

# GlobalVision Salesforce Quote System

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## **User's Guide**

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GV-SFQS-VHE-003.002

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## Introduction

This document describes how to use the custom quote creation and editing functionality in Salesforce.com built exclusively for GlobalVision. The features in this application serve as a replacement for the following:

- Standard quote functionality from Salesforce.com, which is not versatile enough for GlobalVision's needs.
- The quote application previously leased from Astadia, which no longer functions.

### *What is GlobalVision Quotes?*

The GlobalVision quote application (GV Quote) is a 100% native Salesforce application with a custom User Interface (UI). The application consists of a collection of custom Salesforce.com objects that integrate perfectly with GlobalVision's Salesforce instance to provide users with the ability to create a variety of quotes and output them to Microsoft Word and Adobe PDF documents.

For GlobalVision, this system enables each user to create company-wide consistent documents. The quote information and quote documents are stored in Salesforce, allowing users to quickly access this information from anywhere in the world via the Salesforce cloud.

GV Quotes in Salesforce are associated with Opportunities, and also GV Invoices. Having all of this information inside of Salesforce has almost limitless business benefits.

### *Document Format Conventions*

The following format conventions are used in this document:

Item	Format	Example
Field name	<b>Calibri, bold</b>	<b>Extended Price</b> is a field name on a Salesforce page
Pulldown field option,	Courier New	Select a Monthly Subscription Fees
Table Column Name	<b>Calibri, bold</b>	In the Word output document, each quote type has a column named <b>Description</b>
Salesforce page titles	Courier New	When starting a new Opportunity you complete fields on the Opportunity Detail page.

Item	Format	Example
Salesforce section titles	Courier New	Please complete the fields in the Address Information section
Salesforce hyperlink	Courier New	Click on the GV Quotes shortcut link.
Salesforce button	<b>Calibri, bold</b>	Click on the <b>New GV Quote</b> button.

**Features**

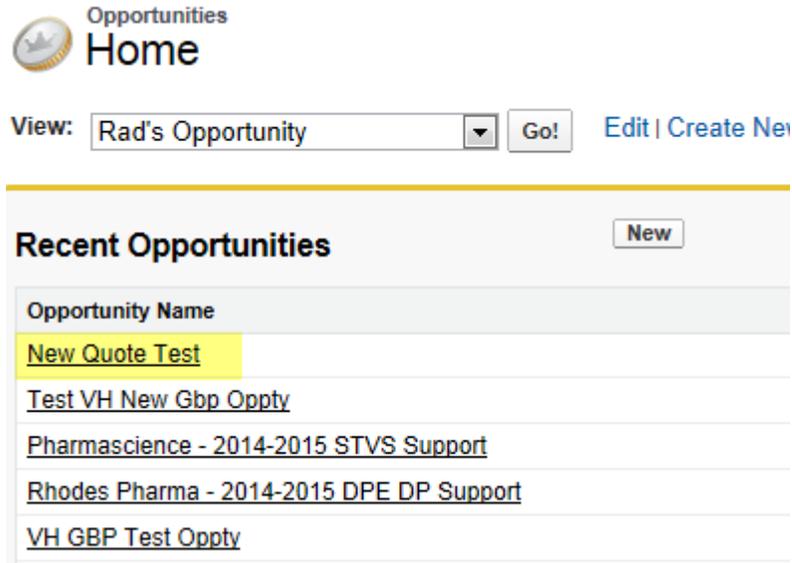
The quote system is designed to be completely intuitive: users experienced with Salesforce should rarely need to consult this document to create professional looking GlobalVision quotes. The quote application has the following cool features:

- Support for a variety of different quote types. The following quote types are supported:
  - Monthly (Subscription) Fees
  - Standard Product Prices (which includes Initial Startup Fees)
- Automatic Fields. Certain fields are formula fields, which are automatically filled when a user completes related dependent fields. As an example, if the user enters a value in the **Unit Price** and **Quantity** fields, the field **Extended Price** is automatically filled by the product of Unit Price and Quantity.
- Quote Output Preview. With a single mouse click you can see what your completed quote will look like BEFORE it is converted into a document and printed.
- Quotes saved a MS Word documents. With a simple mouse click your completed quote is converted to a Word document.
- Quotes saved a PDF documents. With one mouse click your completed quote is converted to a PDF document.
- Quote support for products and services, which are both internal (inside of Salesforce) and external (ad-hoc combinations of current products used to make the sale).
- In-line Help Text. A click on the tiny question mark (?) in front of the field causes help text related to that field to popup.

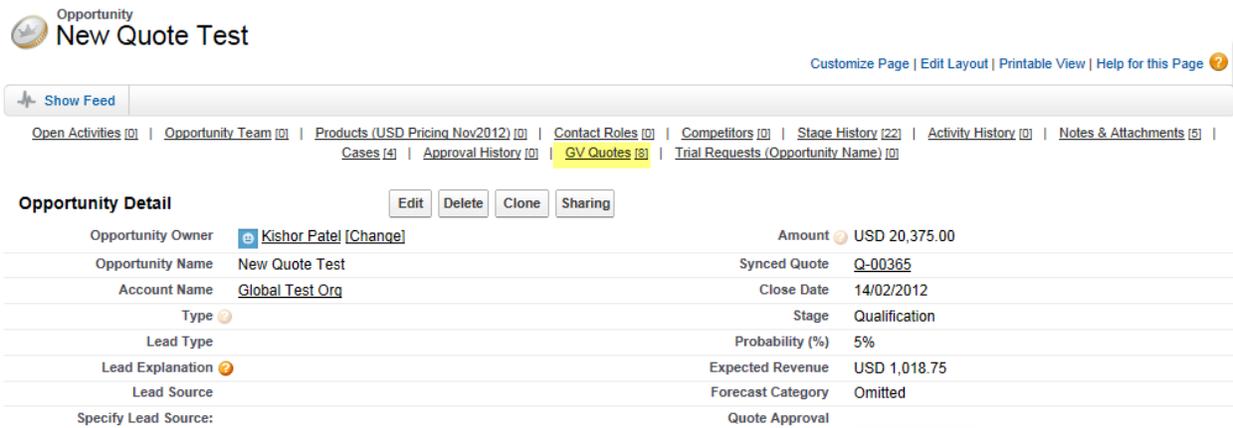
# Viewing GV Quotes with the Standard User Interface

This document assumes you are experienced with Salesforce at GlobalVision, and that you have created or used Opportunities within Salesforce. You can create a GV Quote for a new or existing opportunity.

1. Log into Salesforce and click on the Opportunities tab. Locate the opportunity that you want to create your quote for. For this example we will use the opportunity “New Quote Test” as shown highlighted in the screen below:



2. Click on the Opportunity “New Quote Test”. Depending on how your account is configured, you will see a screen similar to the following:



Notice the shortcut hyperlinks near the top of the page. For your convenience the GV Quotes link is highlighted.

