

# Salesforce Certified Admin and App Builder

## Lesson 19—Quote Templates



## What You'll Learn

- Creating a quote record
- Creating a quote template
- Generating a quote PDF
- Emailing a quote PDF
- Modifying existing quote templates





# Creating a Quote Record




Keep the following points in mind while creating a quote record:

- Each opportunity can have multiple associated quotes
- You can create activities and upload documents
- You can also create approval processes

 **Orbit Maintenance Salesforce Project Proposal**

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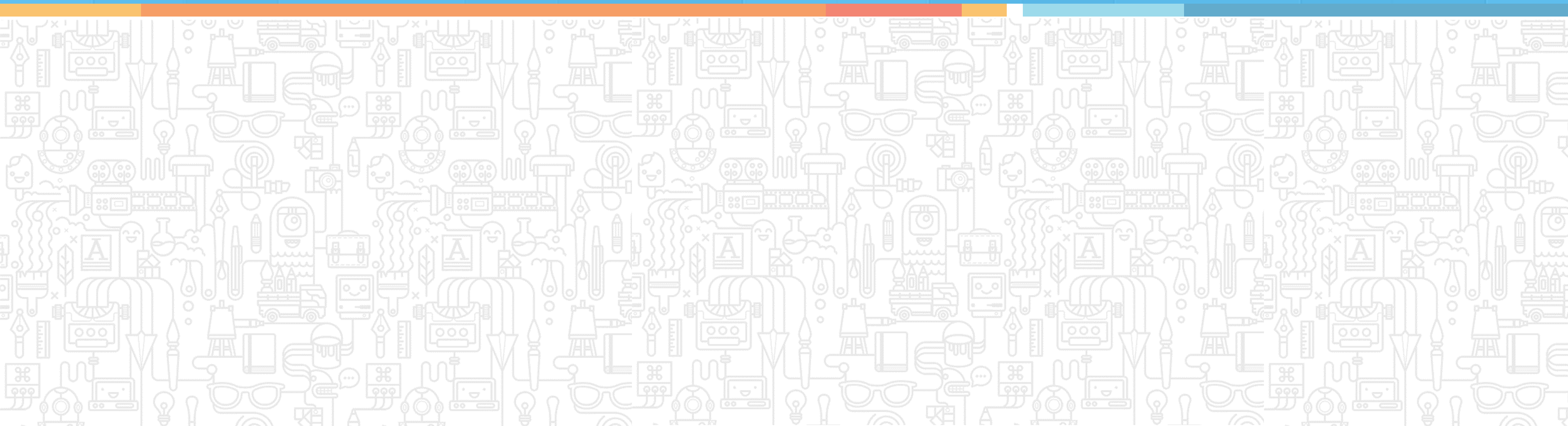
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Opportunity Name	<u>Orbit Maintenance</u>	Account Name	<u>Orbit Maintenance</u>
Quote Name	Orbit Maintenance Salesforce Project Proposal	Stage	Disqualified
Grand Total	\$35,250.00	Expiration Date	8/2/2015
Total Billable Hours	235.00	PDF Created On	
Cloud Creations Hours	0.00	75% Mark	0
Client Hours	0.00	Number of Line Items	0
Discount		Go Live Date	
Next Step		Manual Termination Date	<input type="checkbox"/>
Project Termination Date			
Premium			
Data Export			
Final Project Termination Date			

# Creating a Quote Template





Keep the following points in mind while creating a quote template:

- You can create multiple quote templates for different purposes
- You can also activate or deactivate the quote templates accordingly

