

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.

salesforce	Search All v Search			YourName ▼ Help & Tra	lining License Management App 🔹
Home Leads Licenses Pa	ackages Package Versions Report	Dashboards Documents Subse	cribers +		
Expand All Collapse All	Package Installation	Details PriceLenz			Help for this Page 🥝
Force com Home	Version Name	February 2012			
	Version Number	1.14			
Personal Setup	Publisher	OneTree Solutions S.A.			
	Description				
My Personal Information Email					
Import			Continue Cancel		
 Desktop Integration 	Package Components				
 My Chatter Settings 	▼ Code (9)				
App Setup	Action	Component Name	Parent Object	Component Type	Installation Notes
	Create	CurrencyRow		Apex Class	This is a brand new component.
Customize	Create	EditAllOppLineItem		Apex Class	This is a brand new component.
Develop	Create	UpdateOpportunityLineItem	Opportunity Product	Apex Trigger	This is a brand new component.
Deploy	Create	OptimalValues		Apex Class	This is a brand new component.
Schema Builder New!	Create	EnableFullVersion		Apex Class	This is a brand new component.
Installed Packages	Create	Products		Apex Class	This is a brand new component.
AppExchange Marketplace	Create	EditOppLineItem		Apex Class	This is a brand new component.
Chical Opdates	Create	ProductRow		Apex Class	This is a brand new component.
Administration Setup	Create	MathUtilities		Apex Class	This is a brand new component.
Manage Users Company Profile	▼ Pages (27)				
Security Controls	Action	Component Name	Parent Object	Component Type	Installation Notes
Communication Templates	Create	OTReMax Thank You Post		Visualforce Page	This is a brand new component.
Translation Workbench	Create	OTReMax Javascript		Visualforce Component	This is a brand new component.
Data Management	Create	OTReMax About Us Pre		Visualforce Page	This is a brand new component.
Monitoring Mobile Administration	Create	OTReMaxSidebarPost		Visualforce Component	This is a brand new component.
 Desktop Administration 	Create	OTReMax Welcome Pre		Visualforce Page	This is a brand new component.

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

PriceLenz			Help for this Page 🥝
Step 1. Approve Package API Acc	985		Step 1 of 3
These settings control the access that s-o to standard objects after the package is in	ontrols and other components in this package have to st stalled from the package detail page. <u>Tell me more</u>	andard objects via the API. The access will still be constrai	ned by the user's profile. You can view and edit the package API access
Package Custom Objects			
Components in this package will have the	user's full API access to the following custom objects in	cluded in the package:	
PriceLenz Line Item PriceLenzKey			
Extended Object Permissions			
	Read Create Edit Delete		Read Create Edit Delete
Accounts		Ideas	
Assets		Leads	
Campaigns		Opportunities	\checkmark \checkmark \checkmark \checkmark
Cases		Price Books	
Contacts		Products	
Contracts		Quotes	
Documents		Solutions	
General User Permissions			
This Package will be able to use all of the	General User Permissions from the user's Profile.		
Administrative Permissions			
This Package will not be able to use any o	of the Administrative Privileges from the user's Profile.		
			Next Cancel

3. 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.

Package Installer PriceLenz	Help for this Page 🥥
Step 2. Choose security level	Step 2 of 3
Select security settings:	
 Grant access to admins only Grant access to all users Select security settings 	Users with your profile get full access (best for limited deployments) All internal custom profiles get full access User access set by profile (recommended for most packages)
Customize security	
These security settings determine acces	ss to the custom objects and components installed in the package. It doesn't affect permissions for existing objects.
Standard profiles (including the Re more!	ead-Only profile) don't receive access to any installed custom objects. Because permissions are not editable for standard profiles, you must clone your profile to grant access. Tell me
Action Access Level	Description
Set All No Access	No access to any features in this package.
Set All Full Access	Full access to all features and fields in this package
Please select a level of access to the fe	atures in this package for each of your organization's custom profiles.
Profile	Access Level
System Administrator	Full Access (Your profile must have full access to the package)
Standard User	Full Access ÷
Read Only	No Access ÷
Solution Manager	No Access a
Marketing User	No Access =
Contract Manager	No Access ‡
	Previous Next Cancel

