EasyPrice™

Quantity Discounting for SalesForce.com™

EasyPrice™ allows your organization to easily create quantity discount structures for SalesForce.com™ (SF) and use these seamlessly with the standard SF objects and functionalities such as Report and Quote. EasyPrice™ can be used to create common or unique discount tiers for different Price Books. EasyPrice can be installed on any end user Edition of SalesForce™.

In addition, creating new products and pricebooks with the standard SalesForce™ functionality can be done from the EasyPrice tab.

We recommend that you spend a few minutes getting familiar with how EasyPrice™ works before installing it on your production version of SalesForce™ . There are two ways that you can do this:

Set-up for SF Enterprise Edition

- Install in your sandbox
- Work with EasyPrice™ using the demo SF version provided through the SF Application Exchange.

A   Getting Started

Prior to installing EasyPrice™ in your production edition of SF, it is strongly recommended that you install it in your SF sandbox. (Make sure that your sandbox has been refreshed before, installing EasyPrice™) . After installing EasyPrice™ check your tabs for the **EasyPrice** tab. If you do not see them, click on the tabs **+** sign and then on the orange **Customize My Tabs** button. Scroll down the Available Tabs listing, select **EasyPrice** and then click the right pointing **Add** button. Do the same with **EasyPrice Setup.** You can change the order of the tabs listing by selecting and moving the selected tabs up or down. Make sure you click the **Save** button after doing this. After saving, click on the **Home** tab to make sure that **EasyPrice** and **EasyPrice Setup** are visible in the tab listing. It will also be useful for what follows to have the **Opportunity,** and **Account** tabs selected for display on your Home page. If those tabs are not showing, you can select them as with EasyPrice above, being sure to save afterwards.

In case you have only recently installed SalesForce™, use the immediately following section to get help on setting up some basics like a few products. Your page page on **SF** should looks like the screen shot below – we call it the EasyPrice "home" in what follows.
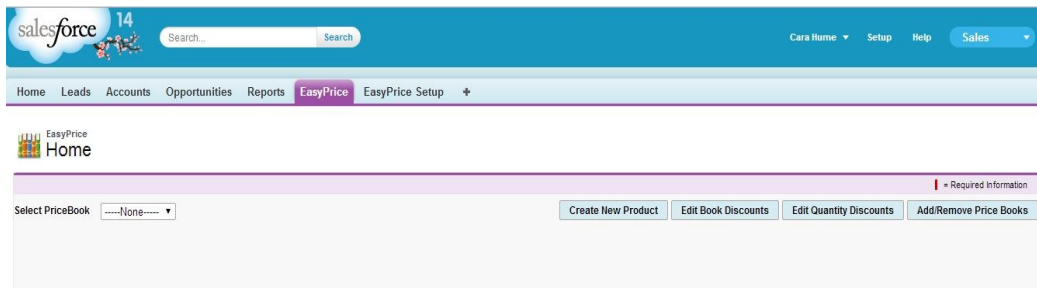
From this page you can use the buttons to branch out to perform all product and price administration tasks. With EasyPrice, you will not have to use the Standard SF **Product** or **Pricebook** tabs, as their functionalities are embedded in EasyPrice™.
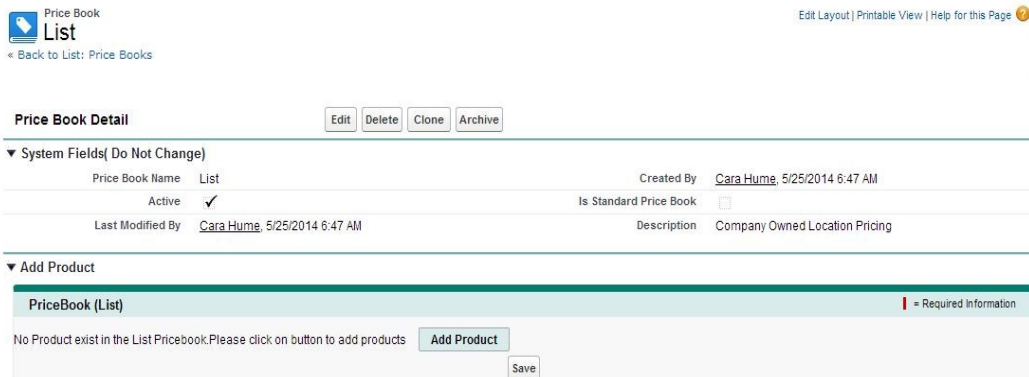
B.   EasyPrice™ and Some Common Tasks Related to Pricing