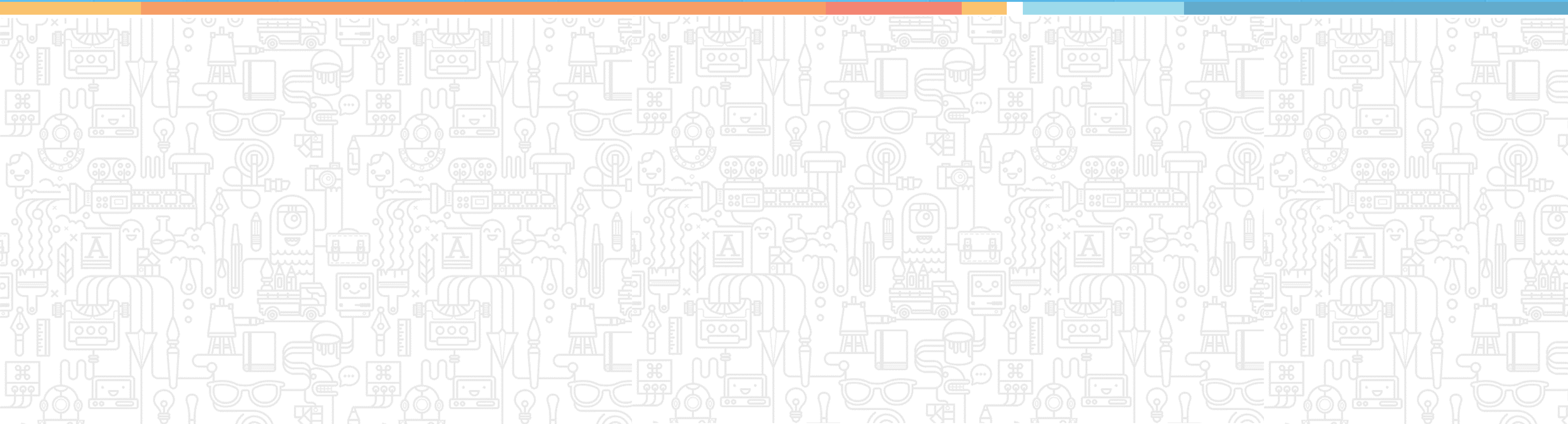
## Quote Templates

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Click New to create a quote template based on either the standard template or one of your own. Activate it when it's ready for use.

Quote Templates <span>New</span>				
Action	Name	Created By	Modified By	Active
<a href="#">Edit</a>   <a href="#">Activate</a>	Standard Template	<a href="#">Justin Davis</a> , 3/15/2015 8:43 PM	<a href="#">Justin Davis</a> , 3/15/2015 8:43 PM	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	FB D - With Logo	<a href="#">Justin Davis</a> , 8/12/2015 8:43 AM	<a href="#">Justin Davis</a> , 11/16/2015 3:24 PM	<input checked="" type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	FB D - Without Logo	<a href="#">Justin Davis</a> , 8/12/2015 8:41 AM	<a href="#">Justin Davis</a> , 11/16/2015 3:24 PM	<input checked="" type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	FB ND - With Logo	<a href="#">Justin Davis</a> , 8/12/2015 8:41 AM	<a href="#">Justin Davis</a> , 11/16/2015 3:24 PM	<input checked="" type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	FB ND - Without Logo	<a href="#">Justin Davis</a> , 8/12/2015 8:44 AM	<a href="#">Justin Davis</a> , 11/16/2015 3:24 PM	<input checked="" type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Activate</a>	Fixed Bid - With Logo	<a href="#">Justin Davis</a> , 8/8/2015 1:43 PM	<a href="#">Justin Davis</a> , 8/10/2015 8:27 AM	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Activate</a>	Fixed Bid - Without Logo	<a href="#">Justin Davis</a> , 8/8/2015 4:40 PM	<a href="#">Justin Davis</a> , 8/8/2015 4:41 PM	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Activate</a>	Quote Template - With Logo	<a href="#">Justin Davis</a> , 4/26/2015 10:33 AM	<a href="#">Justin Davis</a> , 7/31/2015 9:11 AM	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Activate</a>	Quote Template - Without	<a href="#">Justin Davis</a> , 7/25/2015 10:03 AM	<a href="#">Justin Davis</a> , 7/31/2015 3:29 PM	<input type="checkbox"/>

