



MultiSelect v1.1

<input checked="" type="checkbox"/> Partner	<input checked="" type="checkbox"/> Installer	<input checked="" type="checkbox"/> Reseller
<input type="checkbox"/> Competitor	<input checked="" type="checkbox"/> Supplier	<input type="checkbox"/> University
<input type="checkbox"/> High School	<input type="checkbox"/> Factory	<input type="checkbox"/> Store
<input type="checkbox"/> Services Supplier		

Partner, Installer, Reseller, Competitor, Supplier

search text

- Partner
- Installer
- Reseller
- Competitor
- Supplier
- University
- High School
- Factory
- Store
- Services Supplier

8 Selected Items

search text

- Ordering
 - Order Status
 - Returns & Refunds
 - Dislike product
 - Product defect
 - Battery Issue
 - Not Working
 - Order Cancellation
 - Changes to an Order
 - Product Availability
 - Product Registration
- Billing
- Shipping
- Technical Assistance
- Community Help
 - Community Ideas
- My Account
- General
- Alerts

User Manual

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1 OVERVIEW

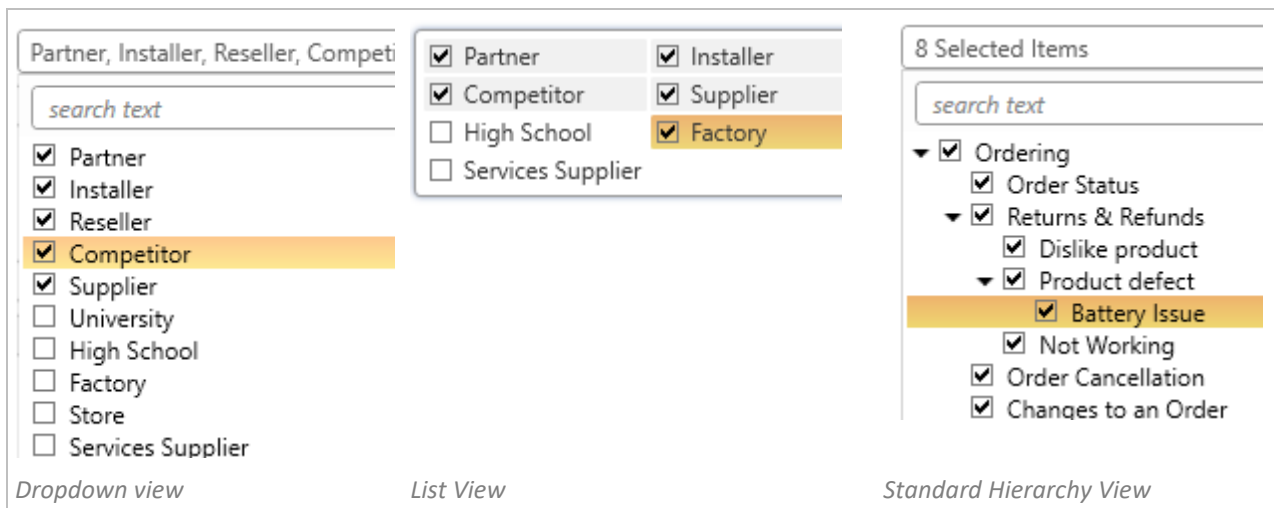
1.1 Introduction

CX Builders MultiSelect is a very flexible workspace Add-In that can be used to select and store multiple menu items for any given parent record.

In this manual the different features are first discussed, followed by how MultiSelect can be set up. In addition there are reporting examples and two detailed step by step guides. When you are in need of advice on how to use MultiSelect or what would be the best setup for your site, you can contact CX Builders at cxbuilders.com.

1.2 Views

MultiSelect comes shipped with three views: Dropdown, List and Standard Hierarchy view. The Standard Hierarchy view is used to display Products, Categories or Disposition. The Dropdown and List views are used to display any other custom or standard menu available within Oracle Service Cloud.



