



AppExchange Program
PARTNER

Product Pick Setup Guide

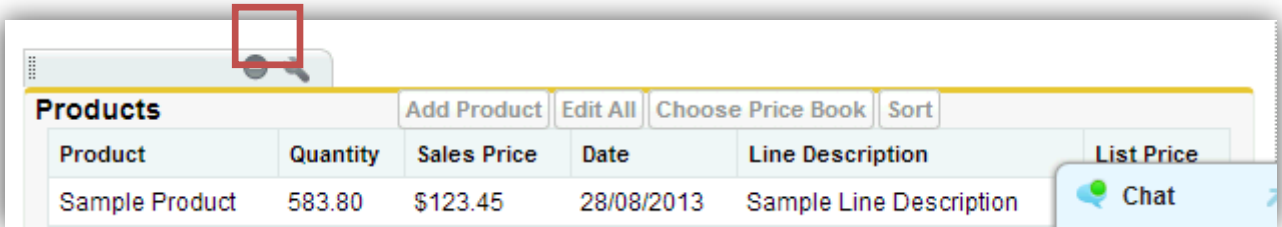
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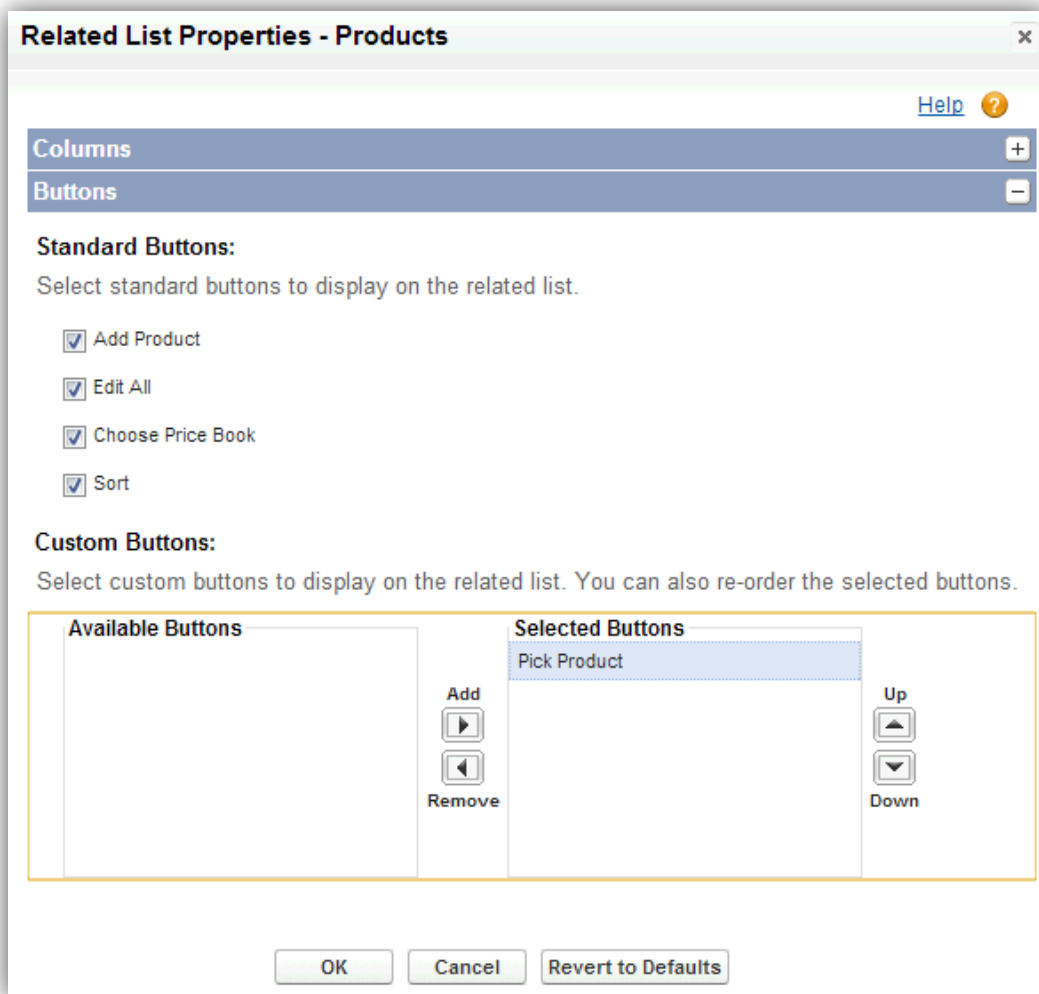
1. Add the Pick Product button:

Your salesforce.com admin will need to add the " Pick Product" button to all the page layouts for those using the app.

