



Opportunity Product Selector  
Admin Guide v1.5 (Lightning)

## Contents

1. Overview.....	3
2. Add the New Picker buttons .....	4
3. Adding Users.....	5
4. Security Permissions .....	5
5. Update the Opportunity Product Selector to latest version.....	7
6. Configuring the fields to be used for configuration.....	7
A. Opportunity Field Set on the Opportunity Object: .....	7
B. Search Field Set on the Price Book Entry Object: .....	9
C. Products Field Set on the Price Book Entry Object: .....	9
D. Field Set on the Opportunity Line Item Object:.....	9
7. Advanced Filtering .....	11
Example:.....	11
This is how it would look in salesforce.....	12
8. Contact.....	13

# 1. Overview

One Screen User Interface (includes Opportunity Details, Product Selector and Opportunity Product Line Items)

Search, Add, Edit & Remove Multiple Products from your Opportunity

Configure Multiple Picklist/Dropdown & Text Search Filters

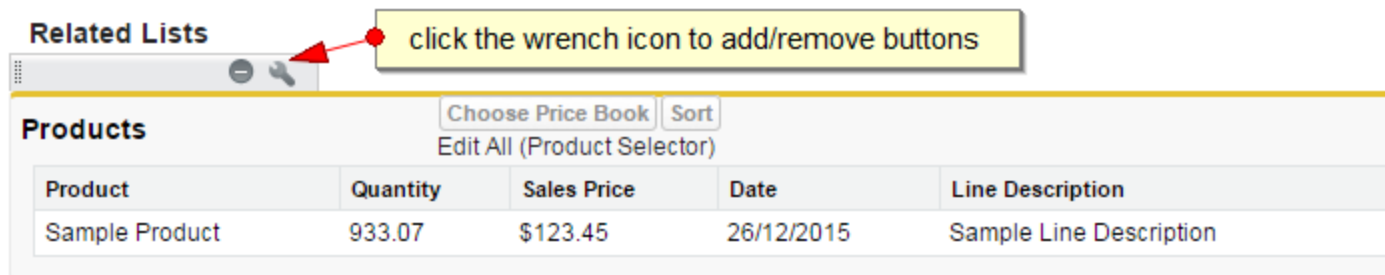
## **Key Features:**

- Single Screen Interface with Opportunity Details, Product Selector & Opportunity Products
- Search, Add, Edit, Remove Multiple Products for your Opportunity
- Sort opportunity products (Salesforce Classic only)
- Configure Multiple Picklist / Dropdown & Text Search Filters
- Easily Add the Same Product Multiple Times to your Opportunity
- Quickly Edit Opportunity Details
- Quickly Recalculate Opportunity Amount
- Easily Configure Page Layout to edit Opportunity Details and Products
- Create Buttons for Automated Product Filters
- Available for both Salesforce Lightning Experience and Salesforce Classic
- Available for Salesforce Professional, Enterprise, Unlimited and Performance Editions

