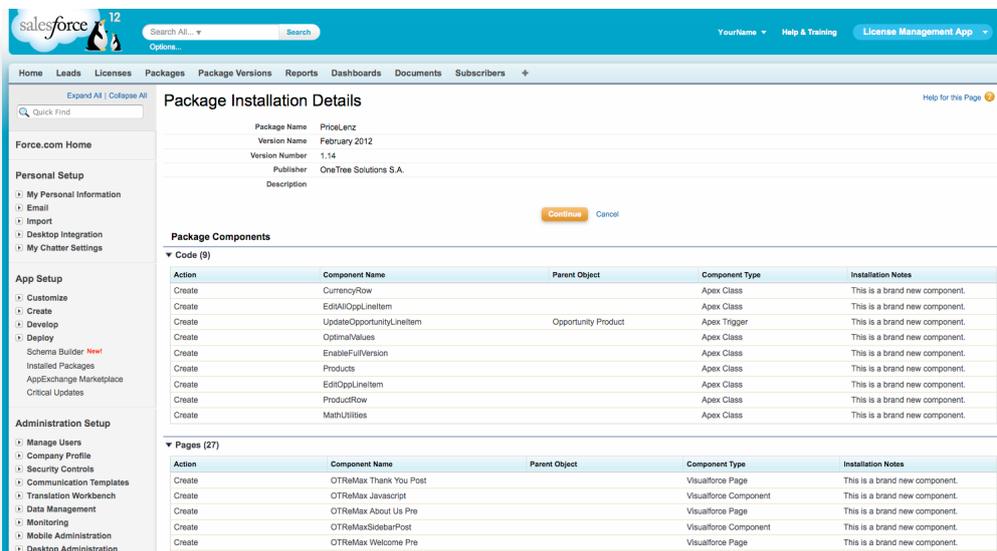


Before you begin

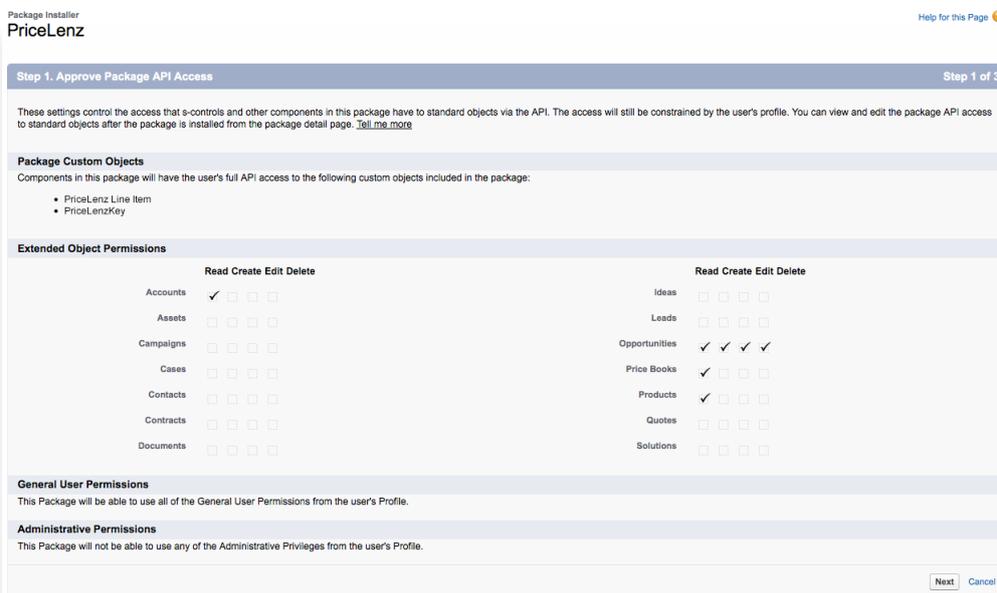
- You will need to be a Salesforce® administrator to install the application
- Installation will take around 12 minutes
- Installation should be in a ‘production’ Salesforce account, not ‘sandbox’.
- The application can be installed in either Professional, Enterprise or Unlimited Salesforce editions.

