SuperOffice CRM

Quote templates

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Quote templates

Note: This document is an excerpt from SuperOffice CRM Administrator Training.

The templates for quote documents, quote details and order confirmations differ from ordinary document templates, as they use "mergefields" in addition to standard template variables.

- The quote document is the document that is available via the link on the **Quote** section tab and via the **Print** button.
- The quote details are generated as a PDF file together with the quote document (if one is created) when you click **Send** on the quote.
- The order confirmation is generated as a PDF file together with the quote document (if one is created) when you click the **Place order** button.

A quote often consists of more than one product. It is therefore necessary to create a quote details template (and an order confirmation template) in which each product is listed in a table with different groupings (e.g. alternatives).

The user will only be able to edit the quote document in Word. The quote details template and the order confirmation template will only be generated as a PDF and cannot be edited by the user. All quote templates can be edited in the normal way in Settings and maintenance.

You can customise your own templates for quotes and order confirmations. Using fields (mergefields) in Word, you can insert quote information in the template. Combined with the template variables which you use to retrieve customer data and other information, you can create exactly the quote or order confirmation you want. SuperOffice CRM is supplied with a number of standard templates that you can use as they are or adapt to suit your needs.

Note: This requires the Sales User licence.

The mergefields with the quote details (lines, prices, product names, etc.) are normally placed in a separate template document separated from the quote document. The quote document is the document/covering letter which the sales person creates (the **Quote** section tab in the **Sales** screen). The quote is generated as a PDF file in which the quote details are merged into the quote document and attached to the e-mail that is sent to the customer.

- If you use both the tender document and the quote details, there are two options:
- If the **"QuoteDetails"** mergefield is present in the quote document, the quote details will be inserted where the field is located.
- If the **"QuoteDetails"** mergefield is NOT present in the quote document, the quote details will be inserted right at the end of the document.

- If you only use either the quote document or the quote details, the quote will be generated as a PDF and attached to the e-mail that is sent to the customer.

In both cases, one PDF file will be generated and then attached to the e-mail.

Design

Mergefields are used differently to template variables. Whereas template variables can be placed anywhere in a template document, mergefields must follow a structure or a hierarchy. This hierarchy consists of four levels (tables) which must be placed in the following order ("nesting order"): **quote** > **alternative** > **group** > **line** (row)

The **"TableStart:xxx"** and **"TableEnd:xxx**" fields define the start and end of the various table areas (levels):

"TableStart:quote"

"TableStart:alternative"

"TableStart:group"

"TableStart:line"

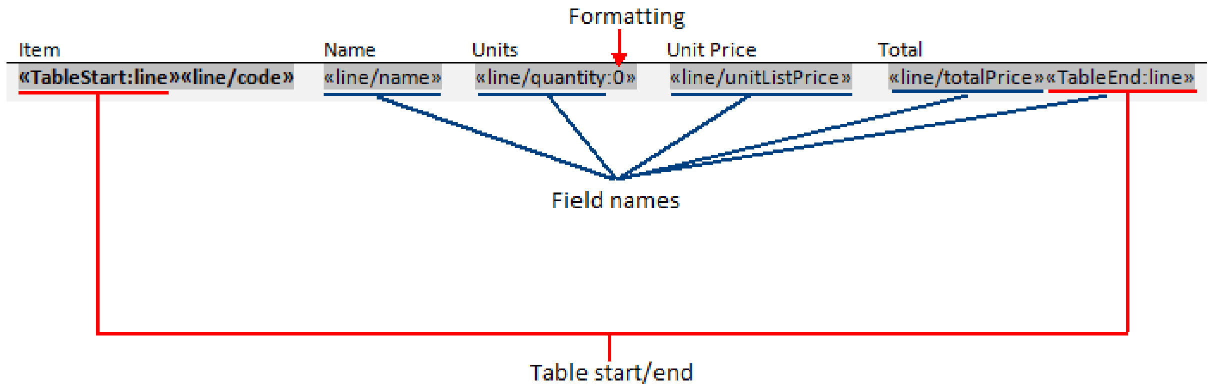
"TableEnd:line"

"TableEnd:group"

"TableEnd:alternative"

"TableEnd:quote"

For example: Line fields (such as **"line/name"**) can only be placed within the line table (**"TableStart:line""TableEnd:line"**), while alternative fields can be placed within both the alternative table and the underlying tables (group and line).



