

# Creemore Salesforce Quote Application

## Quick Start Guide

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### Introduction

The Creemore Salesforce Quote application is a 100% native custom application using Salesforce.com standard components. This application has been built exclusively for Creemore. Using this application, users can create customized quotes, edit existing quotes, and print quotes with pictures of Creemore products as a formatted PDF with Creemore logos.

### Authorized Users

The quote application can be used by persons with a standard Salesforce license. There are two levels of users: application administrators and sales reps.

### Application Administrators

The Quote application administrator will be your Salesforce System Admin. This user can create and edit quotes, as well as add and modify products and image graphics. The System Admin can also authorize new users for the Quote application.

**NOTE:** System Admins need to use Classic UI to thoroughly manage the Quote Application, because Documents are not available in Lightning.

### Sales Reps

Sales reps will create quotes, edit quotes, print the quote as a PDF file, and download the PDF to their file system.

### Creating a Quote

Quotes in Salesforce are found inside of opportunities.

To show quotes in production we use the opportunity "ABC Enterprises, Inc."

**NOTE:** The Quote application is supported by both the Classic and Lightning Salesforce UIs.

1. Quotes are in the right pane. Click on the drop-down menu arrow and select "New Quote" as shown in the screen capture:

The screenshot displays the Creemore CRM interface for an Opportunity record titled "ABC Enterprises, Inc.". The top navigation bar includes "Leads", "Accounts", "Contacts", "Opportunities", "Products", "Files", "Reports", "Dashboards", "Status\_check\_lists", and "More". A search bar is located at the top center. The main content area shows the opportunity details, including Account Name, Close Date, Amount, and Opportunity Owner. A progress bar at the top indicates the current stage is "6. Quote ...". The "Details" tab is active, showing a list of fields and their values. A red box highlights the "Quotes (3+)" section, which contains two quote entries. A red arrow points to a "New Quote" button in the top right of this section.

Field	Value
Opportunity Owner	Admin Group
Opportunity Name	ABC Enterprises, Inc.
Opportunity #	201904-982
Account Name	ABC Enterprises, Inc. **FOR TESTING**
Sales Rep	Marc-Olivier
Lead Source	Other
Lead Source Details	
Stage	1. Fact Finding
Amount	\$62,131.00
Expected Revenue	\$6,213.10
Total Payment %	
Probability (%)	10%
Close Date	12/04/2019

2. In the New Quote: Leibinger dialog box, enter information for the quote. Logic for required fields has been built into the form.

The custom fields on this form have built in help text that describes the field. You can read the help text by hovering your mouse over the small shaded "i" next to the custom field:

## New Quote: Leibinger

Bill To City	Bill To State/Province	Ship To City	Ship To State/Province
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Bill To Zip/Postal Code	Bill To Country	Ship To Zip/Postal Code	Ship To Country
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Enter the title of the Leibinger-Jet picture. If no value is entered, the Leibinger-Jet picture and notes under it will NOT be displayed on the quote.

Printer Picture Title

Printer Picture

Rich text editor toolbar with icons for bold, italic, underline, strikethrough, bulleted list, numbered list, indent, outdent, link, unlink, and insert image.

Printer Picture URL

3. After entering information for the Quote, click on the **Save** button.
4. From the "ABC Enterprises, Inc." opportunity, locate your new quote in the right pane. If you are using Lightning UI, you may need to click on **View All** to find your quote:

**NOTE:** If your opportunity is currently synced to a quote, the quote line items by default will appear on your quote. Simply remove them and then pick your own quote line items.

## Editing a Quote

### Adding Quote Line Items (Quote Products)

In the Lightning UI you edit your new quote to add the Quote Line Items (Quote Products). Whereas in Classic UI the Quote Line Items appear in a related list below your main quote information, the Lightning UI puts Quote Line Items and other related lists in a separate tab called “Related”.

1. Click on the Related tab of your new quote.
2. Remove any unwanted Quote Line Items (if the opportunity is synced to an existing quote).

