

Enhanced Product Schedules Salesforce Lightning Component

Admin Guide

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Supporting product version 1.17

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Overview

Product Overview

With the Enhanced Product Schedules (EPS) lightning component installed, users will be empowered to efficiently manage native product quantity and revenue schedules in a grid-style editor. With minimal setup needed you can instantly deliver value to your team, increasing productivity and improving adoption. If you have existing Line Item Schedule data, no data migration is necessary to begin viewing and managing your existing schedules. The EPS lightning component is available from the Salesforce AppExchange.

Developed by Foglight Solutions, Inc., we saw an opportunity to expand capabilities of the Salesforce Platform™. Below is a list of key features:

- Instant drag and drop setup
- One easy-to-use grid for product schedule editing
- Edit multiple product schedules at once
- Grid supports custom fields
- Auto calculate revenue from quantity & sales price
- Auto calculate quantity from revenue & sales price
- Quickly build product schedules from scratch, no need to “Establish Schedules”
- In grid comparison of original and updated quantity & revenue
- View related product information when editing product schedules
- Works with existing native schedule records

EPS is compatible with the following:

- Salesforce Professional Edition
- Salesforce Enterprise Edition
- Salesforce Performance / Unlimited Edition
- Salesforce Developer Edition
- Desktop layouts only, not supported on mobile page layouts

Common Use Cases Addressed

I want to make changes to my product schedules, but how does this impact my opportunity product line item?

Users can make changes to product schedules using the Establish Schedule feature or by directly editing values in the grid. The grid footer displays the delta between what is scheduled in the grid and what is currently saved on the opportunity product line. This allows end users to see how the opportunity product quantity, revenue, and/or sales price might be impacted if the grid changes are saved.

I want to update the status of multiple product schedules.

You want to update the Status, or some other custom product schedule field, for multiple schedules. With an editable grid, you can tab through each row and update the values as needed. The grid also supports multi-row editing, so you can select multiple schedule rows and apply edits from any particular cell to all the selected rows.

I want to derive the product schedule revenue based on quantity.

Let the system do the math for you. If you often schedule product quantities over time and want the revenue to automatically calculate based on changes to those quantities, you can use our *Derive Revenue from Quantity Schedule and Sales Price* feature. This uses the sales price on the opportunity product record and the product schedule quantity that you've entered to calculate the product schedule revenue amount.

Note: We also offer the reverse of this feature, where product schedule quantity is derived from product schedule revenue and opportunity product sales price.

I want to recalculate quantities for a subset of product schedules

Let's say you have a product scheduled to ship out on the 15th of the month for the next 5 months. Your first shipment is complete. Then the customer wants to change the ship date for the remaining 4 installments to the 20th of each month. The EPS lightning component will allow you to select the 4 schedules and use the Establish Schedule feature to reallocate the remaining quantity on the 20th of each month.

I want to build a product schedule from scratch.

Are your products shipping on a varied schedule? Would it be easier to manually build unique schedules for your products? The EPS grid provides a single screen to mass enter product schedule data.

Installation

Technical Prerequisites

The following must be done before the Enhanced Product Schedules managed package can be installed.

- **Salesforce product schedules must be enabled in Setup.**
 1. Navigate to Setup and use Quick Find to search for **Product Schedules Settings**.
 2. Check the **Enable quantity scheduling** and/or **Enable revenue scheduling** checkboxes.
 3. Check the box to **Enable customization of product schedules (Lightning Experience only)**, if you want to be able to add [custom fields](#) to the EPS grid and footer.
 4. Click **Save**.



At least one of the product schedule types must be enabled before installation can be completed.

- For more information on enabling product schedules, refer to this [Salesforce Help Documentation](#).
- **Salesforce Lightning must be enabled.**
 - If you have not transitioned to Lightning Experience, view the Salesforce [Lightning Experience Transition Info Center](#) for more information.
 - If Lightning Experience has already been enabled and you need to change the UI from Salesforce Classic to Lightning Experience, view this helpful [Salesforce Knowledge Article](#).

Install the EPS Managed Package

This section covers how to install the EPS lightning component managed package. Before installing, verify that your org meets the [technical prerequisites](#) outlined in this document.

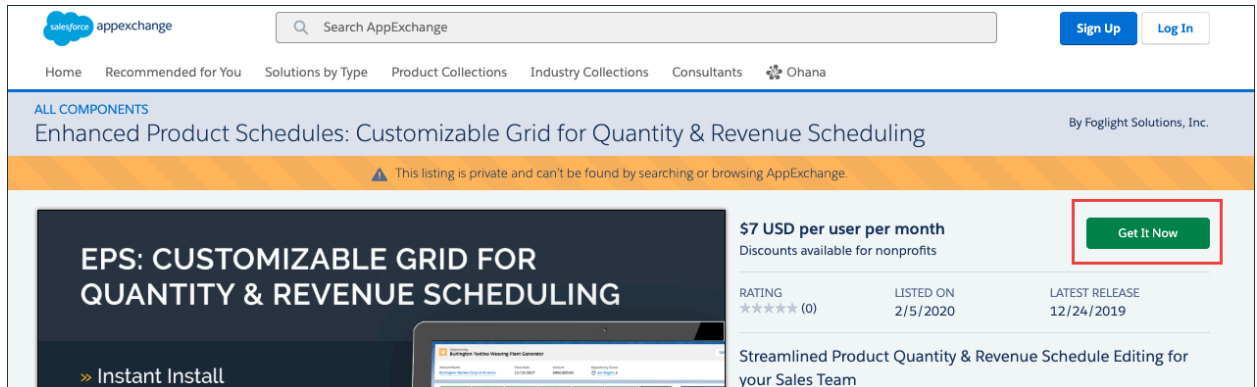
If you have questions about installing packages into your org, refer to the following helpful resources:

1. [Salesforce Help documentation](#)
2. [Application Installation Guide](#) (pdf)

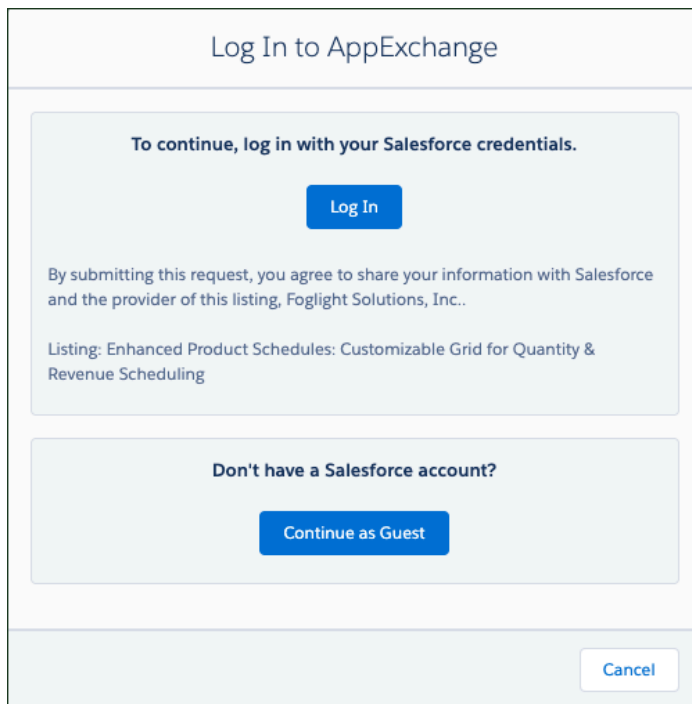
We recommend installing EPS in a sandbox environment first to test out the functionality and evaluate integration with your current Salesforce setup. Then prepare a change management strategy before rolling out to a production environment.

Installation Steps:

1. Click on this link to visit the EPS listing on the AppExchange:
<https://appexchange.salesforce.com/appxListingDetail?listingId=a0N3A00000G0urEUAR>
2. Click **Get It Now**.



3. Click **Log In**.



4. Select if you would like to install it in a Production or Sandbox environment.

Where do you want to install this package?

Before you install in a production org, we suggest testing in a sandbox.

Install in a Production Environment

Install where you or your users work, including developer orgs.

Install in Production

Install in a Sandbox

Test in a copy of a production org.

Install in Sandbox

Cancel

5. Salesforce will direct you to log into your environment again to confirm your identity and confirm installation details. Click **Confirm and Install**

Confirm Installation Details

Package

Enhanced Product Schedules (ver 1.3.0.280 / 1.3.0)

Subscription

Free

Duration

Does Not Expire

Username

Version

ver 1.3.0.280 / 1.3.0

Organization

Number of Subscribers

Site-wide

Here are the details we'll share from your profile

* First Name

* Last Name

Job Title

* Email

Phone

* Company

* Country

United States

* State / Province

Oregon

[Edit Profile](#)

☒ I have read and agree to the [terms and conditions](#).

Salesforce.com Inc. is not the provider of this application but has conducted a limited security review. Please [click here](#) for detailed information on what is and is not included in this review.

☒ Allow the provider to contact me by email, phone, or SMS about other products or services I might like

Cancel

Confirm and Install

6. Select your security level
 - a. Install for Admins Only
 - b. **Install for All Users** - *our recommended security level*
 - c. Install for Specific Profiles

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 **Install Enhanced Product Schedules: Customizable Grid for Quantity & Revenue Scheduling**
By Foglight Solutions, Inc.

☐ Install for Admins Only

☒ Install for All Users

☐ Install for Specific Profiles...

 The package you are attempting to install has the same namespace as your organization. Errors may occur during or after install. Consider installing this package in an organization with a different namespace.

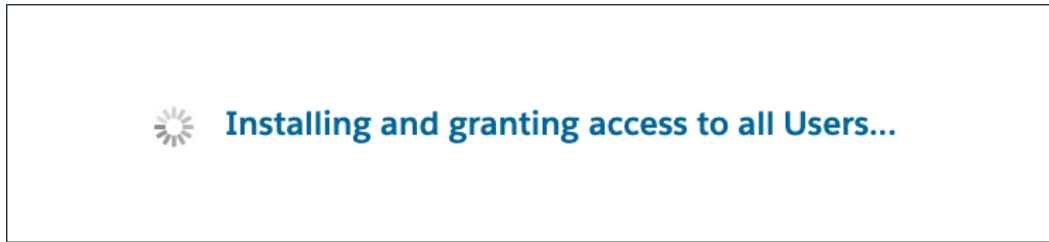
Install Cancel

For more information about security levels, see the Salesforce Help documentation linked above.