You only need to enter each table once in the template. For example: A product line is shown as one row in the template, but when you generate a quote or an order confirmation in SuperOffice CRM, this row is repeated for each product in the quote. The same applies to alternatives and groups.

The group table is not obligatory, so you do not need to use this table if you do not want to group the products.

Preparations

Create a sale for testing the template document

In SuperOffice CRM, you should first create a quote with a number of products. This will make it easier to test the template document you want to create. The products should be from different product families, so that you can see how grouping works. The sale should have the same sale type as that which you link the template document to (see "Link the template document to a sale type" below). In the quote, you must click **Place order**, so that the **Show confirmation** button becomes available.

Select the fields to be displayed

Each product consists of many fields containing product data, but by default not all these fields will be visible. If you want to modify a template document and insert new fields, you must check that the fields concerned are set as visible in the **Configure product** dialog. No value is set for fields which are not defined as visible in Settings and maintenance. For more details, see "Configure products" in Help for Settings and maintenance.

Copy the template to be modified

You are now going to copy an existing template and add it as a new template in Settings and maintenance. We will use an order confirmation template as a basis. To do this:

1. Go to the **Lists** screen and select the **Items** tab.
2. Click the arrow (▾) and select **Document - Template** from the **List** list box.
3. Double-click the **Order confirmation** template and click the **Edit** button. The template document will open in Word.
4. Save the template document under a new name, and place it somewhere where you will easily be able to find it again later.
5. Add the template document as described in "Add items to the Document – Template list" in Help for Settings and maintenance.
6. Give the template document a logical name, such as "Order confirmation – Grouped".
7. Check the **Quote document type** option so that the template document becomes available when you create a quote in SuperOffice CRM. You

must also select the **Template for order confirmations** type in the list box.

8. Click **Save** when you have finished.

Link the template document to a sale type

We are now going to link the template document to a sale type. Sales with this sale type will then use this template when you display the confirmation in SuperOffice CRM. If you have already created a sale in SuperOffice CRM, you can use this sale type for this sale. To do this:

1. Open the **Lists** screen.
2. Double-click **Sale - Type, Stages, Quote** in the **Lists** tab. The list opens in the **Items** tab.
3. Double-click a sale type in the **List items** overview. The **Edit list item** dialog opens.
4. Open the **Default values** tab > **Order confirmation template** list, and select the template document you have created.
5. Click **OK**.

Modify the template

We are now going to modify the template document you have prepared. We will start by inserting some simple fields and an extra column containing product images in the product list. We will then group the products according to product family and choose the sorting order.

Insert fields in Word

Below, we have described two methods for inserting fields in a template document. The first method is the quickest.

1. Copy an existing field in the template. Make sure you copy the entire field, including «».
2. Paste the field into the template.
3. Right-click on the field and select **Edit fields**.
4. In the **Field name** field under **Field properties**, enter/paste the field name you want to insert. Do not include **«»**. For a full list of fields, see "Annex: Mergefields for quotes" on page 12.
5. Click **OK**.

OR

1. Place the cursor where you want to insert the field.
2. Go to **Insert > Quick Parts > Field**. The **Field** dialog opens.
3. Click in the **Field name** list under **Select a field**, and type in **"merge"**. The **MergeField** field name is now highlighted in the list.

4. In the **Field name** field under **Field properties**, enter/paste the field you want to insert. Do not include **«»**. For a full list of fields, see "Annex: Mergefields for quotes" on page 12.
5. Click **OK**.

Note: You cannot edit the field name (MergeField) directly in the template document. You must right-click on it and select **Edit fields**.