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

Package Installer PriceLenz	Help for this Page 🥹
Step 3. Install Package	Step 3 of 3
The package is ready to be installed. Click Install to continue.	
	Previous Install Cencel

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

Package Details PriceLenz (Managed)						Help for this Page 🕜
Follow any remaining steps in	n the app install guide to compl	lete deployment.				
Installed Package Detail		Uninstall View Components	Manage Licenses	View Dependencies		
Package Name	PriceLenz			Version Number	1.16	
Language	English			First Installed Version Number	1.16	
Version Name	February 2012			Package Type	Managed	
Namespace Prefix	OTReMaxOp			Allowed Licenses	2	
Publisher	OneTree Solutions S.A.			Used Licenses	1	
Status	Trial			API Access	Restricted [Disable Restrictions]	
Expiration Date	3/14/2012			Modified By	John Smith, 2/14/2012 1:17 AM	
Description						
Installed By	John Smith, 2/14/2012 1:17	AM				

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

Page layout customization

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

Salesforce 12 Search AL - Beach AL - Beach Cotona. Vourtierre - Neip & Training License Management App -									
Home Leads Licenses Packages Package Versions Reports Dashboards Documents Subscribers +									
Expand Al Cotapee Al C Quark Find This page allows you to create different page layouts to display Opportunity data. After creating page layouts, click the Page Layout Assignment button to control which page layout users see by default.									
Dereenal Satur	Opportun	ity Page Layouts	New Page Layout Assignment						
Fersonal detup	Action	Page Layout Name	Created By	Modified By					
My Personal Information Email	Edit Del	Opportunity (Marketing) Layout	A Developer, 12/1/2011 10:12	A Developer, 12/1/2011 10:12					
Import	Edit Del	Opportunity (Sales) Layout	A Developer, 12/1/2011 10:12	A Developer, 12/1/2011 10:12					
Desktop Integration	Edit Del	Opportunity (Support) Layout	A Developer, 12/1/2011 10:12	A Developer, 12/1/2011 10:12					
 My Chatter Settings 	Edit Del	Opportunity Layout	A Developer, 12/1/2011 10:12	A Developer, 12/1/2011 10:12					
My Social Contacts New!	Edit Del	PriceLenz Opportunity Layout	A Developer, 12/1/2011 10:12	A Developer, 12/1/2011 10:12					
App Setup									

8. Click the 'Edit Assignment' button.

Page Layout Assignment Opportunity		Help for this Page 🥝
The table below shows the page layout ass	ssignments for different profiles.	
	Edit Assignment	
Profiles	Page Layout	
Contract Manager	Opportunity Layout	
Custom: Marketing Profile	Opportunity (Marketing) Layout	
Custom: Sales Profile	Opportunity (Sales) Layout	
Custom: Support Profile	Opportunity (Support) Layout	
Force.com - Free User	Opportunity Layout	
Gold Partner User	Opportunity Layout	
Marketing User	Opportunity Layout	
Read Only	Opportunity Layout	
Silver Partner User	Opportunity Layout	
Solution Manager	Opportunity Layout	
Standard Platform User	Opportunity Layout	

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

Edit Page Layout Assignment Opportunity	Help for this Page 🥥
The table below shows the page layout ass choose a new page layout from the drop-do	gnments for different profiles. Use SHIFT + click or click and drag to select a range of adjacent cells. Use CTRL + click to select multiple cells that are not adjacent. Then wn.
	Savo
	Page Layout To Use: PriceLenz Opportunity Layout : 1 Selected 3 Changed
Profiles	Page Layout
Contract Manager	PriceLenz Opportunity Layout
Custom: Marketing Profile	PriceLenz Opportunity Layout
Custom: Sales Profile	PriceLenz Opportunity Layout
Custom: Support Profile	Opportunity (Support) Layout
Force.com - Free User	Opportunity Layout
Gold Partner User	Opportunity Layout
Marketing User	Opportunity Layout
Read Only	Opportunity Layout
Silver Partner User	Opportunity Layout

