



OPPORTUNITY SPLIT





ASTREA IT SERVICES
C-52 Sector – 65, Noida

OVERVIEW

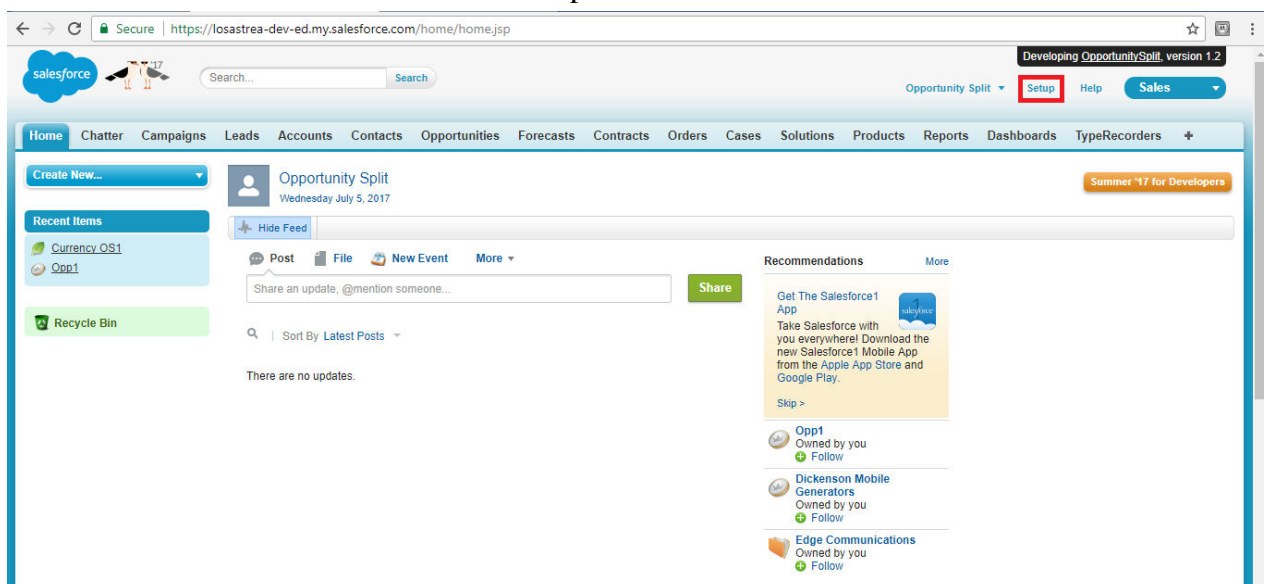
Opportunity Split is a lightning component used to Split the Opportunity-Amount, Opportunity-Expected Revenue or any Opportunities Currency field among Opportunity team members.

KEY FEATURES

- It includes Standard Splits as well as Custom Splits.
- You can view and edit Opportunity Splits.
- It supports in salesforce1 mobile application.

GETTING STARTED OPPORTUNITY SPLIT

- **Step 1:**
 - ◆ In the classic environment click on setup



- ◆ In Quick Find Box enter Remote Site Settings and click on Remote Site Settings

The screenshot shows the Salesforce Quick Find search results for 'Remote Site Settings'. The search bar at the top contains 'Remote Site Settings'. Below the search bar, the 'Remote Site Settings' link is highlighted in the left sidebar under the 'Security Controls' section. The main content area displays the 'Getting Started' section with a 'Build App' button and a 'Recent Items' table. The 'Recent Items' table lists various Apex classes and Visualforce pages, including 'OpportunitySplitController', 'SFDC_DevConsole', 'GetSessionId_VF', 'Utils', 'MetadataServiceTest', 'MockHttpServletResponseGenerator', 'MetadataService', and 'opportunitysplittest1'.

- ◆ Click New Remote Site button

The screenshot shows the 'All Remote Sites' page in Salesforce. The page title is 'All Remote Sites'. Below the title, there is a message: 'Below is the list of Web addresses that your organization can invoke from salesforce.com. To add another Web address, click New Remote Site.' The 'View' dropdown is set to 'All Remote Sites'. A table lists the remote sites, with a 'New Remote Site' button highlighted in the top right corner of the table. The table has columns for Action, Remote Site Name, Namespace Prefix, Remote Site URL, Active, Created By, Created Date, Last Modified By, and Last Modified Date. The table contains three rows of data: 'ApexDevNet', 'AstreaOS', and 'test'.

