

VISION PRODUCT SELECTOR

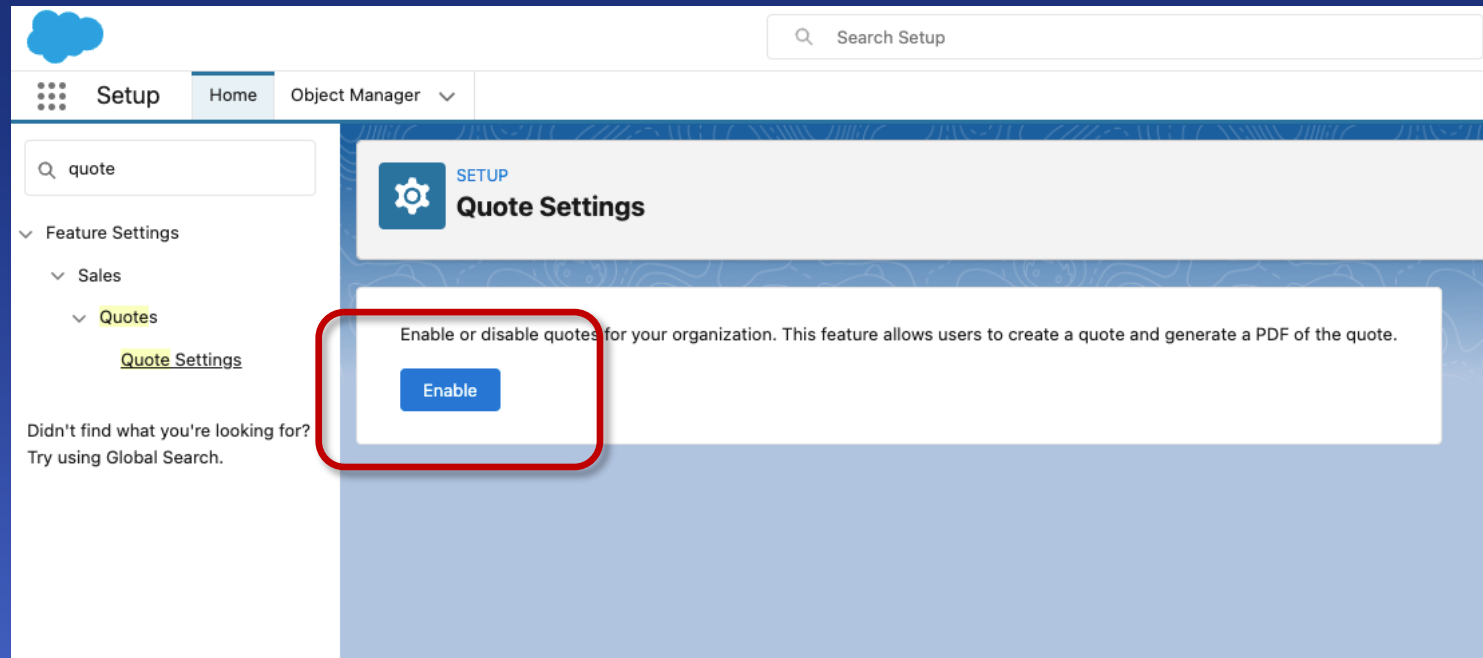
QUICK SETUP GUIDE

flexpricer

A horizontal bar composed of three colored segments: yellow, red, and blue.

STEP 1

ENABLE QUOTES NOT ENABLED BY DEFAULT IN SALESFORCE



STEP 2

SET DISCOUNT FIELD PERMISSIONS

OPPORTUNITY PRODUCT & QUOTE LINE ITEM

The screenshot shows the Salesforce Setup interface. The breadcrumb trail is **SETUP > OBJECT MANAGER**. The main heading is **Opportunity Product**. The left sidebar contains a menu with the following items: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons and Links, Compact Layouts, Field Sets, Object Limits, Triggers, and Flow Triggers. The main content area is titled **Set Field-Level Security Discount** and includes **Save** and **Cancel** buttons. Below this is a table with the following data:

Field Label	Discount
Data Type	Percent(3, 2)
Field-Level Security for Profile	
	☒ Visible ☐ Read-Only
Analytics Cloud Integration User	☒
Analytics Cloud Security User	☒
Contract Manager	☒
Cross Org Data Proxy User	☒
Custom: Marketing Profile	☒
Custom: Sales Profile	☒

A red rectangle highlights the 'Visible' column checkboxes for all profiles listed.