1.3 Menus

MultiSelect supports the following types of menus;

- ✓ Product, Category and Disposition
- ✓ System Menu, like Industry Types and Contact Roles
- ✓ Custom Menu
- ✓ Custom object that generates a menu

2 SETTING UP MULTISELECT

2.1 Installing MultiSelect

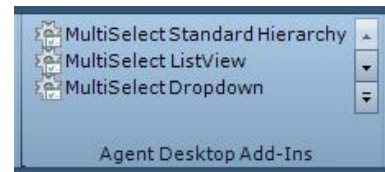
MultiSelect comes in a zip file that contains all the functionality that is needed. Once you received the Add-In take the following steps to install the Add-In.

Steps to install MultiSelect

- ✓ Open Oracle Service Cloud
- ✓ Go to Navigation > Configuration > Site Configuration > Add-In Manager
- ✓ Click on 'New' on the Ribbon
- ✓ Navigate to the folder where you stored the MultiSelect Add-In
- ✓ Change the Windows Explorer window so it shows Compressed Add-In Files
- ✓ Select the MultiSelect Add-In and hit OK
- ✓ Click on 'Profile Access' in the ribbon
- ✓ Select all the Accounts and corresponding interfaces that should have access to the MultiSelect Add-In
- ✓ Hit Save & Close on the Ribbon
- ✓ Restart Oracle Service Cloud

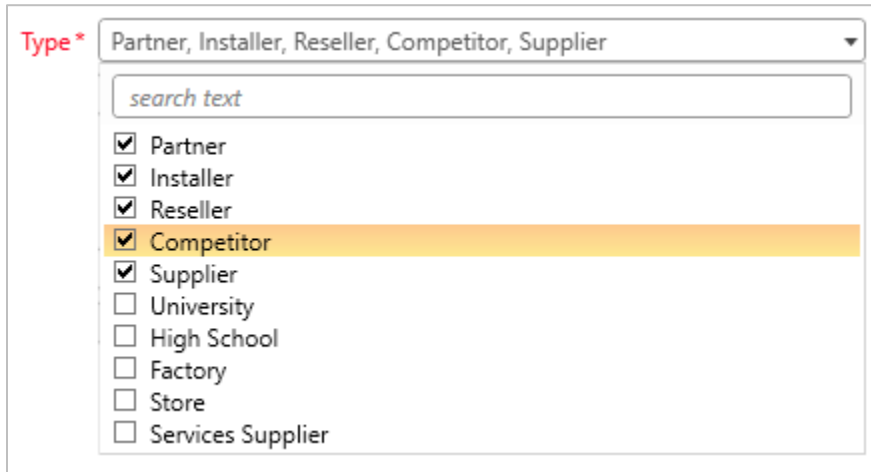
2.2 Choosing a View

MultiSelect comes with three distinct view modes that you can use. These views are shown in the workspace editor as two distinct Add-Ins. Simply pick the one you would like to use and drop it on the workspace.



Drop Down View

The DropDown View is suitable for situations where you do not want the MultiSelect control to take up a lot of space on the workspace. It is identical in behavior as the Access Level field on the standard Oracle Service Cloud Answer workspace. The height of the dropdown will automatically resize, based on the number of menu items. When the list of items exceeds a maximum length a scrollbar appears.

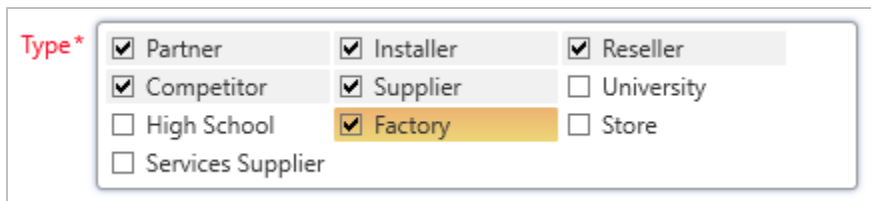


Steps to setup the Drop Down View

- ✓ Select the MultiSelect Dropdown Add-In from the workspace editor and drop it on the workspace
- ✓ Select the Add-In and go to the Design Tab
- ✓ Select Position = Fill Cell / Stretch across Top

List View

The List View shows the menu items directly on the workspace. This takes up more space but the overview is better and it is faster for agents to select the values.