Install the application

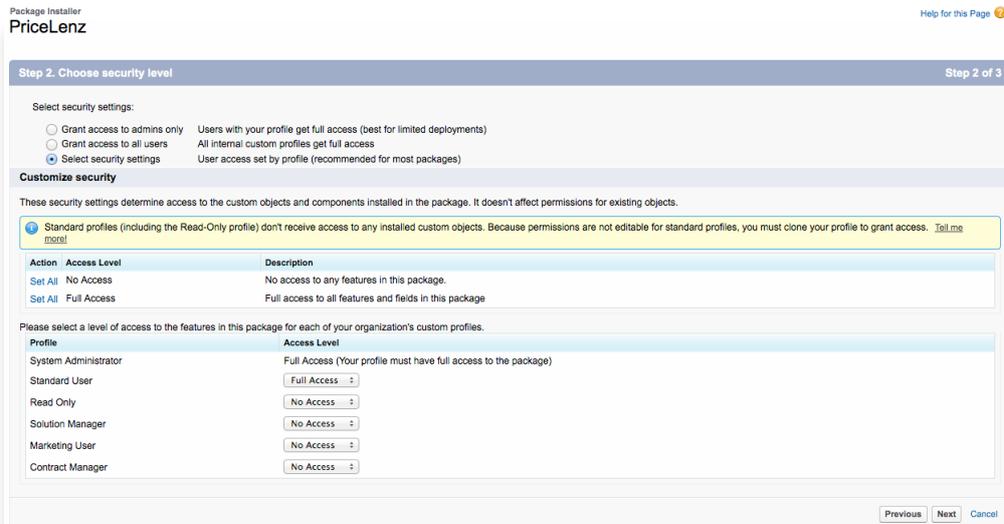
1. After clicking the ‘Get it now’ button from the AppExchange and entering your credentials, a screen like the one below will appear. Click ‘Continue’ to start the installation wizard.



2. On Step 1 of the installation wizard, approve package API access by clicking the ‘Next’ button.



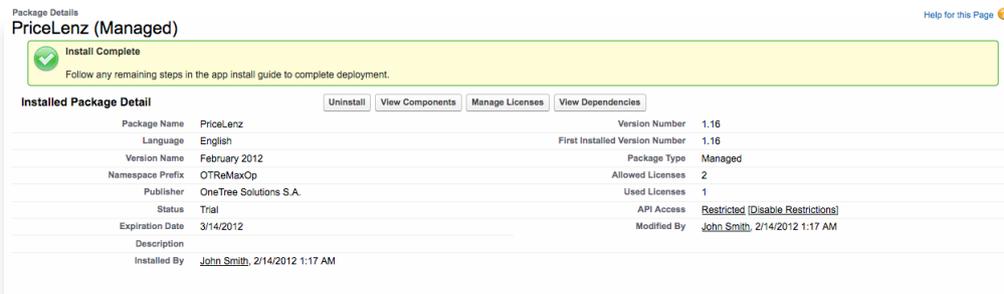
- On Step 2 of the installation wizard, choose a security level. We recommend choosing 'User access set by profile' where you can limit/provide access to certain profiles and users. Click the 'Next' button.



- On the last step of the installation wizard, click 'Install' to begin the application installation.



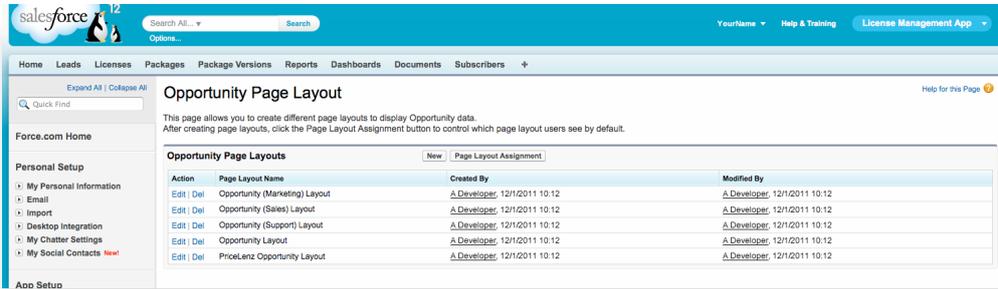
- After the installation process has finished, you will see an 'Install Complete' screen.