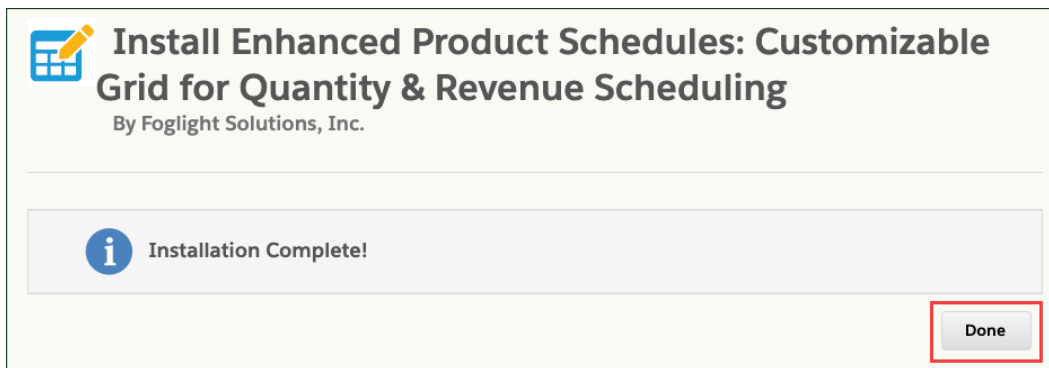
Installing the EPS managed package with the recommended security level, will not automatically expose the EPS component to your end users. At a minimum, the EPS component must be added to your lightning record page and the end user must have an EPS license assigned to their user record before they can use the component.

We recommend reviewing the package component list to understand what will be installed and available to all users. One of these components, a custom field on the Line Item Schedule (API name OpportunityLineItemSchedule) called **Related?** (epsched__IsRelated__c), should be editable by end users in order to support the ability to derive revenue from quantity and vice versa. This field does not need to be visible on any page layouts and will not be added to any existing line item schedule page layouts. By selecting the security level “Install for All Users”, and after users are assigned licenses, they will have edit access to this field automatically.

7. Click **Install**. You'll see a message that describes the progress and a confirmation message after the installation is complete.



8. After the installation completes, click **Done**.



9. You will need to complete the configuration setup for the lightning component.

Setup & Configuration

Grant Read Access to Product Fields

After product schedules are enabled in Settings, Salesforce does not automatically grant access to the following standard fields on the Product (Product2) object. System Administrators and all EPS users need **read** access to one or both of these fields before they can use the EPS lightning component. The availability of these fields on the Product object depends on whether you have one or both of the product schedule types enabled in Product Settings.

<u>FIELD LABEL</u>	<u>FIELD NAME</u>
Quantity Scheduling Enabled	CanUseQuantitySchedule
Revenue Scheduling Enabled	CanUseRevenueSchedule

- We recommend granting read access by [creating a new custom permission set](#) called “Enhanced Product Schedules”. Then edit the permission set’s [object permissions](#) to give “Read Access” these fields. Then assign the permission set to System Administrators and EPS users.
- If you prefer not to use a permission set, access can be granted by [editing object permissions](#) on a given user’s profile.
- Note, the EPS component does not require these fields to be added to the product record page layout.

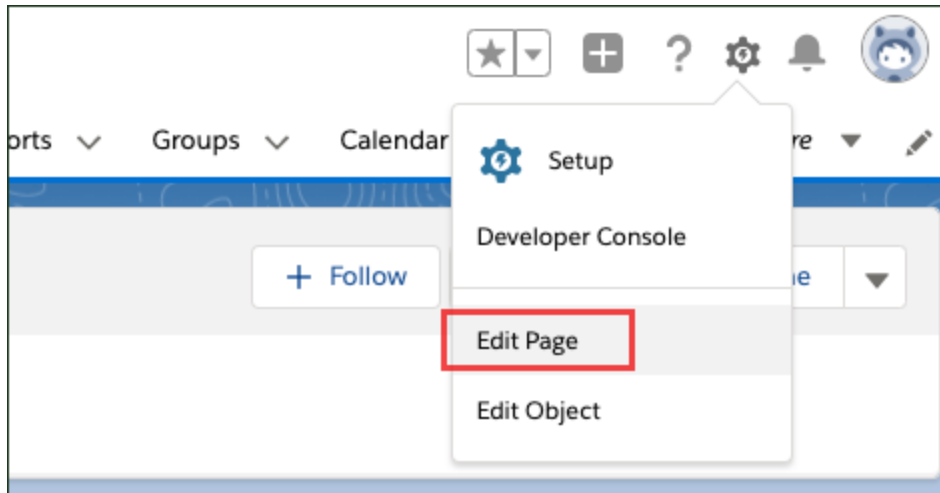
Add EPS to Lightning Experience

Before you can use the EPS lightning component, you must add it to your Lightning record page.

