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Establish Product Schedules

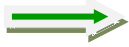
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Creating Opportunity Product Schedules



Tip: Quantity and / or Revenue Scheduling must be enabled in Salesforce.com in order to create Opportunity Product Schedules
Set by your Administrator in: Setup->Customize->Products->Schedule Setup

The screenshot shows the Salesforce.com 'Schedule Setup' page. The browser window title is 'Schedule Setup - salesforce.com - Enterprise Edition - Mozilla Firefox'. The URL is 'https://na7.salesforce.com/setup/pbk/orgAnnuityEnable.jsp?setupid=Product'. The page header includes the RevenueCloud logo, a search bar, and the user name 'Jotham Fisher-Smith'. The navigation menu includes Home, Leads, Accounts, Contacts, Opportunities, Reports, Dashboards, Documents, Quotas, and Compensation P. The left sidebar contains 'Expand All | Collapse All', 'Quick Find', 'Force.com Home', 'Personal Setup' (with sub-items: My Personal Information, Email, Import, Desktop Integration, My Chatter Settings), and 'App Setup'. The main content area is titled 'Schedule Setup' and includes a 'Help for this Page' link. Below the title is a description: 'Enable or disable the ability to create schedules on products. Disabling both schedule types will delete all existing schedule information.' The 'Schedule Setup' form has a legend: ' = Required Information'. It contains two sections: 'Quantity Schedules' and 'Revenue Schedules'. Each section has a 'Scheduling Enabled' checkbox (checked) and an 'Enable [type] scheduling for all products' checkbox (checked). At the bottom of the form are 'Save' and 'Cancel' buttons. The browser's status bar at the bottom shows 'Done'.



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1. Add Product to Opportunity

Choose your product(s) and click Select

The screenshot shows the Salesforce 'Product Selection' page for an opportunity. The page title is 'Opportunity Adobe - Email blasts: Product Selection'. The breadcrumb trail is 'Home > Leads > Accounts > Contacts > Opportunities > Reports > Dashboards > Documents > Quotas > Compensation P...'. The page contains a search bar with 'Search All...' and a 'Search' button. Below the search bar is a 'Find Products [7]' section with a 'Customize...' dropdown. The 'Find Products' section has two tabs: 'By Keyword' and 'By Field Filter'. The 'By Field Filter' tab is active, showing a dropdown menu with '-None-' selected. Below the tabs is a table of products with columns: Product Name, Product Code, Standard Price, Product Description, and Product Family. The 'Email Blast' product is selected with a checkmark. Below the table are 'Select' and 'Cancel' buttons.

Opportunity Adobe - Email blasts
Product Selection

Enter your keyword and filter criteria, then click Search to begin your search. Click More filters to use more than one filter. Search results include all records that match both your keyword and filter entries.

Select Cancel

Find Products [7] Customize...

By Keyword By Field Filter

Search

<input type="checkbox"/>	Product Name +	Product Code	Standard Price	Product Description	Product Family
<input type="checkbox"/>	Asset Management	-	\$25,000.00		
<input checked="" type="checkbox"/>	Email Blast	email-2.0	\$3,000.00		
<input type="checkbox"/>	Quantity & Rev Sched	-	\$1,000.00		
<input type="checkbox"/>	Social Media Ads	SMA-1.0	\$10,000.00		
<input type="checkbox"/>	Solar Array	-	\$10,000.00		
<input type="checkbox"/>	Video Subscription	AsiaVid	\$10,000.00		
<input type="checkbox"/>	Viral Video	w-2.3	\$10,000.00		

Select Cancel



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2. Configure Product

Enter quantity, sales price and date

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3. Click the Product

To begin establishing a schedule, click the product name in the Products related list.

Opportunity: Adobe - Email blasts - salesforce.com - Enterprise Edition - Mozilla Firefox

RevenueCloud

Splits Status: ✔ OK - Revenue Splits: 2 Total: 100%

Rep	Percentage	Amount	Chatter
J Peterman	40%	\$896,000.00	+ Follow ✕
Jotham Fisher-Smith	60%	\$1,344,000.00	+ Follow ✕
Total		✔ 100%	

Forecast Status: ✔ OK - RevenueCloud Forecast Data is Current for this Opportunity

RevenueCloud Info

Additional Information

System Information

Products (Standard Price Book) [Products \(Standard Price Book\) Help](#)

