product Price column and fill in the "Validation error message" so that the user understands why the value is incorrect.

Column	Price
Validation comparison type	More or equal
Validation error message	Price can not be less then pricelist price
Required	☐

Validation column: Price

Picture 1.17

Correspondence of columns in the selection - a detail in which the correspondence of the columns of the selection object and the part for which the selection is configured is configured. Picture 1.19 shows the setting, in which the value from the "id" column on the selection object will be stored in the "Product" part column, and the value from the "Name" column on the selection page will be saved in the "Name" column on the detail:

Column mapping in selection + ⋮

Selection setting	Detail column	Detail column (Name)	Select object column
Selection into detail 'Products' in object 'Order'	Product	Product	Id
Selection into detail 'Products' in object 'Order'	Name	Name	Name

Picture 1.19

Filters

Object settings records filter

This filter selects records of the object to which the setting will be applied. In our example, in Picture 1.20, these are Contracts, with the type "Commercial offer".

‹ MAIN INFO   COLUMNS   **FILTRATION**   CALCULATIONS

Actions ▾

☑ AND
  ☑ Inactive = No
  + Add condition

Picture 1.20

The filter setting is located on the GENERAL INFORMATION tab at the bottom of the page.

Selection object record filter

This filter is designed to filter the records of the selection object, in Picture 1.21, this is the "Product". This filter is located on the FILTERING tab (Picture 1.22).

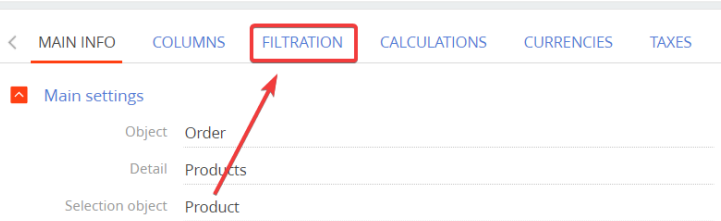## Selection into detail 'Products' in object 'Order'
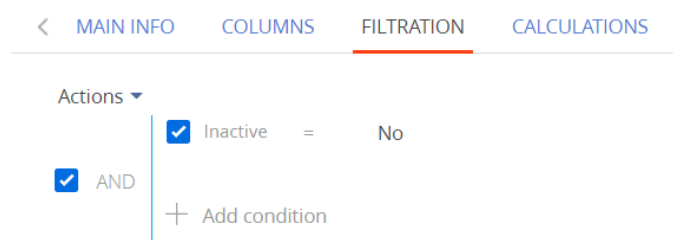SalesUp.Catalogue 2.2.3

CLOSE **ACTIONS ▾** ✎ **UPDATE MOBILE APP**

Selection page title   Selection products to Order № {0}

❮ MAIN INFO   COLUMNS   **FILTRATION**   CALCULATIONS   CURRENCIES   TAXES

▲ Main settings

Object   Order

Detail   Products

Selection object   Product

Picture 1.21

❮ MAIN INFO   COLUMNS   **FILTRATION**   CALCULATIONS
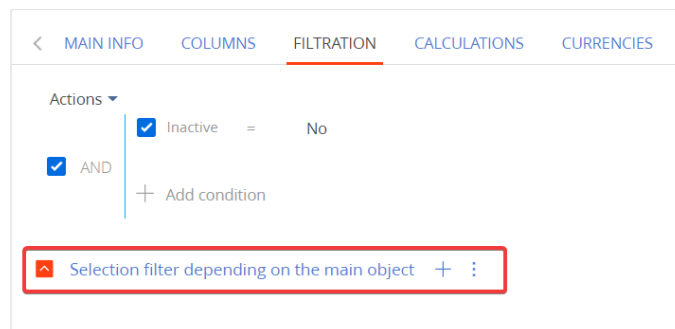
Actions ▾

☑ Inactive   =   No

☑ AND

＋ Add condition

Picture 1.22

On Picture 1.22, an example of setting when the task is to filter records on the Products page, according to the attribute NOT archived.

In addition to the standard filter, the tab contains the "Select filter depending on the main object" (Picture 1.23).

❮ MAIN INFO   COLUMNS   **FILTRATION**   CALCULATIONS   CURRENCIES

Actions ▾

☑ Inactive   =   No

☑ AND

＋ Add condition

▲ Selection filter depending on the main object   ＋   ⋮

Picture 1.23

For example, if you need to filter the price, and the contract contains conditions on which this price depends (delivery conditions, warehouse), then this filter will allow you to filter the necessary prices depending on these conditions (Picture 1.24).