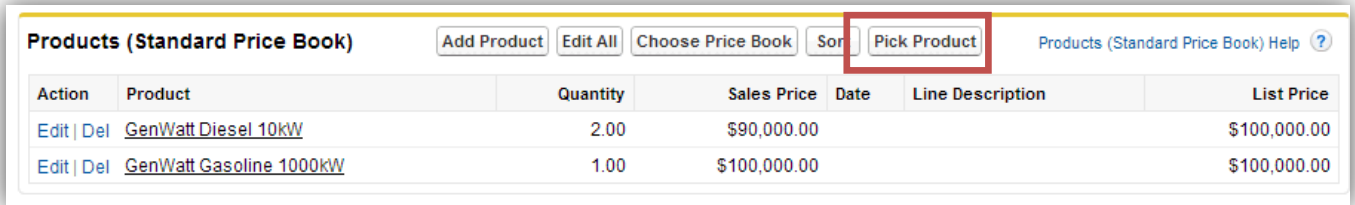
- 1. Setup | Customize | Opportunities | Page Layouts | Click Edit next to your layout
- 2. Scroll down to the Products related list



- 3. Scroll down to the Products related list and click the wrench icon to edit the Related List Properties of the Product list
- 4. Select the Pick Product button and Add



5. The Pick Product button will now be added



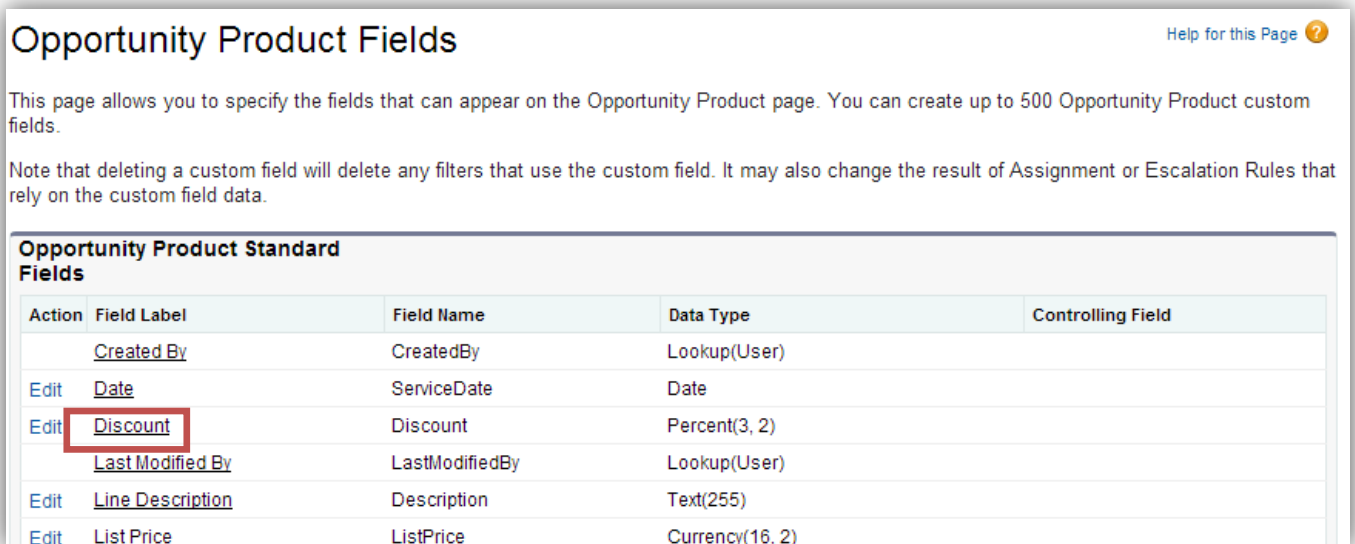
The screenshot shows a table titled "Products (Standard Price Book)" with columns for Action, Product, Quantity, Sales Price, Date, Line Description, and List Price. Two rows of product data are visible. Above the table, there are several buttons: "Add Product", "Edit All", "Choose Price Book", "Sort", and "Pick Product". The "Pick Product" button is highlighted with a red rectangular box. A "Help" link is also present in the top right corner.