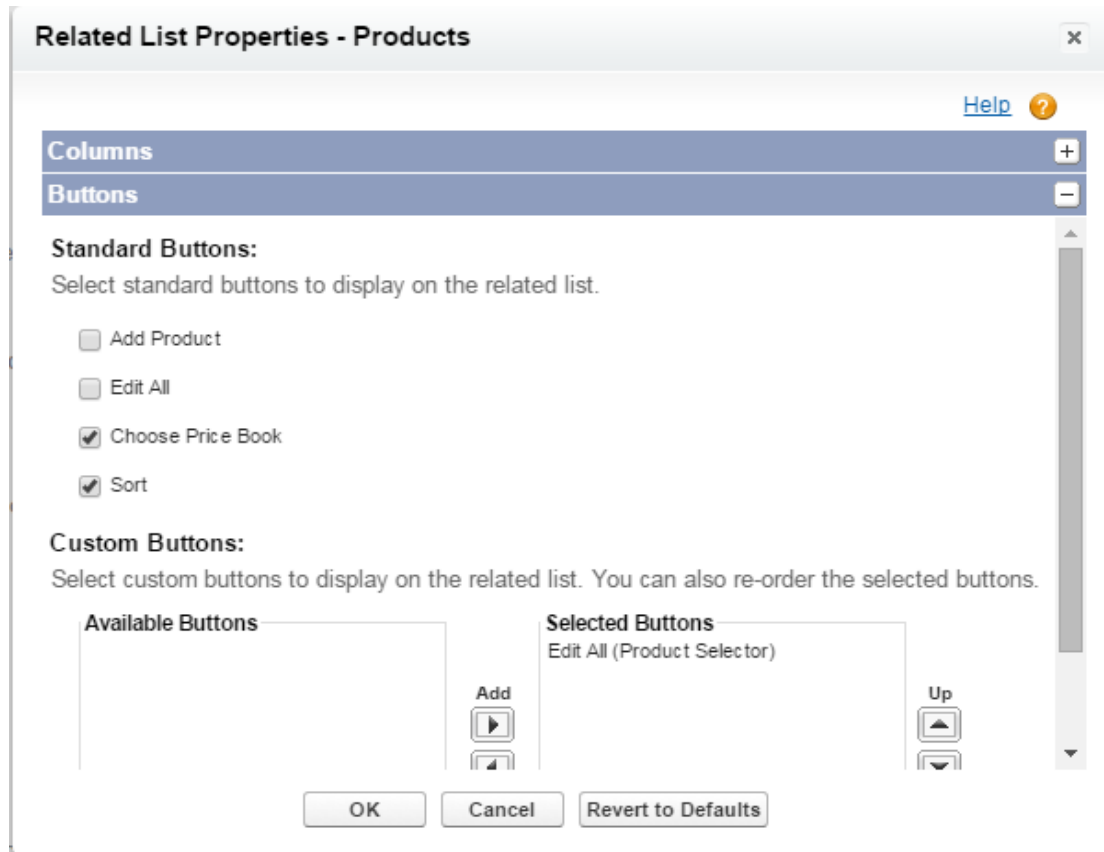
## 2. Add the New Picker buttons

Your salesforce.com admin will need to add the button you created to all the page layouts for those using Product Selector.

1. Setup | Objects and Fields | Object Manager | Opportunity| Page Layouts | Click Edit next to your layout
2. From the layout editor go to the related list



- Uncheck the standard Add Product and Edit all buttons, and add the Edit All (Product Selector) button

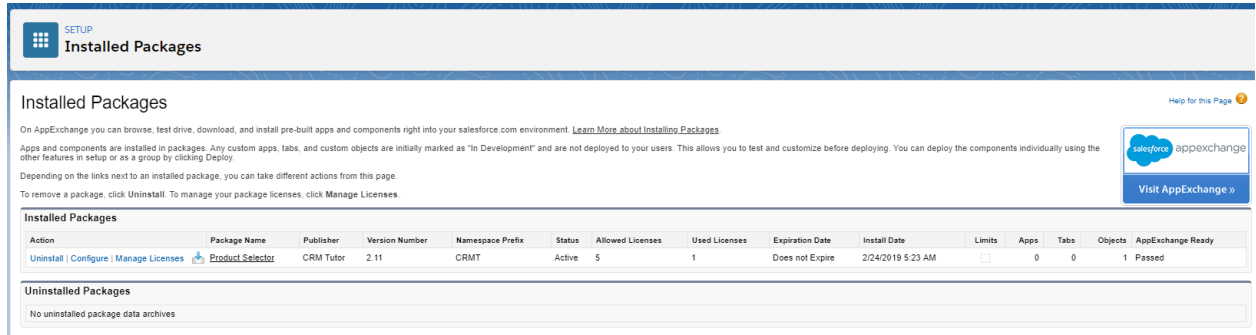


### 3. Adding Users

You'll need to assign access to a user within your organization, you'll need to be an Administrator of your salesforce.com system.

To assign a user to a license for one of the available managed packages:

- Click Your Name | Setup | Apps | Installed Packages.