I.   Creating Price Books

Price Book – definition and use.   A Price Book is an object that SalesForce™ uses to contain pricing and descriptive data on products an organization sells. An organization will often have several active pricebooks – each of which may have the same or a different set of products. Different price books may be used for different distribution channels, reseller performance levels, sales geographies or other marketing management divisions. When adding products to an Opportunity in SalesForce™ , an Account may have a single Price Book set by the SF marketing/sales administrator, based on account characteristics (such as wholesaler vs retailer), or based on geography or other marketing management criteria. To add a Product to SalesForce™, a Price Book must be selected. First let's go through creating a new Price Book. Then we will create products and add them to the new pricebook.

Create a New Price Book. The pricebook we will create will be called "List" and this one will be the pricebook we use (in our example) to sell from our company-owned sales locations.

1.   Select the **EasyPrice** tab; click on the **Add/Remove Pricebooks** button.
2.   Click the **New** button.
3.   Fill in the needed fields. Here is your List pricebook page looks:

3

4. Since we have not created any products yet, bypass the **Add Product** button and click **Save**.

Now we are going to create one more pricebook, which will be for resellers of our product.

1. Click **Clone.**
2. Replace "List" with "Reseller" in the Name field
3. We described this book with "Company Distributors"
4. Click **Save.**

Now we will create two products

II.   Creating Products

New products can easily be created from the **EasyPrice** tab, and since you may not have any products defined in your edition, let's do that now. We'll create two products and that will be enough to show you everything.

Create a New Product. You should have **EasyPrice** showing in you your SF tabs, but if not – no problem – just go through the little routine above to get it there. Then:

1. Click the on the **EasyPrice** tab.
2. Click the **Create New Product** button**.** You will now see an input page for the new product. We will create a sample product (unimaginatively) called "Widget 1", with a product code "WGT1". We will check the **Active** box, because we will be using the product for Opportunities, and it needs to be active to be sellable. We have not defined product families so disregard that field. Fill in the fields with the relevant information before saving, with the possible exception of the description, which is entirely up to you.
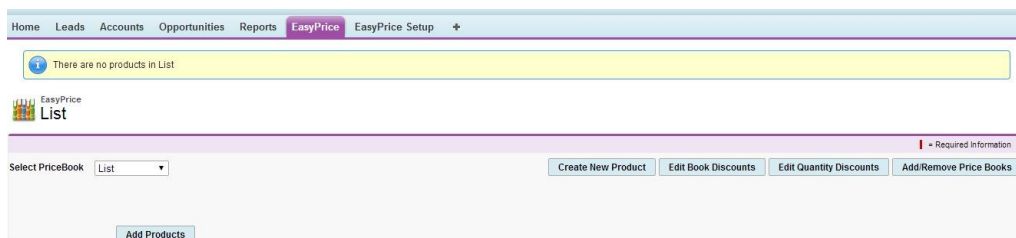
3. Click **Save & Add Price**. You are now prompted to put in the Standard Price for Widget 1. The Standard Price is a reference price used as a reference for defining prices in pricebooks you have set up. The pricebooks you set up will probably have lower prices (than the Standard Price), and may not have the full set of products that your organization sells, depending on geographic markets, distribution channels and other product marketing factors. While it is possible to define negative discounts, it is best to think of the Standard Price as a maximum – such as a "List" price.

4. Input a **Standard Price** (numerical, without commas or currency symbols) – we put in 500**,** to set the standard price at $500.00 The **Active** field should already be checked, because we did that when we created the product.

5. Click **Save and New Product** to add a second product. For what follows this one Widget 2, with a product code WGT2, and priced it at $750.00.

We now have products to sell! But…we need to add them to our pricebooks before the will be available to.

