QUOTE FOR {{Company\_Name}}

{{city}}, {{state}} {{country}}

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| --- |
| **INFORMATION ABOUT THIS SAMPLE**  This is an example of a simple DOCX template for a multi-site Quote that displays quote lines (with unique formatting based on the level of the product in the quote) and quote terms and conditions, including a conditional product specific term section. To best try this out a quote needs to be created with multiple bundled products, with the top level products having their own service accounts/locations.   1. Various variable tokens such as **Company\_name, city, otc, mrc,** etc. are used. 2. Quote line items are looped over, using a repeating content token **(#lineitems)** 3. Quote lines are displayed, where the top level lines in bundled products are displayed differently from lower level items. For top level items quantity and prices displayed along with their *service location* in a separate table. For items a lower level in the bundle, only product name and quantity is listed one beow the other. This shows how conditional displays can be done, again using a **#IF\_** conditional token within the **#items** repeating content. Here the **#IF\_top\_level\_product** and **^IF\_top\_level\_product** conditional tokens are used. If the line item is a top level in the bundle, this token has to be set to true. This happens in the transform Dataraptor formula. As for every #IF\_ token, **the value passed has to be Boolean**. Note the output data type of the mapping also has to be Boolean and not string. 4. At the bottom of the display of quote items, there are general terms and conditions, and product specific and conditions. Product specific terms need to appear only if a particular product (or product family) is ordered on one of the quote lines. In this example, we display the product specific terms for “Business Essentials” family of products only if any of the quote lines has the product name that starts with “Business”. To evaluate this a conditional token **(# IF\_Business\_Essentials\_Products)** is used. Whether this condition is met or not by this Quote is evaluated in the Transform dataraptor. As for every #IF\_ token, **the value passed has to be Boolean**. Note the output data type of the mapping also has to be Boolean and not string. 5. This particular DOCX template has some unique attributes such as a background water mark and header and footer sections that have variable token in them. This demonstrates that some of the useful features of Word can be used to design your DOCX templates. |

**PRODUCT SUMMARY**

{{#lineitems}}{{#IF\_top\_level\_product}}

**{{product\_name}}**

|  |  |
| --- | --- |
| **NUMBER OF SERVICES: {{qty}}** | **CONTRACT TERM : {{term}} months** |
| **UNIT MONTHLY CHARGE: {{mrc}}** | **UNIT ONE TIME CHARGE: {{otc}}** |
| **TOTAL MONTHLY CHARGE: {{mrc\_total}}** | **TOTAL ONE TIME CHARGE: {{otc\_total}}** |
| **SERVICE ADDRESS:**  **{{service\_account}}**  **{{service\_street}}, {{service\_city}},**  **{{service\_state}} {{service\_country}}** | |

{{/IF\_top\_level\_product}}{{^IF\_top\_level\_product}} **{{product\_name}} ({{qty}})** {{/IF\_top\_level\_product}}

{{/lineitems}}

GENERAL TERMS AND CONDITIONS

Cancellation

If you cancel any of the Services on an Individual Service:

(a) before the Service Start Date, then you must pay Vlocity all infrastructure and installation costs incurred by Vlocity in connection with preparation for the provision of the Service or Individual Service; or

(b) during the Contract Term, then you may have to pay Vlocity a Cancellation Fee, as set out in the Standard Form of Agreement Pricing Table for the relevant Service.

Privacy Information

We collect personal information in forms like these and also during our on-going relationship with you. We use it to supply products, give you the best possible service and for the other purposes described in our privacy policy. Without it, we may not be able to supply products or provide the level of service you expect.

We share personal information within the Vlocity Group and with a number of other service providers and partners for these purposes; some of whom may be overseas.

Unsolicited Sales

If you have purchased a good or service from us as a result of an unsolicited telemarketing call or visit, you have a right to cancel your service within 80 business days from and including the day after you signed or received this agreement. Please contact your Vlocity sales representative for details about your additional rights to cancel this agreement and the cancellation form.

Produce-specific terms and conditions

The section below detailed information relevant to your products and services in plain language that is easy to understand. For further information and the full terms and conditions about other product and services which do not have a Critical Information Summary, please refer to the Standard Form of Agreement found at [www.vlocity.com](http://www.vlocity.com)

PRODUCT SPECIFIC TERMS AND CONDITONS

{{#IF\_Business\_Essentials\_Products}}

BUSINESS ESSENTIAL PRODUCTS

Charges

In addition to the fixed monthly charges, variable Internet usage charges may apply for this Service. All usage charges will be billed monthly per individual Customer access, based on the total gigabytes of traffic sent and received on Pay as you go option, or based on the minimum bandwidth commitment and the higher of the over usage sent or received on 95 th Percentile billing method. Usage Options are described in the following table and the Usage Option selected by the Customer is specified in the Solution Details.

Customer Responsibilities

Business Essentials Bundles Service will be provisioned in accordance with IP addressing and routing standards, and the Customer must ensure non-conflicting LAN address practices are maintained within the network plan. If we provides the IP addresses to the Customer, these addresses shall be governed by the our IP address policy. If the Customer provides the IP addresses, the Customer must assign one IP address for use as the IP address of the CIU, and must also set that address as the default gateway for every device at that Site. The Customer is responsible for any equipment or facilities required to complete the connection between the Service Demarcation and the Customer’s LAN, and to add or connect BI Bundles Service to the Customer’s LAN media, or to extend the Service Demarcation beyond the master telephone room.

{{/IF\_Business\_Essentials\_Products}}

{{^IF\_Business\_Essentials\_Products}}

There are no product specific terms and conditions. Only the general terms and conditions will apply

{{/IF\_Business\_Essentials\_Products}}