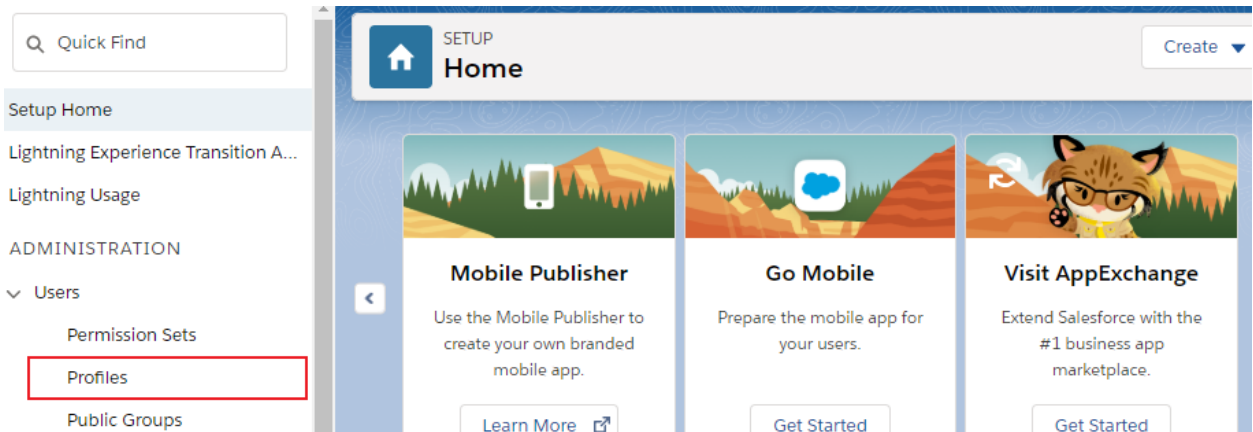
- Select Product Selector
- Click Manage Licenses.
- Click Add Users
- Check the box next to the name of users you would like to give access
- Click Add

### 4. Security Permissions

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

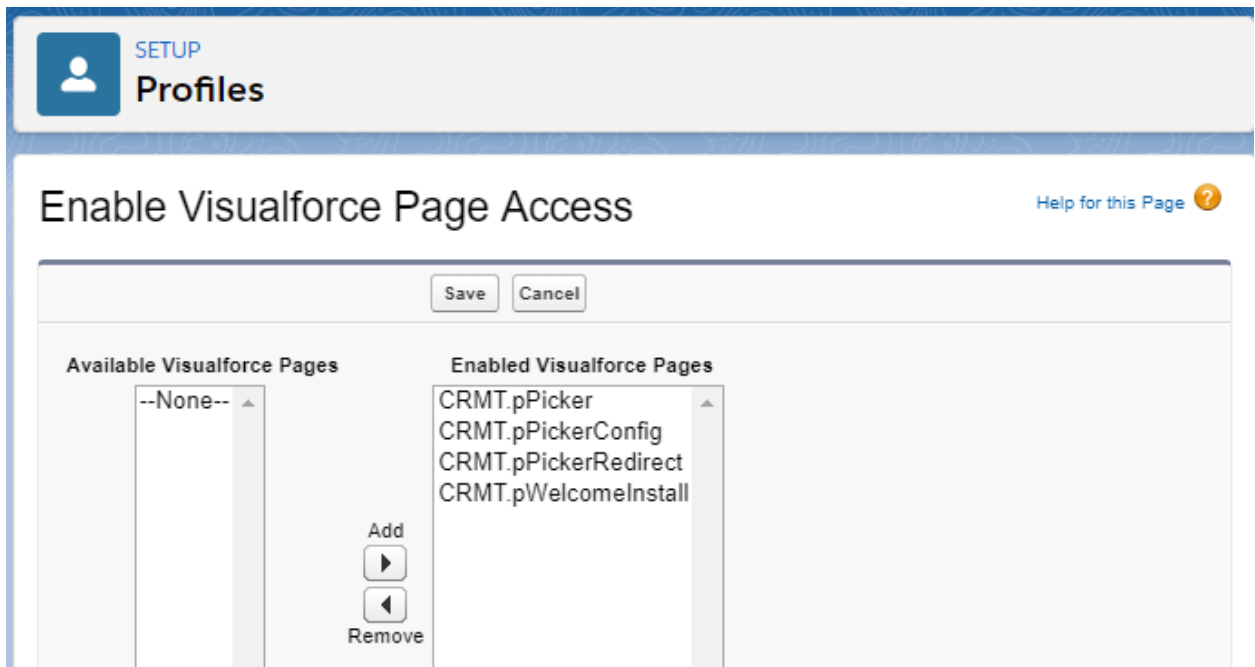
1. Click Your Name | **Setup | Administration | Users | Profile | Select the profile of your users | Enabled Apex Class Access | Edit | Add** the following classes:

- CRMT.pPickerCon



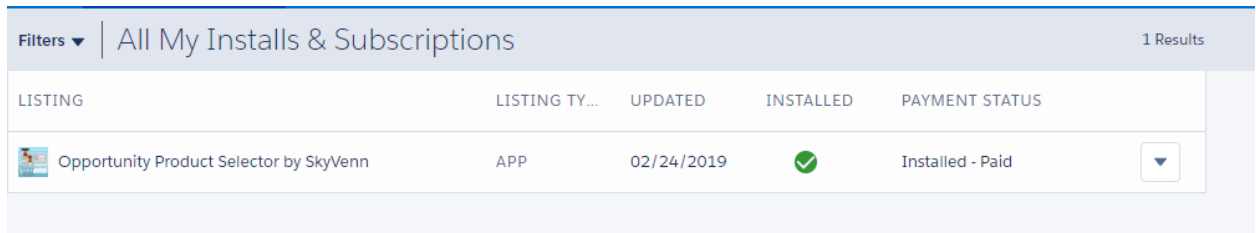
2. Click Your Name | Setup | Administration | Users | Profile | Select the profile of your users | Enabled Visualforce Page Access | Edit | Add the following pages:

- CRMT.pPicker





## 5. Update the Opportunity Product Selector 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://salesforce.com) credentials to log into the [salesforce.com](https://salesforce.com) appexchange
4. Select your name at top of page>My Account
5. Select update for the Opportunity Product Selector package



The screenshot shows the 'All My Installs & Subscriptions' page in Salesforce AppExchange. It features a table with columns for Listing, Listing Type, Updated, Installed, and Payment Status. One entry is visible: 'Opportunity Product Selector by SkyVenn', which is an APP updated on 02/24/2019, with a green checkmark indicating it is installed and paid for.

LISTING	LISTING TY...	UPDATED	INSTALLED	PAYMENT STATUS
 Opportunity Product Selector by SkyVenn	APP	02/24/2019		Installed - Paid

## 6. Configuring the fields to be used for configuration

To help support reporting you can configure some of the fields on the configuration page. There is a standard set of fields you can add/remove or you can create your own custom fields on the associated objects and add them to the pages.

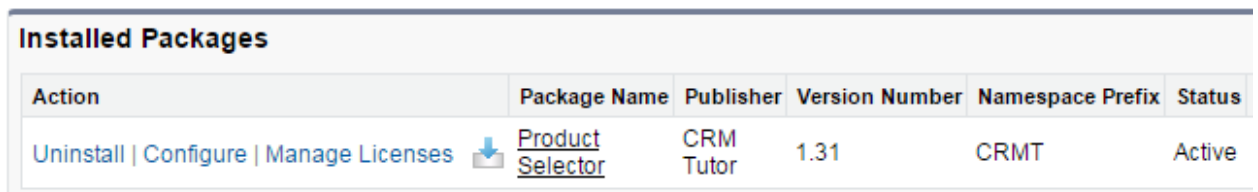
Setup | App Setup | Create | Objects | < object> | Field Sets | Click Edit next to the field set you wish to modify. Then click and drag fields from the meeting object down into your field set.

### Fieldset Configuration


#### A. Opportunity Field Set on the Opportunity Object:

This controls the parent object details in the field set to be displayed on the product selector page

1. Setup | Build | Installed Package | Product Selector | Configure




The screenshot shows the 'Installed Packages' table in Salesforce. It has columns for Action, Package Name, Publisher, Version Number, Namespace Prefix, and Status. One package is listed: 'Product Selector' by 'CRM Tutor', version 1.31, with namespace prefix 'CRMT' and status 'Active'.