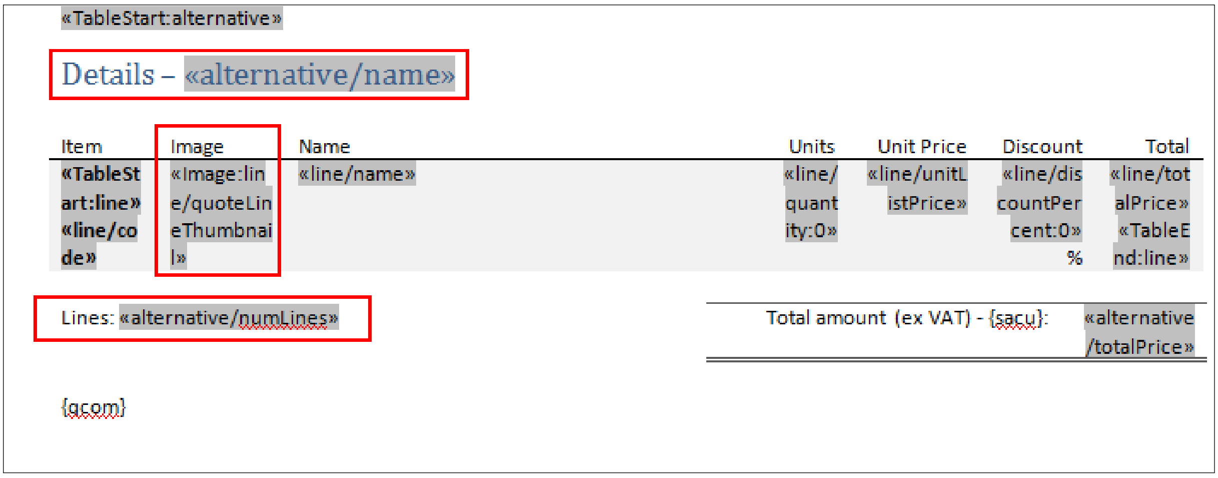
Insert fields in the template document

1. Open the template document from the **Document - Template** list (as described above).
2. Insert the following fields in the template document:

Field name	Location	Description
«alternative/name»	After the title ("Details")	The name of the alternative (taken from the quote)
«alternative/numLines»	Below the product table (left-aligned on the same row as the sum total for the alternative). You should also enter the label Lines: to the left of the field.	Number of lines in the alternative
«Image:line/quoteLineThumbnail»	Insert a new column with the title "Image".	Thumbnail of the product.

Note: It is important that you distinguish between capital and lower case letters when you type in the field names.

Once you have done this, the template document will look like this (new fields have been highlighted in the image below):



3. Save the template document, but do not close it.

View the order confirmation in SuperOffice CRM

Before we move on, you can view the order confirmation in SuperOffice CRM and verify that your changes are displayed correctly. To do this:

1. Open a sale of the same sale type to which the template is linked.
2. Open the Quote tab in the sale and click Open.
3. Click Place order if you have not already done so.
4. Click Show confirmation in the Edit quote dialog. The order confirmation opens as a PDF file.
5. Check that the order confirmation is displayed correctly:
   - All content in the tables must be displayed correctly. Numbers must not be split over two lines.
   - There must be no field names in the document. If there are, you have entered the wrong field name in the template.
   - Are any fields which you have inserted in the template missing? This may be because data for the field concerned is missing in the quote/product.
6. Make any modifications you wish to make to the template document and save it.
7. View the order confirmation again and check that everything is displayed correctly.

Grouping and sorting of products

We are now going to do the following:

- Sort the products by product name.
- Group the products in the template document by product family. A product family could for example be "hardware", "software" or "accessory".
- Enter a sum total for the products in each group, but retain the sum total for the alternative that already exists in the template document.

Specify sort order

By default, the products are displayed in the same order (ranking) as in the quote. However, you can use **"OrderBy:"** to choose a different sorting order for the products. "**OrderBy:name"** sorts the products alphabetically by product name, while **"OrderBy:vatInfo"** sorts the products according to VAT status.

- Insert the "**OrderBy:name**" field somewhere in the template document.

All the products will now be sorted by product name within each alternative. They will also be sorted within each group after the grouping area has been defined (see below).