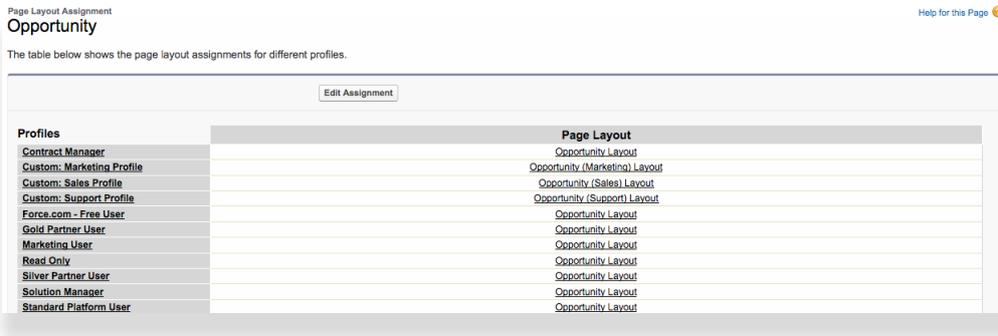
- Installation is complete, now proceed to step 7 in the 'page layout customization' section.

Page layout customization

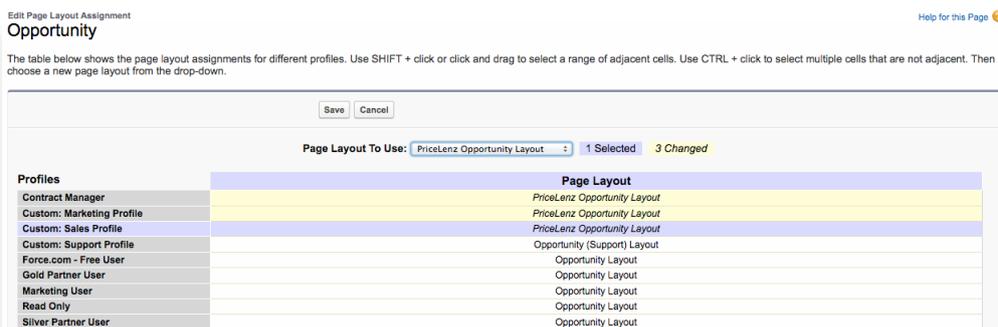
- Go to <YourName> -> Setup -> App Setup -> Customize -> Opportunities -> Page Layouts, and click the 'Page Layout Assignment' button.



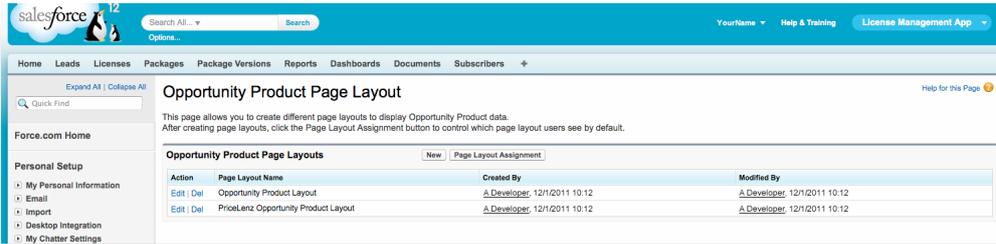
- Click the 'Edit Assignment' button.



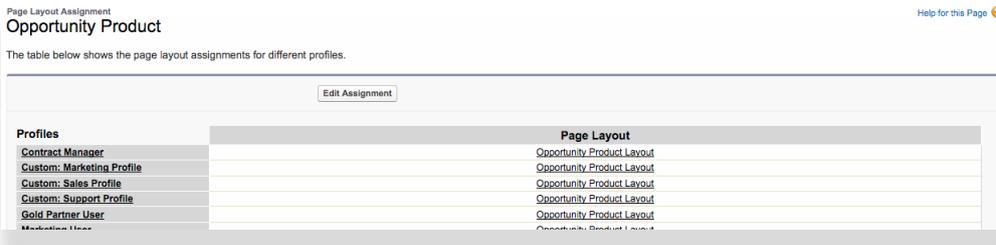
- From the list, select the profile(s) for which you want to assign* the 'PriceLentz Opportunity Layout' to. Then select the 'PriceLentz Opportunity Layout' from the 'Page Layout To Use' drop-down list. If you want to test PriceLentz as an administrator, also select the 'System Administrator' profile. Click the 'Save' button.