5

III.   Adding Products to Pricebooks

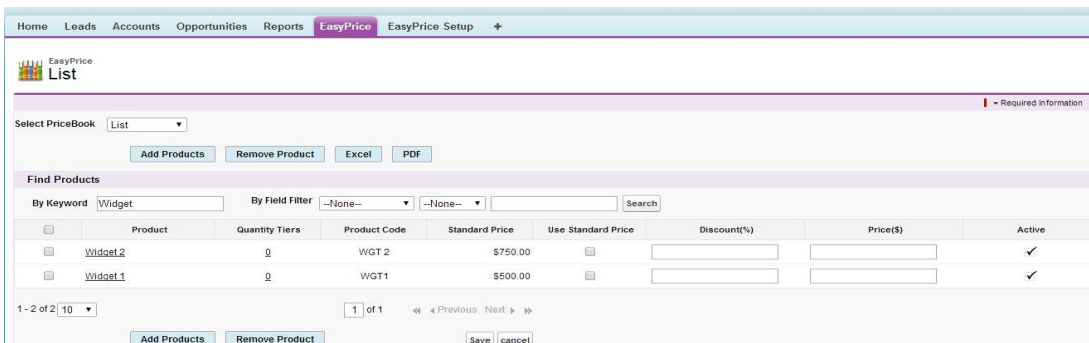We will add Widget 1 and Widget 2 to the List and Reseller Pricebooks

1.   If not on the EasyPrice Home page, select the EasyPrice tab.
2.   On the **Select Pricebook** dropdown menu, select List. This will bring up a page like this:

3.   Click **Add Products**.
4.   Select the Products using the check box to the left of the product name from the Dropdown menu. Use the Keyword search tool to find them if you do not see them. If you cannot find them, they may not have been added correctly.
5.   Click the **Add Product** button on the product selection menu after selecting Widget 1 and Widget 2.

You will now see the Standard EasyPrice product listing page for a Pricebook.

Here you can select the prices for Widget 1 and Widget 2 in the List Pricebook in 3 ways –

a) clicking the **Use Standard Price** boxes;
b) Typing in a discount percent – 10% would be entered as "10" or "10.0" (up to 3 decimals).
c) entering a price (no currency symbols).
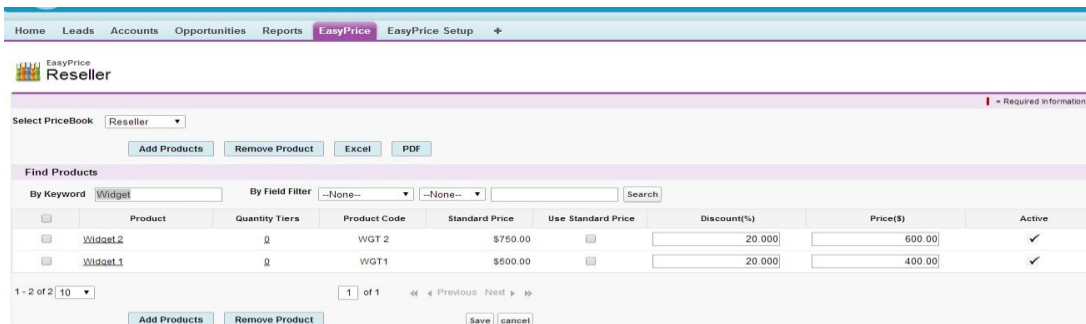
For this pricebook, check the **Use Standard** box for each and **Save.** *Note: From this Standard EasyPrice Pricebook page, you do other things:*

a) Add Products – click the **Add Products** button.
b) Remove Products from the Pricebook (or from all Pricebooks) – Check the product(s) selection boxes and click on the **Remove Product** button.
c) Add or Edit Quantity Discounts for a product in the pricebook – that is explained below under

Let's add Widget 1 and Widget 2 to the Reseller pricebook:

1. From the EasyPrice home page, or from any Standard EasyPrice Pricebook page, use the dropdown menu at the top to select the Reseller pricebook. Then use the search tool or click on the **Add Products** button to add Widget 1 and Widget 2.

2. Type in a **Discount %** of 20 for each product, tabbing out of the fields after putting each number in. *This discount price establishes a price for the product 20% below the Standard prices specified when the products were defined.* **Any quantity discounts specified in this pricebook will be based on this new price, which relates specifically to this pricebook.**

3. **Save.** You will see this:

Now we have pricebooks with products and are all set to Create/Edit Quantity Discount Tiers in our Pricebooks.