▲ Selection filter depending on the main object   ＋   ⋮

Placeholder for QuickSearch field   Search by Name or Code

Picture 1.24

In the filter condition setting window, select comparison columns (Picture 1.24) and type (Picture 1.25).

Master column path	Currency
Comparison type	Equal
Selection column path	Currency

Add Null filter if value is Null ☐

Or value is Null ☐

Picture 1.24

Master column path	Currency
Comparison type	Equal ▼
Selection column path	

Contains (terms)

Ends on (terms)

Equal

Less

Less or equal

More

More or equal

Not equal

Starts on (terms)

Add Null filter if value is Null ☐

Or value is Null ☐

Picture 1.25

In addition to setting the selection object filter, there is a quick search setting on the FILTERING tab (Picture 1.26).

Quick search columns in the selection   + ⋮

Selection setting	Column name	Column caption	Column type
Selection into detail 'Products' in object 'Or...	Code	Code	1
Selection into detail 'Products' in object 'Or...	Name	Name	1

Picture 1.26

The "Quick search columns in the selection" detail specifies the columns by which the user will be able to search. In the "Quick Search Field" you need to specify these search columns from the detail so that other users understand what parameters they can search by. The inscription in this field is displayed in the search field on the selection page (Picture 1.27):

Order №ORD-12 product selection

SAVE   CANCEL

Search by product name or code

Items: 2 Total: $ 5,425.00

	Code	Name	Price, $	Quantity	Unit of measure
	N7500CVN5510	DELL Vostro 5510 (N7500CVN5510_WP)	2,300.00	2.000	pieces
	89138765	Motherboard UT165LZ-32P1	825.00	1.000	pieces
	W7509876549	Windows 11 pro	300.00		pieces

+ ◆ Catalog
− ★ Favorites
− 📁 All

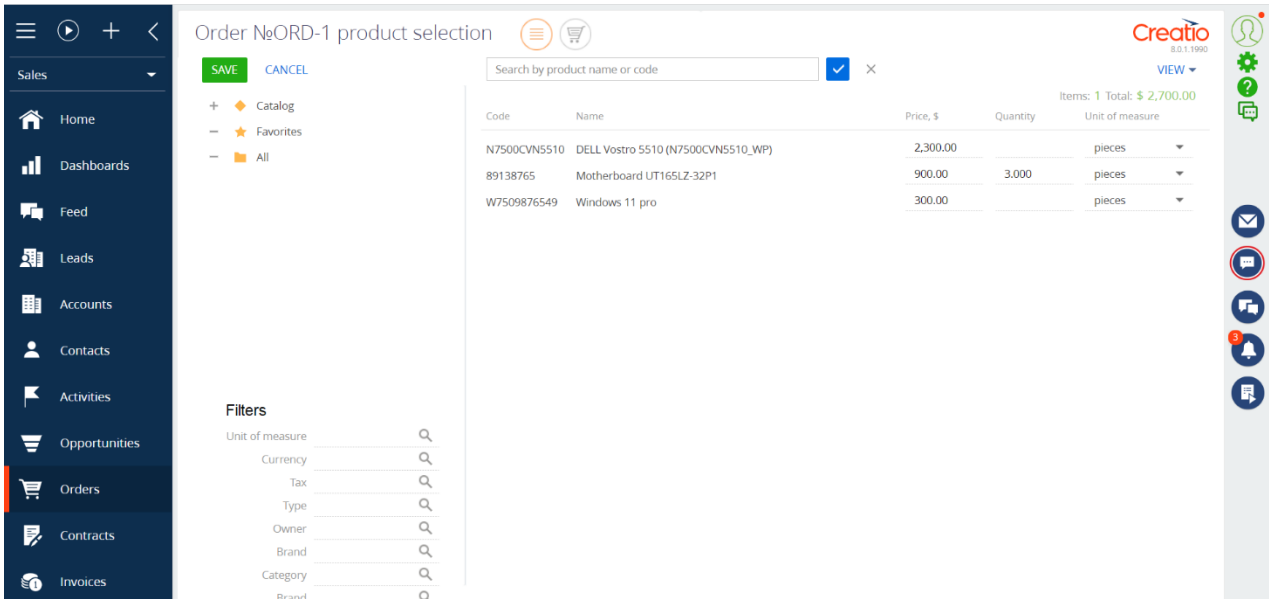Picture 1.27

Additional selection object filtering by fields

In the lower left corner of the selection page, under the catalog, there is a filtering module, which displays all the columns of the selected object, for example, the Product.