STEP 3

INSTALL FROM APPEXCHANGE

<https://appexchange.salesforce.com/appxListingDetail?listingId=a0N30000000CNjh3EAD>

The screenshot displays the Salesforce AppExchange interface for the Flexpricer CPQ app. The top navigation bar includes the Salesforce logo, a search bar, and links for 'Sign Up' and 'Log In'. Below the navigation bar, the breadcrumb trail reads 'ALL APPS > SALES > QUOTES & ORDERS'. The main heading for the app is 'Flexpricer® CPQ', followed by a checkmark and the text 'Free Product Selector' and 'Configure Price Quote for Salesforce'. A red box highlights the 'Get It Now' button, which is a green button with white text. Below this button is a 'Watch Demo' button. The app's rating is shown as 'RATING ★★★★★ (18)' and the latest release date is 'LATEST RELEASE 8/26/2022'. The app is categorized under 'Categories Quotes & Orders'. The main content area features a large banner for the 'flexpricer' app, which includes the tagline 'The clever native app that makes pricing and quoting feel easier' and a 'Watch Demo' button. The banner also mentions 'FREE VISION PRODUCT SELECTOR'. Below the banner, there is a section for 'Highlights' and a 'Description' section. The 'Highlights' section lists several features, including 'The RIGHT PRICE, EVERY TIME', 'admin-friendly, simple b2b configure, price, quote - cpq app for Salesforce', 'Reprice & Discount by Account & Account Groups', 'Product Bundles & Product Configurator', 'Volume Discounts & Tiered Pricing', and 'Pricing Lock'. The 'Description' section provides a detailed overview of the app's capabilities, including 'PRICE THE RIGHT WAY FOR YOUR BUSINESS with Flexpricer CPQ', 'Many pricing and selling combinations from 38 simple features', 'Take control & get visibility of your margins', 'Sell smarter with lots of ways to control prices & discounts, including Pricing Partners', 'Intuitive & user-friendly product selector', and 'Quote faster & easier with better visibility & real-time price updates'.

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SELL MORE ON EVERY DEAL

FREE
VISION PRODUCT SELECTOR

The clever native app that makes pricing and quoting feel easier

Watch Demo

1 of 15 · CPQ · Configure, Price, Quote in Salesforce | Pricing, Quoting Product Selector | Sales Cloud

Free ⓘ

Watch Demo

RATING ★★★★★ (18)

LATEST RELEASE 8/26/2022

CATEGORIES
Quotes & Orders

Native Product Selector & CPQ for Salesforce. Easy Pricing/Quote Experience

Vision Product Selector: Free for unlimited users 🌟

B2B Sales cloud CPQ premium features: guided selling, volume pricing, product bundles, subscription & renewals, product configurator, upsells, addons & more

Configure, Price & Quote in Salesforce 🌟

Overview Reviews (18)

Highlights

- ✓ The RIGHT PRICE, EVERY TIME - admin-friendly, simple b2b configure, price, quote - cpq app for Salesforce.
- Reprice & Discount by Account & Account Groups
- Product Bundles & Product Configurator
- Volume Discounts & Tiered Pricing
- Pricing Lock

Description

PRICE THE RIGHT WAY FOR YOUR BUSINESS with Flexpricer CPQ

- Many pricing and selling combinations from 38 simple features
- Take control & get visibility of your margins
- Sell smarter with lots of ways to control prices & discounts, including Pricing Partners
- Intuitive & user-friendly product selector
- Quote faster & easier with better visibility & real-time price updates

