

# How to add Opportunity-Products to Opportunities in Salesforce.com

February 9, 2015

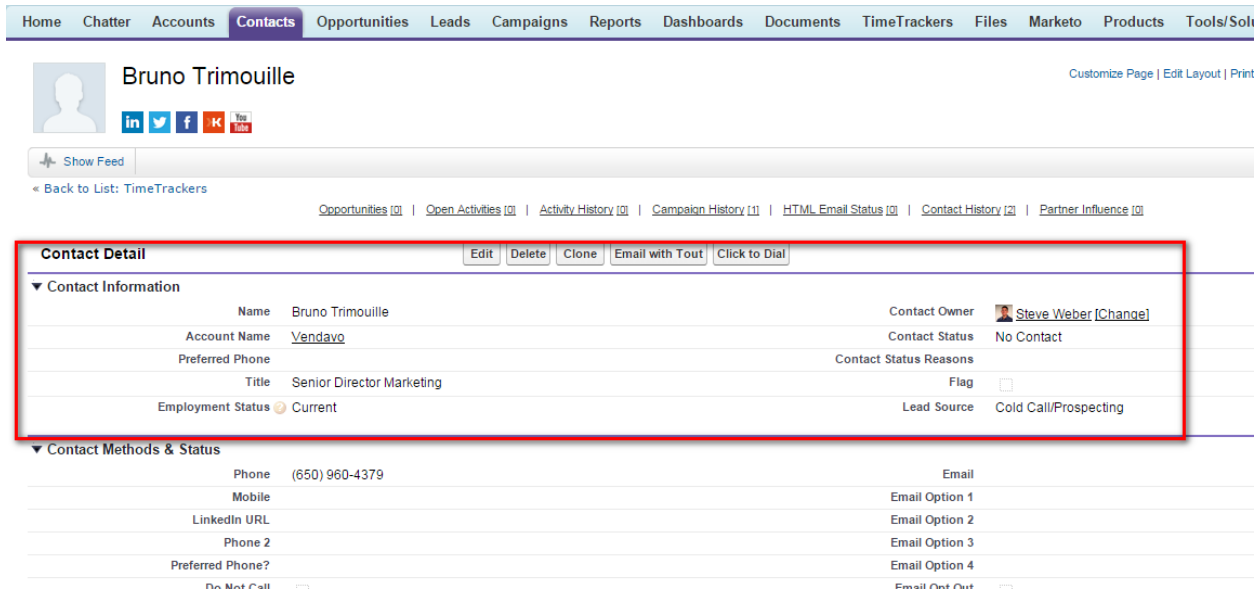
Are you seeking greater visibility into demand and pricing for your products in [Salesforce.com](http://Salesforce.com)? Below is a brief overview for sales people detailing how to add Opportunity-Products to an Opportunity in Salesforce.

## First, a refresher:

The three most important Objects in Salesforce.com are:

1. Accounts: Organization or companies
2. Contacts: People that work at the organization or company
3. Opportunities: Potential sales/pending deals

The most important fields for each of these objects are located in the top section of the screen when looking at the Accounts, Contacts or Opportunities page (as shown below). It is important that all the information in those fields remains up to date. For example, if a client leaves it is extremely important that the record type is updated to "Former."



Home Chatter Accounts **Contacts** Opportunities Leads Campaigns Reports Dashboards Documents TimeTrackers Files Marketo Products Tools/Sol

Bruno Trimouille Customize Page | Edit Layout | Print

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Opportunities [0] | Open Activities [0] | Activity History [0] | Campaign History [1] | HTML Email Status [0] | Contact History [2] | Partner Influence [0]

**Contact Detail** Edit Delete Clone Email with Tout Click to Dial

▼ Contact Information

Name	Bruno Trimouille	Contact Owner	Steve Weber [Change]
Account Name	Vendavo	Contact Status	No Contact
Preferred Phone		Contact Status Reasons	
Title	Senior Director Marketing	Flag	<input type="checkbox"/>
Employment Status	Current	Lead Source	Cold Call/Prospecting