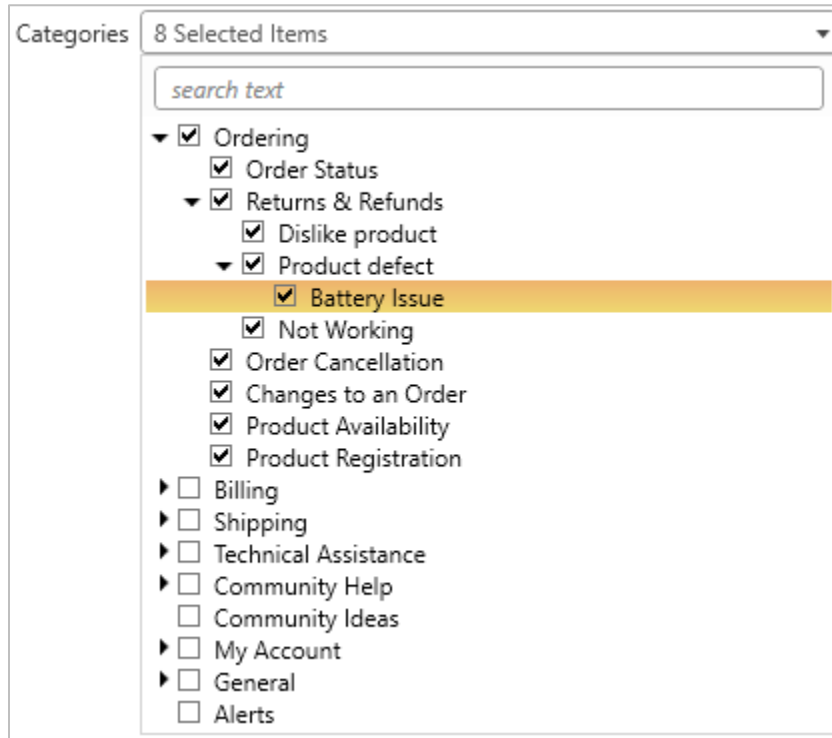


Steps to setup the List View

- ✓ Select the List View Dropdown Add-In from the workspace editor and drop it on the workspace
- ✓ Select the Add-In and go to the Design Tab
- ✓ Select Position = Fill Cell
- ✓ Click Layout > Size and enter the height you want

Standard Hierarchy

The Standard Hierarchy view displays the Category, Product or Disposition hierarchy in a dropdown field.



Steps to setup the List View

- ✓ Select the List View Dropdown Add-In from the workspace editor and drop it on the workspace
- ✓ Select the Add-In and go to the Design Tab
- ✓ Select Position = Fill Cell / Stretch across Top

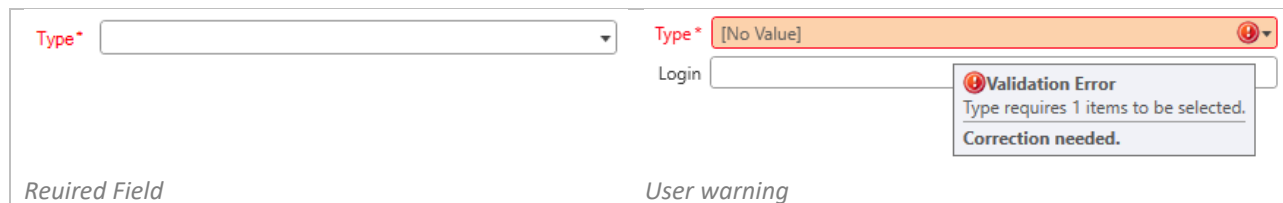
2.3 MultiSelect Options

Once you have selected the view and placed the MultiSelect Add-In on the workspace, all other settings can be managed from the Ribbon. To show the options in the workspace editor, select the MultiSelect Add-In and click on the Design Tab. If you hover over the different options a tooltip is shown telling you what the option is for and how to populate it.



Minimum Required

Since users can select multiple items, you can define the minimum number of items that are required. The default value is 0. Once you enter a value higher than 0, the label turns red with a * at the end indicating this field is required, just like normal Service Cloud Fields. Users will receive a warning when they do not select the minimum number required items and the workspace will not be saved until they do.



Label & Label Width

Currently Service Cloud does not offer an automated way for Add-Ins to align themselves with the rest of the controls; therefore you can use the label width option in MultiSelect. Here you can enter the width of the label in pixels to align MultiSelect with other controls on the Workspace. When other labels are smaller than the one you use for the MultiSelect, you can simply add spaces to the beginning of one of the other labels to make them wider, then use the label width to align the MultiSelect.