3. Click on the shortcut “GV Quotes”

GV Quotes		New GV Quote		GV Quotes Help ?				
Action	Quote ID	Comments	Quote Discount	Grand Total	Quote Date	Quote Valid Until	Last Modified Date	Is Primary Quote?
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Q-00586</a>		USD 0.00	USD 500.00	25/10/2012	26/10/2012	24/10/2012	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Q-00365</a>		USD 125.00	USD 20,250.00	30/08/2012	14/10/2012	31/08/2012	<input checked="" type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Q-00389</a>		USD 45.00	USD 52,680.00	30/08/2012	14/10/2012	21/09/2012	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Q-00211</a>		USD 346.00	USD 61,612.00	27/07/2012	08/09/2012	27/07/2012	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Q-00245</a>		USD 25.00	USD 71,475.00	27/07/2012	10/09/2012	30/08/2012	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Q-00212</a>	vh-tests	USD 0.00	USD 10,688.00	19/07/2012	02/09/2012	27/06/2013	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Q-00008</a>	This is a VH Test	USD 0.00	USD 100.00	09/05/2012	23/06/2012	10/05/2012	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Q-00009</a>		USD 0.00	USD 200.00	08/05/2012		09/05/2012	<input type="checkbox"/>

From both the “GV Quotes” link shortcut and the GV Quotes related list you can see that there are already three quotes for this opportunity. Before we create new quotes, let’s study a Quote that has already been created by the new system.

4. Click on **Quote ID Q-00365**.

GV Quote **Q-00365**

[Customize Page](#) | [Edit Layout](#) | [Printable View](#) | [Help for this Page](#) ?

[GV Quote Products](#) [4] | [Assets](#) [0] | [Notes & Attachments](#) [0] | [GV Invoices](#) [0]

**GV Quote Detail**      [Edit](#)   [Delete](#)   [Clone Quote and Products](#)

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▼ **Quote Type**  
Quote Type Standard Product(s)

---

▼ **Deployment Method**  
Deployment Method Workstation

---

▼ **Information**

Quote ID	Q-00365	Quote Date	30/08/2012
Opportunity Name	<a href="#">New Quote Test</a>	Quote Valid Until	14/10/2012
Opportunity Stage		Contact	
Subtotal	USD 20,375.00	Quote Approval Status	
Quote Discount	USD 125.00	Comments	
Grand Total	USD 20,250.00	Product Item #	
Notes	vh tests multi line edit and sync	GV Quote Style	

▼ Address Information	
Billing Street	15795 gouin
Billing City	montreal
Billing State	qc
Billing Postal Code	h9h1c5
Billing Country	canada

▼ Special Instructions			
Line 1	All pricing quoted USD.	Line 2	Software delivery available through download. Delivery lead time is 2 full business days.
Line 3	Lead time 4-6 weeks for ScanTVS and 10 - 12 weeks for BraillePoint	Line 4	Shipping is not included. All taxes and duties are the responsibility of the customer at destination.
Line 5	Any hardware not purchased through Global Vision Inc. will be the sole responsibility of the customer.	Line 6	
Line 7		Line 8	
Created By	<a href="#">Kishor Patel</a> , 30/08/2012 10:40 AM	Last Modified By	<a href="#">Kishor Patel</a> , 31/08/2012 1:31 PM

**Custom Links**

[Create New Quote Product for Opportunity](#)

▼ Create Quote as a Document

[Preview Quote Output](#) [Create Standard Product Quote As PDF](#)

[Create Standard Product Quote As Word](#)

The automatically generated unique ID for this quote is Q-00365.

This page provides the information about the quote and its quote products. It also provides the ability to preview and print the quote in Microsoft Word or Adobe PDF formats.

This shows how you can view GV Quotes and GV Quote Products using the standard Salesforce interface.

## The Custom GV Quote Application

The GV Quote application for GlobalVision enables you to view and edit quotes and quote products using a custom user interface. This user interface enables you to edit quotes and their related quote products on the same page.

In addition to the custom user interface, a standard interface also exists in which you can do the following:

- view quote and quote product information
- preview and print quotes
- add a new quote product to the existing quote

### Viewing an Existing Quote

1. Start with the New Quote Test opportunity. Scroll down to the Custom Links section and click on the link `Edit Existing Quote` as shown below.

## Custom Links

[Create New Quote](#)

[Edit Existing Quote](#)

Created By [Kishor Patel](#), 13/02/2012 3:00 PM

Edit

Delete

Clone

Sharing

The Select Quote page of the GV Quote application appears:

 GV Quotes  
New Quote Test

Select Quote					
▼ GV Quotes					
Select the Quote to edit.					
Quote ID	Quote Type	Grand Total	Quote Date	Is Primary Quote?	Action
Q-00586	Standard Product(s)	USD 500.00	25/10/2012	<input type="checkbox"/>	<a href="#">Edit</a>
Q-00389	Standard Product(s)	USD 52,680.00	30/08/2012	<input type="checkbox"/>	<a href="#">Edit</a>
Q-00365	Standard Product(s)	USD 20,250.00	30/08/2012	<input checked="" type="checkbox"/>	<a href="#">Edit</a>
Q-00245	Standard Product(s)	USD 71,475.00	27/07/2012	<input type="checkbox"/>	<a href="#">Edit</a>
Q-00212	Standard Product(s)	USD 10,688.00	19/07/2012	<input type="checkbox"/>	<a href="#">Edit</a>
Q-00211	Standard Product(s)	USD 61,612.00	27/07/2012	<input type="checkbox"/>	<a href="#">Edit</a>
Q-00009	Standard Product(s)	USD 200.00	08/05/2012	<input type="checkbox"/>	<a href="#">Edit</a>
Q-00008	Standard Product(s)	USD 100.00	09/05/2012	<input type="checkbox"/>	<a href="#">Edit</a>

2. Click the **Edit** button for **Quote Id Q-00389**. The **Edit Quote** page appears:

**Edit Quote**

**GV Quote Products** I = Required Information

Item #	Product	Description	List Price	* Qty	Extended Price	Discount	Total	Is a Service?	
1	BraillePoint	vh	39,250.00	1	39,250.00	200.00	39,050.00	<input type="checkbox"/>	Update Delete
2	Validation Document for Braille	IQ, OQ & PQ	10,500.00	1	10,500.00	225.00	10,275.00	<input type="checkbox"/>	Update Delete
3	Additional copy of Validation D	vh	1,950.00	1	1,950.00	0.00	1,950.00	<input checked="" type="checkbox"/>	Update Delete
4	Validation Execution for Braille	Daily Rate	1,450.00	1	1,450.00	0.00	1,450.00	<input checked="" type="checkbox"/>	Update Delete

