



surfwriter.com

Surfwriter Products Manager™ Administration Guide - Winter 2023

Table of Contents

About Surfwriter Products Manager	1
Products Manager App Install and Setup	2
App Install: Grant Access for all Users	2
App Prerequisites: Enable Products, Pricebooks and Product Schedules	2
App Prerequisites: Object and Field Permissions	3
Setup Step 1: Add Products Manager Button to Opportunity Page Layout	4
Setup Step 2: Products Manager Setup Custom Setting (optional)	5
Products Manager Create / Edit Schedules Quick Start	6
Quick Start Step 1: Open Products Manager	6

About Surfwriter Products Manager

Products Manager is an App by Surfwriter that enables creating / editing and shifting Salesforce Quantity and Revenue Schedules simultaneously for all Opportunity Products under an Opportunity. To use Products Manager, you must first



surfwriter.com

Surfwriter Products Manager™ Administration Guide - Winter 2023

have an Opportunity with one or more Opportunity Products which reference Product2 records that are enabled for Salesforce Quantity or Revenue Schedules.

Products Manager App Install and Setup

App Install: Grant Access for all Users

Confirm that Product Schedules are enabled for your Org prior to install.

Click through the install screens and accept the defaults.

If you're installing in a Production Salesforce Org, Select Grant Access to all Users.

App Prerequisites: Enable Products, Pricebooks and Product Schedules

Surfwriter Products Manager is a Salesforce Quantity and Revenue Schedule editor.

To use Products Manager you must have Products, Pricebooks and Product Schedules enabled for your Org. You must also have Quantity or Revenue Schedules enabled on your Product2 records in order to create Schedules for your Opportunity Products.

Products

- Product Schedules Settings
- Product Settings

Didn't find what you're looking for?
Try using Global Search.

Schedule Setup

[Help for this Page](#)

Use product schedules to determine the payment and delivery cycles for products that are paid for or delivered over time. For flexibility in managing and reporting on product schedules, enable customizable schedules.

Schedule Types

- ☒ Enable quantity scheduling
 - ☒ Enable for all products
- ☒ Enable revenue scheduling
 - ☒ Enable for all products



surfwriter.com

Surfwriter Products Manager™ Administration Guide - Winter 2023

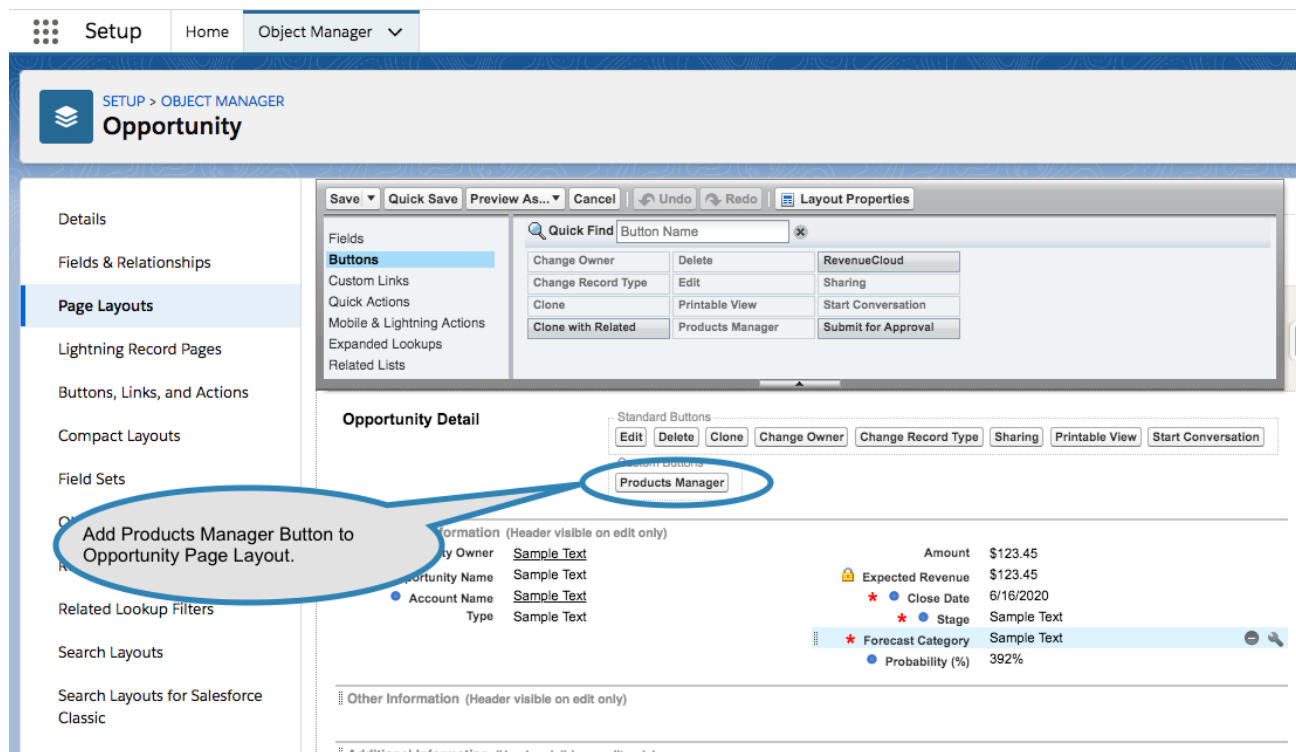
App Prerequisites: Object and Field Permissions