Action	Package Name	Publisher	Version Number	Namespace Prefix	Status
<a href="#">Uninstall</a>   <a href="#">Configure</a>   <a href="#">Manage Licenses</a> 	<a href="#">Product Selector</a>	CRM Tutor	1.31	CRMT	Active

2. Select "Click Here to Edit" for pOpportunityFS

## Field Sets

New

Action	Field Label	Installed Package	API Name	Where is this used?
<a href="#">Edit</a> 	pOpportunityFS	<u>Product Selector</u>	CRMT__pOpportunityFS	pOpportunityFS




## B. Search Field Set on the Price Book Entry Object:

This controls the Price Book Entry object details in the field set to be displayed on the product selector page for available records

Initial Setup:

1. Setup | Build | Installed Package | Product Selector | Configure

Installed Packages					
Action	Package Name	Publisher	Version Number	Namespace Prefix	Status
<a href="#">Uninstall</a>   <a href="#">Configure</a>   <a href="#">Manage Licenses</a> 	<a href="#">Product Selector</a>	CRM Tutor	1.31	CRMT	Active

2. Select "Click Here for Initial Setup" for pSearchFS

### 3. Configure Fields on Search, Product Selector and Product Edit

Product Selector will have default columns and fields selected but you can customize the fields used in Product Selector.


1. Opportunity: Edit **pOpportunityFS** Fieldset [Click Here to Edit](#)
2. Search: Edit **pSearchFS** Fieldset [Click Here for Initial Setup](#) [Click Here to Edit](#)
3. Product Listing: Edit **pPriceBookEntryFS** Fieldset [Click Here for Initial Setup](#) [Click Here to Edit](#)
4. Opportunity Product: Edit **pOLIFS** Fieldset [Click Here to Edit](#)

## C. Products Field Set on the Price Book Entry Object:

This controls the Price Book Entry object details in the field set to be displayed on the product selector page for available records

Initial Setup:

1. Setup | Build | Installed Package | Product Selector | Configure

Installed Packages					
Action	Package Name	Publisher	Version Number	Namespace Prefix	Status
<a href="#">Uninstall</a>   <a href="#">Configure</a>   <a href="#">Manage Licenses</a> 	<a href="#">Product Selector</a>	CRM Tutor	1.31	CRMT	Active

2. Select "Click Here for Initial Setup" for pPriceBookEntryFS

### 3. Configure Fields on Search, Product Selector and Product Edit


Product Selector will have default columns and fields selected but you can customize the fields used in Product Selector.

1. Opportunity: Edit **pOpportunityFS** Fieldset [Click Here to Edit](#)
2. Search: Edit **pSearchFS** Fieldset [Click Here for Initial Setup](#) [Click Here to Edit](#)
3. Product Listing: Edit **pPriceBookEntryFS** Fieldset [Click Here for Initial Setup](#) [Click Here to Edit](#)
4. Opportunity Product: Edit **pOLIFS** Fieldset [Click Here to Edit](#)

## D. Field Set on the Opportunity Line Item Object:

This controls the field set of the objects you're editing that joins Opportunity and Price Book Entry records.

1. Setup | Build | Installed Package | Product Selector | Configure |

Field Sets <span style="float: right;">New</span>				
Action	Field Label	Installed Package	API Name	Where is this used?
<a href="#">Edit</a> 	pOLIFS	<u>Product Selector</u>	CRMT__pOLIFS	pOLIFS

2. Select "Click Here to Edit" for pOLIFS

## 7. Advanced Filtering

If you're interested in having default filters set for your users, you can create your own Custom buttons and add conditions to the standard button URL:

```
{!IF(ISBLANK(Opportunity.CRMT__Pricebook2Id__c),  
urlfor('/oppitm/choosepricebook.jsp?id='+Opportunity.Id+'&retU  
RL='+Opportunity.Id+'&saveURL='+'/apex/CRMT__ppicker?id='+Oppo  
rtunity.Id+'&CRMTBOO__isActive=true'),  
URLFOR('/apex/CRMT__ppicker?id='+Opportunity.Id+'&CRMTBOO__isA  
ctive=true'))}
```