The Lightning UI gives you several options for your quote line items (see screen capture):

- Add a product to the quote. (**Add Products** button)
- Edit all products at once. (**Edit Products** button)
- Edit an individual product. (**Edit** button)
- Delete a product from the quote. (**Delete** button)

Creemore Leads Accounts Contacts Opportunities Products Files Reports Dashboards

Quote  
Testing-Use Case No 4

Quote Number: 00000019    Expiration Date:    Syncing:     Opportunity Name: ABC Enterprises, Inc.    Account Name: ABC Enterprises, Inc. \*\*FOR TESTING\*\*

Draft    Needs Review    In Review    Approved    Rejected    Presented    Accepted    De

Related    Details

Quote Line Items (4)

Add Products    Edit Products

PRODUCT	QUANTITY	PRODUCT CODE	LINE ITEM DESCRIPTION
ALcode industrial labeling...	1.00	CD20	
APPLICATOR WITH MOV...	1.00	AC45	
ENCODER FOR AUTOMAT...	1.00	CS01	
JET3UP 50µM 3M OD SK6...	1.00	97-005000S-1	

View All

Activity

Next Steps

No next steps. 1 meeting.

Past Activities

No past activity up here.

**NOTE:** There is a built-in rule preventing users from entering a Sales Price that is lower than the Minimum Selling Price (MinimumSP of Product).

- Be sure that you have at least one Quote Line Item that has the "Is An Option" checkbox **NOT** checked. The output PDF requires one product to be a main product, while 0 or more products can be options. Click on "View All" to see all of your Quote Line Items with more fields displayed:

Quotes > Testing-Use Case No 4  
Quote Line Items

4 Items • Sorted by Product • Updated 5 minutes ago

Add Products    Edit Products

	PRODUCT	Q...	PRODUC...	LI...	LIST P...	SALES...	SUBT...	IS...	TOTAL...
1	ALcode industrial labeling head for real time print/apply of self-adhesive labels, equip...	1.00	CD20		\$5,759.00	\$5,759.00	\$5,759.00	<input checked="" type="checkbox"/>	\$5,759.00
2	APPLICATOR WITH MOVABLE PEELER BAR, FOR HIGH ACCURACY	1.00	AC45		\$14,908.00	\$14,908.00	\$14,908.00	<input checked="" type="checkbox"/>	\$14,908.00
3	ENCODER FOR AUTOMATIC LABEL D	1.00	CS01		\$1,345.00	\$1,345.00	\$1,345.00	<input checked="" type="checkbox"/>	\$1,345.00
4	JET3UP 50µM 3M OD SK6 JET3up for non pigmented ink nozzle size: 50µm Print head: ...	1.00	97-005000S-1		\$19,548.00	\$19,548.00	\$19,548.00	<input type="checkbox"/>	\$19,548.00

- After finalizing your selection of Quote Line Items, be sure to save them.

#### (Option) Additional PDF Information (Visualforce)

On the Quote Details page this section enables you to add a user defined **Ink Consumption Note** and **Installation Note** to appear near the bottom of your PDF quote.

## ▼ Additional PDF Information (Visualforce)

Additional PDF Info Type

Ink Consumption Note

Installation Note   
\*\* put LEIBINGER default  
Installation Note stuff here  
\*\*  
(Contact your System  
Administrator to update  
this information)

Your Salesforce System Admin will define these fields. Next you simply select the **Additional PDF Info Type** and click on the **Refresh Template Info** button.

The two fields **Ink Consumption Note** and **Installation Note** will then be filled. Next you click on **Save Template Info** to save the template data to your Quote.

### Creating PDF of Quote

1. After you have selected and saved your Quote Line Items, return to the main Quote page and locate the **Create PDF** button as shown in the screen capture:
2. Click on this button to create and display the quote as a PDF, complete with any graphics associated with your products, and with Creemore headers and footers.
3. You can download the quote to email and/or fax as you see fit.

Redemac Leads Accounts Contacts Opportunities Products Files Reports Dashboards Status\_check\_lists Testing-Use Case No 4 X More

Quote  
**Testing-Use Case No 4**

Edit Delete Start Sync **Create PDF**

Quote Number 00000019	Expiration Date	Syncing <input type="checkbox"/>	Opportunity Name <a href="#">ABC Enterprises, Inc.</a>	Account Name <a href="#">ABC Enterprises, Inc. **FOR TESTING**</a>	Grand Total \$41,560.00
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**Draft** Needs Review In Review Approved Rejected Presented Accepted Denied **Mark Status as Complete**

Related **Details**

Quote Number 00000019	Valid Until 26/04/2019
Quote Title Testing-Use Case No 4	Syncing <input type="checkbox"/>
Quote Name	Status

**Activity**

Filters: All time - All activities - All types

Refresh Expand All

Next Steps **More Steps**

(End of Document)