**Quote Information**

Quote Type <input type="radio"/> Standard Product(s)	Deployment Method <input type="text" value="Client / Server"/>
Quote ID Q-00389	Is Primary Quote? <input type="checkbox"/>
Currency USD	Subtotal <input type="text" value="USD 52,725.00"/>
Opportunity Stage <input type="text"/>	Quote Discount <input type="text" value="45.00"/>
Contact <input type="text"/>	Grand Total <input type="text" value="USD 52,680.00"/>
Quote Approval Status <input type="text" value="--None--"/>	Notes <input type="text" value="vh update all and edit sync tests"/>
Comments <input type="text"/>	

Quote Date  [ 12/07/2014 ]

Quote Valid Until  [ 12/07/2014 ]

**Special Instructions**

Select Line 1 <input type="checkbox"/>	Line 1 <input type="text" value="All pricing quoted USD."/>
Select Line 2 <input type="checkbox"/>	Line 2 <input type="text" value="Software delivery available through"/>
Select Line 3 <input type="checkbox"/>	Line 3 <input type="text" value="Lead time 4-6 weeks for"/>
Select Line 4 <input type="checkbox"/>	Line 4 <input type="text" value="Shipping is not included. All taxes"/>
Select Line 5 <input type="checkbox"/>	Line 5 <input type="text" value="Any hardware not purchased through"/>
Select Line 6 <input type="checkbox"/>	Line 6 <input type="text"/>
Select Line 7 <input type="checkbox"/>	Line 7 <input type="text"/>
Select Line 8 <input type="checkbox"/>	Line 8 <input type="text"/>

The custom display shows the GV Quote Products on top and the general Quote Information below.

## GV Quote Products Section

In the same quote Q-00389, four GV Quote products are listed in rows.

### Field Descriptions

Field Name	Description
<b>Item #</b>	Used to determine the sequence which the products will be displayed in the quote output documents. For example "BraillePoint" will be the first

Field Name	Description
	quote product listed, and “Validation Execution for BraillePoint” will be the last product listed.
<b>Product</b>	Name of the GV Quote Product. These are products found in the Salesforce Product page.
<b>Description</b>	The description of the product.
<b>List Price</b>	The default price of the product. This price can be changed.
<b>Qty</b>	The number of these products.
<b>Extended Price</b>	The result of the <b>List Price</b> multiplied by the <b>Qty</b> .
<b>Discount</b>	An optional discount to be subtracted from the <b>Entended Price</b> .
<b>Total</b>	The result of the <b>Extended Price</b> minus the <b>Discount</b> .
<b>Is a Service?</b>	A checkbox to identify the product as a service. Products marked as services are displayed in a separate section in the quote output documents.
<b>Update button</b>	Click this button to update your changes to the GV Quote Product in the application’s memory.
<b>Delete button</b>	Removes the GV Quote Product from the quote.

**GV Quote Information Section**

To the right of some of the field labels are small question marks, which provide pop-up help text about the field.

**Field Descriptions**

Field Name	Description
<b>Quote Type</b>	Pull-down field enabling you to select one of the types of quotes supported by the system: Subscription and Standard Product(s)
<b>Deployment Method</b>	Pull-down field enabling you to select one of the deployment methods supported by GlobalVision: Workstation (Single User),

Field Name	Description
	Concurrent (Multi User), Intranet (Privately Hosted), and Internet (Publicly Hosted)
<b>Opportunity Stage</b>	A text field for recording the stage of the opportunity.
<b>Subtotal</b>	Formula field = sum of the Total Prices in the GV Quote Products list. This value is automatically computed and updated after you enter, edit, or delete a GV Quote Product in your quote.  You can override this value in case you wish to provide additional discounts in the final quote.
<b>Contact</b>	A lookup field to persons in the Contact object. This field is printed as the "Attn:" contact in the GV Quote output documents.
<b>Quote Discount</b>	Number. An additional discount you can apply to the final quote. Example: 15 = \$15.00 discount.
<b>Quote Approval Status</b>	Pull-down field with options "Accepted" and "Rejected"
<b>Grand Total</b>	Formula field = <b>Subtotal - Quote Discount</b> . This value is automatically computed and cannot be edited.
<b>Comments</b>	Notes about the quote made by the user. These comments will not appear on the GV Quote output documents.
<b>Notes</b>	Summary comments about the quote that will be displayed on the quote document below the GV Quote Product list.
<b>Quote Date</b>	The date when the quote is officially active.
<b>Quote Valid Until</b>	At this date the terms of the quote are no longer valid.

***GV Quote Fields***

The **Address Information** section contains fields that will be displayed on your final quote. These fields are populated with values from the Account related to the Opportunity.

The **Special Instructions** section contains eight check boxes and eight text area fields. When the corresponding check box is selected, the contents of the **Line [X]** field will appear on the quote output document after the list of quote products.

Field	Default Value (after Save)
Select Line 1	Unchecked (false). Select to include the contents of Line 1 in the GV Quote output documents.
Line 1	All pricing quoted USD.
Line 2	Software delivery available through download. Delivery lead time is 2 full business days.
Line 3	Lead time 4-6 weeks for ScanTVS and 10 - 12 weeks for BraillePoint
Line 4	Shipping is not included. All taxes and duties are the responsibility of the customer at destination.
Line 5	Any hardware not purchased through GlobalVision Inc. will be the sole responsibility of the customer.
Line 6	<Intentionally left blank>
Line 7	<Intentionally left blank>
Line 8	<Intentionally left blank>

These values can be edited.

3. Look at the GV Quote Products list toward the bottom of the screen:

GV Quote Products		New GV Quote Product		GV Quote Products Help ?				
Action	Quote Product Name	Unit Price	Quantity	Extended Price	# of Months	Discount %	Total Price	Last Modified Date
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Docu-Proof Enterprise Hosted License</a>	USD 500.00	1	USD 500.00	1		USD 500.00	07/03/2012
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Essential Care Support - A3 Scan-TVS (annual)</a>	USD 0.00	1	USD 0.00			USD 0.00	07/03/2012

The **Total Price** for both products is \$500.00 USD. This same number has been automatically computed and filled into the **Subtotal** field above.

Now let's take a closer look at a product.