When Product Schedules are enabled in a Salesforce Org, new fields will be added to the Product Object. Be sure to add read permissions to the Quantity and Revenue Scheduling Enabled fields and add them to the Product page layout so you can manage the Schedule settings of your Product records. The following Object and Field Permissions are the minimum permissions required for all Products Manager Users:

OBJECT	OBJECT PERMISSIONS	FIELD	FIELD PERMISSIONS
Opportunity	Read, Edit	Close Date	Read, Edit
		Probability	Read, Edit
		Stage	Read, Edit
Opportunity Product	Read, Edit	Id	Read
		Date	Read, Edit
		Product	Read, Edit
		Total Price	Read
		Quantity	Read, Edit
		Sales Price	Read, Edit
Product	Read	Revenue Scheduling Enabled (if enabled for org)	Read
		Quantity Scheduling Enabled (if enabled for org)	Read
		Product Code	Read
Price Book Entry	Read	Product Code	Read
		Product	Read

Surfwriter Products Manager™ Administration Guide - Winter 2023

Setup Step 1: Add Products Manager Button to Opportunity Page Layout



Setup > OBJECT MANAGER

Opportunity

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Fields

Buttons

Custom Links

Quick Actions

Mobile & Lightning Actions

Expanded Lookups

Related Lists

Quick Find Button Name

Change Owner	Delete	RevenueCloud
Change Record Type	Edit	Sharing
Clone	Printable View	Start Conversation
Clone with Related	Products Manager	Submit for Approval

Opportunity Detail

Standard Buttons

Edit Delete Clone Change Owner Change Record Type Sharing Printable View Start Conversation

Custom Buttons

Products Manager

Information (Header visible on edit only)

Opportunity Owner	Sample Text	Amount	\$123.45
Opportunity Name	Sample Text	Expected Revenue	\$123.45
Account Name	Sample Text	Close Date	6/16/2020
Type	Sample Text	Stage	Sample Text
		Forecast Category	Sample Text
		Probability (%)	392%

Other Information (Header visible on edit only)

Additional Information (Header visible on edit only)

Add Products Manager Button to Opportunity Page Layout.



surfwriter.com

Surfwriter Products Manager™ Administration Guide - Winter 2023

Setup Step 2: Products Manager Setup Custom Setting (optional)

The “Shift Opportunity Product Service Dates” feature enables you to move Opportunity Product Dates (API Name “ServiceDate”) forward and back as you shift your Revenue Schedules in Surfwriter Products Manager.