- ◆ Give a name to remote site and enter the URL(Of your Classic Environment) & click Save.

The screenshot shows the 'Remote Site Edit' page in Salesforce. The page title is 'Remote Site Edit'. Below the title, there is a message: 'Enter the URL for the remote site. All s-controls, JavaScript OnClick commands in custom buttons, Apex, and AJAX proxy calls can access this Web address from salesforce.com.' The 'Remote Site Edit' form is displayed, with fields for 'Remote Site Name' (AstreaRemoteSiteSetting), 'Remote Site URL' (https://losastrea-dev-ed.my.salesforce.com), 'Disable Protocol Security' (unchecked), 'Description' (empty), and 'Active' (checked). The 'Save' button is highlighted in red.

- ◆ Just remember that the Active checkbox should be true for you remote site setting.

Below is the list of Web addresses that your organization can invoke from salesforce.com. To add another Web address, click New Remote Site.

View: All Remote Sites Create New View

Action	Remote Site Name	Namespace Prefix	Remote Site URL	Active	Created By	Created Date	Last Modified By	Last Modified Date
Edit Del	ApexDevNet	los	http://www.apexdevnet.com	☐	Split_Opportunity	4/20/2017 10:53 PM	Split_Opportunity	6/20/2017 11:27 PM
Edit Del	AstreaLOS	los	https://ap5.lightning.force.com	☐	Split_Opportunity	6/20/2017 4:11 AM	Split_Opportunity	7/5/2017 6:09 AM
Edit Del	AstreaRemoteSiteSetting	los	https://losastrea-dev-ed.my.salesforce.com	☒	Split_Opportunity	7/5/2017 10:34 PM	Split_Opportunity	7/5/2017 10:34 PM
Edit Del	test	los	https://api.bring.com	☐	Split_Opportunity	6/29/2017 7:14 AM	Split_Opportunity	6/29/2017 7:14 AM

This Checkbox should be Checked

● Step 2:

- ◆ Now add Opportunity Split to the Opportunity's Page Layout in Lightning Environment. For this:-
 - Click on Opportunity Tab.
 - Choose any Opportunity Record.
 - Click on setting on opportunity record page and click on Edit Page.

Search Salesforce

4.28 s 435.41 KB

Sales Home Chatter Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards Rep

OPPORTUNITY Opp1

Account Name Close Date Amount Opportunity Owner

4/30/2017 \$10,000.00 Opportun...

Prospecting Qualification Needs Ana... Value Prop... Id. Decisio... Perception... Proposal/P... Negotiatio... Closed

Mark Stage as Complete

ACTIVITY CHATTER DETAILS

New Task Log a Call New Event Email

Create new... Add

Filter Timeline Expand All

Next Steps More Steps

No next steps. To get things moving, add a task or set up a meeting.

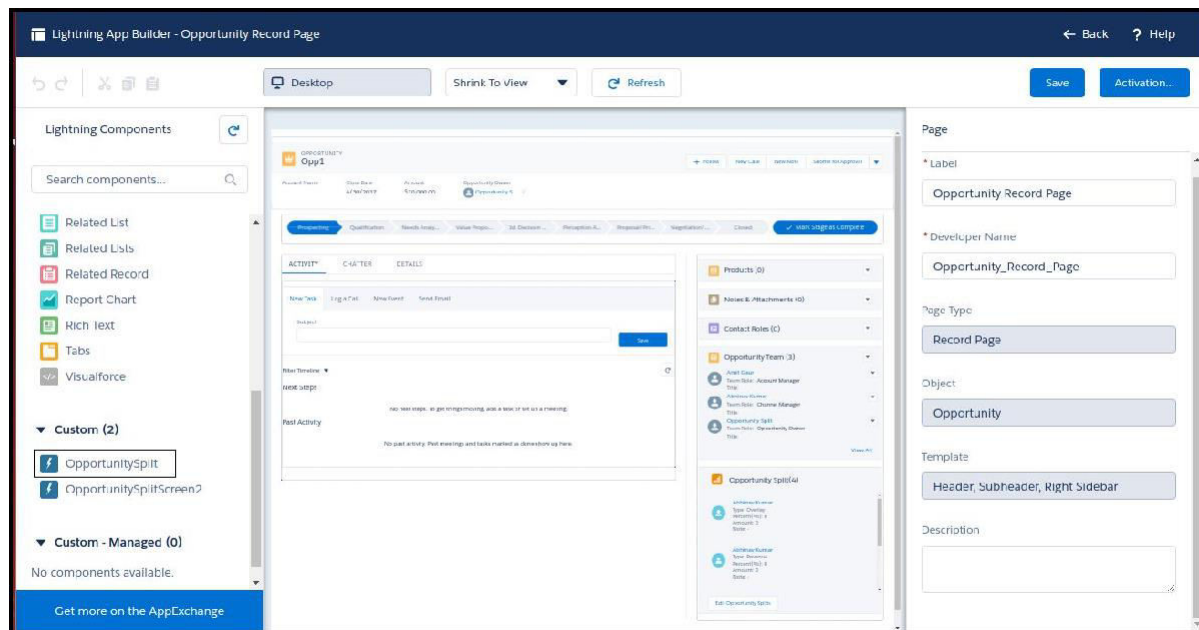
Products (0)