Menu ID

MenuID is only available for the DropDown and List view. Here you enter the ID of the menu you would like to use. You can use a custom field menu or custom object that generates a menu.

- ✓ For a custom menu you can hover over the menu and retrieve the ID by going to: navigation > configuration > application appearance > customizable menus.
- ✓ For custom objects that generate a menu you can hover over the custom object by going to: navigation > configuration > database > object designer.

Standard Hierarchy

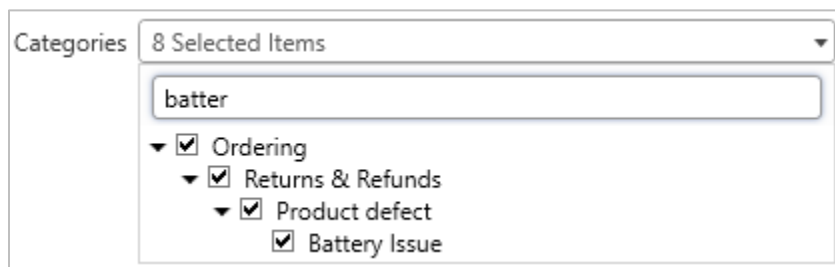
This setting is only available for the Standard Hierarchy view. Here the type of Hierarchy that should be displayed is entered; Product, Category or Disposition.

Product Linking

Only available for the Standard Hierarchy view. This setting has effect when either Categories or Dispositions are used and the standard Product Field exists in the workspace. Categories and Dispositions are refreshed when the product field is changed to only show the ones that are linked to the selected product.

Enable Search

Enable Search is only available for the DropDown and the Standard Hierarchy views. When this is selected a search box is displayed above the field to allow users to filter results and make quick selections.



Storage CO

In the Storage Custom Object you must enter the Custom Object that is used to store the selected menu items. The Custom Object must be entered like '*PackageName.ObjectName*'. You can find this information by going to the Object Designer in Service Cloud.

ObjectField Name & MenuField Name

The ObjectField Name is the name of the field in the Storage Custom Object that holds the primary

object. The MenuField Name is the name of the field that holds the ID of the menu items.

Settings Example

In the scenario where we want Organizations to have multiple Types, we could have the following Custom Object.

The screenshot displays a software interface with a left-hand navigation pane and a right-hand main area. The left pane shows a tree view of objects, with 'MultiSelect' expanded and 'OrganizationType' highlighted. A tooltip for 'TypeOptions' is visible, showing 'ID: 10049'. The right pane is titled 'List of Fields in OrganizationType Object (5)' and contains a table with the following data:

Object Lookup	Field Name	Data Type	Delete
<input checked="" type="radio"/>	ID	Integer	X
<input type="radio"/>	CreatedByAccount	Menu	X
<input type="radio"/>	CreatedTime	Date Time	X
<input type="radio"/>	Organization	Integer	X
<input type="radio"/>	Type	Menu	X

The settings for MultiSelect would be:

- ✓ Storage CO: MultiSelect.OrganizationType
- ✓ ObjectField Name: Organization
- ✓ MenuField Name: Type
- ✓ Menu ID: 10049 (screenshot shows mouse hovering over the menu TypeOptions)

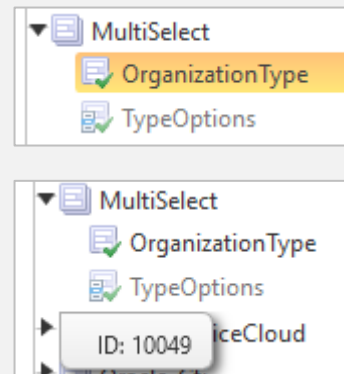
3 STEP BY STEP GUIDES

3.1 Multiple Organization types

In this section we will be setting up MultiSelect in DropDown mode to let users select multiple Organization types, whereby at least 1 option is required.