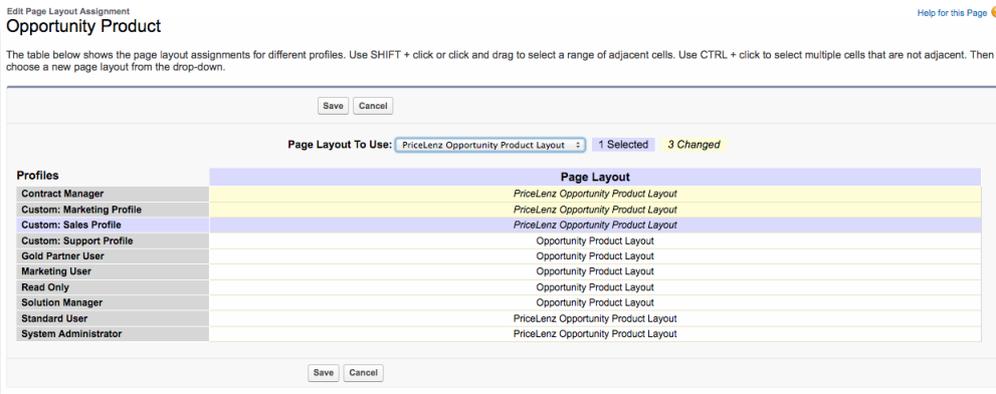
- Go to <YourName> -> Setup -> App Setup -> Customize -> Opportunities -> Opportunity Products -> Page Layouts, and click the 'Page Layout Assignment' button.



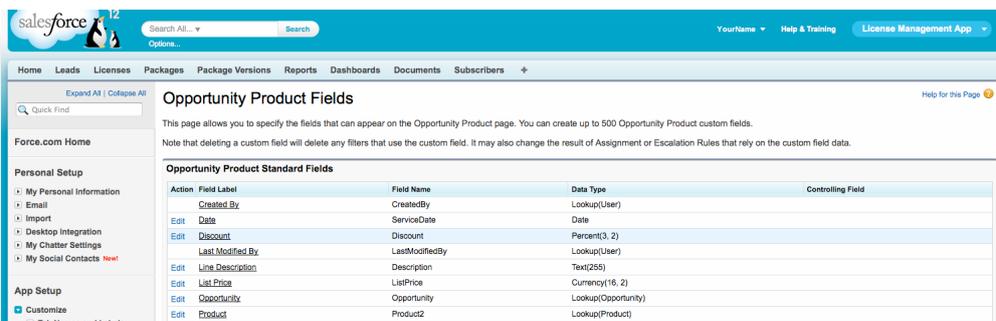
- Click the 'Edit Assignment' button.



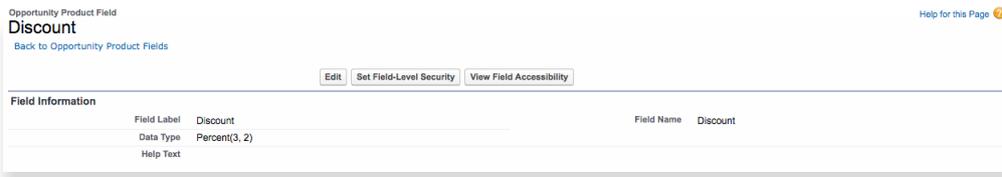
- From the list, select the profile(s) for which you want to assign the 'PriceLenz Opportunity Product Layout' to (select the same profiles you chose in step 11). Then select the 'PriceLenz Opportunity Product Layout' from the 'Page Layout To Use' drop-down list. Click the 'Save' button.



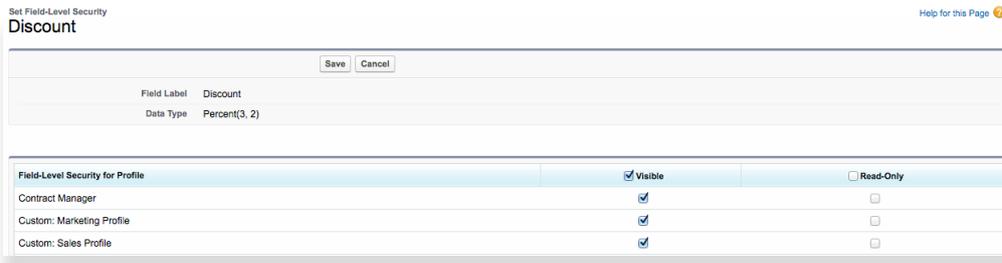
- Go to <YourName> -> Setup -> App Setup -> Customize -> Opportunities -> Opportunity Products -> Fields, and select 'Discount' from the list.



- Click the 'Set Field-Level Security' button.