All fields are lookup fields, with the possibility of multi-selection and the comparison type Equal (Picture 1.28):
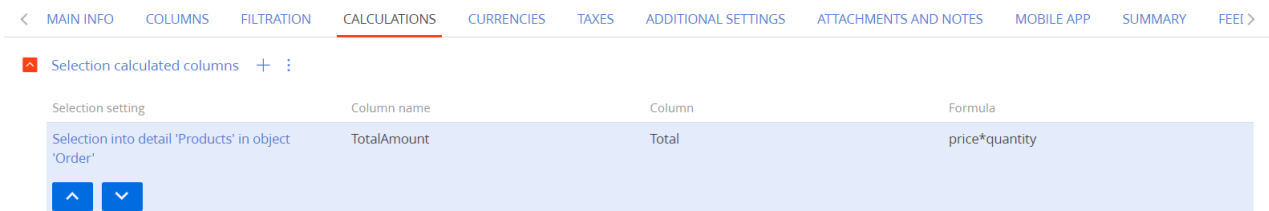
Picture 1.28

Calculations

On the CALCULATIONS tab, the detail "Calculated columns in the selection" has been added. This setting allows you to apply formulas on the selection page (Picture 1.29).
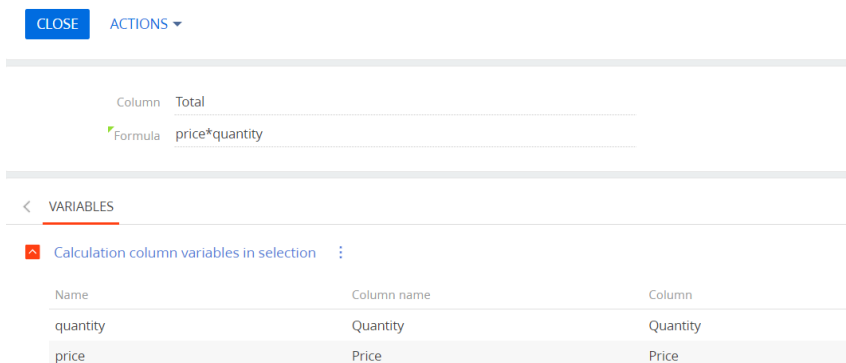

Picture 1.29

Column - indicates the name of the column in which the result will be displayed;

Formula - the formula by which the result in the column will be calculated. After filling in the formula, the variables will appear on the "Calculation column variables in selection" detail. For calculation, the numerical columns of the part object are selected in the formula (Picture 1.30).

Picture 1.30

Currencies

On the CURRENCIES tab, you can set up multi-currency calculations for product prices (Picture 1.32).

Picture 1.32

Main object currency column – select the column where the main object currency is located;

Main object currency rate column – select the column containing the exchange rate of the main object;

The fields: Main object currency column (Name) and Main object currency exchange rate column (Name), are filled in automatically.

Currency columns in the selection - columns in the selection, which should be recalculated at the exchange rate. The following page opens in order to set up column settings, Picture 1.33:

Picture 1.33

Here you need to choose:

Column title – select the column that should be recalculated according to the exchange rate;
Currency column title – select the selection currency column;
Currency rate title – select the column of the selection currency rate.

Additional settings

The ADDITIONAL SETTINGS tab contains (Picture 1.34):

Picture 1.34

Use "Add all" – it displays the "Select all" function on the selection page, which allows you to add all records that match the current filter (Picture 1.35).

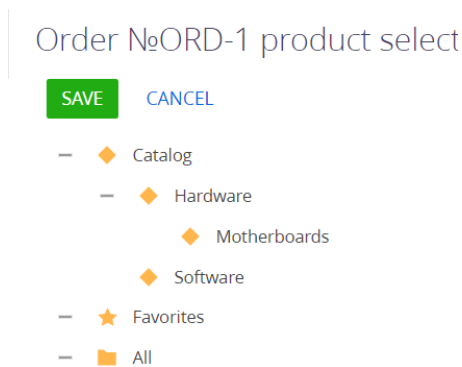Default "Add All" - will keep this setting active by default.

Picture 1.35

Use replication – displays the "Replication" function on the selection page, which allows you to copy the largest value to all selection records.

Enter a value in any record in the Quantity column and activate Duplication. The system will display a confirmation request and the value will be copied to the rest of the records.

Group settings – allows you to group catalog folders by indicator (Picture 1.39)

Picture 1.39

CONTACT US:

salesup-it.com

+38 050 140 11 22
Kyiv, Lobanovskoho Avenue, 119B