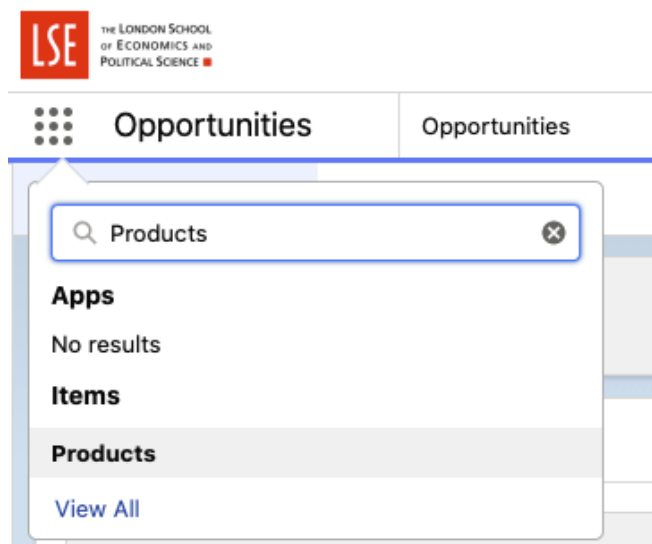


Salesforce Opportunity Products & Price Books

Add a Product to the Price Book

Products need to exist in a Price Book in order to be used on Opportunities. The standard Price Book will hold all the products that are available to you.

To add a product to a Price Book, you will need to navigate to the **Products** item using the App Launcher on the top left-hand corner. Choose the Product you wish to add to the price book or create a new Product.



If your product already exists, then select your Product (scroll down for creating a new Product). On the Related tab, click **Add Standard Price** to create a New Price Book Entry. This will allow the Product to appear on the Price Book.

New Price Book Entry

| | |
|--|-------------------------------------|
| * Product | Active |
| <input type="text" value="Course X"/> | <input checked="" type="checkbox"/> |
| * Price Book | Product Code |
| <input type="text" value="Standard Price Book"/> | |
| * List Price | Use Standard Price |
| <input type="text" value="2000"/> | <input type="checkbox"/> |

Salesforce will automatically populate the Product and Price Book field. If you need to change it, you can do so, for example if you are adding the course to a different price book. If you've gone through the route as described above, you can leave it as is to add the product to the Standard Price Book. The important bit here is making sure that you enter a **List Price** for the product. This will be the 'Standard Price' for the product.

Click **Save** at the bottom of the page. Your chosen Product has now been added to the Standard Price Book.

Creating a new Product

If you're creating a new Product, click **New** on the right-hand side. Enter the **Product Name** and make sure **Active** is ticked so you can use the Product. You can also select the appropriate Product Family and input a code and description if desired. Click **Save** at the bottom of the page. You can then follow the steps above for adding a Product to the price book.

New Product

Product Information

* Product Name

Course X

Product Family

Courses

Product Code

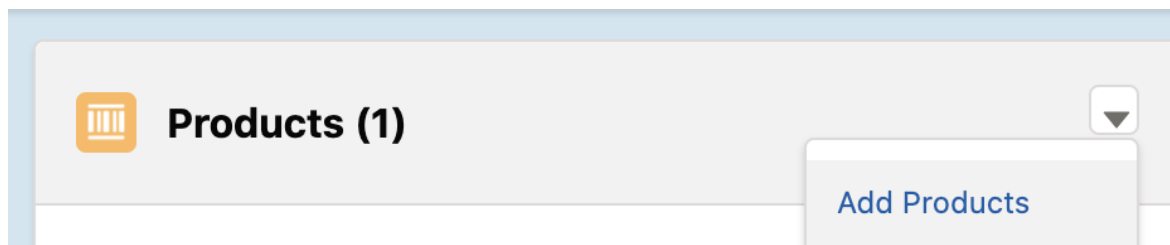
Active



Product Description

Add a Product to an Opportunity

When in the Opportunity on your choice, navigate to the Products section on the right hand side of the page. Click the downward arrow to reveal a list of choices. You'll want to choose **Add Product**.



This will display all the Products available to you in the Price Book you've chosen. Standard is the default. You can either search for your Product using the search bar or scroll through the list to find it. Tick the checkbox on the left side to select your Product(s). Click **Next**.




You will then be prompted to add a **Quantity** and **Sales Price** for each Product. These are both mandatory fields. The Sales Price will be pre-populated with the Standard Price for the Product. You can change this if you are offering the Product at a different price to the Standard Price. This will not change the price on the Price Book, only this Product attached this particular Opportunity. You should not include any discounts in this Sales Price as there is a separate method to adding any discounts which we will cover later on.

Edit Selected Products

| *Product | *Quantity | *Sales Price | Date | Line Description |
|-----------------|-----------|--------------|------|------------------|
| 1 Course X | 3.00 | £2,000.00 | | |
| 2 Ed's Course A | 4.00 | 1000 | | |

Once you've populated all required fields, you can click **Save**. This will add your Product(s) to the Product list on the right hand side.

Adding the Product(s) to the Opportunity will also populate the **Quantity**, **Sales Price**, and **Price After Discount** fields in the Financial Information section on the Opportunity page. If there is a discount to apply to the Opportunity, you can double click the **Discount (%)** field to edit. Once you have entered the figure, click **Save** to store the discount. The discount will automatically apply to the **Price After Discount** field.

| Financial Information | |
|--|--|
| Quantity | 5.00  |
| Sales Price | £6,200.00 |
| Discount Awarded (%)  | 50%  |
| Price After Discount | £3,100.00 |



Edit the price and quantity on an existing Product entry

In order to edit the Sales Price and/or Quantity on an Opportunity, you will need to do this through the Products entries. Similar to adding a Product, navigate to the Products list on the right-hand side, click the downward arrow and choose **Edit Products**.

This will display the existing Products on this Opportunity. You can edit the Quantity and Sales Price fields here and click **Save** when finished. This will update the fields in the Financial Information section.

Deleting a Product entry

To delete a Product entry, similar to above, navigate to the Products list on the right hand side, click the downward arrow on the Product item you wish to delete and click **Delete**.

| Products (2)  | |
|--|---|
| <u>Course X</u> |  |
| Quantity: | 3.00 |
| Sales Price: | £2,000.00 |
| Date: | |
| <u>Ed's Course A</u> | |
| Quantity: | 2.00 |
| Sales Price: | £100.00 |
| Date: | |

Edit

Delete

[View All](#)