C.   Creating and Editing Quantity Discount Tiers

Below we will edit the quantity discounts on Widget 1 and Widget 2 in the List Pricebook

1. From the EasyPrice Home select the List pricebook using the dropdown menu:
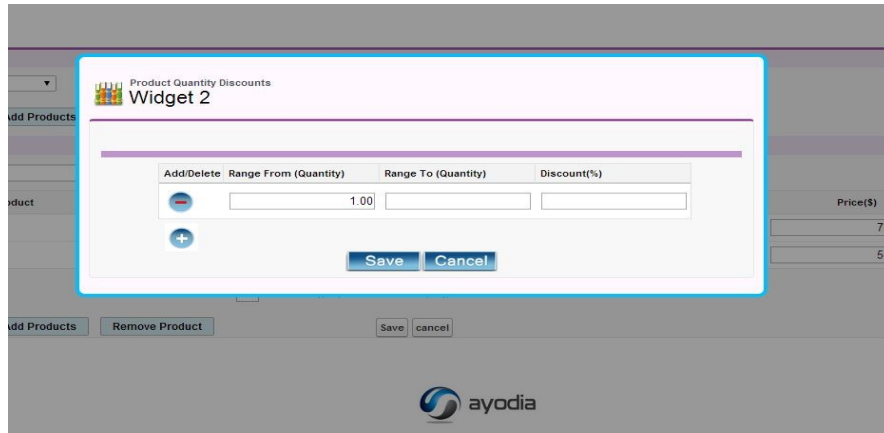
2.   Click on the Underlined "**0**" in the **Quantity Tiers** column for Widget 1. You will now see the discount tier creation tool,

3.   Click the "**＋**"button:

4. Because customers will not get a discount for orders of quantities below 5, we put in a 4 for the **Range To** field, and a 0 in the **Discount %** field. This creates the first Tier (actually a trivial one – because there is no discount, but we need it to establish the order quantity where discounts kick in.

5. Click the "**+**" button again.

6. The **Range From** field automatically populates with 5, which is where this new Tier picks up from the last one. Put in 9 in the **Range From** field, and 10 in the **Discount %** field.

7. Click the "**+**" button again for a third tier. Put in 25 for the **Range From** and 20 for the **Discount %**. Here is how your tool will now be displaying:

9

Product Quantity Discounts
Widget 2
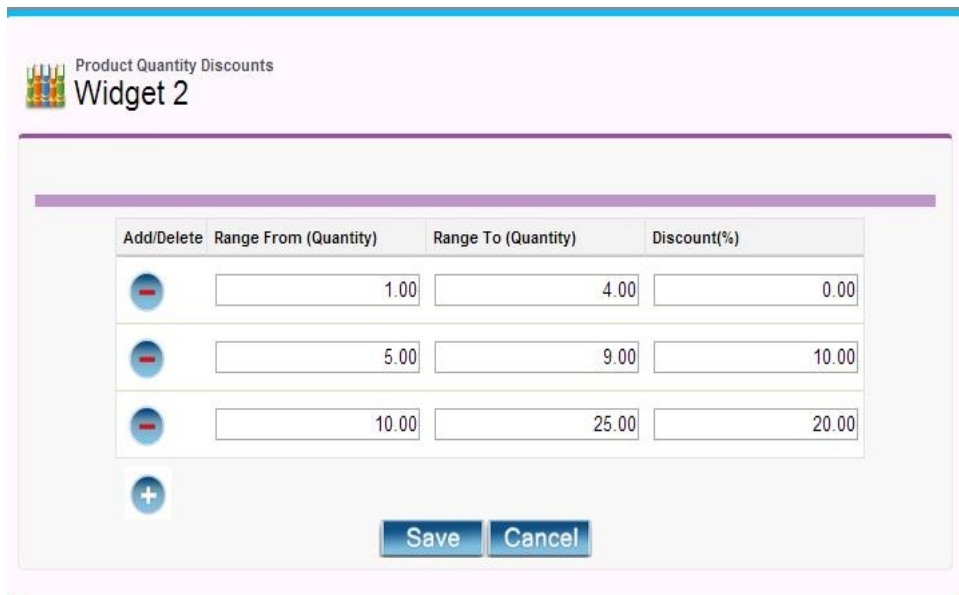
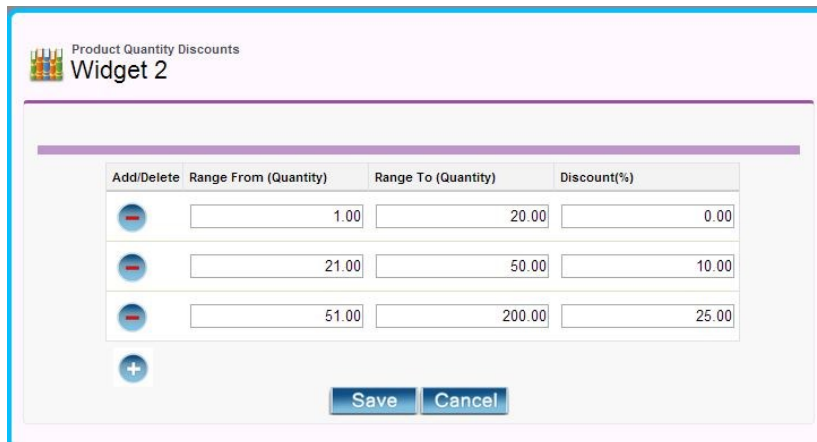| Add/Delete	Range From (Quantity)	Range To (Quantity)	Discount(%)
⊖	1.00	4.00	0.00
⊖	5.00	9.00	10.00
⊖	10.00	25.00	20.00
⊕			