Action	Product	Quantity	Sales Price	Date	Line Description	List Price
Edit Del	GenWatt Diesel 10kW	2.00	\$90,000.00			\$100,000.00
Edit Del	GenWatt Gasoline 1000kW	1.00	\$100,000.00			\$100,000.00

2. Security Permissions:

If you're using Enterprise Edition, it's important that your users have access to the following in their Profile

1. Click Your **Name** | **Setup** | **Customize** | **Opportunities** | **Opportunity Products** | **Fields** | **Edit Discount**



The screenshot shows the "Opportunity Product Fields" page. It includes a header, a help link, a descriptive paragraph, a note, and a table of standard fields. The "Discount" field in the table is highlighted with a red rectangular box.

Opportunity Product Fields

[Help for this Page](#)

This page allows you to specify the fields that can appear on the Opportunity Product page. You can create up to 500 Opportunity Product custom fields.

Note that deleting a custom field will delete any filters that use the custom field. It may also change the result of Assignment or Escalation Rules that rely on the custom field data.

Action	Field Label	Field Name	Data Type	Controlling Field
	Created By	CreatedBy	Lookup(User)	
Edit	Date	ServiceDate	Date	
Edit	Discount	Discount	Percent(3, 2)	
	Last Modified By	LastModifiedBy	Lookup(User)	
Edit	Line Description	Description	Text(255)	
Edit	List Price	ListPrice	Currency(16, 2)	

2. Click Set Field-Level Security

Opportunity Product Field Help for this Page ?

Discount

[Back to Opportunity Product Fields](#)

[Edit](#) [Set Field-Level Security](#) [View Field Accessibility](#)

Field Information

Field Label	Discount	Field Name	Discount
Data Type	Percent(3, 2)		
Help Text			

Validation Rules [New](#) [Validation Rules Help ?](#)

No validation rules defined.

3. Give users visibility to Discount field to the profiles by checking the box next to the profiles that will be picking products.

Set Field-Level Security Help for this Page ?

Discount

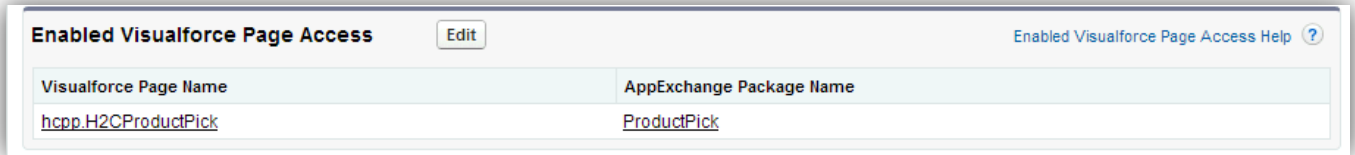
[Save](#) [Cancel](#)

Field Label	Discount
Data Type	Percent(3, 2)

Field-Level Security for Profile	<input type="checkbox"/> Visible	<input type="checkbox"/> Read-Only
Contract Manager	<input type="checkbox"/>	<input type="checkbox"/>
Gold Partner User	<input type="checkbox"/>	<input type="checkbox"/>
Marketing User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Partner Community Login User	<input type="checkbox"/>	<input type="checkbox"/>
Partner Community User	<input type="checkbox"/>	<input type="checkbox"/>
Read Only	<input type="checkbox"/>	<input type="checkbox"/>
Solution Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Standard User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
System Administrator	<input checked="" type="checkbox"/>	<input type="checkbox"/>

2. Click Your Name | Setup | Administration Setup | Manage Users | Profile | Select the profile of your users | Enabled Visualforce Page Access | Edit | Add the following pages:

- hcpp.H2CProductPick



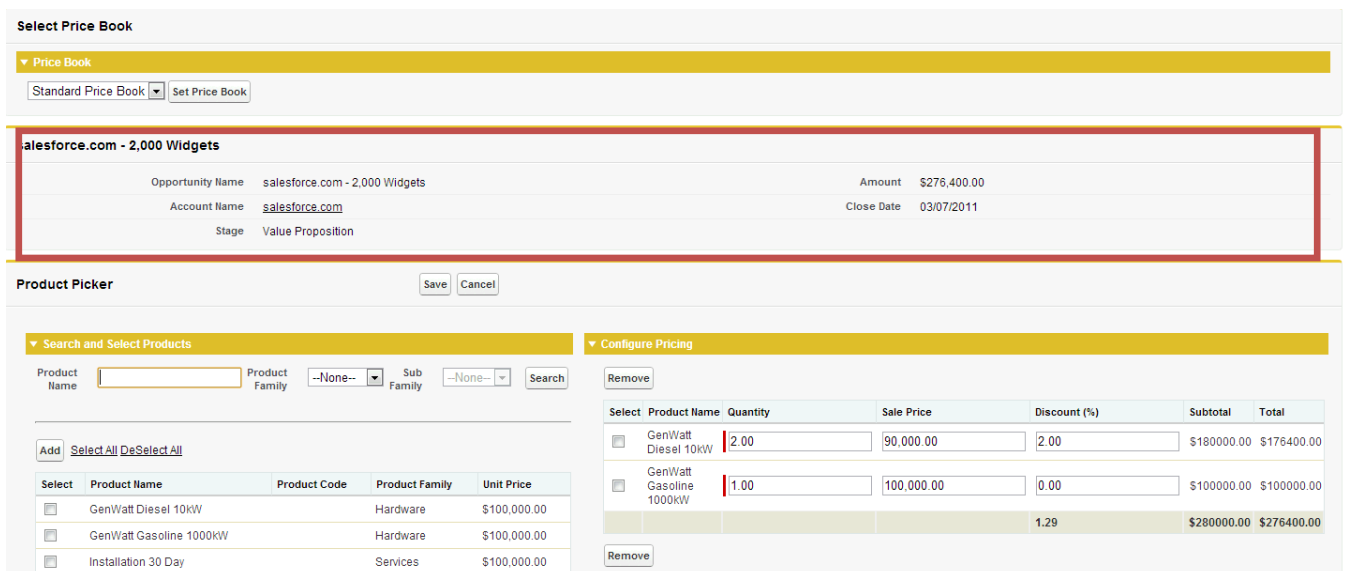
3. Configuring the Fields on the Product Pick Page

You can configure the fields on the Product Pick page. There is a standard set of fields you can add/remove or you can create your own custom fields from the opportunity, opportunity line items and product objects

i.e. For your sales teams add the product description field to make it easier for them to select products. Or add the date field to the product editing grid.

1. Setup | Customize | Opportunities | Field Sets | Click Edit ProductPick Opportunity FS. Then click and drag fields from the meeting object down into your field set.

- ProductPick Opportunity FS: This controls the fields that appear on the picker screen about the original opportunity



2. Setup Setup | Customize | Opportunities | Opportunity Products | Field Sets | Click Edit ProductPick OLI FS. Then click and drag fields from the meeting object down into your field set.

- ProductPick OLI FS: This controls the fields that appear on the Configure pricing grid

Select Price Book

Price Book: Standard Price Book [Set Price Book]

salesforce.com - 2,000 Widgets

Opportunity Name: salesforce.com - 2,000 Widgets Amount: \$276,400.00
 Account Name: salesforce.com Close Date: 03/07/2011
 Stage: Value Proposition

Product Picker [Save] [Cancel]

Search and Select Products

Product Name: [] Product Family: --None-- Sub Family: --None-- [Search]

Add [Select All] [DeSelect All]

Select	Product Name	Product Code	Product Family	Unit Price
<input type="checkbox"/>	GenWatt Diesel 10kW		Hardware	\$100,000.00
<input type="checkbox"/>	GenWatt Gasoline 1000KW		Hardware	\$100,000.00
<input type="checkbox"/>	Installation 30 Day		Services	\$100,000.00

Configure Pricing

Select	Product Name	Quantity	Sale Price	Discount (%)	Subtotal	Total
<input type="checkbox"/>	GenWatt Diesel 10kW	2.00	90,000.00	2.00	\$180,000.00	\$176,400.00
<input type="checkbox"/>	GenWatt Gasoline 1000KW	1.00	100,000.00	0.00	\$100,000.00	\$100,000.00
				1.29	\$280,000.00	\$276,400.00

3. Setup | Customize | Products | Field Sets | Click Edit ProductPick Product Available FS. Then click and drag fields from the meeting object down into your field set.