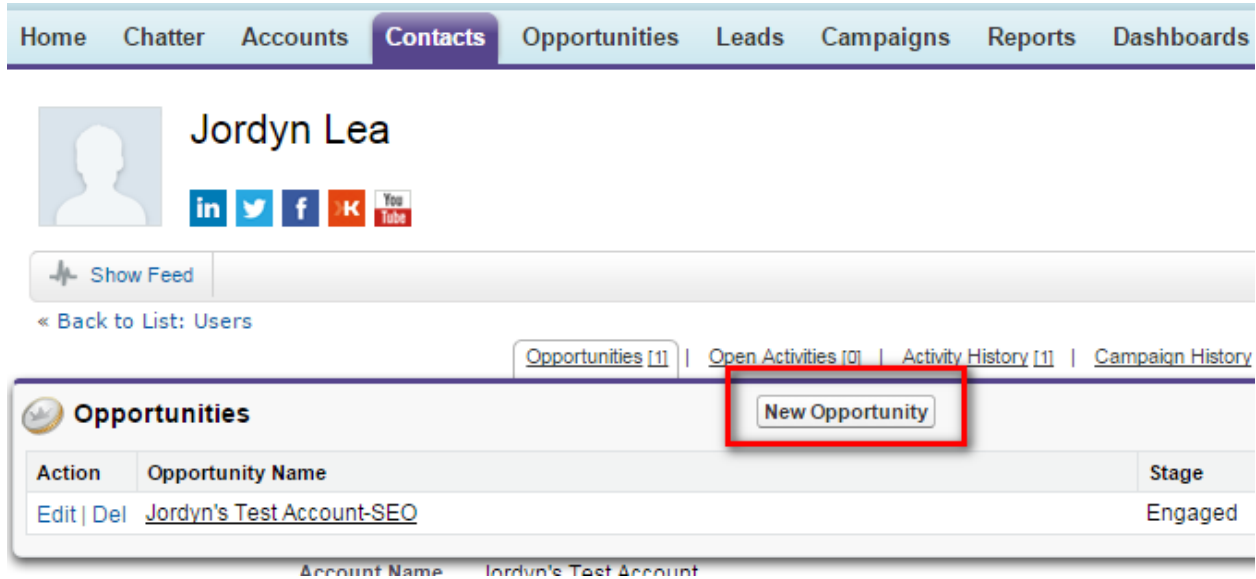
▼ Contact Methods & Status

Phone	(650) 960-4379	Email	
Mobile		Email Option 1	
LinkedIn URL		Email Option 2	
Phone 2		Email Option 3	
Preferred Phone?		Email Option 4	
Do Not Call	<input type="checkbox"/>	Email Opt Out	<input type="checkbox"/>

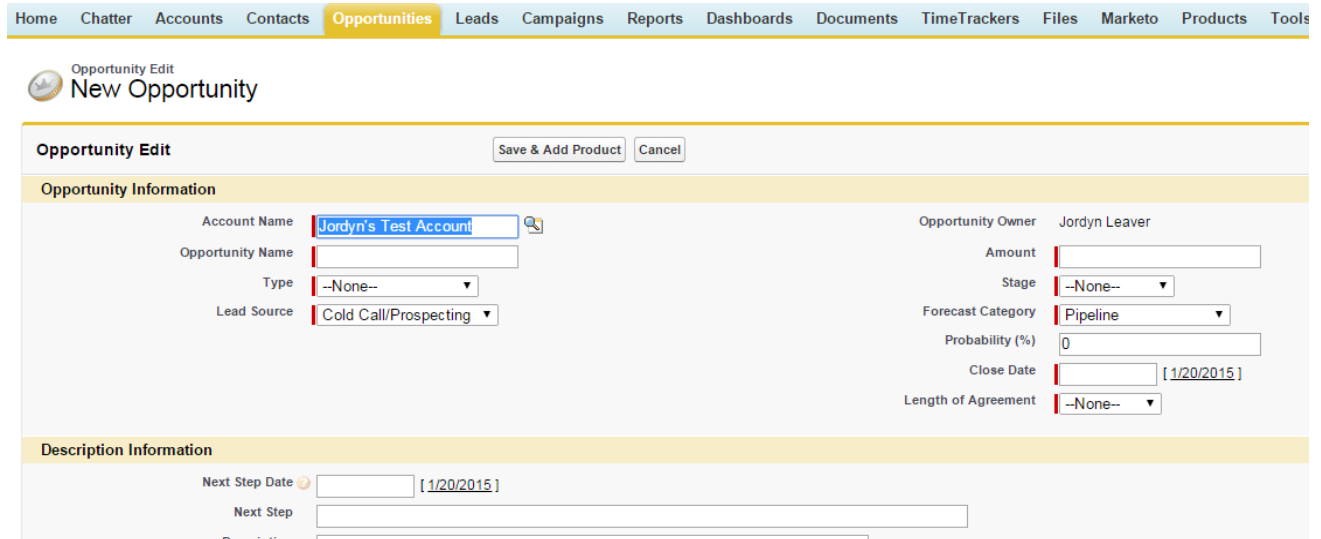
To add Opportunity-Products to an Opportunity follow the steps listed below:

### 1. Log an Opportunity

To log an opportunity first go to the “Contact page,” hover over opportunities, and click “New Opportunity” as shown in the screenshot below.