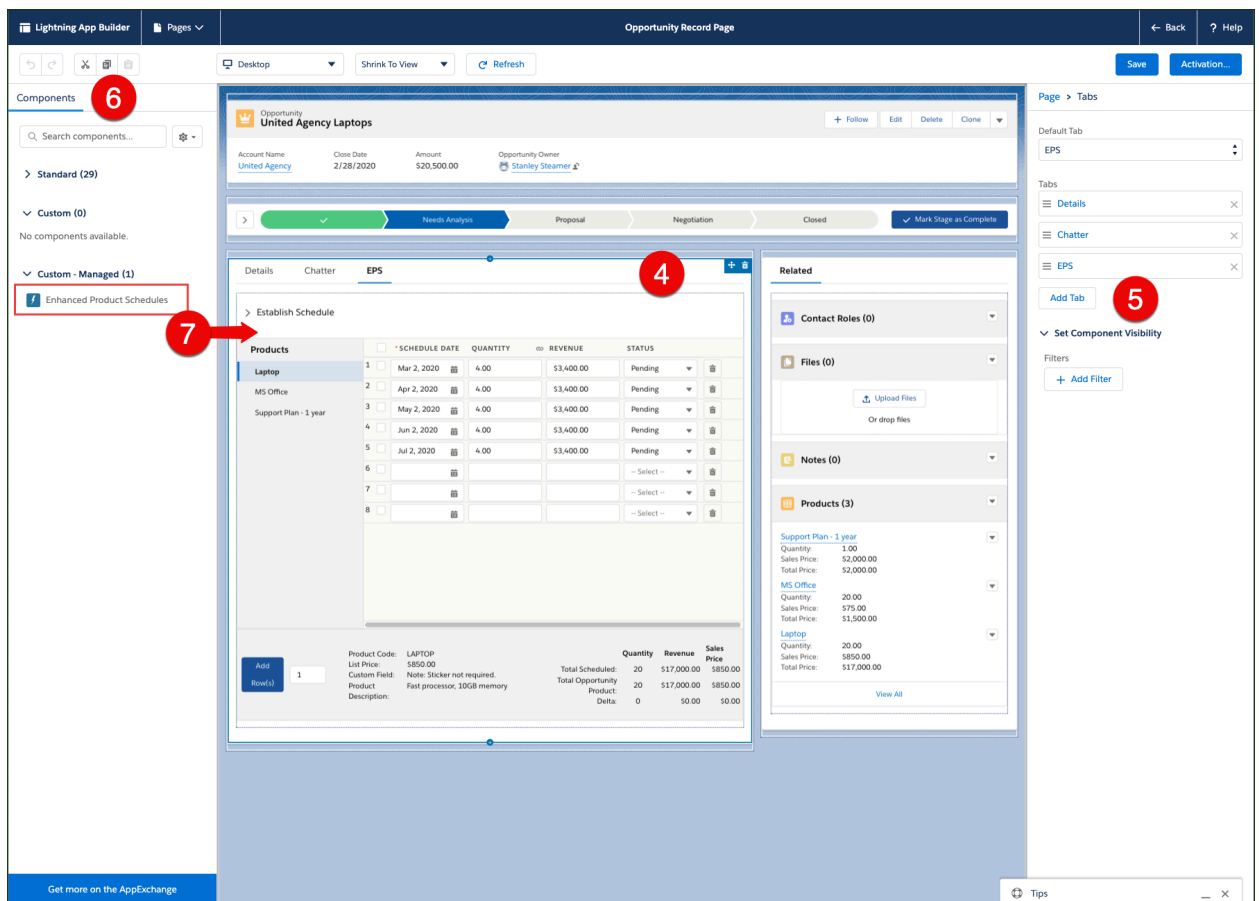
To configure your Lightning record page:

1. Navigate to a Salesforce opportunity record where you want the EPS component to be used.

2. In the upper right, click the **Settings gear icon** and then click **Edit Page**.



3. Place the EPS component onto the opportunity record page.





We recommend placing the EPS component in a main region. Sidebars do not provide enough width to make the component function efficiently. The component was designed to be placed within a Tabs component, but it will also aesthetically work if placed directly on the record page layout.

4. Select the Tabs component.
5. Click **Add Tab**. The name of the defaults to “Details”. Click the tab to change the name.
6. In the left navigation window, scroll to the **Custom - Managed** section or search components.
7. Select the **Enhanced Product Schedules** component and drop it onto the record page in the newly created tab.
8. After you have finished configuring the component, click **Save**.
9. You will be navigated back to your Salesforce opportunity record and the EPS component should be visible. If it is not visible, check the [License Assignment](#).

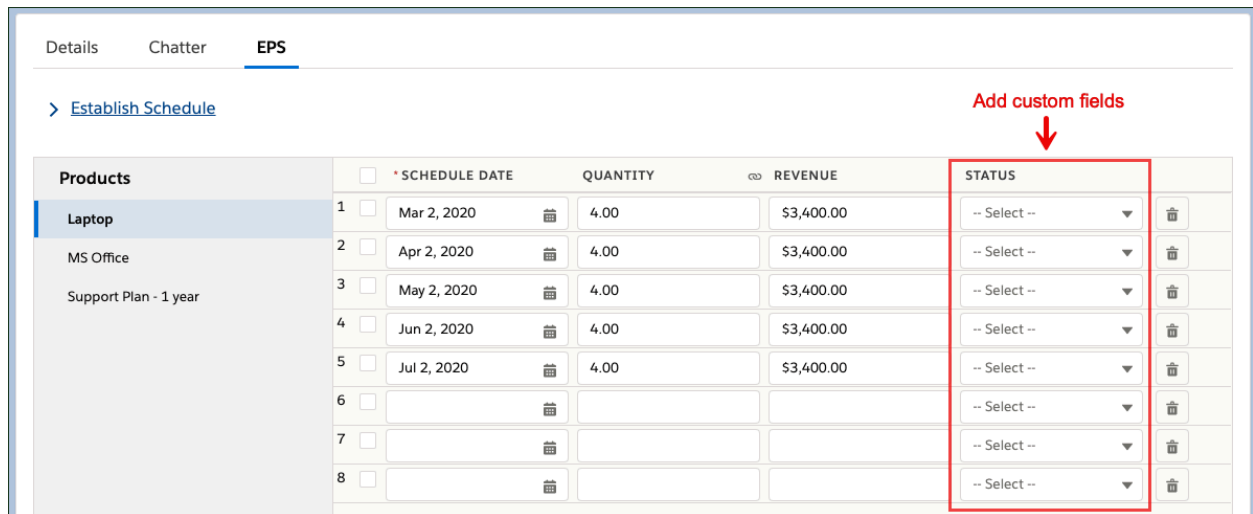
You can also access Lightning flexipages through Setup configuration in two different ways:

1. Setup > Home > User Interface > Lightning App Builder > select Edit for the Lightning page that you want to edit.
2. Setup > Object Manager > Opportunity > Lightning Record Pages > select the Lightning page that you want to edit

Add Custom Fields to the EPS Grid

As an administrator, you have the ability to configure the product schedule grid's columns to display custom fields by modifying a field set.

Example:



The screenshot shows the Salesforce Lightning interface for the EPS (Enhanced Product Schedules) grid. The interface includes tabs for Details, Chatter, and EPS. Below the tabs is a link to 'Establish Schedule'. The main table has columns for Products, SCHEDULE DATE, QUANTITY, REVENUE, and STATUS. The STATUS column is highlighted with a red box, and a red arrow points to it with the text 'Add custom fields'.

Products	☐ * SCHEDULE DATE	QUANTITY	REVENUE	STATUS
Laptop	1 ☐ Mar 2, 2020	4.00	\$3,400.00	-- Select --
MS Office	2 ☐ Apr 2, 2020	4.00	\$3,400.00	-- Select --
Support Plan - 1 year	3 ☐ May 2, 2020	4.00	\$3,400.00	-- Select --
	4 ☐ Jun 2, 2020	4.00	\$3,400.00	-- Select --
	5 ☐ Jul 2, 2020	4.00	\$3,400.00	-- Select --
	6 ☐			-- Select --
	7 ☐			-- Select --
	8 ☐			-- Select --

To define the field set:

1. Navigate to Setup > Object Manager > Line Item Schedule > Field Sets
2. Click **Enhanced Product Schedules Table**.
3. Drag fields into the list.
4. Optional: Hover over the field in the field set and use the wrench icon to make the field required.

5. Click **Save**.



- The grid will respect fields marked required via the field set configuration.
- The grid will respect fields that are [universally required](#).
- The grid will not respect fields marked required on page layouts.
- The grid supports formula fields, however their values are only recalculated upon save of the record; they do not update in real-time.
- By default, the grid will always display Schedule Date, Quantity, and Revenue. Adding these fields to the field set will result in duplicate columns in the grid.

Add Custom Fields to the Footer

As an administrator, you have the ability to configure the schedules grid footer to display custom opportunity line item fields by modifying a field set. This feature supports lookups from the opportunity line item to custom objects, such as the Salesforce CPQ Quote Line Item.

The attribute information that is displayed will correspond to the product selected in the grid.

Example:

Details
Chatter
EPS

> Establish Schedule

Products	☐ * SCHEDULE DATE	QUANTITY	REVENUE	STATUS
Laptop MS Office Support Plan - 1 year	1 ☐ Mar 2, 2020	4.00	\$3,400.00	Pending
	2 ☐ Apr 2, 2020	4.00	\$3,400.00	Pending
	3 ☐ May 2, 2020	4.00	\$3,400.00	Pending
	4 ☐ Jun 2, 2020	4.00	\$3,400.00	Pending
	5 ☐ Jul 2, 2020	4.00	\$3,400.00	Pending
	6 ☐			-- Select --
	7 ☐			-- Select --
	8 ☐			-- Select --

Add
Row(s)

1

Product Code: LAPTOP
List Price: \$850.00
Custom Field: Note: Sticker not required.

	Quantity	Revenue	Sales Price
Total Scheduled:	20	\$17,000.00	\$850.00
Total Opportunity Product:	20	\$17,000.00	\$850.00
Delta:	0	\$0.00	\$0.00

To define the field set:

1. Navigate to Setup > Object Manager > Opportunity Product > Field Sets
2. Click **Enhanced Product Schedules Table Footer**.
3. Drag fields into the list.

Note: All fields in the footer are always displayed in read only mode. Checking the Required checkbox in the field set configuration does not impact this behavior.

4. Click **Save**.

License Assignment

Users must be assigned an EPS license to view and manage product schedules via the EPS lightning component. There are two ways to assign a license.

Option 1 - From a user's record

1. Navigate to a user's user record.
2. Scroll to the Managed Packages related list. Click **Assign Licenses**.
3. Select the Enhanced Product Schedules package (namespace epsched).
4. Click **Add**.

Option 2 - From the Installed Package screen

1. Navigate to Setup > Apps > Packaging > Installed Packages
2. Click on **Managed Licenses** for the Enhanced Product Schedules package (namespace epsched).
3. Click **Add Users**.
4. Select users.
5. Click **Add**.

Other Features

Change Product Name to Product Code in Sidebar

As an administrator, you have the ability to configure the label that is displayed in the left sidebar of the grid. For example, you may want to display products in the grid by their product code because product names are too long and descriptive.

If no custom setting is set, the grid default displays the Product Name.

Activity

Details

Chatter

EPS

> Establish Schedule

Products

Laptop

	☐	* SCHEDULE DATE	QUANTITY	REVENUE	
1	☐	Jun 18, 2020	100.00	\$85,000.00	
2	☐				
3	☐				

Product Name is displayed by default.