Prefix	Description	Example
CRMTBOO__	is for Boolean fields this uses an equals	&CRMTBOO__isActive=true
CRMTSTR__	is for String fields this uses a contains	&CRMTSTR__Name=diesel

### Example 1:

Only show products whose name contains diesel

Create a new Button URL:

```
{!IF(ISBLANK(Opportunity.CRMT__Pricebook2Id__c),  
urlfor('/oppitm/choosepricebook.jsp?id='+Opportunity.Id+'&retU  
RL='+Opportunity.Id+'&saveURL='+'/apex/CRMT__ppicker?id='+Oppo  
rtunity.Id+'&CRMTBOO__isActive=true&CRMTSTR__Name=diesel'),  
URLFOR('/apex/CRMT__ppicker?id='+Opportunity.Id+'&CRMTBOO__isA  
ctive=true&CRMTSTR__Name=diesel'))}
```

### Example 2:

Only show products whose currency matches the currency of the opportunity. Notice that we're using the CurrencyIsoCode value as a merge field from the Opportunity. The merge field doesn't have

```
{!IF(ISBLANK(Opportunity.CRMT__Pricebook2Id__c),urlfor('/oppitm/choo  
sepricebook.jsp?id='+Opportunity.Id+'&retURL='+Opportunity.Id+'&save  
URL='+'/apex/CRMT__ppicker?id='+Opportunity.Id+'&CRMTBOO__isActive=t  
rue&CRMTSTR__CurrencyISOCode='+ TEXT(Opportunity.CurrencyIsoCode)),  
URLFOR('/apex/CRMT__ppicker?id='+Opportunity.Id+'&CRMTBOO__isActive=  
true&CRMTSTR__CurrencyISOCode='+ TEXT(Opportunity.CurrencyIsoCode)  
))}
```

This is how it would look in salesforce

Edit Opportunity Product Custom Button or Link

## Edit All (Custom)

**Custom Button or Link Edit** Save Quick Save Preview Cancel

Label

Name  [i](#)

Namespace Prefix CRMT

Description

Display Type

- Detail Page Link [View example](#)
- Detail Page Button [View example](#)
- List Button [View example](#)

Display Checkboxes (for Multi-Record Selection)

Behavior  [View Behavior Options](#)

Content Source

---

Select Field Type  Insert Field

[https://crmt.na22.visual.force.com/apex/ppicker?id=0061500000Rx7Wc&CRMTBOO\\_\\_isActive=true&CRMTFSSEARCH=CRMT\\_\\_pSearchFS&CRMTFSPBE=CRMT\\_\\_pPriceBookEr](https://crmt.na22.visual.force.com/apex/ppicker?id=0061500000Rx7Wc&CRMTBOO__isActive=true&CRMTFSSEARCH=CRMT__pSearchFS&CRMTFSPBE=CRMT__pPriceBookEr)  
(Text) =

```
{!IF (ISBLANK (Opportunity.CRMT__Pricebook2Id__c), urlfor ('/oppitm/choosepricebook.jsp?id='+Opportunity.Id+'&retURL='+Opportunity.Id+'&saveURL='+'/apex/CRMT__ppicker?id='+Opportunity.Id+'&CRMTBOO__isActive=true&CRMTSTR__Name=diesel'), URLFOR ('/apex/CRMT__ppicker?id='+Opportunity.Id+'&CRMTBOO__isActive=true&CRMTSTR__Name=diesel'))}
```

## 8. Contact

We offer professional services to accelerate your pipeline by combining the power of Salesforce.com to optimize your sales reps performance and Pardot to accelerate your marketing automation.

Contact us today to get started!

Website: <https://www.skyvenn.com>

Email: [info@skyvenn.com](mailto:info@skyvenn.com)

Need more licenses?

Email: [sales@ skyvenn.com](mailto:sales@skyvenn.com)