To enable this feature:

1. Navigate to Custom Settings -> Products Manager Custom Setting.
2. Create a new Organization Level entry (or optionally create entries for Users or Profiles).
3. Set “Shift Opportunity Product ServiceDates” to true.
4. Save the setting.

The screenshot shows the Salesforce Custom Settings interface. At the top, there's a header with a gear icon, the word "SETUP", and "Custom Settings". Below this, the specific setting is "Products Manager Setup". There are two paragraphs of explanatory text: one for list-based settings and one for hierarchy-based settings. Below the text are "Edit" and "Delete" buttons. A section titled "Default Organization Level Value" shows a table with columns "Location" and "Shift Opportunity Product ServiceDates". The "Location" column has the value "Surfwriter Inc." and the "Shift Opportunity Product ServiceDates" column has a checked checkbox. Below the table, there's a "View:" dropdown set to "All" and a "Create New View" link. At the bottom, there's a "New" button and a table with columns "Setup Owner" and "Location". The table currently shows "No records to display."

Location	Shift Opportunity Product ServiceDates
Surfwriter Inc.	☒

Setup Owner	Location
No records to display.	

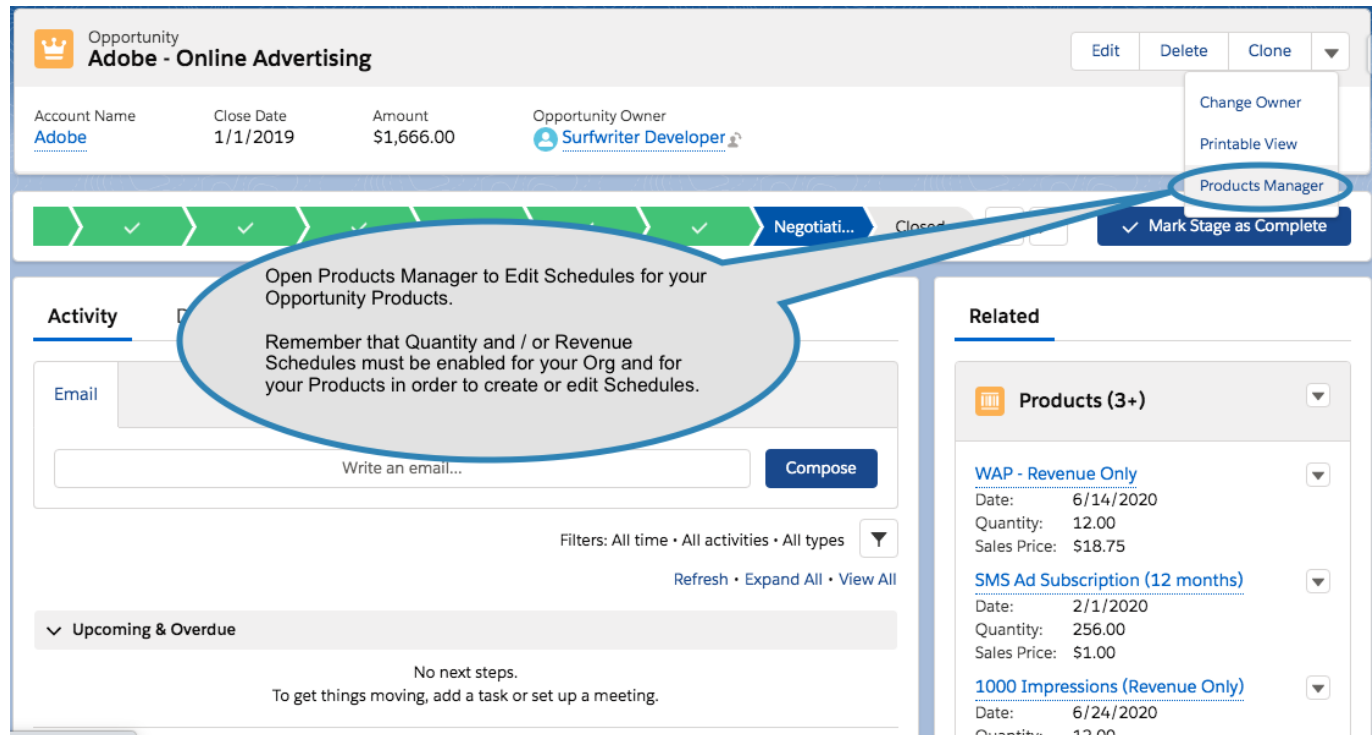
Surfwriter Products Manager™ Administration Guide - Winter 2023