Once you click “New Opportunity” the screen below will appear: All fields with a red mark are required.



**Opportunity Name:** When naming the opportunity use the Account Name and the product they are interested in: Example: Jordyn’s Test Account-SEO.

**Type:** Below are the four **types** of billing engagements a company can offer:

1. New Recurring: New client with recurring revenue at least 6 months or more
2. New Project: New client with project length less than 6 months
3. Add-On Recurring: Current client, adding on additional revenue
4. Add-On Project: Current client adding on revenue for less than 6 months

**Amount:** Any value can be placed in the amount field (this will make more sense in step 2&3).

## 2. Log a Product on an Opportunity

Once all the information is entered, click “Save and Add Product” at the top of the page and the following screen will appear:

Product Selection for  
**Opportunity Jordyn's Test Account-SEO**

Enter your keyword and filter criteria, then click Search to begin your search. Click More filters to use more than one filter. Search results include all records

Select Cancel

---

**Find Products**

By Keyword  By Field Filter    [More filters >>](#)

Search

---

<input type="checkbox"/>	Product Name	Product Family	Product Description	Active (Pr
<input type="checkbox"/>	<a href="#">Mgmt Fee</a>	Advertising		✓
<input type="checkbox"/>	<a href="#">Consulting Advertising</a>	Advertising		✓
<input type="checkbox"/>	<a href="#">PPC % Fee</a>	Advertising		✓
<input type="checkbox"/>	<a href="#">Display</a>	Advertising		✓
<input type="checkbox"/>	<a href="#">Consulting Analytics</a>	Analytics		✓
<input type="checkbox"/>	<a href="#">Content Production</a>	Content Marketing		✓
<input type="checkbox"/>	<a href="#">Consulting Content Marketing</a>	Content Marketing		✓
<input type="checkbox"/>	<a href="#">Design</a>	Creative Design		✓

This is where you will select the product the customer is interested in by either searching “By Keyword” at the top or by scrolling down the screen or choosing the right product.

**Product Family:** This represents a broad category used to group all the products a company offers.

**Product Name:** This is the specific product you will be selling.

Check the box next to the desired product and then click “select” at the top of the screen. (Note: You may select more than one product per opportunity-if a client is increasing spend in Email & SEO-that can be done on the same opportunity).

Once you click “Select” you will see the screen shown below:

The screenshot shows the Salesforce interface for adding products to an opportunity. The navigation bar includes Home, Chatter, Accounts, Contacts, Opportunities (highlighted), Leads, Campaigns, Reports, Dashboards, Documents, and TimeTrackers. The page title is 'Add Products to Jordyn's Test Account-SEO'. Below the title, it says 'Add products to this opportunity from Standard Price Book price book.' The main form area contains a table with columns: Product, Billing Type, Billing Category, Sales Price, Date [ 1/20/2015 ], and Line Description. There are two rows of data: 'Marketing Automation' and 'SEO'. Each row has dropdown menus for 'Billing Type' (set to 'New') and 'Billing Category' (set to 'MRR'), and a text input for 'Sales Price' (set to '0.00'). There are also empty text inputs for 'Date' and 'Line Description'. At the top and bottom of the form area are buttons for 'Save', 'Save & More', and 'Cancel'.

Product	Billing Type	Billing Category	Sales Price	Date [ 1/20/2015 ]	Line Description
Marketing Automation	New	MRR	0.00		
SEO	New	MRR	0.00		

Adjust the “Billing Type” and “Billing Category” for each product above.


**Note:** If one product is MRR and the other is a project-that is OK to log on the same opportunity, just be certain to make the distinction on the screen above.

Next, enter the sales price and the Scheduled Date.

### 3. Establish an Opportunity Schedule

Once you have selected your products they will now appear on the opportunities page. To view the opportunity products hover over the “Products (Standard Price Book)” object shown in the screen shot below. You can see Marketing Automation and SEO have been added as products.