4. In the GV Quote Products list, click on the first **Quote Product Name**: "Docu-Proof Enterprise Hosted License".

[Back to List: GV Quotes](#)

[Open Activities \[0\]](#) | [Activity History \[0\]](#) | [Notes & Attachments \[0\]](#)

**GV Quote Product Detail**

[Edit](#) [Delete](#) [Clone](#)

Quote	Q-00003	Quote Product Name	Docu-Proof Enterprise Hosted License
Item No.	1	Description	Text Inspection
Product	Docu-Proof Enterprise Hosted License	Notes	
Unit Price	USD 500.00	Is a Service?	<input type="checkbox"/>
Quantity	1		
Extended Price	USD 500.00		
Is Monthly Rate?	Yes		
# of Months	1		
Subtotal Price	USD 500.00		
Discount			
Total Price	USD 500.00		

Created By [Kishor Patel](#), 23/02/2012 4:46 PM  
Last Modified By [Kishor Patel](#), 19/04/2012 10:30 AM

[Edit](#) [Delete](#) [Clone](#)

## GV Quote Product Fields

The following table summarizes the important fields on this form.

Field Name	Description
<b>Item No.</b>	Number. Specifies the order this product will appear on the output quote document. For example "1" means the item will be the first product listed.
<b>Quote Product Name</b>	Text field auto-populated with the value selected for the <b>Product</b> field. You can enter a product or service in this field which is not in the Products table.
<b>Product</b>	Lookup field. Enables you to search the Salesforce Products for an item to add to your quote.
<b>Unit Price</b>	Currency field = Price for 1 product selected. For Monthly Fees quotes this is the Price per Month
<b>Description</b>	Text Area field. Enter text here that will be displayed on the final quote document.
<b>Is a Service?</b>	Check box. Click if this item is a Service as opposed to a Product. This field determines whether the item will be listed in the Product table or the Service table in your output document.

Field Name	Description
<b>Quantity</b>	Number. The number of product(s)
<b>Extended Price</b>	Formula field = <b>Unit Price * Quantity</b>
<b>Is Monthly Rate?</b>	Pull-down. Select Yes for Monthly Subscription Fees quotes, No for all other quote types.
<b># of Months</b>	<p>For Monthly Subscription Fees quotes enter the number of months the quote is based on. Most of the time you will enter "1" so that the computed Price per Month is easily understood.</p> <p>For Standard Product(s) quotes, leave this field blank.</p>
<b>Subtotal Price</b>	<p>Formula field. For Monthly Subscription Fees quotes, the value = Extended Price * # of Months.</p> <p>For Standard Product(s) quotes, the value = <b>Extended Price.</b></p>
<b>Discount</b>	The discount in dollars to be applied to this product. Note that you can also enter a Discount for the total of All products in the GV Quote Detail page.
<b>Total Price</b>	Formula field = <b>Subtotal Price - Discount</b>

## Creating the Quote as a Word Document

GV Quote Product  
Docu-Proof Enterprise Hosted License

Customize Page | Edit Layout | Printable View | Help for this Page

« Back to List: GV Quotes

Open Activities [0] | Activity History [0] | Notes & Attachments [0]

**GV Quote Product Detail** [Edit] [Delete] [Clone]

Quote	Q-00003	Quote Product Name	Docu-Proof Enterprise Hosted License
Item No.	1	Description	Text Inspection
Product	Docu-Proof Enterprise Hosted License	Notes	
Unit Price	USD 500.00	Is a Service?	<input type="checkbox"/>
Quantity	1		
Extended Price	USD 500.00		
Is Monthly Rate?	Yes		
# of Months	1		
Subtotal Price	USD 500.00		
Discount			
Total Price	USD 500.00		

Created By [Kishor Patel](#), 23/02/2012 4:46 PM  
Last Modified By [Kishor Patel](#), 19/04/2012 10:30 AM

[Edit] [Delete] [Clone]

## Previewing the Output Document in Salesforce

1. Click on the **Quote** field as shown above to return to the Quote Detail page.

▼ Create Quote as a Document

[Preview Quote Output](#) [Create Monthly Quote As PDF](#)

[Create Monthly Quote As Word](#)

[Edit] [Delete] [Clone]

2. Locate the section **Create Quote as Document** below the **Special Instructions** section as shown in the screen capture above.
3. Click on **Preview Quote Output**.

A new tab on your browser is created with another Salesforce window. In the right pane of the window you will see a quote similar to this:

<b>COMPANY:</b> Vincent Harriott Enterprises Attn: Vincent Harriott 35 Coolman Drive Montreal QC 23491 CA						<b>QUOTE ID:</b> Q-00003	
<b>DATE:</b> Feb 27 2012 <b>VALID UNTIL:</b> Mar 14 2012 <b>ACCOUNT EXECUTIVE:</b> Kishor Patel <b>PREPARED BY:</b> Kishor Patel							
PRODUCTS							
PRODUCT	DESCRIPTION	MONTHLY RATE/USER	QTY OF LICENSES	PRICE	# OF MONTHS	MONTHLY PRICE	
Docu-Proof Enterprise Hosted License	Text Inspection	\$500	1	\$500	1	\$500	
Essential Care Support - A3 Scan-TVS (annual)	Annual Maintenance Plan 15%	\$0	1	\$0		\$0	
DEPLOYMENT METHOD							
TYPE	OPTION						
Workstation	<input checked="" type="checkbox"/>						
Client Server	<input type="checkbox"/>						
Intranet/Internet	<input type="checkbox"/>						
Hosted	<input type="checkbox"/>						
						<b>*Grand Total: \$500</b>	

## Fields in the Quote Preview Document

<b>COMPANY:</b>	
Vincent Harriott Enterprises	1.
Attn: Vincent Harriott	2.
35 Coolman Drive Montreal QC 23491 CA	3.

The numbers in the graphic above correspond to the numbers in the following descriptions:

1. The company name is the name of the Account related to the parent Opportunity of the quote.
2. The Contact field for the quote. This value will be used unless there is a Primary Contact Role for the parent Opportunity, otherwise the Primary Contact will appear here.
3. The Address fields are populated from the Address of the Account related to the parent Opportunity.