Notes & Attachments (0)

Upload Files

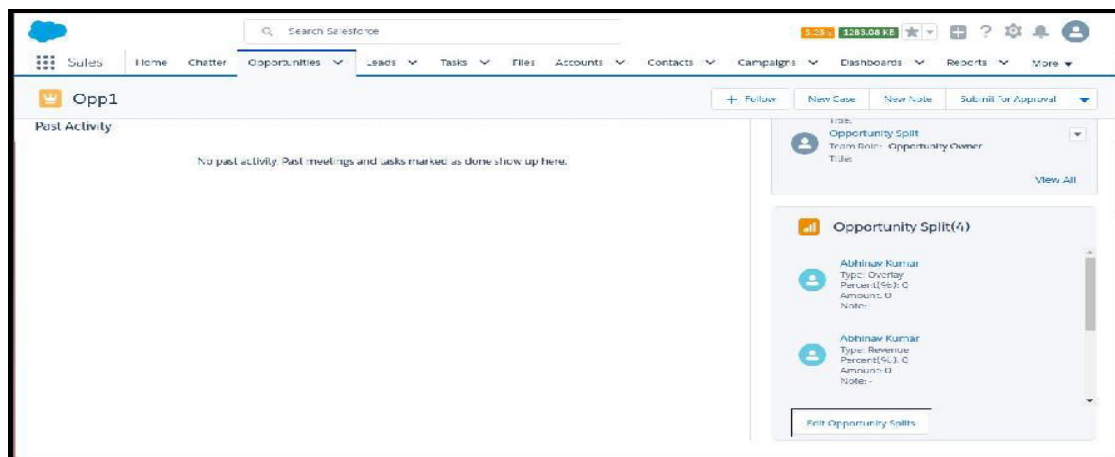
Or drop files

- ◆ Now drag and drop the component 'Opportunity Split' to the page layout and activate the page.



HOW TO SPLIT THE OPPORTUNITY

- Open any opportunity in which you want to perform split.
- Click **Edit Opportunity Split Button** as shown in fig. below.



Back

TEMPORARY SPLIT 2 TEMPORARY SPLIT 3 **TEMPORARY SPLIT1** REVENUETEST OVERLAYTEST

Temporary Split1
Split on Opportunity-ExpectedRevenue
Each split assignment for this split type must total 100%.

ACTION	TEAM MEMBER	PERCENT(%)	AMOUNT	NOTE
Delete	Opportunity Split	100	1000	-
Delete	Abhinav Kumar	0	0	-

+ Add 1 more row

Total Percent : 100 Total Amount : 1000

Save SaveAndClose

- Click on Any split Types as show in fig.
- Fill Split Percent of each Team Members .
- Click on Save to save the Opportunity Split.
- Click on **Delete** button to delete any Opportunity Split Record from that opportunity.
- Click **+Add 1 more row** button to add any Opportunity Split Record in the opportunity. A new record with random Team member will be **saved** with percentage as 0%.
- You can also change the team member. Record will be saved on change of the team member.

Note:-

1. Total Sum of Split percentages can not be more than 100 % if selected Split type is Revenue or it is like revenue.
2. Split percentages for each team member should not Exceed 999.99% if selected Split type is Overlay or it is like Overlay.
3. On Opportunity split setting page,If checkbox under Total 100% column is true as then this split type will behave as a revenue,otherwise it will behave as Overlay.
4. If there is any validation rule regarding the split percentage on Opportunity Split then you must allow to add percentage as 0% as well.
5. You can only add Opportunity Team Member to the Opportunity Split record.