Specify a different label using Custom Settings.

To change the product label in the grid sidebar:

1. Navigate to Setup > Home > Custom Code > Custom Settings
2. Click **Manage** next to EPS Settings.
3. Click **New**.
4. Specify the field API name. This setting supports both standard and custom fields.
5. Click **Save**.

EPS Settings Edit

Provide values for the fields you created. This data is cached with the application.

Edit EPS Settings

Save Cancel

EPS Settings Information

Location

Product Selection Label Field 

Enable Visibility of Derive Link Button

When using the *Derive Revenue from Quantity Schedule and Sales Price* feature or *Derive Quantity from Revenue Schedule and Sales Price* feature, the quantity and revenue fields are linked to each other. Changes to one of these fields in the grid, will cause the other to automatically update. Linking quantity and revenue together enables the product to retain the Sales Price, while unlinking quantity and revenue introduces the possibility of inadvertently affecting the product's Sales Price. By default, end users cannot unlink this relationship.

Activity
Details
Chatter
EPS

Derive Link button
Click to unlink or link quantity & revenue.

> Establish Schedule

Products	☐ * SCHEDULE DATE	QUANTITY	 REVENUE
Laptop	1 ☐ Jun 18, 2020 	100.00	\$85,000.00 
	2 ☐		
	3 ☐		



The Derive Link button controls how calculations work for **all products** in the grid.

As of EPS version 1.11, the Derive Link button is hidden by default.

If you want to give end users the ability to unlink and link this relationship, thus giving them the decision making power to change how product calculations work in the grid, you can enable visibility of the Derive Link button via a permission set, or via a profile.

To enable visibility of the Derive Link button:

1. Click on the profile or permission set that you want to extend this permission to.
2. Click **Custom Permissions**.
3. Click **Edit**.
4. Move the **epsched.EPS Salesprice Lock Permission** from the available custom permissions to the enabled custom permissions.
5. Click **Save**.

Permission Set
EPS User

Find Settings... | Clone Delete Edit Properties Manage Assignments

Permission Set Overview > Custom Permissions

Custom Permissions Save Close

Available Custom Permissions	Enabled Custom Permissions
--None--	epsched.EPS Salesprice Lock Permission

Add
Remove

SETUP Profiles

Enable Custom Permissions

Save Cancel

Available Custom Permissions

--None--

Enabled Custom Permissions

Enhanced Product Schedules.epsched.EPS Salesprice Lock Permission

Add

Remove

Default the “Maintain Sales Price” Checkbox

When establishing quantity only schedules, ensure the integrity of your product pricing is maintained when your sales reps update quantities at a later date.

A custom setting now controls the default value for the “Maintain Sales Price across edits to the schedule” feature. Enabling this setting defaults the checkbox to checked.

If your sales rep has an opportunity with 100 widgets at \$20 each, and most of the time they want the opportunity amount to update as they adjust quantities in the schedule, then enable this custom setting. Whenever quantities are adjusted in the future, the sales price will be maintained and the opportunity product total price will update.

Note: a sales rep can always uncheck this checkbox when they are establishing a schedule. This custom setting only controls the default value.

▼ Establish Schedule

Choose Schedule Type

Quantity Schedule Only ▼

* For

- ☒ Selected Product
☐ All Product(s)
☐ Selected Schedule(s)

Quantity Schedule

Copy to Revenue Schedule

☒ Maintain Sales Price across edits to the schedule

← Default to checked

* Start Date



* Quantity

20.00

* Installment Period

Please Select ▼

* Number of Installments

* Installment Type

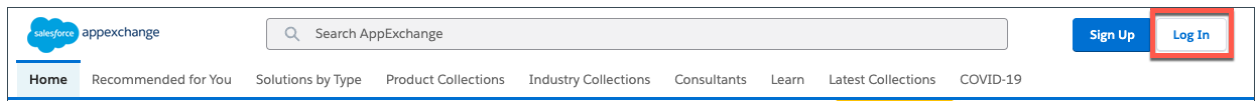
Please Select ▼

Establish Schedule

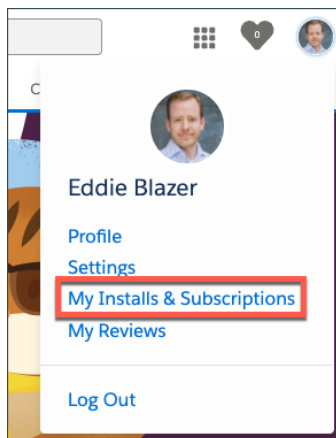
Purchasing EPS

EPS is sold through Salesforce's "AppExchange Checkout" giving customers more control over their licenses and security with their payment details. To purchase EPS for your org, follow these steps:

1. Navigate to <https://appexchange.salesforce.com>
2. Login to the AppExchange by clicking the "Log In" button in the upper-right corner.