DATE: Feb 27 2012

VALID UNTIL: Mar 14 2012

ACCOUNT EXECUTIVE: Kishor Patel **4.**

PREPARED BY: Kishor Patel

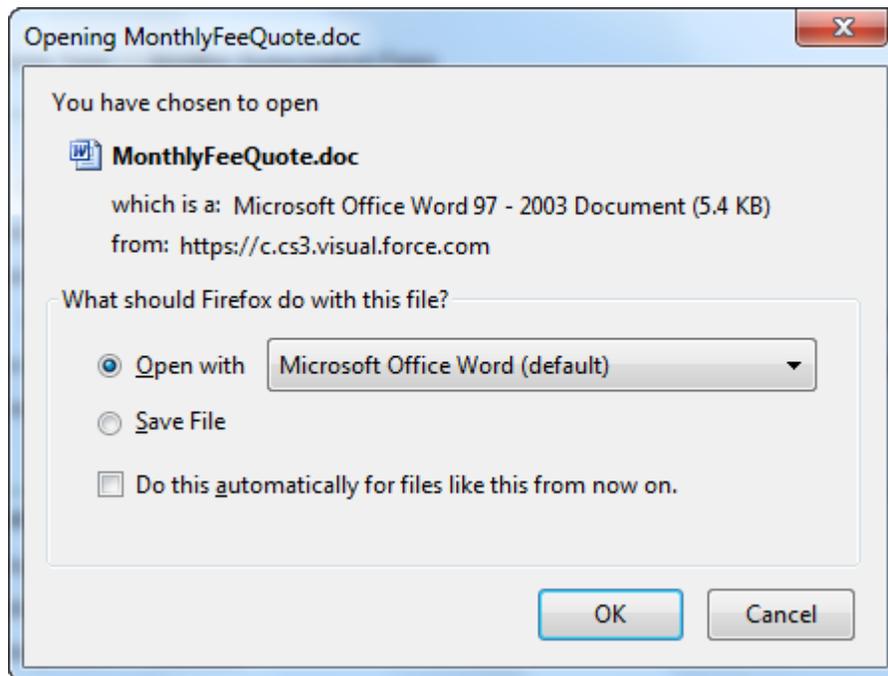
4. The “ACCOUNT EXECUTIVE” is the owner of the parent Opportunity of the quote.

Assuming you are overwhelmingly impressed by the quote and that all of the data displayed is correct, you can now create the official output quote as a Word or PDF document.

## Creating the Word Document

If you still have the Quote Preview open, click on the link titled “Create Monthly Subscription Quote as Word” at the top right of the screen.

If you are using the Firefox browser you will see a dialog box similar to this one:



At this point the system has gathered all of the information from your Quote and has created a Word document with the default filename *MonthlyFeeQuote.doc*.

1. Click on **OK** to download this document and open it on your computer.

The following Word document is what you will see:

QUOTE ID: Q-00003

**COMPANY:**  
 Vincent Harriott Enterprises  
 Attn: Vincent Harriott  
 35 Coolman Drive  
 Montreal QC 23491  
 CA

**DATE:** Feb 27 2012  
**VALID UNTIL:** Mar 14 2012  
**ACCOUNT EXECUTIVE:** Kishor Patel  
**PREPARED BY:** Kishor Patel

PRODUCTS						
PRODUCT	DESCRIPTION	MONTHLY RATE/USER	QTY OF LICENSES	PRICE	# OF MONTHS	MONTHLY PRICE
Docu-Proof Enterprise Hosted License	<i>Text Inspection</i>	\$500	1	\$500	1	\$500
Essential Care Support - A3 Scan-TVS (annual)	<i>Annual Maintenance Plan 15%</i>	\$0	1	\$0		\$0

TYPE	OPTION
Workstation	<input checked="" type="checkbox"/>
Client Server	<input type="checkbox"/>
Intranet/Internet	<input type="checkbox"/>
Hosted	<input type="checkbox"/>

**\*Grand Total: \$500**

- Now you can rename the document and save it. Remember to use the Word Print Preview feature to see exactly how the quote will look after it is printed.

## Creating Your Own Quote

There are two starting points from which you can create a new quote: the Opportunities tab or the GV Quotes tab.

### *Starting from Opportunities*

- Quotes are related to an Opportunity, so if you want to create a quote from an existing opportunity, click on the Opportunities tab and locate that opportunity.

Show Chatter Following

« [Back to List: Opportunities](#)

[Open Activities \[0\]](#) | [Quotes \[0\]](#) | [Sales Team \[0\]](#) | [Products \[0\]](#) | [Contact Roles \[0\]](#) | [Competitors \[0\]](#) | [Stage History \[1\]](#) | [Activity History \[0\]](#) | [Notes & Attachments \[0\]](#) | [Cases \[0\]](#) | [Approval History \[0\]](#) | **[GV Quotes \[0\]](#)**

**Opportunity Detail** Edit Delete Clone Sharing

Opportunity Owner	<a href="#">Kishor Patel</a> <span>[Change]</span>	Amount	
Opportunity Name	EPA Oppty 1	Close Date	14/03/2012
Account Name	<a href="#">Environmental Protection Agency</a>	Stage	Proposal
Type		Probability (%)	50%
Lead Source		Expected Revenue	
Budget Allocated <span>?</span>		Forecast Category	Pipeline
Fiscal Year End <span>?</span>		Quote Approval	
Quote Expiry			
Next Steps			
Opportunity Status <span>?</span>			

---

▼ **Additional Information**

Integration Needs	Contract End Date
Current Proofing Method	Target Installation Date
Proofreaders <span>?</span>	
Main Competitor	Deal Lost Reason
	Notes
Created By <a href="#">Kishor Patel</a> , 12/03/2012 3:51 PM	Last Modified By <a href="#">Kishor Patel</a> , 12/03/2012 3:51 PM

Edit Delete Clone Sharing

In the screen capture above, note the highlighted shortcut to GV Quotes. You will see the same link in the opportunity you select.

2. Click on the GV Quotes shortcut link.

**GV Quotes** New GV Quote GV Quotes Help ?

No records to display

3. Click on the **New GV Quote** button.

The GV Quote Edit screen appears:

**GV Quote Edit** Save Save & New Cancel

**Quote Type** = Required Information

Quote Type

**Deployment Method**

Deployment Method

**Information**

<p>Opportunity Name <input type="text" value="EPA Oppty 1"/></p> <p>Currency <input type="text" value="USD - U.S. Dollar"/></p> <p>Opportunity Stage <input type="text"/></p> <p>Subtotal <input type="text"/></p> <p>Quote Discount <input type="text" value="0.00"/></p> <p>Notes <input type="text"/></p>	<p>Quote Date <input type="text" value="[ 15/05/2012 ]"/></p> <p>Quote Valid Until <input type="text" value="[ 15/05/2012 ]"/></p> <p>Contact <input type="text"/></p> <p>Quote Approval Status <input type="text" value="--None--"/></p> <p>Comments <input type="text"/></p> <p>Product Item # <input type="text"/></p>
--	---

**Special Instructions**

<p>Line 1 <input type="text"/></p> <p>Line 3 <input type="text"/></p> <p>Line 5 <input type="text"/></p>	<p>Line 2 <input type="text"/></p> <p>Line 4 <input type="text"/></p> <p>Line 6 <input type="text"/></p>
--	--

Save Save & New Cancel

## GV Quote Edit Page

This page is divided into four sections: Quote Type, Deployment Method, Information, and Special Instructions.