STEP 4

INSTALL FOR ADMINS ONLY

GIVE ACCESS TO USERS WITH PERMISSION SETS PROVIDED

**Install Flexpricer® cpq**
By Flexpricer® (CRMS11)


☒ **Install for Admins Only**


☐ **Install for All Users**


☐ **Install for Specific Profiles...**

Install

Cancel

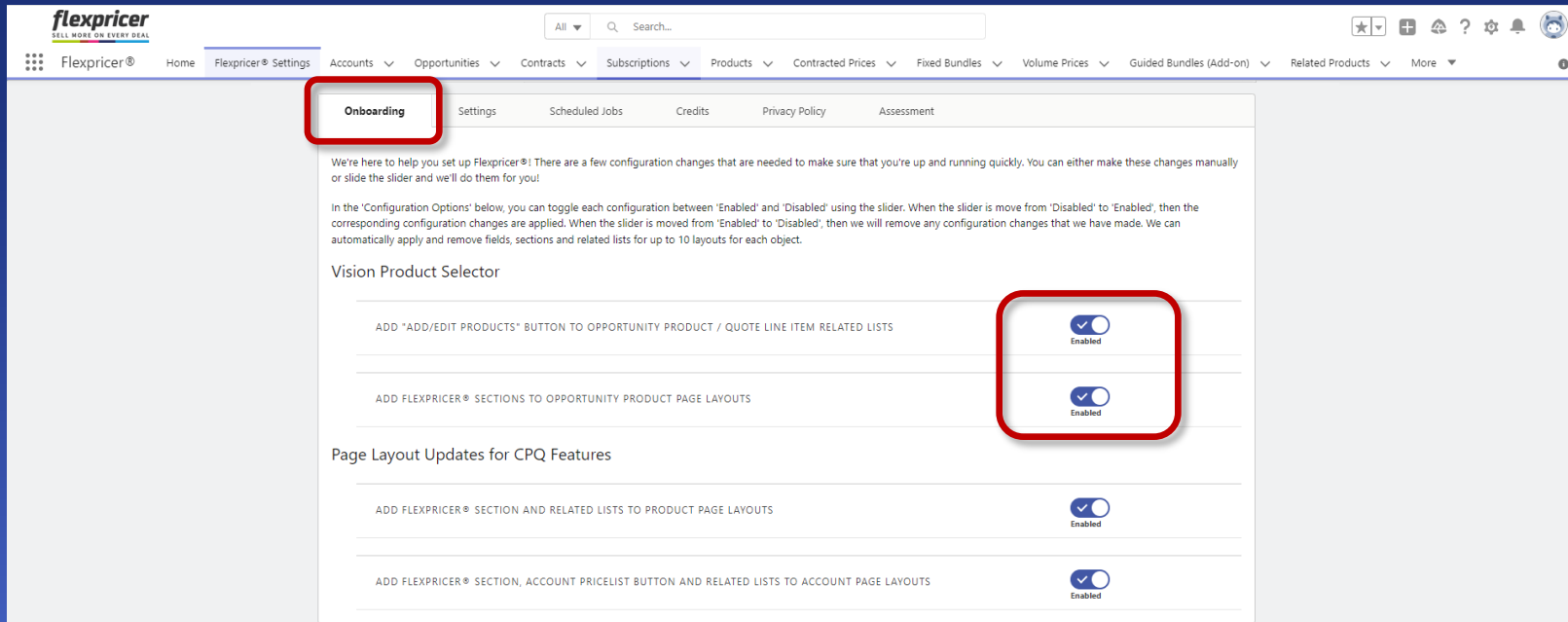
App Name	Publisher	Version Name	Version Number
Flexpricer® cpq	Flexpricer® (CRMS11)	Nelson V	1.67.3

Additional Details [View Components](#)

STEP 5

UPDATE SETTINGS

ONBOARDING TAB – ENABLE VISION PRODUCT SELECTOR SLIDERS



The screenshot shows the Flexpricer user interface. At the top, the 'flexpricer' logo is on the left, and a search bar is on the right. Below the logo is a navigation menu with 'Flexpricer®' and 'Home'. The 'Flexpricer® Settings' tab is selected and highlighted. Under this tab, the 'Onboarding' sub-tab is highlighted with a red box. The main content area contains instructions for setting up Flexpricer and a section titled 'Vision Product Selector'. This section has two sliders, both of which are in the 'Enabled' position and highlighted with a red box. Below this is a section titled 'Page Layout Updates for CPQ Features' with two more sliders, both also in the 'Enabled' position.

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All Search...

Flexpricer® Home Flexpricer® Settings Accounts Opportunities Contracts Subscriptions Products Contracted Prices Fixed Bundles Volume Prices Guided Bundles (Add-on) Related Products More

Onboarding Settings Scheduled Jobs Credits Privacy Policy Assessment

We're here to help you set up Flexpricer®! There are a few configuration changes that are needed to make sure that you're up and running quickly. You can either make these changes manually or slide the slider and we'll do them for you!

In the 'Configuration Options' below, you can toggle each configuration between 'Enabled' and 'Disabled' using the slider. When the slider is moved from 'Disabled' to 'Enabled', then the corresponding configuration changes are applied. When the slider is moved from 'Enabled' to 'Disabled', then we will remove any configuration changes that we have made. We can automatically apply and remove fields, sections and related lists for up to 10 layouts for each object.