ProductPick Product Available FS: This controls the fields that appear available to be selected

Select Price Book

Price Book: Standard Price Book [Set Price Book]

salesforce.com - 2,000 Widgets

Opportunity Name: salesforce.com - 2,000 Widgets Amount: \$276,400.00
 Account Name: salesforce.com Close Date: 03/07/2011
 Stage: Value Proposition

Product Picker [Save] [Cancel]

Search and Select Products

Product Name: [] Product Family: --None-- Sub Family: --None-- [Search]

Add [Select All] [DeSelect All]

Select	Product Name	Product Code	Product Family	Unit Price
<input type="checkbox"/>	GenWatt Diesel 10kW		Hardware	\$100,000.00
<input type="checkbox"/>	GenWatt Gasoline 1000KW		Hardware	\$100,000.00
<input type="checkbox"/>	Installation 30 Day		Services	\$100,000.00

Configure Pricing

Select	Product Name	Quantity	Sale Price	Discount (%)	Subtotal	Total
<input type="checkbox"/>	GenWatt Diesel 10kW	2.00	90,000.00	2.00	\$180,000.00	\$176,400.00
<input type="checkbox"/>	GenWatt Gasoline 1000KW	1.00	100,000.00	0.00	\$100,000.00	\$100,000.00
				1.29	\$280,000.00	\$276,400.00

4. Setup | Customize | Products | Field Sets | Click Edit ProductPick Product Search FS. Then click and drag fields from the meeting object down into your field set.

ProductPick Product Search FS: This controls the fields that are used for searching

Select Price Book

Price Book: Standard Price Book [Set Price Book]

salesforce.com - 2,000 Widgets

Opportunity Name: salesforce.com - 2,000 Widgets Amount: \$276,400.00
 Account Name: salesforce.com Close Date: 03/07/2011
 Stage: Value Proposition

Product Picker [Save] [Cancel]

Search and Select Products: Product Name [] Product Family [--None--] Sub Family [--None--] [Search]

Configure Pricing: [Remove]

Select	Product Name	Quantity	Sale Price	Discount (%)	Subtotal	Total
<input type="checkbox"/>	GenWatt Diesel 10kW	2.00	90,000.00	2.00	\$180,000.00	\$176,400.00
<input type="checkbox"/>	GenWatt Gasoline 1000kW	1.00	100,000.00	0.00	\$100,000.00	\$100,000.00
				1.29	\$280,000.00	\$276,400.00

Product Picker Table:

Select	Product Name	Product Code	Product Family	Unit Price
<input type="checkbox"/>	GenWatt Diesel 10kW		Hardware	\$100,000.00
<input type="checkbox"/>	GenWatt Gasoline 1000kW		Hardware	\$100,000.00
<input type="checkbox"/>	Installation 30 Day		Services	\$100,000.00

4. Update Product Pick to latest version

1. Go to <https://appexchange.salesforce.com/>
2. Click on Login at the top of the page
3. Enter your [salesforce.com](https://www.salesforce.com) credentials to log into the [salesforce.com](https://www.salesforce.com) appexchange
4. Select your name at top of page>My Account

My Account - Hitch2Cloud

Show: All My Company's Apps [View all apps that are currently installed or were bought on the AppExchange.]

Apps listed: Hitch2Cloud Connector Standard of GoToMeeti..., License Management App (L...), Recurly - Subscription Billing To Salesforc..., Salesforce.com Channel Ord...

User Profile: Dennis Lee, dennis@hitch2cloud.com

My Activity: Questions, Answers, Ideas, Reviews, **My Account**, Edit My Profile, Publishing Console, Logout

5. Select update for the Product Pick package

My Account - Hitch2Cloud


Show: *View all apps that are currently installed or were bought on*



Product Pick

Status: Installed - Free

[Write Review](#) - [Uninstall App](#)

 **Update Available**

5. Contact Us

Website: <http://hitch2cloud.com>

Email: info@hitch2cloud.com