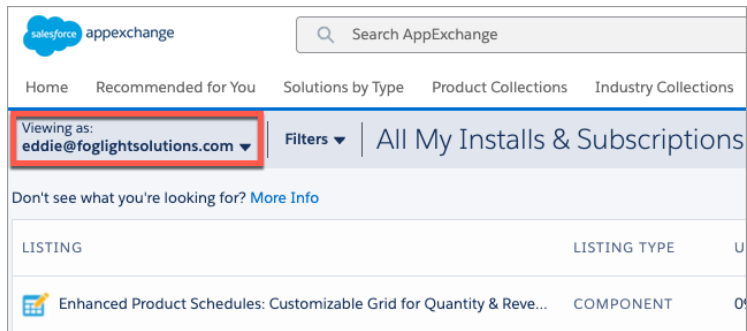


- a. Salesforce will redirect you to trailblazer.me and allow you to "Login with Salesforce"
 - b. After logging in with your Salesforce account, you may be presented with an option to "link" that account with your Trailblazer.me account.
 - c. After logging in, you'll be redirected back to the AppExchange and you'll now see a profile icon in the upper-right corner.
3. Click on your profile icon in the upper-right corner and select "My Installs & Subscriptions" from the menu.

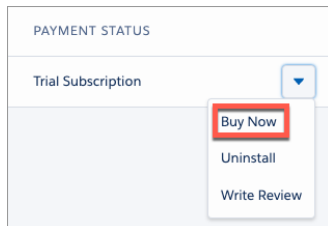


4. You'll now be presented with a list of installs and subscriptions you can manage. First ensure that the list is showing installs & subscriptions for the correct org by reviewing,

and if needed, changing the “Viewing as” option:

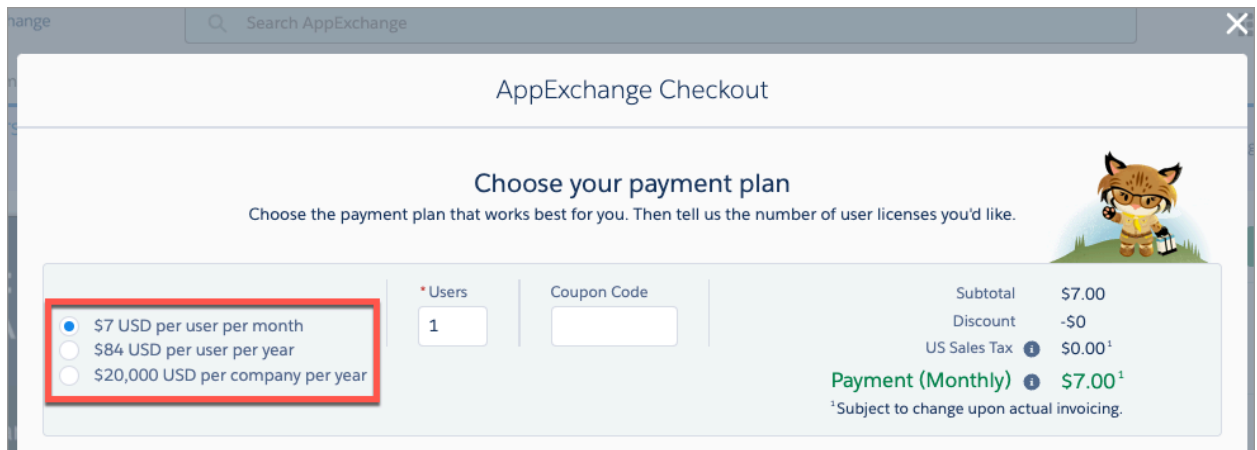


5. Click the menu next to “Enhanced Product Schedules...” and select “Buy Now”.



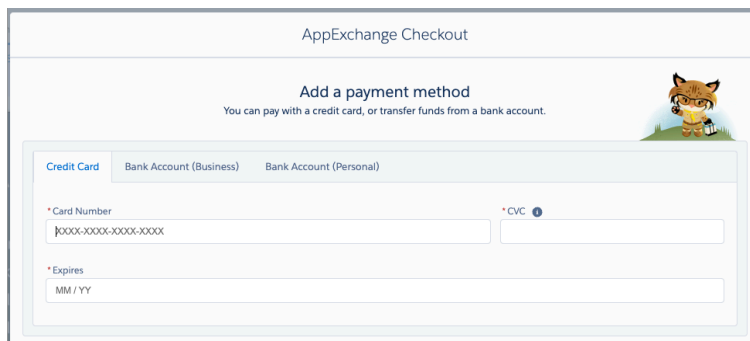
6. Next you’ll be taken through the AppExchange Checkout wizard. Start by providing your Name, Email, and address **billing** details. These details are used for payment verification and receipt communication, so they must match what’s associated to your credit card.

7. Select the payment plan appropriate for your organization and the number of user licenses needed. Note: “per company” plans don’t need a user count.



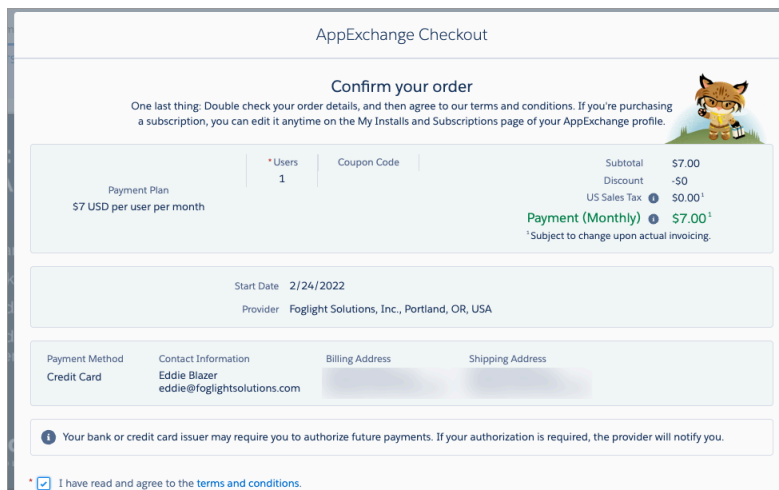
The screenshot shows the 'AppExchange Checkout' page with the heading 'Choose your payment plan'. Below the heading is the instruction: 'Choose the payment plan that works best for you. Then tell us the number of user licenses you'd like.' There are three radio button options for payment plans: '\$7 USD per user per month' (selected and highlighted with a red box), '\$84 USD per user per year', and '\$20,000 USD per company per year'. To the right, there is a field for '* Users' with the value '1' and a 'Coupon Code' field. On the far right, a summary table shows: Subtotal \$7.00, Discount -\$0, US Sales Tax \$0.00¹, and Payment (Monthly) \$7.00¹. A note at the bottom right states: ¹ Subject to change upon actual invoicing.