### Quote Type Section

The single field in this section is a pull down field **Quote Type**. The two quote types currently supported by this application are described below:

Quote Type	Description
Standard Product(s)	Products like proof-readers and add-on modules. Annual Maintenance plans, One time fee for Software Applications: Named and Concurrent Licensing, Hosted Environment and User Setup

Quote Type	Description
	You can also include services like Installation & Training, or Estimated Travel Expenses.
Monthly Subscription Fees	Products that are paid for on a monthly basis, like Docu-Proof Enterprise  You can also include the Support plans for these products

An opportunity can consist of several quotes, so you may have three quotes for a single opportunity: one Monthly Subscription and two Standard Product quotes. With this system, you can either send the three quotes as separate Word documents, or using Word you can combine them into a single document.

## Deployment Method Section

The single field in this section is a pull down field **Deployment Method**. The options currently supported by GlobalVision are described below:

Deployment Method	Description
Workstation	Simple deployment for local installs. All components are installed on a single PC for named licenses.
Client/Server	Install software on multiple client PCs with one central server for administration: a great option for concurrent licensing.
Intranet/Internet	Large scale on-premise deployments. Optional NetCloud add-on available for file storage.
Hosted	Internet deployment features 1000 Mbps speeds, 1000 GB of bandwidth and built-in firewall and anti-virus.

## Information Section

This section collects general information about the quote and its related opportunity.

4. Complete as many fields as you require.

There is no need to enter a value for the **Subtotal** field, as it is automatically computed after a change is made to a GV Quote Product.

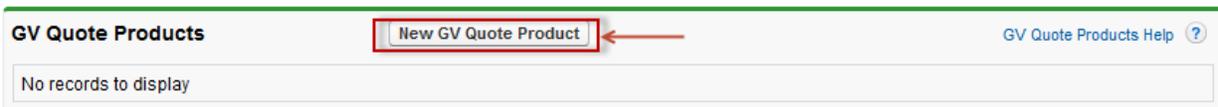
5. If there are some special notes that you would like to appear on the Word document at the bottom of the quote, enter them into the **Notes** field.

## Special Instructions Section

6. Enter any additional text that should appear after the Notes field at the bottom of the quote. If you leave these fields blank they will be automatically filled with values previously described in the section “Here’s a Sample Quote” beginning on Page 4.
7. Click the **Save** button. You are returned to the `Quote Detail` page.

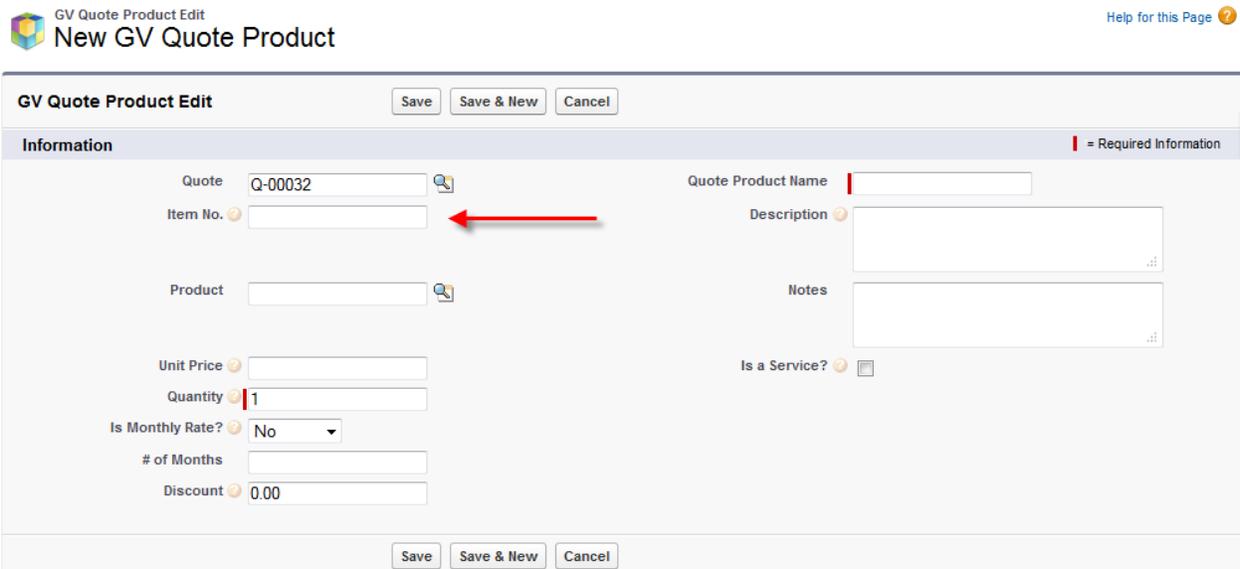
## Adding GV Quote Products

1. Locate the GV Quote Products section near the bottom of the page as shown:



2. Click on the **New GV Quote Product** button.

The `GV Quote Product Edit` page appears:

A screenshot of the "GV Quote Product Edit" page. At the top left is a logo and the text "GV Quote Product Edit". At the top right is a link "Help for this Page" with a question mark icon. Below the header are three buttons: "Save", "Save & New", and "Cancel". The main content area is titled "Information" and contains several input fields. On the left side, there are fields for "Quote" (with value "Q-00032"), "Item No.", "Product", "Unit Price", "Quantity" (with value "1"), "Is Monthly Rate?" (with a dropdown menu set to "No"), "# of Months", and "Discount" (with value "0.00"). On the right side, there are fields for "Quote Product Name", "Description", and "Notes". There is also a checkbox for "Is a Service?". A red arrow points to the "Item No." field. At the bottom of the form are three buttons: "Save", "Save & New", and "Cancel".

3. Enter the number 1 into the **Item No.** field. This value specifies that this product will be the first one listed in the quote output documents.

Next you can select a product from the list of products stored in Salesforce. The **Product** field is a Lookup field, which provides search methods that enable you to quickly find the product you wish to add to this quote.

## Searching for a Product

There are several ways you can search for a product. The methods I use most I call “Wildcard Search” and “Filter Search”.

