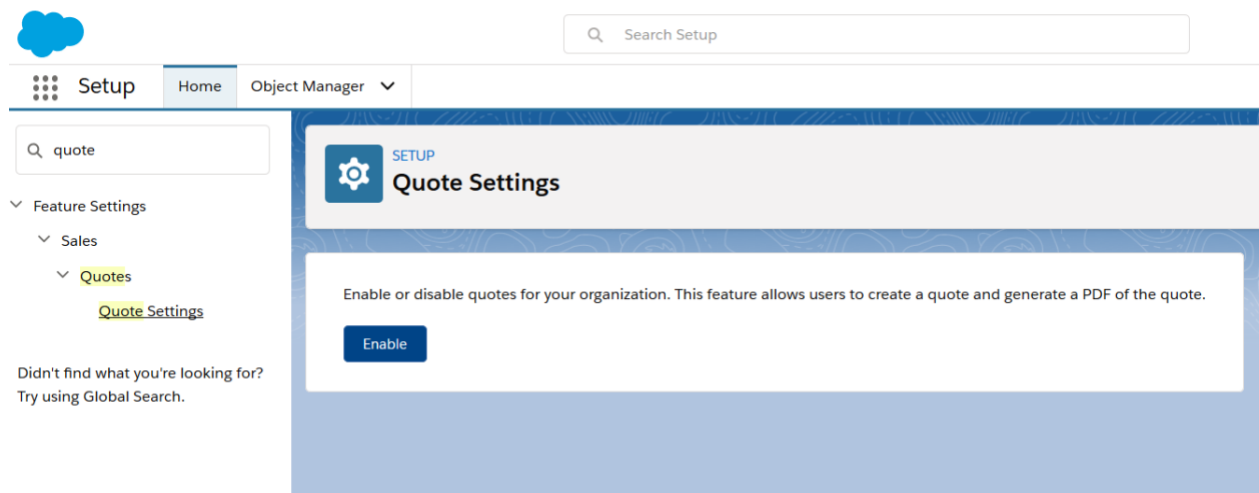


How to Setup, Use, and Customize Easy PDF

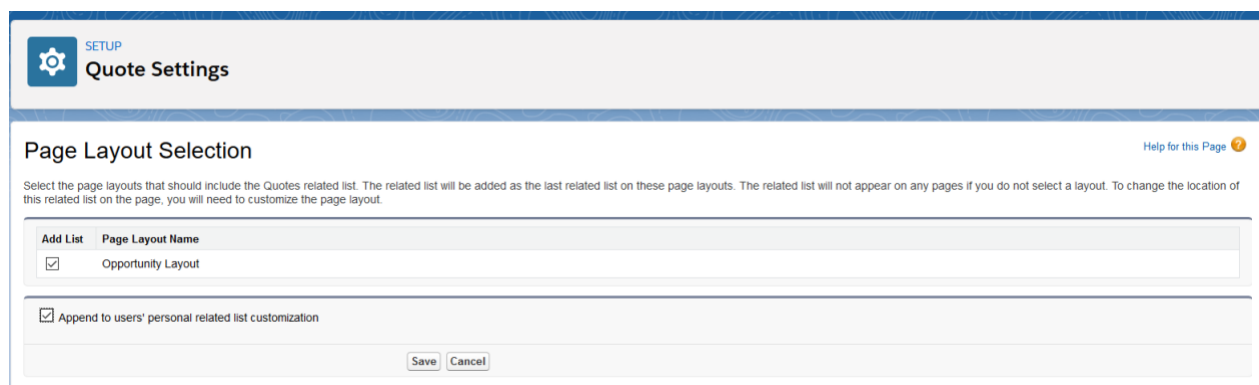
Setup overview: Enable the Quote object, install the package, arrange fields and buttons onto Page Layouts, and upload company logo.

1. Enable Quote

- a. Click the enable button in Quote Settings under Setup.



- b. Set the Quote object to show on the Opportunity Layout and Append to users' personal related list customization.