Products Manager Create / Edit Schedules Quick Start

Quick Start Step 1: Open Products Manager

Navigate to the little down arrow in the upper right of your Opportunity Page and Click the Products Manager Button.

The Products Manager interface opens all Quantity and Revenue Schedules in a monthly grid for editing together.



The screenshot shows the Salesforce interface for an Opportunity named "Adobe - Online Advertising". The Opportunity Owner is "Surfwriter Developer". The Amount is \$1,666.00. The Close Date is 1/1/2019. The Account Name is Adobe. The Opportunity is in the "Negotiated" stage. The Products Manager button is highlighted in the dropdown menu.

Open Products Manager to Edit Schedules for your Opportunity Products.

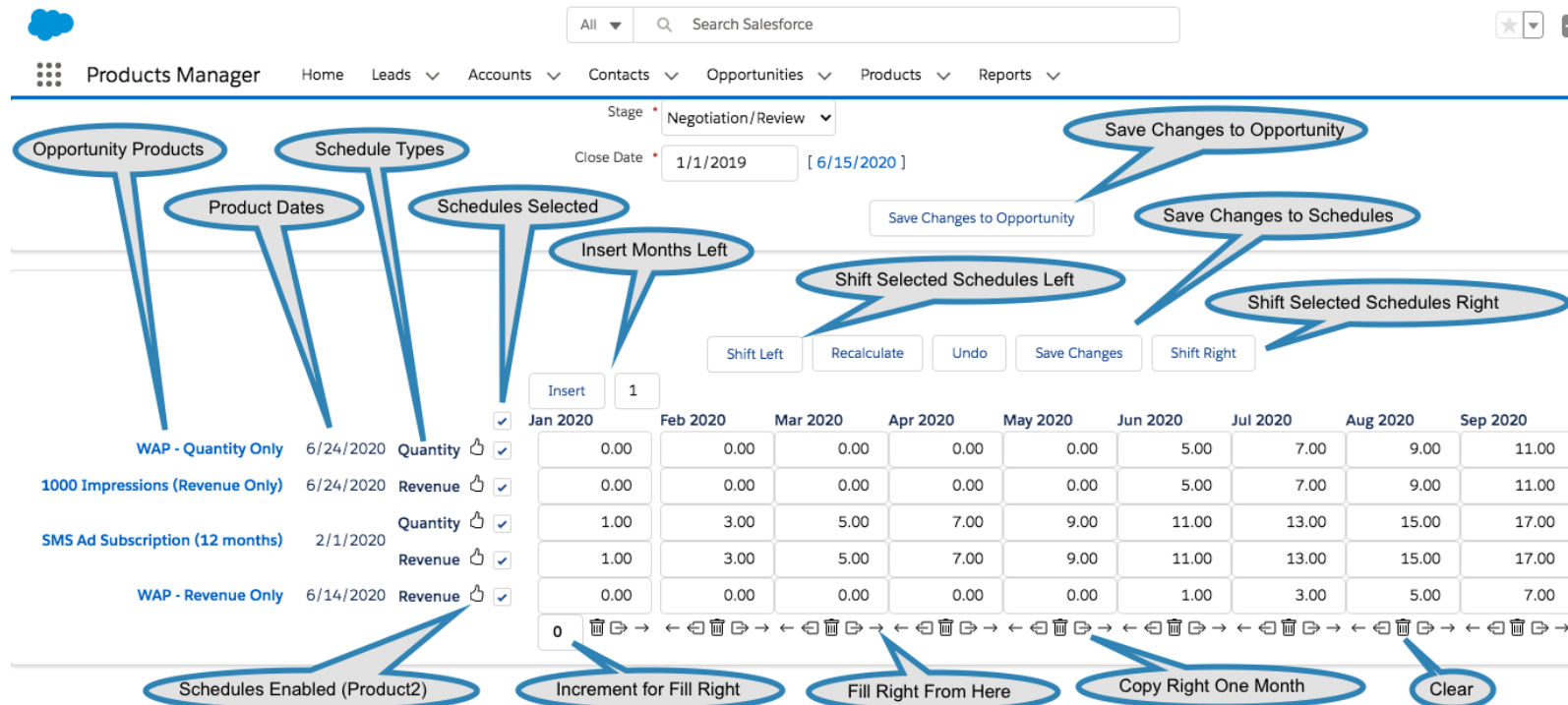
Remember that Quantity and / or Revenue Schedules must be enabled for your Org and for your Products in order to create or edit Schedules.