Setting up the Menu

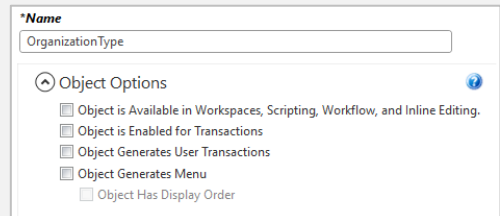
- ✓ In the Navigation Pane go to Configuration > Database > Object Designer
- ✓ Click on New > Package
- ✓ Type in MultiSelect (this can be anything)
- ✓ Select the MultiSelect package and click on New > Menu Only Object
- ✓ Name the menu 'TypeOptions' and fill in some organization types
- ✓ Save the Object Designer
- ✓ Hover over the TypeOptions menu and write down the Menu ID



Setting up the Custom Object

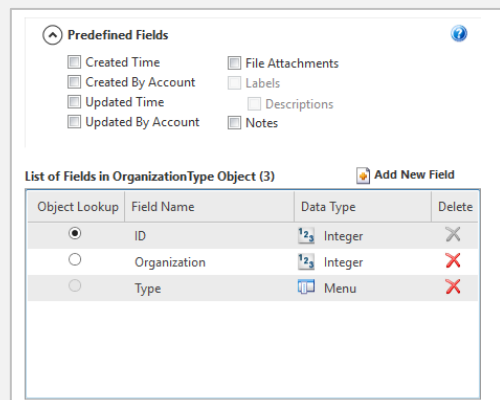
Creating the object

- ✓ Select the MultiSelect package and click on New > Object
- ✓ Name the Object 'OrganizationType' and deselect all options



Adding fields

- ✓ Click on Fields in the Ribbon
- ✓ If you want the time and the account that selected the Menu option you can select 'Created Time' & 'Created by Account'. Otherwise deselect those items
- ✓ Add a new Menu Field
- ✓ Fill in 'Type' for the Name
- ✓ Under the Menu Field Settings select 'MultiSelect.TypeOptions'
- ✓ Add a new Integer Field
- ✓ Fill in 'Organization' for the Name



Setting relationships

Parents of OrganizationType Object (2) Add

Main	Type	Parent Object	Parent Field	Child Field	Edit Relationship	Delete
<input checked="" type="radio"/>	Aggregation	MultiSelect.TypeOptions	ID	Type	Edit	
<input checked="" type="radio"/>	Aggregation	OracleServiceCloud.Organization	org_id	Organization	Edit	

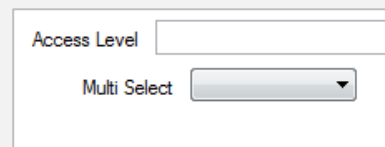
- ✓ Click on Relationships in the Ribbon
- ✓ Add a new Parent for Organization
- ✓ Under Type select Aggregation (this will ensure that when an organization is deleted, all its selected types will be deleted as well).
- ✓ Under Parent Object select OracleServiceCloud.Organization
- ✓ Under the Child Field select Organization
- ✓ Click on edit for the MultiSelect.TypeOptions relationship
- ✓ Change the type to Aggregation. (This will ensure that when you remove a menu item it will remove all entries for that menu item from this table. This way there are no 'orphaned' menu items left)

Extra Options

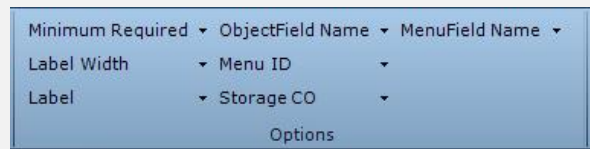
- ✓ Click on Extra Options on the Ribbon
- ✓ Select all permissions for all the profiles that will use the MultiSelect control
- ✓ Save & Deploy

Setting up the view

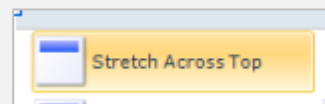
- ✓ Open the organization workspace
- ✓ Go to the Insert Control Tab
- ✓ Select the MultiSelect Dropdown Add-In and drop it on the workspace



- ✓ Double click on the drop down to show the design tab (hover over the options to see a description)
- ✓ Select the Label option and type in 'Org Type'
- ✓ Go to Label Width and type in the number of pixels for the label. You can use this to align the MultiSelect with other controls on the workspace (when the other controls have labels less wide than the MultiSelect, simply give one of them some extra spaces at the beginning)
- ✓ Minimum Required: 1
- ✓ Storage CO: MultiSelect.OrganizationType
- ✓ ObjectField Name: Organization
- ✓ MenuField Name: Type
- ✓ Menu ID: ID from the menu in first step



- ✓ Go to the Position button and select 'Stretch across Top', to stretch to the full width of the cell in the Workspace.