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

salesforce	sarch All ▼ tions	Sear	reh				YourName 🔻	Help & Training	License Management App -
Home Leads Licenses Pac	kages Pac	ckage Versions Rep	orts Dashboards	Documents	Subscribers +				
Expand All Collapse All Q Quick Find Force.com Home Research Setup	Equard AT Columnation of the Page Layout Method of the Page Layout Assignment Dutton to control which page layout users see by default.								
Personal Setup	Action	Page Layout Name			Created By		Modified	Ву	
My Personal Information Email	Edit Del	Opportunity Product La	ayout		A Developer, 12/1/2011	10:12	A Develo	per, 12/1/2011 10:12	2
Import	Edit Del PriceLenz Opportunity Product Layout <u>A Developer</u> , 12/1/2011 10:12 <u>A Developer</u> , 12/1/2011 10:12				2				
Desktop Integration My Chatter Settings									

11. Click the 'Edit Assignment' button.

Page Layout Assignment Opportunity Product		Help for this Page 🥝
The table below shows the page layout assi	gnments for different profiles.	
	Edit Assignment	
Profiles	Page Layout	
Contract Manager	Opportunity Product Layout	
Custom: Marketing Profile	Opportunity Product Layout	
Custom: Sales Profile	Opportunity Product Layout	
Custom: Support Profile	Opportunity Product Layout	
Gold Partner User	Opportunity Product Layout	
Marketing Llear	Onnortinitis Braduat Laurat	

12. 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.

Edit Page Layout Assignment Opportunity Product	Help for this Page 🥹
The table below shows the page layout assig choose a new page layout from the drop-dow	nments for different profiles. Use SHIFT + click or click and drag to select a range of adjacent cells. Use CTRL + click to select multiple cells that are not adjacent. Then n.
	Save
	Page Layout To Use: PriceLenz Opportunity Product Layout : 1 Selected 3 Changed
Profiles	Page Layout
Contract Manager	PriceLenz Opportunity Product Layout
Custom: Marketing Profile	PriceLenz Opportunity Product Layout
Custom: Sales Profile	PriceLenz Opportunity Product Layout
Custom: Support Profile	Opportunity Product Layout
Gold Partner User	Opportunity Product Layout
Marketing User	Opportunity Product Layout
Read Only	Opportunity Product Layout
Solution Manager	Opportunity Product Layout
Standard User	PriceLenz Opportunity Product Layout
System Administrator	PriceLenz Opportunity Product Layout
	Save

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

salesforce	earch All v ptions	Search		YourName 🔻 Hel	Ip & Training License Management App 🔻			
Home Leads Licenses Pa	ckages F	Package Versions Reports Dashboards	Documents Subscribers +					
Expand All Collapse All	Орро	ortunity Product Fields			Help for this Page 🥹			
Force.com Home	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 detering 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.							
Personal Setup	Opporte	unity Product Standard Fields						
My Personal Information	Action I	Field Label	Field Name	Data Type	Controlling Field			
• Email	1	Created By	CreatedBy	Lookup(User)				
Import	Edit	Date	ServiceDate	Date				
Desktop Integration	Edit	Discount	Discount	Percent(3, 2)				
My Chatter Settings	1	Last Modified By	LastModifiedBy	Lookup(User)				
E my obciar contacts from	Edit	Line Description	Description	Text(255)				
Ann Catur	Edit	List Price	ListPrice	Currency(16, 2)				
Abb gerab	Edit	Opportunity	Opportunity	Lookup(Opportunity)				
Customize Tab Names and Labels	Edit	Product	Product2	Lookup(Product)				

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

Opportunity Product Field Discount Back to Opportunity Product Fields						Help for this Page 🤣
		Edit Set Field-Level Security	View Field Accessibility			
Field Information						
Field Label	Discount			Field Name	Discount	
Data Type	Percent(3, 2)					
Help Text						

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

iscount			Help for this Pag
	Save		
Field Label Disco	unt		
Data Type Perce	nt(3, 2)		
eld-Level Security for Profile		Visible	Read-Only
ield-Level Security for Profile		€ Visible €	C Read-Only
ield-Level Security for Profile Contract Manager Dustom: Marketing Profile		ଟି Visible ଟ ଟ	Read-Only

16. 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 'PriceLenz Opportunity Layout' page layout name.