Save Cancel

8. Click **Save** – you could go on creating tiers for this product, but you get the hang of it now.

You can do this for any of the products in the List pricebook – just click on the Tier number for the product.

You can also change pricebooks using the pricebook selection menu and define quantity tiers for products in other pricebook*. (Quantity discounts are often different in pricebooks, and so EasyPrice does not populate discount tiers across pricebooks.)*

For the Reseller Pricebook, select Reseller using the pricebook selection dropdown, then click on the underlined numbers for Widget 1 in the **Quantity Tiers** column. We entered the discount structure as:
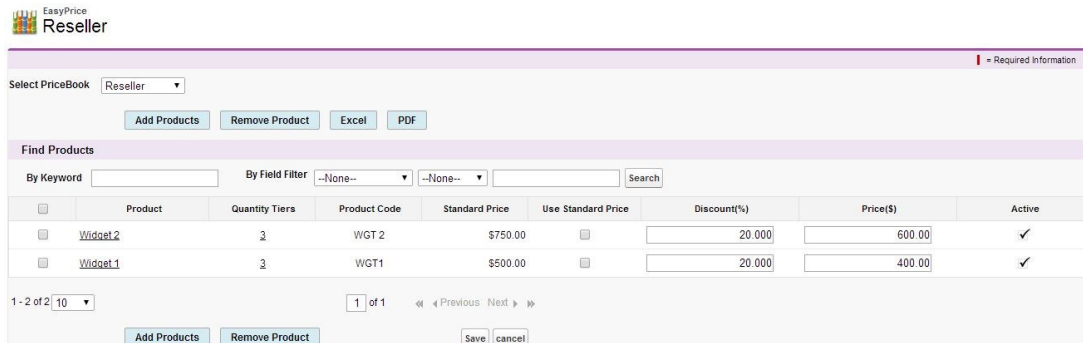

Then we did the same for Widget 2. Now the Reseller pricebook reflects in the **Quantity Tiers** column our definition of 3 tiers for each product:

We are all set to create opportunities and sell now.

D   Quantity Discounts – Sales Process

We are going to create two opportunities – one for an Account called Hopewell Quarry that is managed by one of our company-owned stores, and one for a large distributor called American Energy Alternatives. The first opportunity – the one for Hopewell Quarry – will use the List pricebook (which has quantity discounts but no book discount (to reflect that they did not find and sell the end-customer and they don't stock our solar arrays, etc.)

The second opportunity – a potential sale to American Energy Alternatives - will be based on our Reseller pricebook. This pricebook will have a book discount from standard pricing (which we used in our List book). This discount on both our products is 20% *regardless of quantity.* This pricebook also has quantity discounts. Our opportunity pages will show the various discounts in for each order. Let's get started:

1.   Select the **Opportunities** tab, and then the **New** button.

2.   We input "Hopewell Quarry Land Use" as the Opportunity Name, 6/30/2014 for the close, and used the Stage dropdown to select Proposal/PriceQuote.

3.   Since we (like you) did not have this Account set up, we used the Account field magnifying glass to create it – account name "Hopewell Quary Inc. (we didn't bother to put a bunch of other Account info in.

4.   At the Hopewell Quarry Land Use Opportunity Detail page, scroll down and click on the **Chose Pricebook** button in the Product Section, and select List, then **Save.**

5.   Back on the Opportrunity page now, scroll go to the Product section and click the **Add Product** button. Check both the Widget 1 and Widget 2 **Selection Boxes**, as the order will have both, and then click the **Select** *button.*

6. Put in eighteen(18) for Widget 1 and three(3) for Widget 2. Then click **Save.**

You are now returned to the Hopewell Quarry Land Use Opportunity detail page. Scroll down the Products section. You can will see what the order looks like so far –

Widget 2 is below the second tier (and we defined the first as a zero discount tier), but Widget 1 at a quantity of 18 gets 20 % discount in the List pricebook, as shown. Unit **Price at Quantity** is the price per unit reflecting any book discount *and* the appropriate quantity discount.