Related Products (3+):

- WAP - Revenue Only
 - Date: 6/14/2020
 - Quantity: 12.00
 - Sales Price: \$18.75
- SMS Ad Subscription (12 months)
 - Date: 2/1/2020
 - Quantity: 256.00
 - Sales Price: \$1.00
- 1000 Impressions (Revenue Only)
 - Date: 6/24/2020
 - Quantity: 12.00

Surfwriter Products Manager™ Administration Guide - Winter 2023

Products without schedules will have all zeros in the grid, so you can create schedules by simply entering values. The Products Manager interface enables shifts forward and back, fill, copy, clear and months can be added to either end of schedules. To perform incremental fills, you can enter a value to increment left or right and fills can begin at any column.



The screenshot shows the Surfwriter Products Manager interface. At the top, there's a navigation bar with 'Products Manager' and various tabs like Home, Leads, Accounts, Contacts, Opportunities, Products, and Reports. Below this, there's a 'Stage' dropdown set to 'Negotiation/Review' and a 'Close Date' field set to '1/1/2019'. The main area displays a table of products and their schedules. The table has columns for months from Jan 2020 to Sep 2020. The products listed are 'WAP - Quantity Only', '1000 Impressions (Revenue Only)', 'SMS Ad Subscription (12 months)', and 'WAP - Revenue Only'. Each product has a 'Quantity' or 'Revenue' column and a 'Schedule Types' column. The 'Schedules Selected' column shows the number of months selected. The 'Insert Months Left' button is visible. The 'Shift Left', 'Recalculate', 'Undo', 'Save Changes', and 'Shift Right' buttons are also present. The 'Save Changes to Opportunity' and 'Save Changes to Schedules' buttons are also visible. The 'Shift Selected Schedules Left' and 'Shift Selected Schedules Right' buttons are also visible. The 'Schedules Enabled (Product2)' button is visible. The 'Increment for Fill Right' button is visible. The 'Fill Right From Here' button is visible. The 'Copy Right One Month' button is visible. The 'Clear' button is visible.

	Jan 2020	Feb 2020	Mar 2020	Apr 2020	May 2020	Jun 2020	Jul 2020	Aug 2020	Sep 2020
WAP - Quantity Only	0.00	0.00	0.00	0.00	0.00	5.00	7.00	9.00	11.00
1000 Impressions (Revenue Only)	0.00	0.00	0.00	0.00	0.00	5.00	7.00	9.00	11.00
SMS Ad Subscription (12 months)	1.00	3.00	5.00	7.00	9.00	11.00	13.00	15.00	17.00
WAP - Revenue Only	0.00	0.00	0.00	0.00	0.00	1.00	3.00	5.00	7.00