Specify grouping area

The group must start with **"TableStart:group"** and end with **"TableEnd:group**".

- Insert the "**TableStart:group**" anywhere in front of "**TableStart:line**", e.g. immediately after the name of the alternative.
- Insert the "**TableEnd:group**" field after "**TableEnd:line**", e.g. immediately after the table containing the product fields.

See the screen under "Insert group field" on page 9.

Specify the grouping key

You must also add a field which indicates what you want to group by (**"GroupBy:"**). In our case, we are going to group according to product family.

You can of course group using a different criterion, such as product category or an extra field that you have defined yourself. It is possible to group all fields at line level (i.e. all data that is linked to the products).

- Insert the **"GroupBy:productFamilyKey"** field somewhere in the template document.

You can place this field anywhere. It will not be shown in the order actual confirmation. You can only specify one grouping key.

Insert group field

In the group (i.e. between **"TableStart:group"** and **"TableEnd:group"**), you can add fields which are group-specific. For a full list of fields, see "Annex: Mergefields for quotes" on page 12.

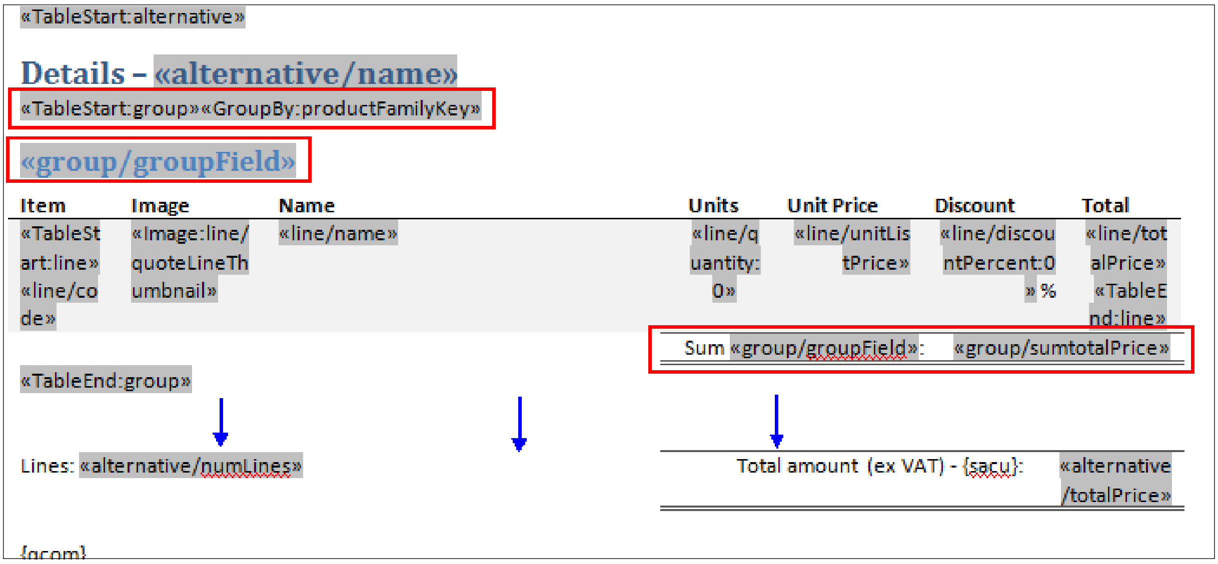
Tip: Move the table with the sum total for the alternative (including the total number of lines) down a few lines, so that you have room to insert the group fields. See the screen below.

1. Insert the following fields:

Field name	Location	Description
«group/groupField»	Between the title and the table containing the products. Give the field a header style.	The title of the group (the name of the field by which the products are grouped).
«group/sumtotalPrice»	At the bottom of the column with prices.	Sum total for the entire group.
«group/groupField»:	In the cell to the left of the sum total for the entire group. You	The title of the group (the name of the field by which the

	should also type in the label **Sum to the left of the field**.	products are grouped).