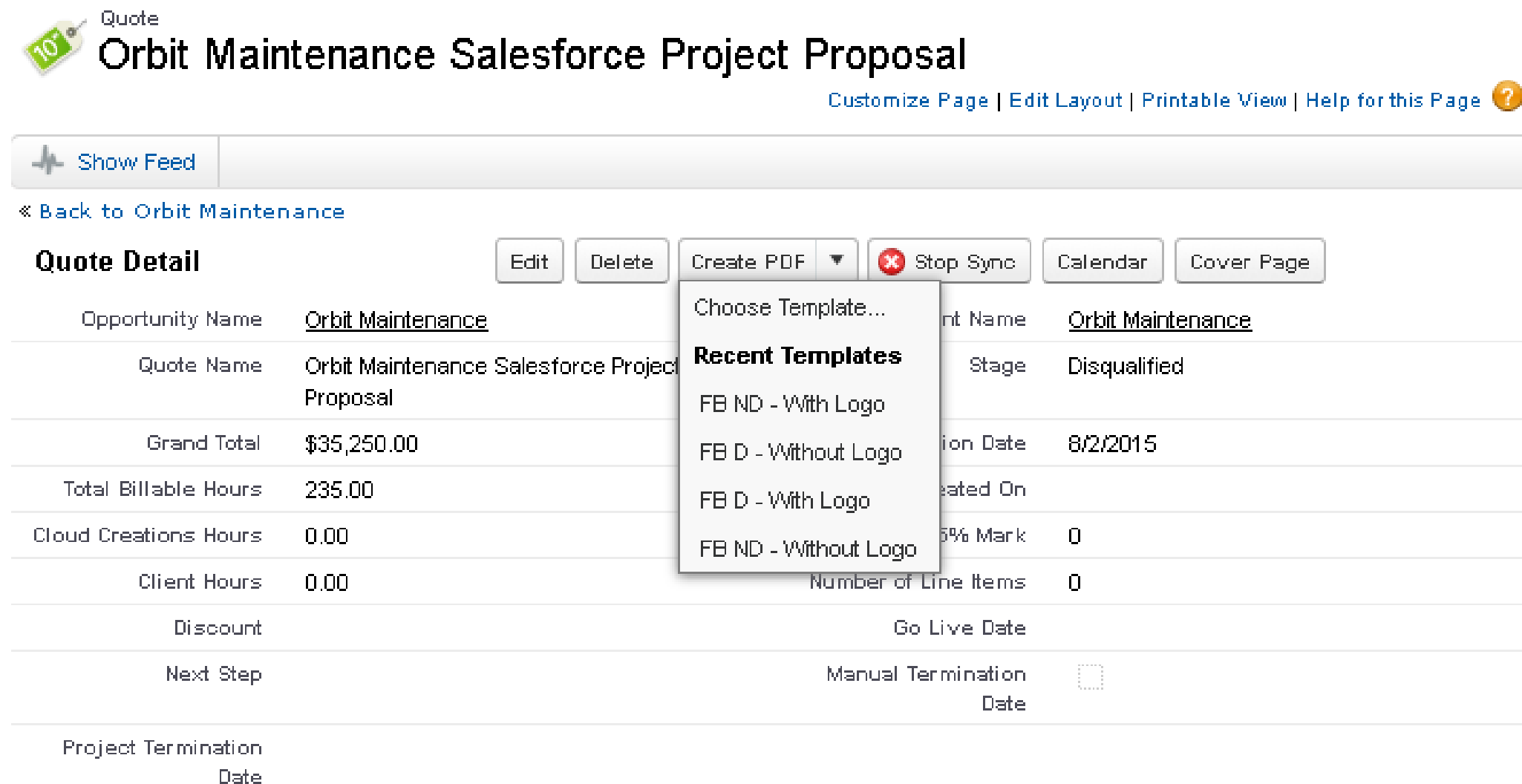
# Generating a Quote PDF



Keep the following points in mind

while generating a quote PDF:

- You can generate a PDF directly from the quote record
- You can also save and download the quote PDF to computer



Quote

## Orbit Maintenance Salesforce Project Proposal

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**Quote Detail** [Edit](#) [Delete](#) [Create PDF](#) [Stop Sync](#) [Calendar](#) [Cover Page](#)