Second example: Consultative Sales Process.

1. On the Opportunity Tab, create an Opportunity called "Fall Order". You will have to put in a close date (9/15/2014) a stage (proposal/price quote). At this stage we also created the Account called American Energy Alternatives.

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2. After **Saving,** scroll down the Fall Order opportunity page to the Product section and click the **Choose Price Book** button, and select Reseller and **Save.**
3. Back on the opportunity page go to the Products section again and click **Add Products.**
4. Click both Widget 1 and Widget 2 selection boxes than, the **Select** button.

Our reseller – American Energy – is unsure how big to make the order and asks the salesperson where the quantity discount breaks are and *what* they are. To see this, before entering any quantities, the sales rep will be see the following screen:

To be able to advise the distributor on the discount structure the sales person can just click on the **Quantity Discounts** button for a product, say Widget 2 to see where and how big the breaks are:

13

The pop-up can be closed and a quantity entered.

5. Enter 30 for Widget 1 and 100 for Widget 2, and then **Save.** The Products section of the Opportunity page (Fall Order) will show what has been added:

Note: The Quantity Discounts are above and beyond the Discount on Standard Price that these products have have in the Reseller pricebook. A reseller gets a 20 % discount regardless of order quantity, against standard price (which happens to be what we chose for our List price book) and then gets quantity discounts based on order size.

- *End of EasyPrice™ Manual -*

Appendix: EasyPrice™ Setup Instructions

Set-up for SF Professional or Lower Editions

1. Click App Exchange Install button
2. Add the EasyPrice fields to Product, Pricebook, and Opportunity Product Page Layouts – these fields begin with "AYprice__"
3. Override standard Opportunity Product page:
   a. Setup > Customize>Opportunity>Opportunity Product>Buttons & Links
   b. Click the Add Product button
   c. Click Edit
   d. Check the radio button under **Override With** (if not checked) and use the dropdown menu to select

   AddProductVf[AY__AddProductVf]

4. After Installation, click on the **EasyPrice Setup** Tab. You will see the following screen:

The **Sync New Product or Book** button is to sync your existing pricebooks and products with a just-installed EasyPrice application (from the AppEX, that is). After being done _once_, standard Salesforce pricebooks and products will _remain_ in sync. After clicking that button following installation, you will see all of your pricebooks in the EasyPrice pricebook drop-down menu on the EasyPrice tab home page. There is no need to use this button again.

Set-up for Enterprise Edition and Higher

1. Install application from App Exchange
2. Assign permission for *administering* pricebooks to user who is responsible for creating/editing pricebooks:
   a. Users>User who is responsible for pricebook admin>
   b. Click on **Edit Assignments** under Permissions Set Assignments section.
   c. Click on EasyPrice Admin, then use add arrow to move it to the right.
   d. Click **Save** button.
3. Assign permissions for any user who will be using Opportunities tab and creating Opportunities.
   a. Do as above, but select users who will create Opportunities
   b. After clicking on Edit Assignments under the selected Users Permission Set Assignment section, select the Standard User permission and use the right pointing arrow button to add this permission.

4. Assign required Layout pages for *all* users of EasyPrice.
   a. Click Setup>Manage Users>Profiles
   b. Select (sequentially) profile of any User who will be using EasyPrice, starting with System Administrator.
   c. Scroll down page to Page Layouts
   d. Change the Product, Pricebook and Opportunity Product page layouts to EasyPrice.
5. Open the **EasyPrice Setup** Tab, which brings up the following screen:

The **Sync New Product or Book** button is to sync your existing pricebooks and products with a just-installed EasyPrice application (from the AppEx, that is). After being done *once*, standard Salesforce pricebooks and products will *remain* in sync. After clicking that button following installation, you will see all of your pricebooks in the EasyPrice pricebook drop-down menu on the EasyPrice tab home page. There is no need to use this button again.

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EasyPrice Support

EasyPrice™ installation support is available free of charge:

Support@ayodia.com

(866) 640 8950

SalesForce.com implementation and customization assistance is available. Please visit **Ayodia.com.**

17