Action	Product	Quantity	Sales Price	Date	Line Description	List Price
Edit Del	Asset Management	4.00	\$100,000.00	11/1/2011		\$25,000.00
Edit Del	Email Blast	10.00	\$3,000.00	9/1/2011		\$3,000.00
Edit Del	Quantity & Rev Sched	10.00	\$1,000.00			\$1,000.00
Edit Del	Social Media Ads	20.00	\$90,000.00			\$10,000.00

[Back To Top](#) Always show me more records per related list

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Find: Match case

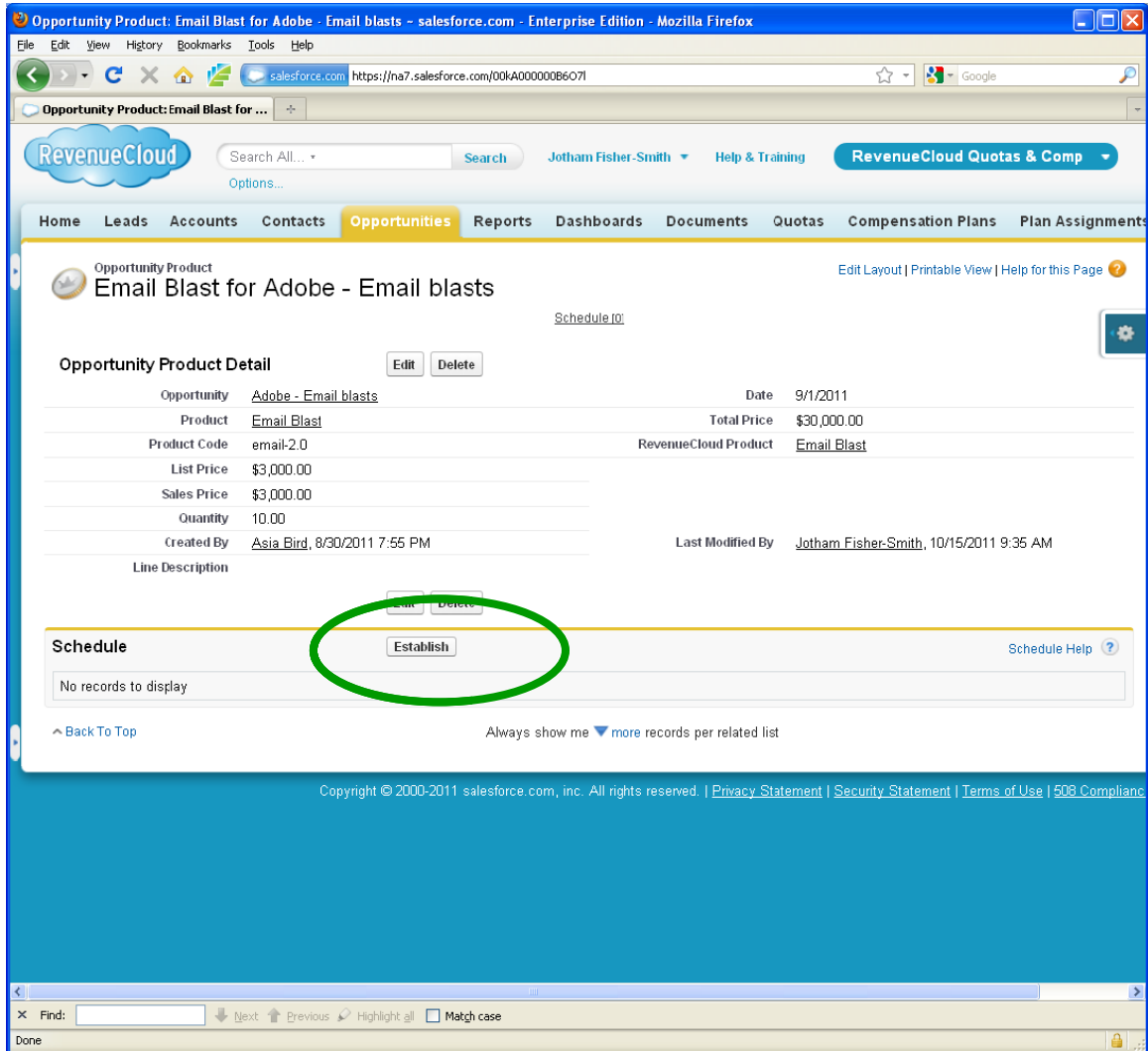
Done



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4. Establish Schedule

Click Establish to create a new schedule, or click Re-Establish to delete the old schedule and create a new one.