Once you have done this, the template document will look like this (new fields have been highlighted in the image below):


«TableStart:alternative»

Details – «alternative/name»

«TableStart:group»«GroupBy:productFamilyKey»

«group/groupField»

Item	Image	Name	Units	Unit Price	Discount	Total
«TableStart:line» «line/code»	«Image:line/quoteLineThumbnail»	«line/name»	«line/quantity:0»	«line/unitListPrice»	«line/discountPercent:0» %	«line/totalPrice» «TableEnd:line»

Sum «group/groupField»: «group/sumtotalPrice»

«TableEnd:group»

Lines: «alternative/numLines»

Total amount (ex VAT) - {sacu}: «alternative/totalPrice»

{qcom}

2. Save the template document and display it in SuperOffice CRM, as described above.

Customisation options

We have summarised below a number of customisation options you can use in the template documents for quotes.

Formatting

You can use the formatting options in Word to customise the way in which fields are displayed in the template documents.

Below, you will see an example of a summary of groups and prices in a quote, including the sum total for the entire alternative (the quote). In this example, we have used tabs to place the fields.

Template document

Summary¶
«TableStart:group»«group/groupField»*«group/sumTotalPrice»*«TableEnd:group»¶
→ «alternative/totalPrice»¶

Generated quote

Summary

Ice equipment	*160.00*
Karabiners	*1,600.00*
Lighting	*200.00*
Verticality	*1,100.00*
	3,060.00

Numbers

Number fields (e.g. "**line/totalPrice**") can be formatted with the required number of decimal places. "**line/totalPrice:2**" shows a number to two decimal places. You can also specify five decimal places. If no formatting is specified, the default value for the selected language will be used.

Date/time

Date fields (e.g. "**quote/sent**") can be specified with different date formats. For example, you can insert the "**quote/sent:ShortDate**" field if you want a short date format, or "**quote/sent:LongDateTime**" if you want to show the full date and time. The actual format that is displayed will take account of the language/country ("culture") that has been selected for the quote. If no formatting is specified, the default value for the selected language will be used.

The following formats are available: **ShortDate**, **ShortTime**, **ShortDateTime**, **LongDate**, **LongTime** and **LongDateTime**.

Settings for language and country ("culture")

When you send a quote or an order confirmation in SuperOffice CRM, you must also select a language. The template for the relevant language will be selected, and the date, time and numbers will be shown in the correct format for the chosen language.

However, date, time and number formats are not always the same for all countries, even if they use the same language. In these cases, you can create a special template for the language and country concerned (e.g. "Quote to Swiss customers"). In the template, you must insert the "**Culture:xx-YY**", field, where **xx-YY** is the language/country code. For example: **de-CH** is German-Switzerland and **ar-KW** is Arabic-Kuwait. You can place the field anywhere in the template.

For an overview of language codes, see the MSDN pages (http://msdn.microsoft.com/en-us/library/system.globalization.cultureinfo%28v=vs.80%29.aspx).

Annex: Mergefields for quotes

The quote fields use "mergefields" in addition to ordinary template variables. Mergefields are used to merge details such as product lines and alternatives. The method used to merge lines and entire documents in a template is Aspose. For more information about Aspose, visit www.aspose.com.

In the tables below, you will find all the mergefields which can be used in templates for quotes and order confirmations.

Quote fields

Field name	**Name**	**Description**
«quote/contactDepartment»	Sale - Owning department	Name of the department at the company the user belongs to
«quote/contactName»	Sale - Owning company	Name of the company the user belongs to
«quote/currency»	Sale – Currency	The currency of the sale
«quote/description»	Description	Description of the quote version
«quote/expiration»	Expiration	The last date that the quote is valid
«quote/saleType»	Sale – sale type	The sale type of the sale
«quote/extraField1»	Extra field 1	One of the extra fields on the product; meaning is installation dependent
«quote/extraField2»	Extra field 2	One of the extra fields on the product; meaning is installation dependent
«quote/extraField3»	Extra field 3	One of the extra fields on the product; meaning is installation