Vision Product Selector

ADD "ADD/EDIT PRODUCTS" BUTTON TO OPPORTUNITY PRODUCT / QUOTE LINE ITEM RELATED LISTS **Enabled**

ADD FLEXPRICER® SECTIONS TO OPPORTUNITY PRODUCT PAGE LAYOUTS **Enabled**

Page Layout Updates for CPQ Features

ADD FLEXPRICER® SECTION AND RELATED LISTS TO PRODUCT PAGE LAYOUTS **Enabled**

ADD FLEXPRICER® SECTION, ACCOUNT PRICELIST BUTTON AND RELATED LISTS TO ACCOUNT PAGE LAYOUTS **Enabled**

STEP 6

ENABLE SALES PRICE AND DISCOUNT SETTINGS TAB – FINANCIAL MANAGEMENT SECTION

The screenshot shows the Flexpricer Settings page, specifically the Financial Management section. The 'Settings' tab is highlighted in the top navigation bar. The 'Financial Management' section contains several toggle switches, all of which are turned on. The 'Edit Sales Price Amount' and 'Edit Sales Price Discount' toggles are highlighted with a red box. The 'Profit Calculator' toggle is also turned on. The 'Cost-based Pricing' toggle is turned on. The 'Finance Schedule' toggle is turned off. The 'Enterprise Features' section is partially visible at the bottom.

Enable	Feature Name	Description
☒	Edit Sales Price Amount	Enable user to edit the Sales Price amount of a Product.
☒	Edit Sales Price Discount	Enable percentage discounts off the Sales Price of a Product.
☒	Profit Calculator	Calculate Margin/Contribution for each product when added to an opportunity
☒	Cost-based Pricing	Automatically set the Sales Price of a product based on its cost plus a markup percentage (Mark-up Pricing), or to a value where its Sales Price achieves a percentage profit margin (Margin Pricing).
☐	Finance Schedule	Spread Opportunity amount between start and end dates on Line Items, to distribute revenue across different months.

Default	Description
All Line Items	Spread Opportunity amount between start and end dates on All Line Items.

Enable	Feature Name	Description
☒	Simple Subscriptions	Automatically create Contracts, Subscriptions, Billing and Renewal Opportunity records for products that your customers subscribe to.

FINAL STEP

LAUNCH VISION PRODUCT SELECTOR

PRESS ADD/EDIT PRODUCTS BUTTON ON OPPORTUNITY PRODUCTS

The screenshot displays the Flexpricer web application interface. At the top, the navigation bar includes the Flexpricer logo, a search bar, and various menu items like Home, Settings, Accounts, Opportunities, Contracts, Subscriptions, Products, Contracted Prices, Fixed Bundles, Volume Prices, Guided Bundles (Add-on), Related Products, and More. Below the navigation bar, a banner message encourages users to connect with the support team. The main content area shows the 'Opportunity 02. Deluxe Sale' details, including the account name 'Jim Coffee', close date '31/10/2022', amount '£14,150.00', and owner 'James Ratcliffe'. The 'Products' tab is selected, showing a list of 8 items. The 'Add/Edit Products' button is highlighted with a red box.

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Connect with our friendly team to learn more about Flexpricer® including how easy it is to setup and maintain. Visit now flexpricer.com/discovery-call

Opportunity 02. Deluxe Sale

Account Name: [Jim Coffee](#) | Close Date: 31/10/2022 | Amount: £14,150.00 | Opportunity Owner: [James Ratcliffe](#)

Details | **Flexpricer®** | **Products** | Quotes | Finance Schedules

Products (8)

8 items • Sorted by Sort Order • Updated a few seconds ago

	Product	Translation	Quantity Breakdown	Sales Price	Discount	Total Price	Contribution
1	Espresso Machine Deluxe		1	£6,825.00	0.00%	£6,825.00	£6,325.00
2	Chrome Finish		1	£100.00	0.00%	£100.00	£100.00
3	Gold Knobs		1	£50.00	100.00%	£0.00	£0.00
4	Steel Trim		1	£150.00	0.00%	£150.00	£150.00
5	Espresso Machine Deluxe		1	£6,825.00	0.00%	£6,825.00	£6,325.00
6	Brushed Steel Finish		1	£100.00	0.00%	£100.00	£100.00
7	Silver Knobs		1	£50.00	100.00%	£0.00	£0.00
8	Steel Trim		1	£150.00	0.00%	£150.00	£150.00

[View All](#)