Opportunity Name	<a href="#">Orbit Maintenance</a>	Quote Name	Orbit Maintenance Salesforce Project Proposal
Grand Total	\$35,250.00	Stage	Disqualified
Total Billable Hours	235.00	Creation Date	8/2/2015
Cloud Creations Hours	0.00	Created On	
Client Hours	0.00	5% Mark	0
Discount		Number of Line Items	0
Next Step		Go Live Date	
Project Termination Date		Manual Termination Date	

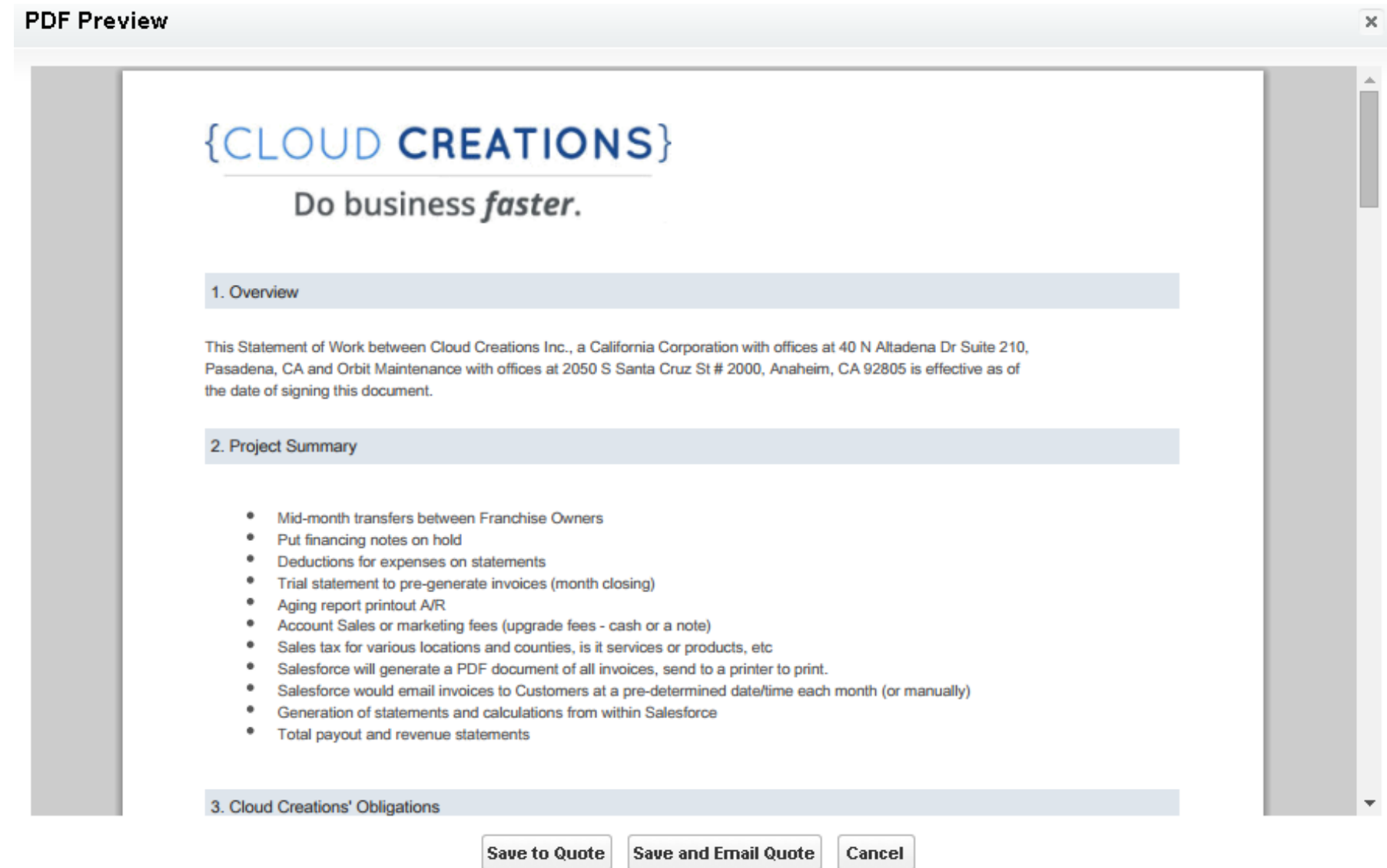


# Emailing a Quote PDF



Keep the following points in mind while emailing a quote PDF:

- You can email a PDF directly from a quote record
- The PDF is automatically saved directly to the quote record

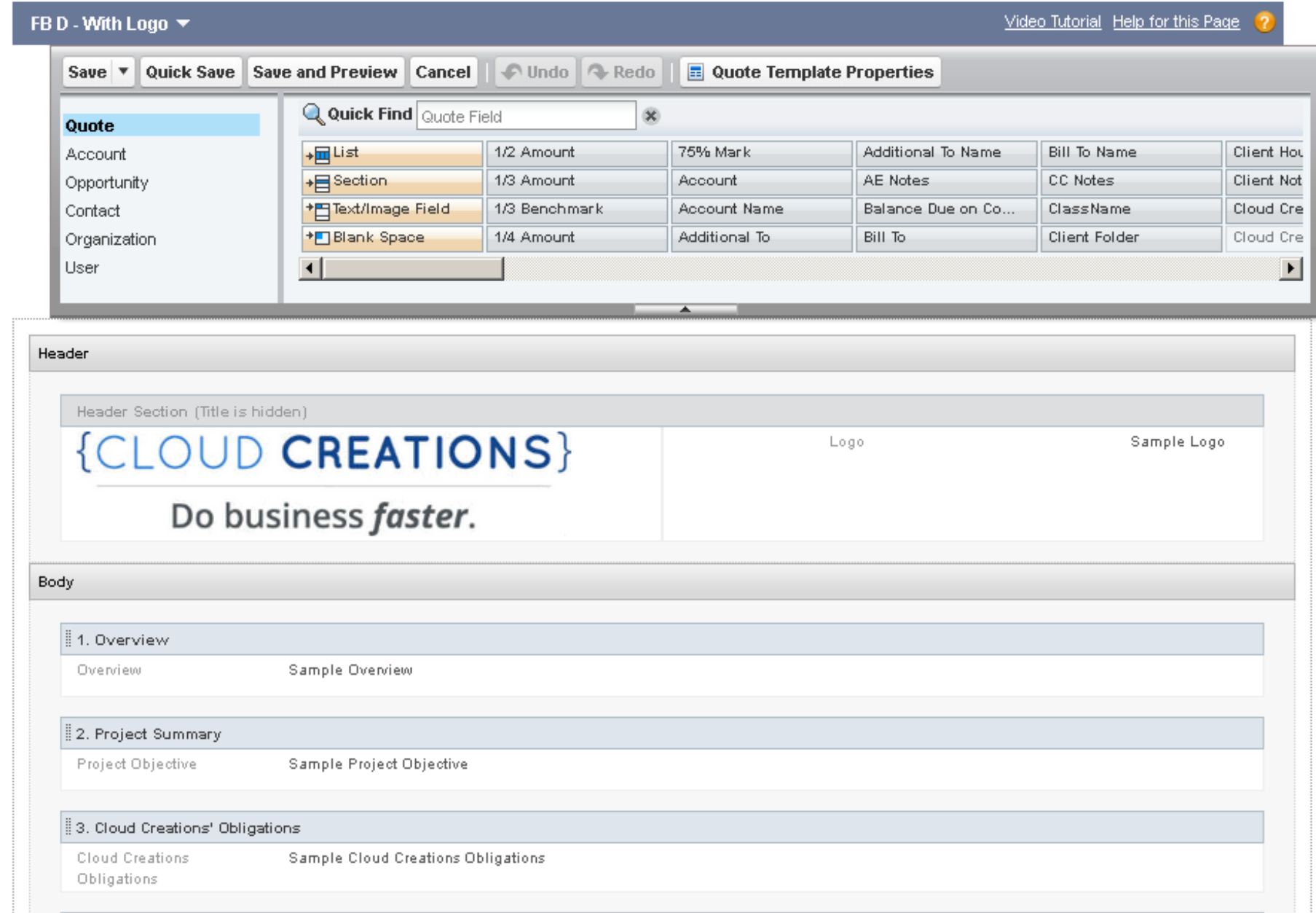


# Modifying Quote Templates



Keep the following points in mind while modifying quote templates:

- You can drag and drop quote object fields directly to the page layout
- You can create sections and blank spaces for more customization
- You can also add images and footers for additional graphics



The screenshot displays the 'Quote Template Properties' dialog box and a preview of a quote template layout.

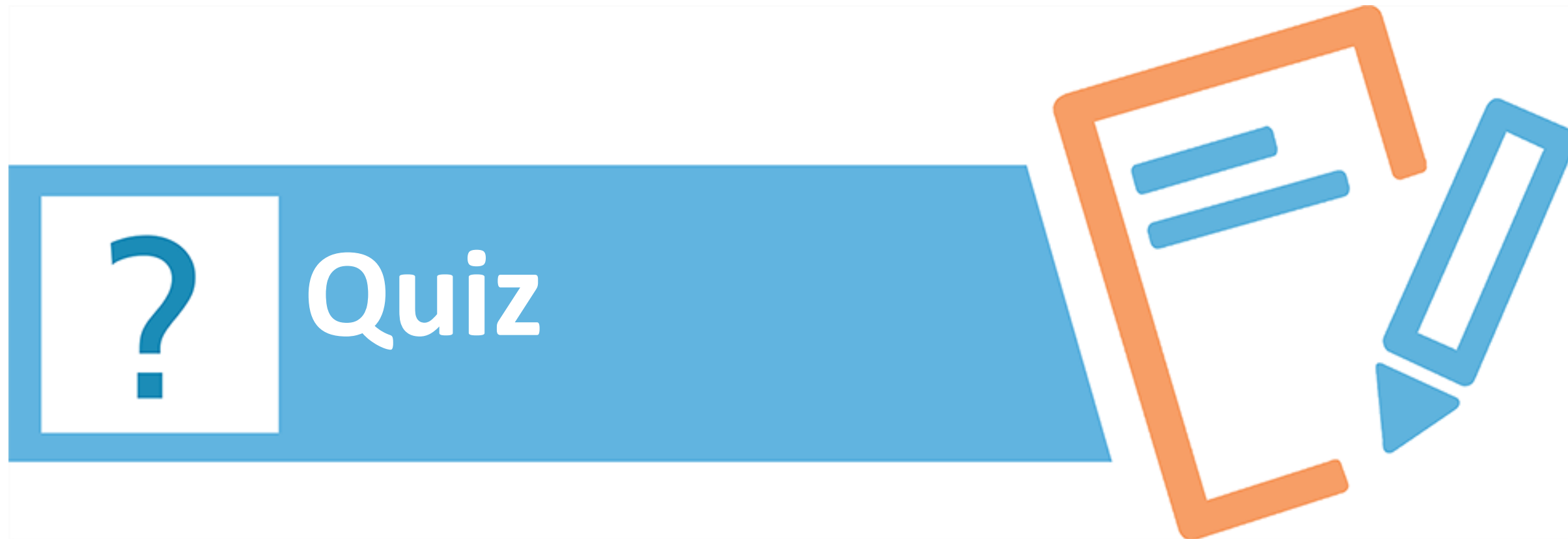
**Quote Template Properties Dialog Box:**

- Header:** FB D - With Logo (dropdown), Video Tutorial, Help for this Page (help icon).
- Buttons:** Save, Quick Save, Save and Preview, Cancel, Undo, Redo.
- Quote Template Properties:**
  - Quote:** Account, Opportunity, Contact, Organization, User.
  - Quick Find:** Quote Field.
  - Fields:**