8. Now specify payment information. US-based Credit Cards and ACH Bank details are supported. Note: this information is not sent to Foglight Solutions, nor Salesforce, and is instead sent to our trusted 3rd party processor, [Stripe](#).



The screenshot shows the 'AppExchange Checkout' page with the heading 'Add a payment method'. Below the heading is the instruction: 'You can pay with a credit card, or transfer funds from a bank account.' There are three tabs: 'Credit Card' (selected), 'Bank Account (Business)', and 'Bank Account (Personal)'. Under the 'Credit Card' tab, there are fields for '* Card Number' (placeholder: j0000-xxxx-xxxx-xxxx), '* CVC' (placeholder: 1234), and '* Expires' (placeholder: MM / YY).

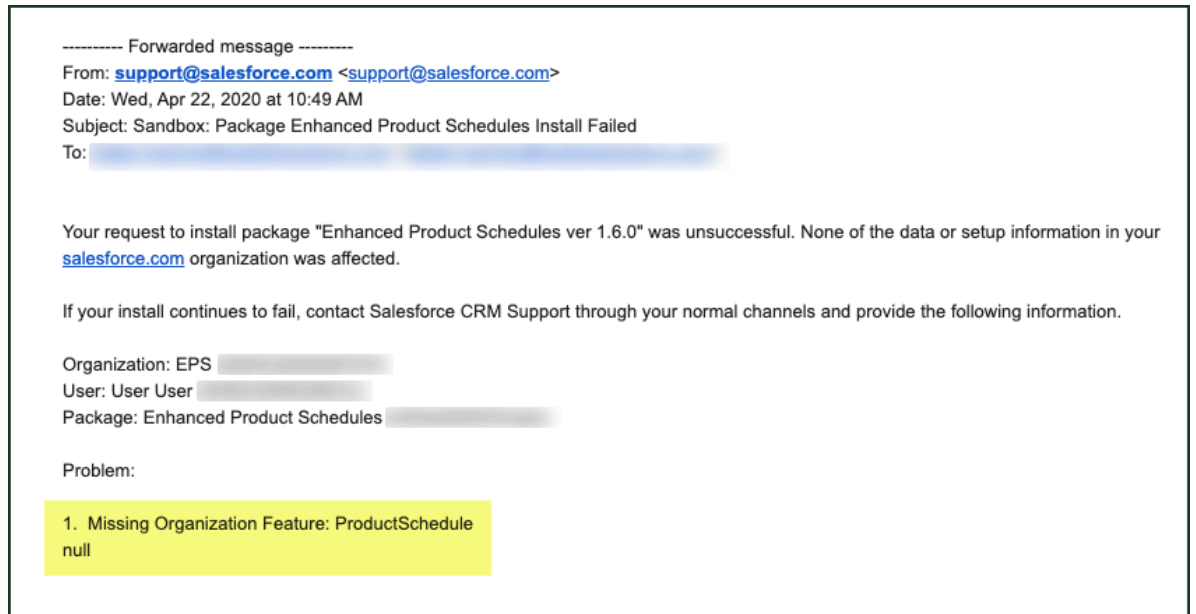
9. Review & confirm the provided details before clicking “Purchase”.



The screenshot shows the 'AppExchange Checkout' page with the heading 'Confirm your order'. Below the heading is the instruction: 'One last thing: Double check your order details, and then agree to our terms and conditions. If you're purchasing a subscription, you can edit it anytime on the My Installs and Subscriptions page of your AppExchange profile.' The page displays a summary of the order: Payment Plan (\$7 USD per user per month), * Users (1), Coupon Code, Subtotal (\$7.00), Discount (-\$0), US Sales Tax (\$0.00¹), and Payment (Monthly) (\$7.00¹). A note at the bottom right states: ¹ Subject to change upon actual invoicing. Below this, there is a section for 'Start Date' (2/24/2022) and 'Provider' (Foglight Solutions, Inc., Portland, OR, USA). At the bottom, there are fields for 'Payment Method' (Credit Card), 'Contact Information' (Eddie Blazer, eddie@foglightsolutions.com), 'Billing Address', and 'Shipping Address'. A checkbox at the bottom left is checked, with the text: 'I have read and agree to the [terms and conditions](#).'

Troubleshooting

ISSUE: Installation was unsuccessful and you received an email with the following error message: "1. Missing Organization Feature: ProductSchedule"



SOLUTION: Ensure [product schedules are enabled](#) before installing the managed package.

Contact Support

If you have any comments or suggestions on this guide, please email support@foglightsolutions.com. We welcome your questions and feedback.