		dependent
«quote/extraField4»	Extra field 4	One of the extra fields on the product; meaning is installation dependent
«quote/extraField5»	Extra field 5	One of the extra fields on the product; meaning is installation dependent
«quote/fullName»	Sale - Full name	Displays full name of user (first, middle, last - according to settings)
«quote/mrMrs»	Sale - Mr/Ms	Displays whether the contact is addressed as Mr or Ms
«quote/number»	Number	Reference number for the quote version
«quote/orderComment»	Comment	Customer's comment
«quote/paymentTerms»	Payment terms	Payment terms
«quote/paymentType»	Payment type	Payment type
«quote/deliveryTerms»	Delivery terms	Delivery terms
«quote/deliveryType»	Delivery type	Delivery type
«quote/approvedBy»	Approved by	Associate who approved a Quote that broke one or more of the workflow rules that trigger an approval process
«quote/approvalRegisteredBy»	Approval reg by	Associate who entered the approval (not necessarily the one who approved!) of a Quote that broke one or more of the workflow rules that trigger an approval process
«quote/approvedText»	Approval comment	Comment added to the approval of a Quote

		that broke one or more of the workflow rules that trigger an approval process
«quote/approvedDate»	Approved date	Date of approval of a Quote that broke one or more of the workflow rules that trigger an approval process
«quote/poNumber»	P.O.Number	Customer's purchase order number
«Image:quote/portraitThumbnail»	Sale - Portrait	Portrait of sale’s associate – note the Image: prefix, without it you will get a lot of funny letters & digits
«quote/quoteId»	Quote Id	SuperOffice database id of quote record
«quote/quoteVersionId»	ID	Database ID of QuoteVersion record
«quote/saleAmount»	Sale - Amount	The gross sales total
«quote/saleDescription»	Sale - Text	Displays the text entered in the description field
«quote/saleEarning»	Sale - Profit	Gross profit (gross sales total - cost) for the sale
«quote/saleEarningPercent»	Sale - Profit as %:	The profit as a percentage of the gross sales total
«quote/saleHeading»	Sale - Sale	Displays a descriptive text for the item
«quote/saleNumber»	Sale - Number	Number
«quote/sent»	Sent	Quote sent date
«quote/title»	Sale - Title	Displays whether the contact is addressed as Mr or Ms

Alternative fields

Field name	Name	Description
«alternative/description»	Description	Description of the quote alternative
«alternative/discountAmount»	Discount	Enter total discount for entire alternative
«alternative/discountPercent»	Discount %	Enter discount in percent for entire alternative
«alternative/earningAmount»	Earnings	Total Earning of all lines in the quote alternative, including all discounts
«alternative/earningPercent»	Earnings %	Total Earning as a percentage of the total price, of all lines in the quote alternative, including all discounts
«alternative/erpDiscountAmount»	ERP Discount	Discount amount suggested by ERP system
«alternative/erpDiscountPercent»	ERP Discount %	Discount percentage suggested by ERP system
«alternative/extraField1»	Extra 1	Extra field 1 on the quote alternative
«alternative/extraField2»	Extra 2	Extra field 2 on the quote alternative
«alternative/extraField3»	Extra 3	Extra field 3on the quote alternative
«alternative/extraField4»	Extra 4	Extra field 4 on the quote alternative
«alternative/extraField5»	Extra 5	Extra field 5 on the quote alternative
«alternative/name»	Name	Name of the quote alternative
«alternative/numLines»	Number of lines	Number of lines in alternative

«alternative/quoteAlternativeId»	QuoteAlternative Id	SuperOffice database id of QuoteAlternative record
«alternative/quoteVersionId»	ID	Database ID of QuoteVersion record
«alternative/sumDiscountAmount»	Sum of discounts	Sum of all discounts in alternative
«alternative/subTotal»	Sub total	Sum of all the quotelines Totalprice, which is the same as alternative.totalPrice + alternative.discountAmount
«alternative/totalPrice»	Total	Total price of all items in the quote alternative, including all discounts
«alternative/vatInfo»	VAT Info	Information about value-added and other taxes
«alternative/vat»	VAT	Value-added and other tax, total amount
«alternative/vatAmount»	VAT	Value-added and other tax, total amount. The quoteline VAT field is interpreted as a percentage and used to calculate from the line-total
«alternative/totalPriceIncVAT»	Total	Total price of all items in the quote alternative, including all discounts and VAT