Home Chatter Accounts Contacts **Opportunities** Leads Campaigns Reports Dashboards

Opportunity  
 **Jordyn's Test Account-SEO**

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Contact Roles [1] **Products (Standard Price Book) [2]** Opportunity Team [1] Open Activities [0] Activity History [0]

**Products (Standard Price Book)** Add Product Edit All Sort

Action	Product
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Marketing Automation</a>
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">SEO</a>

Opportunity Name Jordyn's Test Account-SEO

Next, we want to establish a revenue schedule for each products. First, we are going to click on “Marketing Automation” and you will be directed to the following page:

Opportunity Product  
 **Marketing Automation for Jordyn's Test Account-SEO**

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**Opportunity Product Detail** Edit Delete

Opportunity	<a href="#">Jordyn's Test Account-SEO</a>
Product	<a href="#">Marketing Automation</a>
Family	Email
Billing Type	Add-On
Billing Category	MRR
Line Description	

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▼ **System Information**

Created By [Jordyn Leaver](#), 1/20/2015 1:39 PM Edit Delete

**Schedule** **Establish**

No records to display

^ Back To Top Always show me fewer.

To establish a schedule click the “Establish” button in the screenshot above.

The following screen will appear:

<b>Establish Revenue Schedule for Marketing Automation</b>	
Opportunity	Jordyn's Test Account-SEO
Start Date	1/20/2015 [ 1/20/2015 ]
Revenue	1,000.00
Schedule Type	--None--
Installment Period	--None--
Number of Installments	
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

The schedule type represents how the 1,000 will be distributed. It can either be divided into multiple installments or repeated for multiple installments.

In this example, we will say the client will pay 1,000 with the installment repeated monthly for 12 months. Once the information is filled in it will appear like this:

<b>Establish Revenue Schedule for Marketing Automation</b>	
Opportunity	Jordyn's Test Account-SEO
Start Date	1/20/2015 [ 1/20/2015 ]
Revenue	1,000.00
Schedule Type	Repeat Amount for each installment
Installment Period	Monthly
Number of Installments	12
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

Once you click "Save" you will be directed to a screen that will show the revenue for the next 12 months:



## Edit Schedule for Marketing Automation

Modify the schedule for this product. Click Recalculate to preview how your changes affect the total amount of the stored on the product.

Date	Revenue	Comments
1/20/2015 [ 1/20/2015 ]	1,000.00	
2/20/2015 [ 1/20/2015 ]	1,000.00	
3/20/2015 [ 1/20/2015 ]	1,000.00	
4/20/2015 [ 1/20/2015 ]	1,000.00	
5/20/2015 [ 1/20/2015 ]	1,000.00	
6/20/2015 [ 1/20/2015 ]	1,000.00	
7/20/2015 [ 1/20/2015 ]	1,000.00	
8/20/2015 [ 1/20/2015 ]	1,000.00	
9/20/2015 [ 1/20/2015 ]	1,000.00	
10/20/2015 [ 1/20/2015 ]	1,000.00	
11/20/2015 [ 1/20/2015 ]	1,000.00	
12/20/2015 [ 1/20/2015 ]	1,000.00	
[ ] [ 1/20/2015 ]		

Once you click save and return to the Opportunity, you are able to see that the Opportunity Amount was updated to reflect the TOTAL amount of the Opportunity (the revenue schedule for Marketing Automation totaled as well as the original value for SEO).

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[Contact Roles \[1\]](#) | [Products \(Standard Price Book\) \[2\]](#) | [Opportunity Team \[1\]](#) | [Open Activities \[0\]](#) | [Activity History \[0\]](#) | [Campaign Influence \[0\]](#) | [Partner Influence \[0\]](#) | [DocuSign Status \[0\]](#) | [Notes & Competitors \[0\]](#)

**Opportunity Detail**

[Edit](#) [Delete](#) [Clone](#) [Sharing](#) [Email with Tout](#) [Send with DocuSign](#) [E-Sign](#)

▼ Opportunity Information

Account Name	Jordyn's Test Account	Opportunity Owner	 Jordyn Leaver <a href="#">[Change]</a>
Opportunity Name	Jordyn's Test Account-SEO	Amount	\$14,000.00
Type	Add On (Recurring)	Stage	Engaged
Lead Source	Cold Call/Prospecting	Forecast Category	Pipeline
		Probability (%)	30%
		Close Date	1/20/2015
		Length of Agreement	12 Months

Next, you will follow the same process to establish a schedule for the second product, SEO.

Keep in mind the revenue schedule can be easily edited. For example, the revenue schedule for PPC will be a “best guess” and as we figure out the correct amount for each month, the schedule can be edited.