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5. Select the Type of Schedule to Create

The possible schedule types are limited by your organization's schedule settings, and by the schedule types your administrator has enabled for the particular product. Schedule types include: quantity, revenue, or both.

The screenshot shows the Salesforce interface for setting up a schedule for an email blast. The page title is "Establish Schedule for Email Blast". Below the title, there is explanatory text about how revenue and quantity schedules work. The main form area is divided into sections: "Choose Schedule Type(s)", "Establish Quantity Schedule for Email Blast", and "Establish Revenue Schedule for Email Blast". In the "Choose Schedule Type(s)" section, the "Type" dropdown menu is highlighted with a green circle and set to "Revenue Schedule Only". The "Establish Quantity Schedule" section includes fields for Start Date, Quantity, Schedule Type, and Number of Installments. The "Establish Revenue Schedule" section includes a Start Date field.



6. Set the Schedule Details

Configure your schedule as desired and click "Save"

The screenshot displays the Salesforce interface for setting up a schedule for an email blast. The page title is "Establish Schedule for Email Blast". Below the title, there is explanatory text: "Establish a schedule for this product. The Revenue field defaults to show Total Price, including Discount (if any). Changing the revenue amount in the schedule will not override Discount percentage. Discount applies only to the original Sales Price, not to any new revenue amount you enter." and "Changing the quantity or revenue in the schedule will override the quantity or price amounts stored on the product. Select 'Divide' as the Schedule Type to split the amount into multiple installments occurring every week, month, or other period. Select 'Repeat' to repeat the entire amount every week, month, or other period for multiple installments. You can edit the resulting schedule on the following page."

The main form, titled "Establish Revenue Schedule for Email Blast", contains the following fields:

- Opportunity: Adobe - Email blasts
- Start Date: 9/1/2011 (with a calendar icon and a date range of 10/15/2011)
- Revenue: 30,000.00
- Schedule Type: Divide Amount into multiple installments (dropdown menu)
- Installment Period: Monthly (dropdown menu)
- Number of Installments: 12

At the bottom of the form are "Save" and "Cancel" buttons. A legend indicates that a red vertical bar next to a field name signifies "Required Information".



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7. Edit Schedule Details or Click Save to Finish

In the next screen, you may edit the list of installments if you wish, adding comments or changing the dates, quantities, and revenue amounts.

Click "Save" to finish.

Modify the schedule for this product. Click Recalculate to preview how your changes affect the total amount of the product. The total amount is the sum of the schedule installments. This total amount will override the amount stored on the product.

Date	Revenue	Comments
9/1/2011 [10/15/2011]	2,500.00	
10/1/2011 [10/15/2011]	2,500.00	
11/1/2011 [10/15/2011]	2,500.00	
12/1/2011 [10/15/2011]	2,500.00	
1/1/2012 [10/15/2011]	2,500.00	
2/1/2012 [10/15/2011]	2,500.00	
3/1/2012 [10/15/2011]	2,500.00	
4/1/2012 [10/15/2011]	2,500.00	
5/1/2012 [10/15/2011]	2,500.00	
6/1/2012 [10/15/2011]	2,500.00	
7/1/2012 [10/15/2011]	2,500.00	
8/1/2012 [10/15/2011]	2,500.00	
[10/15/2011]		



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8. Completed Revenue Schedule

The screenshot shows the Salesforce interface for an Opportunity Product. The page title is "Opportunity Product: Email Blast for Adobe - Email blasts". The navigation menu includes Home, Leads, Accounts, Contacts, Opportunities (selected), Reports, Dashboards, Documents, Quotas, and Compensation P. The page displays the following details:

Opportunity Product Detail

Opportunity	Adobe - Email blasts	Date	9/1/2011
Product	Email Blast	Total Price	\$30,000.00
Product Code	email-2.0	RevenueCloud Product	Email Blast
List Price	\$3,000.00		
Sales Price	\$3,000.00		
Quantity	10.00		
Created By	Asia Bird , 8/30/2011 7:55 PM	Last Modified By	Jotham Fisher-Smith , 10/15/2011 10:13 AM

Schedule

Date	Revenue	Comments
9/1/2011	\$2,500.00	
10/1/2011	\$2,500.00	
11/1/2011	\$2,500.00	
12/1/2011	\$2,500.00	
1/1/2012	\$2,500.00	
2/1/2012	\$2,500.00	
3/1/2012	\$2,500.00	
4/1/2012	\$2,500.00	
5/1/2012	\$2,500.00	
6/1/2012	\$2,500.00	
7/1/2012	\$2,500.00	
8/1/2012	\$2,500.00	