Field	Field	Field	Field	Field	Field
List	1/2 Amount	75% Mark	Additional To Name	Bill To Name	Client Hou
Section	1/3 Amount	Account	AE Notes	CC Notes	Client Not
Text/Image Field	1/3 Benchmark	Account Name	Balance Due on Co...	ClassName	Cloud Cre
Blank Space	1/4 Amount	Additional To	Bill To	Client Folder	Cloud Cre

**Quote Template Preview:**

- Header:**
  - Header Section (Title is hidden)
  - {CLOUD CREATIONS}
  - Do business *faster*.
  - Logo
  - Sample Logo
- Body:**
  - 1. Overview**
    - Overview
    - Sample Overview
  - 2. Project Summary**
    - Project Objective
    - Sample Project Objective
  - 3. Cloud Creations' Obligations**
    - Cloud Creations Obligations
    - Sample Cloud Creations Obligations





## QUIZ

1

Which of the following formats is used to create quotes in Salesforce?

- a. .docx
- b. .png
- c. .pdf
- d. .xlsx



## QUIZ

1

Which of the following formats is used to create quotes in Salesforce?

- a. .docx
- b. .png
- c. .pdf
- d. .xlsx



The correct answer is **c**.

**Quotes are generated only in the PDF file format.**

## QUIZ

2

Where can you create a quote record in Salesforce?

- a. From the account record
- b. From the opportunity record
- c. From the contact record
- d. From the product record



## QUIZ

2

Where can you create a quote record in Salesforce?

- a. From the account record
- b. From the opportunity record
- c. From the contact record
- d. From the product record



The correct answer is **b**.

**You can create a quote record only from the opportunity record.**

## QUIZ

3

How do you send a quote PDF to a recipient?

- a. Click the Save and Email Quote button
- b. From the My Documents tab
- c. Using a 3<sup>rd</sup> party application
- d. Save as an attachment on the quote record





## QUIZ

3

How do you send a quote PDF to a recipient?

- a. Click the Save and Email Quote button
- b. From the My Documents tab
- c. Using a 3<sup>rd</sup> party application
- d. Save as an attachment on the quote record



The correct answer is **a**.

**To send a quote to a recipient contact, click the Save and Email Quote button.**

## QUIZ

4

Where is pricing established for Products?

- a. Account
- b. Custom Settings
- c. Pricebook
- d. Opportunity



## QUIZ

4

Where is pricing established for Products?

- a. Account
- b. Custom Settings
- c. Pricebook
- d. Opportunity



The correct answer is **c**.

**Pricing for products is established on the Pricebook record in Salesforce.**

## QUIZ

5

How do you make a quote available for use?

- a. Click "Enable" link next to quote template
- b. Click "Activate" link next to quote template
- c. Check "Active" checkbox next to quote template
- d. Activate quotes from user record



## QUIZ

5

How do you make a quote available for use?

- a. Click "Enable" link next to quote template
- b. Click "Activate" link next to quote template
- c. Check "Active" checkbox next to quote template
- d. Activate quotes from user record



The correct answer is **b**.

**To make a quote template available, you must click Activate link next to the quote template.**





## Case Study

Scenario

Analysis

Solution

United Containers sales teams struggle to send out proposals in a timely manner. Most sales people use a word document on their computer to modify the terms and conditions, as well as product pricing, which leads to the signing of unauthorized contract terms. United Containers needs a way to control the terms and product discounting across all sales teams.

Scenario

Analysis

Solution

United Containers decided to implement the quotes feature in Salesforce for the following reasons:

1. Quote details such as discounting should require an approver.
2. Quotes can be sent in the form of a PDF, which is more secure than a word document.
3. Quotes can be stored for historical purposes, and easily revised if necessary.

Scenario

Analysis

Solution

United Containers performed the following steps to implement the quoting feature:

1. A new quote template was created and activated.
2. Sales people were given training on how to generate quotes.

## Key Takeaways

- Salesforce Quotes can generate PDFs quickly and easily from Opportunities.
- Products are added as line items to Quote records.
- Quotes can be saved and downloaded or emailed directly to customers.





This concludes 'Quote Templates.'

The next Lesson is 'Service Cloud.'