Group fields

Field name	**Name**	**Description**
«group/sumDiscountAmount»	Sum of discounts	Sum of all discounts in the group
«group/sumtotalPrice»	Sum of price	Total price of all lines in the group

«group/sumVat»	Sum of VAT	Sum of VAT of all lines in the group
«group/numLines»	Number of lines	Number of lines in the group
«group/groupField»	Group field value	The value of whatever field has been designated the group field

Line fields

Field name	**Name**	**Description**
«line/code»	Code	The product or article code. This code is created to help you quickly find products you offer regularly.
«line/description»	Description	Description of the product that is offered
«line/discountAmount»	Discount	Discount amount given by salesperson
«line/discountPercent»	Discount (%)	Discount percent given by salesperson
«line/earningAmount»	Earning	Amount of Earning (Total - Cost) on the line, after discount
«line/earningPercent»	Earning (%)	Percentage Earnings on the line (Total - Cost / Total), after discount
«line/name»	Name	The name of the product that is being offered
«line/priceUnit»	Price unit	What is the price unit defined in
«line/PriceUnitSubscriptionQuantityUnit»	Expanded unit	Price unit @ subscription quantity + unit

«line/PriceUnitSubscriptionUnit»	P/S Unit	Price unit/subscription unit
«line/productCategoryKey»	Product category	The category the product is defined in
«line/productFamilyKey»	Product family	The family the product is defined in
«line/productTypeKey»	Product type	The type of product
«line/quantity»	Quantity	The amount that is offered
«line/quantityUnit»	Unit	The unit of the product that is offered.
«line/quoteAlternativeId»	Alternative ID	The database identity of the quote alternative
«Image:line/quoteLineThumbnail»	Thumbnail	A miniature version of the product picture – *note the* **Image:** *prefix*, without it you will get a **lot** of funny letters & digits
«line/rank»	Rank	Shows the rank of a quote line
«line/status»	Quote status	Status field showing the status of each line.
«line/subTotal»	SubTotal	List price * Quantity, and if the quoteline is a subscription, we also multiply in the SubscriptionQuantity.
«line/totalPrice»	Total	SubTotal - Discount Amount
«line/totalPriceWithAlternativeDiscount»	Total with alternative discount	TotalPrice * (1 – (Alternative.DiscountPercent / 100))
«line/totalPriceIncVAT»	Total inc VAT	TotalPrice + VAT
«line/unitCost»	Cost	Cost per item.
«line/unitListPrice»	Unit list price	List price of a unit

«line/UnitListPriceSubscriptionQuantity»	Subscription unit list price	Unit price * subscription quantity
«line/unitMinimumPrice»	Unit minimum price	Minimum price per item. Users are not allowed to send quotes with prices lower than the minimum price.
«line/url»	Web address	The web address of the product info.
«line/vatInfo»	VAT info	
«line/vat»	VAT	May be filled out by the ERP system. (Should be the VAT percentage, but can be the amount)
«line/vatAmount»	VAT	Will be the VAT amount
«line/supplier»	Supplier	Supplier
«line/supplierCode»	Supplier code	Supplier code
«line/isSubscription»	Subscription?	Is this line a subscription line
«line/subscriptionUnit»	Subscription unit	Subscription lines have an additional unit, usually a time (month, week quarter etc.), so you can sell n tons / m months
«line/subscriptionStart»	Subscription start	Start date of subscription
«line/subscriptionQuantity»	Subscription quantity	The quantity tied to the subscription unit, as opposed to the quantity tied to the price/sale units
«line/itemNumber»	Item number	Item number
«line/extraField1»	Extra field 1	The installation-defined extra field 1

«line/extraField2»	Extra field 2	The installation-defined extra field 2
«line/extraField3»	Extra field 3	The installation-defined extra field 3
«line/extraField4»	Extra field 4	The installation-defined extra field 4
«line/extraField5»	Extra field 5	The installation-defined extra field 5

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