3.2 Multiple Incident Categories

In this section we will be setting up MultiSelect using the Standard Hierarchy view to let users select multiple categories for an incident.

Setting up the Custom Object

Creating the object

- ✓ Create a new package called 'MultiSelect'
- ✓ Select the MultiSelect package and click on New > Object
- ✓ Name the Object 'IncidentCategory' and deselect all options

***Name**
IncidentCategory

Object Options

- Object is Available in Workspaces, Scripting, Workflow, and Inline Editing.
- Object is Enabled for Transactions
- Object Generates User Transactions
- Object Generates Menu
- Object Has Display Order

Adding fields

- ✓ Click on Fields in the Ribbon
- ✓ If you want the time and the account that selected the Menu option you can select 'Created Time' & 'Created by Account'. Otherwise deselect those items
- ✓ Add a new Menu Field
- ✓ Fill in '**Category**' for the Name
- ✓ Under the Menu Field Settings select 'Categories'
- ✓ Add a new Integer Field
- ✓ Fill in '**Incident**' for the Name

Predefined Fields

- Created Time
- Created By Account
- Updated Time
- Updated By Account
- File Attachments
- Labels
- Descriptions
- Notes

List of Fields in IncidentCategory Object (5) Add New Field

Object Lookup	Field Name	Data Type	Delete
<input checked="" type="radio"/>	ID	Integer	X
<input type="radio"/>	CreatedTime	Date Time	X
<input type="radio"/>	CreatedByAccount	Menu	X
<input type="radio"/>	Category	Menu	X
<input type="radio"/>	Incident	Integer	X

Setting relationships

Parents of IncidentCategory Object (3) Add

Main	Type	Parent Object	Parent Field	Child Field	Edit Relationship	Delete
<input checked="" type="radio"/>	Aggregation	OracleServiceCloud.Incident i_id		Incident	Edit	X
<input checked="" type="radio"/>	Aggregation	OracleServiceCloud.Categor id		Category	Edit	X
<input checked="" type="radio"/>	Association	OracleServiceCloud.Accoun acct_id		CreatedByAccount	Edit	X

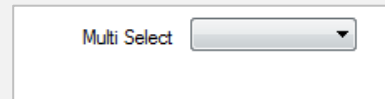
- ✓ Click on Relationships in the Ribbon
- ✓ Add a new Parent for Incident
- ✓ Under Type select Aggregation (this will ensure that when an incident is deleted, all linked categories will be deleted as well).
- ✓ Under Parent Object select OracleServiceCloud.Incident
- ✓ Under the Child Field select Incident
- ✓ Click on edit for the Category relationship
- ✓ Change the type to Aggregation. (This will ensure that when you remove a category, this category will be removed from any incident as well. This way there are no 'orphaned' categories left)

Extra Options

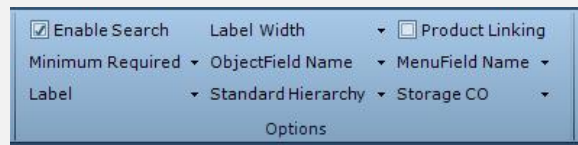
- ✓ Click on Extra Options on the Ribbon
- ✓ Select all permissions for all the profiles that will use the MultiSelect control
- ✓ Save & Deploy

Setting up the view

- ✓ Open the incident workspace
- ✓ Go to the Insert Control Tab
- ✓ Select the MultiSelect Standard Hierarchy Add-In and drop it on the workspace



- ✓ Double click on the drop down to show the design tab (hover over the options to see a description)
- ✓ Select the Label option and type in 'Categories'
- ✓ Go to Label Width and type in the number of pixels for the label. You can use this to align the MultiSelect with other controls on the workspace (when the other controls have labels less wide than the MultiSelect, simply give one of them some extra spaces at the beginning)
- ✓ Standard Hierarchy: Category
- ✓ Storage CO: MultiSelect.IncidentCategories
- ✓ ObjectField Name: Incident
- ✓ MenuField Name: Category
- ✓ Product Linking, Enable Search: as pleased



- ✓ Go to the Position button and select 'Stretch across Top', to stretch to the full width of the cell in the Workspace.