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Expend At I Colore At At									
Force.com Home After creating page layouts, click the Page Layout Assignment button to control which page layout users see by default.									
Personal Seturn Page Layouts New Pege Layout Assignment									
	Action	Page Layout Name		Created By	Modified B				
My Personal Information Email	Edit Del	Opportunity (Marketing) Layout		A Develop	er, 12/1/2011 10:12				
 Import 	Edit Del Opportunity (Sales) Layout A.Developer, 12/1/2011 10.12 A.Developer, 12/1/2011 10.12 Edit Del Opportunity (Support) Layout A.Developer, 12/1/2011 10.12 A.Developer, 12/1/2011 10.12								
Desktop Integration									
My Chatter Settings	Edit Del	Opportunity Layout		A Developer, 12/1/2011 10:12	A Develop	er, 12/1/2011 10:12			
My Social Contacts New!	Edit Del	PriceLenz Opportunity Layout		A Developer, 12/1/2011 10:12	A Develop	er, 12/1/2011 10:12			

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

cecenz opportunity	Layout 🔻					Mini Page	Layout Mini Console View	v Video Tutorial Help for this Page
ve 🔻 Quick Save Pre	view As • Cancel	P Undo 🗛 Redo	E Layout Properties					
lds	Quick Find Field Name							
tons	+ Section Close Date		Description	Lead Source	Opportunity Name	Private	Synced Quote	
atom Links	* Blank Space	Created By	Expected Revenue	Main Competitor(s)	Opportunity Owner	Probability (%)	Tracking Number	
ated Lists	Account Name	Current Generator(s)	Forecast Category	Next Step	Order Number	Quantity	Туре	
	Amount	Delivery/Installa	Last Modified By	Opportunity Currency	Primary Campaign	Stage		
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Opportunity Detail		ſ	Standard Buttons	Custom Buttor	15			
Opportunity Informativ	on (Header visible on edit	anhd						
Opportunity Informatic	Sample User	oniy)			Amount I	ISD 123 45		
Private	1			<u>e</u>	Expected Revenue	JSD 123.45		
* Opportunity	Sample Opportunity N	ame		_	* Close Date	1/30/2012		
Account Name	Sample Account				Next Step	Sample Next Sten		
Type	Sample Type				+ Stage	Sample Stage		
.,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	Sample Lead Source				Probability (%)	749%		
Lead Source					- 1 100000 (70)			

Launch the application

18. From the application picker select 'PriceLenz'.

salesforce	earch All ▼ otions	Search			YourName 🔻	Help & Training Sales -		
Home Chatter Files Leads	Accounts Contact	s Opportunities Reports	Dashboards Products	Forecasts +		Call Center Moritoting		
Contraction with a gas allowing contraction opportunities reports desiribution to control which page layout some by default. Contraction Contract								
Personal Setup	Opportunity Page L	ayouts	New Page Layo	ut Assignment	N	PriceLenz		
	Action Page Lay	rout Name	Installed Package	Created By	Modified By	Checkout		
My Personal Information Email	Edit Del 📥 PriceLer	z Opportunity Layout	PriceLenz	A Developer, 12/1/2011 10:12	A Salesperson, 10	Au. AppExchange Apps		
Import	Edit Del Opportu	nity Layout		A Salesperson, 11/4/2011 11:56	A Salesperson, 11	I/ Create New Appa		
Desktop Integration My Chatter Settings								

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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