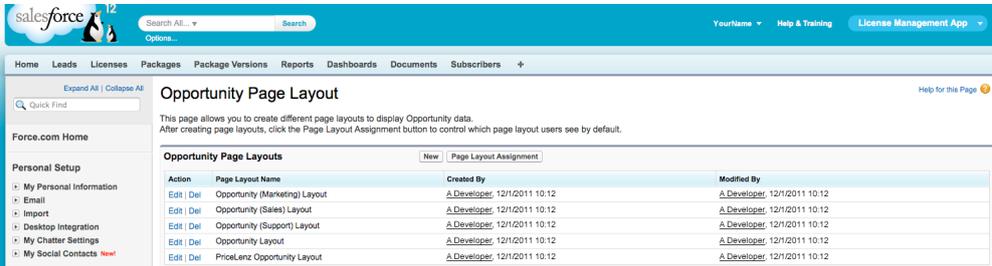


- For the 'Discount' field **it's essential to make it visible** to all the profiles you selected in step 9 (PriceLentz Opportunity Layout). After selecting the appropriate profiles, click the 'Save' button.

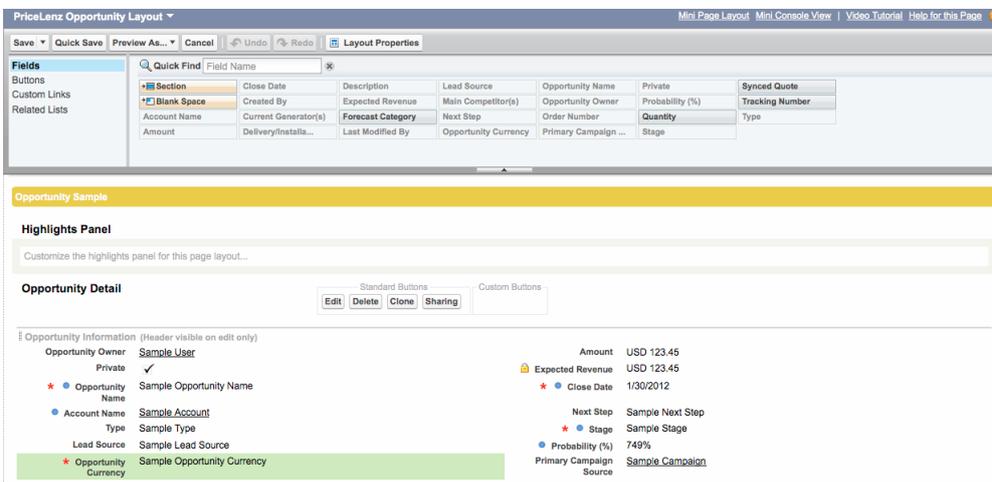


- If you do not have multi-currency enabled in Salesforce, skip this step and go to **step 18**. If you do have multi-currency enabled, please ensure the 'Opportunity Currency' field is viewable on the Opportunity Detail page.

Go to <YourName> -> Setup -> App Setup -> Customize -> Opportunities -> Page Layouts, and select the 'Edit' link next to the 'PriceLentz Opportunity Layout' page layout name.

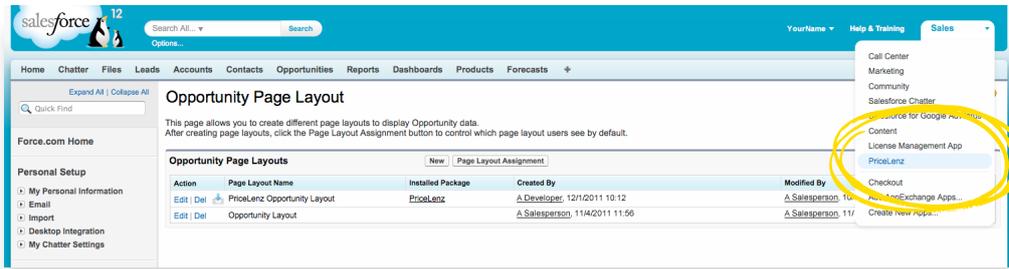


- Locate 'Opportunity Currency' from the top layout panel, then drag and drop it into the Opportunity Detail space. Click the 'Save' button.



Launch the application

18. From the application picker select 'PriceLenz'.



PriceLenz for Salesforce is now configured and ready to use. From within the PriceLenz for Salesforce pages, you will find further information and user guides. If you have any questions, please contact:

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Rest of the world: +352 27 84 55 55 sales@PriceLenz.com