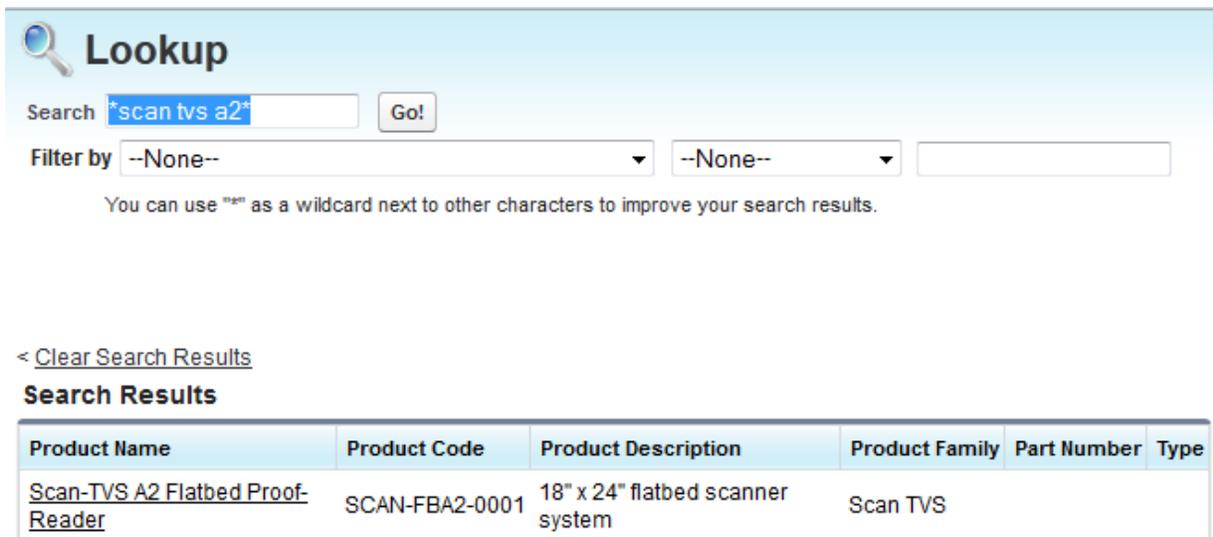
4. Search for and add a product.

### Wildcard Search

This is my favorite method, and if you are familiar with the product names, part numbers, or product codes you will probably use this method to quickly locate the product.

For example the first product you want to add to your new quote is the “SCAN TVS™ A2 PROOF-READER”. Because you are confident that you know a part of the name of this product, enter \*scan tvs a2\* in the **Product** field above, and then click on the magnifying glass icon to the right of the field.

The following dialog box appears:



The screenshot shows a 'Lookup' dialog box with a search input field containing '\*scan tvs a2\*' and a 'Go!' button. Below the search field are two dropdown menus for filtering, both set to '--None--'. A note below the filters states: 'You can use "\*" as a wildcard next to other characters to improve your search results.' Below the filters is a link '< Clear Search Results'. Underneath is a section titled 'Search Results' containing a table with one row of results.

Product Name	Product Code	Product Description	Product Family	Part Number	Type
<a href="#">Scan-TVS A2 Flatbed Proof-Reader</a>	SCAN-FBA2-0001	18" x 24" flatbed scanner system	Scan TVS		

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5. Since the product listed in the `Search Results` is the exact product you were looking for, click on the Product Name. The **Product Name** field on the `GV Quote Product Edit` screen is filled in, and the **Quote Product Name** field is also automatically been given the same value.

For the “Wildcard Search” method to be effective, you simply surround known blocks of text with asterisks. Because “Scan” is the first word of the product name, you can omit the first asterisk and use “scan-tvs a2\*” to get the same result.

### **Search Using Lookup Filters**

This method uses the fields of the Quote product as filter values, enabling you to search for a product using field values you are familiar with.

5. Click on the small magnifying glass to the right of the **Product** field text box.

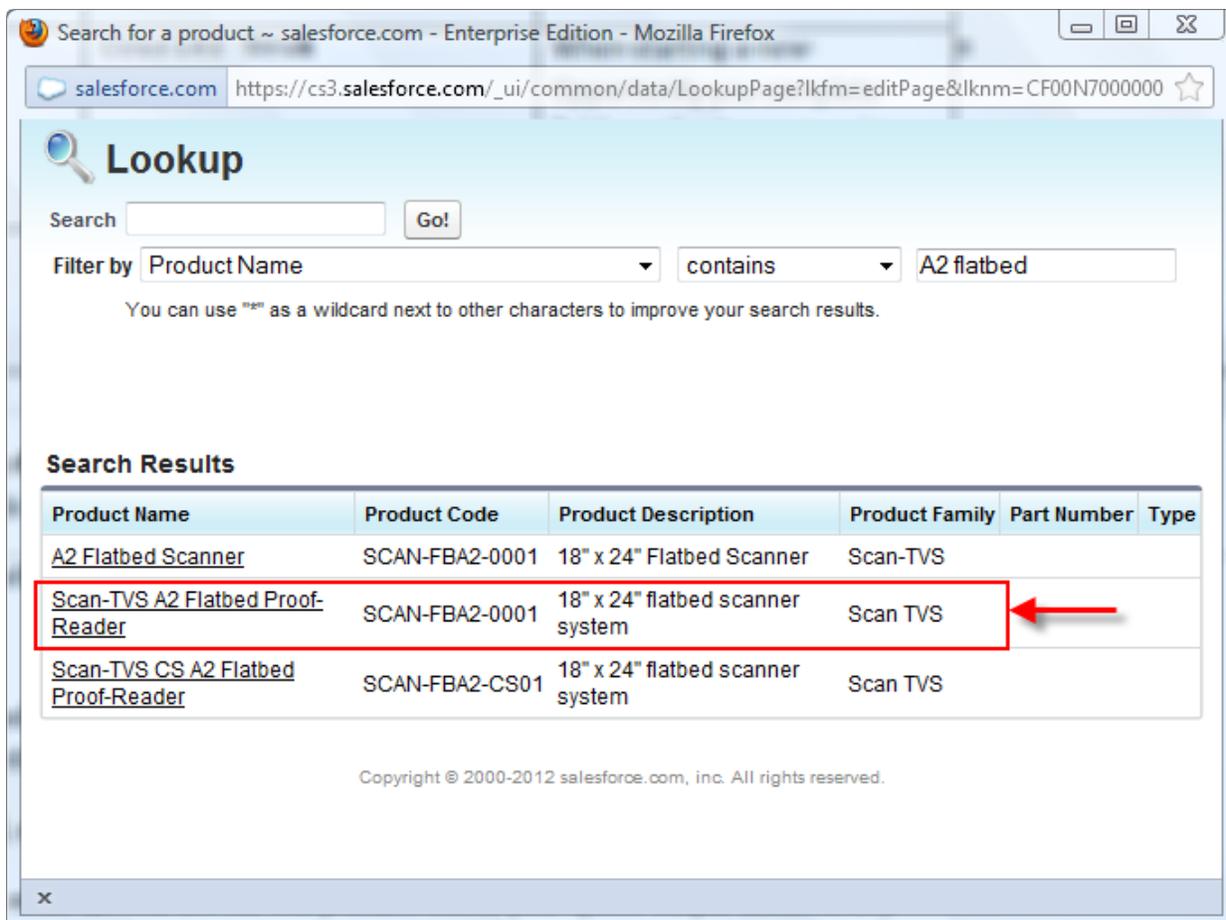
The Quote product lookup dialog box appears:

The screenshot shows the Salesforce Lookup interface. At the top, there is a search bar with a "Go!" button. Below it, the "Filter by" section is highlighted with a red box and contains three dropdown menus, all set to "--None--". A red arrow points to the third dropdown menu. Below the filters, a message states: "You can use '\*' as a wildcard next to other characters to improve your search results." The "Search Results" section shows a message: "The search returned more than the maximum number of rows (200). Please refine your search criteria." Below this message is a table with the following data:

Product Name	Product Code	Product Description	Product Family	Part Number	Type
<a href="#">25" Wide Format Scanner</a>	SCAN-WF25-0001	25" / 600mm - Wide Format Scanner Only	Scan TVS		
<a href="#">36" Wide Format Scanner</a>	SCAN-WF36-0001	36" / 800mm - Wide Format, Scanner Only	Scan TVS		
<a href="#">42" Wide Format Scanner</a>	SCAN-WF42-0001	42" / 1000mm - Wide Format Scanner Only	Scan TVS		
<a href="#">54" Wide Format Scanner</a>	SCAN-WF54-0002	54" / 1200MM - Wide Format Scanner Only	Scan TVS		
<a href="#">A2 Flatbed Scanner</a>	SCAN-FBA2-0001	18" x 24" Flatbed Scanner	Scan-TVS		

Using the three fields next to **Filter By**, select "Product Name", "contains", then enter "A2 flatbed" in the third text field and click on **Go!**

The following dialog box appears:



As shown above, the Search Results section locates the product you are looking for.

6. Click on this product to add it to the quote.

At this point you have used either the Wildcard method or the Lookup Filters to locate your product in the Products table.

To complete the process of adding a product to the quote, you must complete the required fields on the GV Quote Product Edit page, indicated by a red border to the left of the field.

7. In the **Quantity** field, enter 1.
8. Click the **Save** button.

## Adding a Product not Currently in Salesforce

Sometimes you may have the need to “invent” a product or service for a quote, for example create a single product, which is a combination of products never before sold together. Sometimes there may be a new product that is not in the Products table, but you need to include this product in your quote.

The GlobalVision Quote application enables you to add products or services that are not in the Salesforce database. To do this, simply leave the **Product** field blank, and enter the name of your ‘non-standard’ product or service in the **Quote Product Name** field.

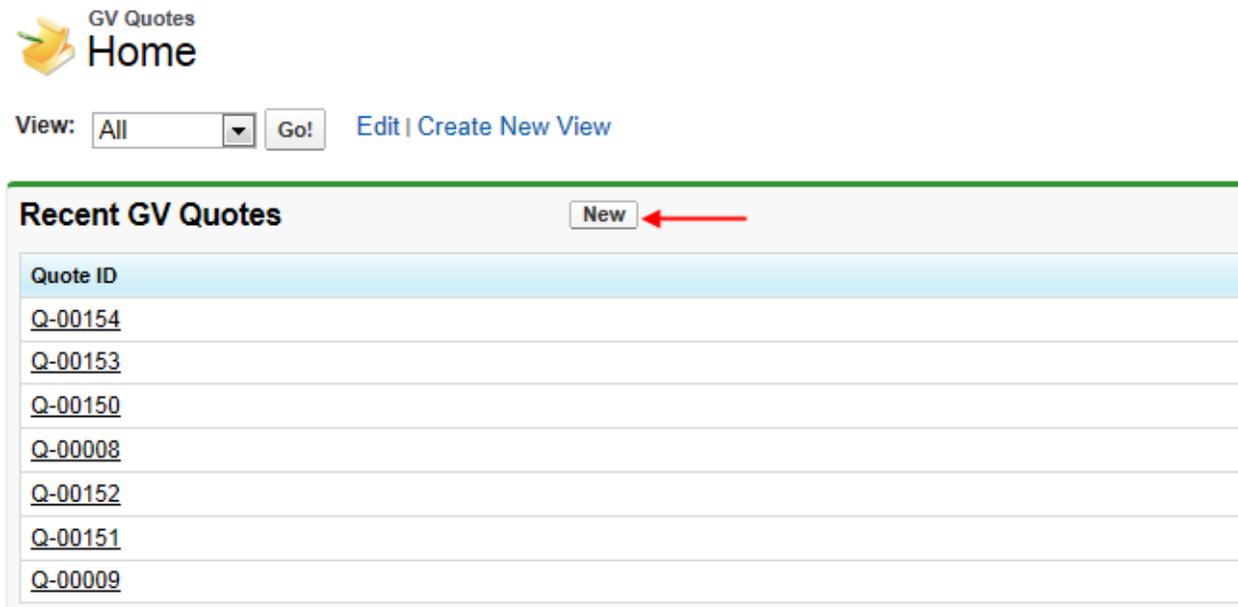
After that, complete all the other fields as described above. After you click on the **Save** or **Save & New** button, your product will be added to the quote, along with any existing ‘standard’ quote products.

### ***Starting from GV Quotes***

If you haven’t already done so, you should add the **GV Quotes** tab to the Salesforce application you use when you are working with quotes. A Salesforce application in this sense is simply a collection of tabs which are combined together and given a name. The name should be the main purpose of the application.

1. Click on the **GV Quotes** tab.

The GV Quotes Home page will appear, and will resemble the following:



2. Click on the **New** button to create a new quote.

The GV Quote Edit page appears as shown:

**GV Quote Edit** Save Save & New Cancel

**Quote Type** = Required Information

Quote Type

**Deployment Method**

Deployment Method

**Information**

<p>Opportunity Name <input style="width: 100%;" type="text"/> <input type="button" value="🔍"/></p> <p>Currency <input type="text" value="USD - U.S. Dollar"/></p> <p>Opportunity Stage <input type="text"/></p> <p>Subtotal <input type="text"/></p> <p>Quote Discount <input type="text" value="0.00"/></p> <p>Notes <input type="text"/></p>	<p>Quote Date <input type="text" value="[ 16/05/2012 ]"/></p> <p>Quote Valid Until <input type="text" value="[ 16/05/2012 ]"/></p> <p>Contact <input type="text"/> <input type="button" value="🔍"/></p> <p>Quote Approval Status <input type="text" value="--None--"/></p> <p>Comments <input type="text"/></p> <p>Product Item # <input type="text"/></p>
--	--

**Special Instructions**

Line 1 <input type="text"/>	Line 2 <input type="text"/>
Line 3 <input type="text"/>	Line 4 <input type="text"/>
Line 5 <input type="text"/>	Line 6 <input type="text"/>

Save Save & New Cancel

3. Start first with the **Opportunity Name** field. Use the lookup magnifying glass to find the Opportunity you want this quote to be associated with.
4. Complete the other fields for this page and the GV Quote Products page as described in the section GV Quote Edit Page starting on page 19.