2. Install the App from the AppExchange, then select how you want it to install

- a. Log into the AppExchange

- b. Click "Get It Now" on the Easy PDF Listing (URL: <https://appexchange.salesforce.com/appxListingDetail?listingId=a0N30000001TLtcEAG>)
- c. You'll see this

Where do you want to install this package?

Before you install in a production org, we suggest testing in a sandbox.

Install in a Production Environment
Install where you or your users work, including developer orgs.

Install in Production

Install in a Sandbox
Test in a copy of a production org.


Install in Sandbox

Cancel

Salesforce suggests that you test AppExchange apps in a sandbox before Production. Select either option. Once you accept the terms and conditions you can "Confirm and Install". You will be asked to log into the org that you want this installed in.


- d. You'll be prompted with these install options. Choose the desired install options, then, click "Install"


Install Easy PDF
By Salesforce Labs


 What if existing component names conflict with ones in this package?

☒ Do not install.

☐ Rename conflicting components in package.


☐ Install for Admins Only


☒ Install for All Users


☐ Install for Specific Profiles...

Install Cancel

e. You should see that the installation is complete

3. Customize the Opportunity Page Layout(s) to include these components from Easy PDF

a. Easy PDF includes these custom fields:

- i. Billing Frequency
- ii. Conditions
- iii. Start Date
- iv. Payment Method
- v. Payment Terms

Most customers will want to use all of these fields but you do not have to. The Salesforce Admin should go into Setup mode, and edit the Opportunity Page Layouts (in Setup mode). Drag and drop the desired fields from the above list onto your page layout (again, most customers will use all of these fields but you might not need to).

The screenshot shows the Salesforce Page Layout editor for the Opportunity object. The top toolbar includes buttons for Save, Quick Save, Preview As..., Cancel, Undo, Redo, and Layout Properties. On the left, a sidebar lists available components: Fields, Buttons, Quick Actions, Mobile & Lightning Actions, Expanded Lookups, Related Lists, and Report Charts. The main area displays a grid of fields. A 'Quick Find' search bar is at the top of the field grid. The fields are organized into sections: 'Section' (Billing Frequency, Close Date, Account Name, Amount) and 'Blank Space'. The 'Billing Frequency' field is highlighted. Below the field grid, there are two sections: 'Additional Information' and 'Description Information'. The 'Additional Information' section contains fields for Billing Frequency, Conditions, Start Date, Payment Method, and Payment Terms, each with a 'Sample Text' value. The 'Description Information' section contains a 'Description' field with a 'Sample Text' value.

Field Name	Field Name	Field Name	Field Name	Field Name	Field Name	Field Name
Billing Frequency	Close Date	Account Name	Amount	Created By	Description	Expected Revenue
Conditions	Contract	Forecast Category	Opportunity Name	Opportunity Owner	Primary Campaign ...	Stage
Payment Method	Payment Terms	Probability (%)	Price Book	Quantity	Type	This item is currently in use (click to locate)

Additional Information

Field Name	Sample Text
Billing Frequency	Sample Text
Conditions	Sample Text
Start Date	11/30/2018
Payment Method	Sample Text
Payment Terms	Sample Text

Description Information (Header visible on edit only)

Field Name	Sample Text
Description	Sample Text

b. Click Save

4. Customize the Quote Page Layout(s) to include these components from Easy PDF

a. Easy PDF includes these custom fields:

- i. Billing Frequency
- ii. Invoice Number
- iii. Opportunity Products
- iv. Purchase End Date
- v. Invoice Paid
- vi. Number of Deliveries
- vii. Template Header Line 1

- viii. Template Header Line 2
- ix. Template Header Line 3
- x. Template Header Line 4
- xi. Template Header Line 5

Most customers will want to use all of these fields but you do not have to. The Salesforce Admin should go into Setup mode, and edit the Quote Page Layouts (in Setup mode). Drag and drop the desired fields from the above list onto your page layout (again, most customers will use all of these fields but you might not need to).

Quote Detail

Standard Buttons: Edit, Delete, Change Owner, Change Record Type, Create PDF, Email Quote, Start Sync

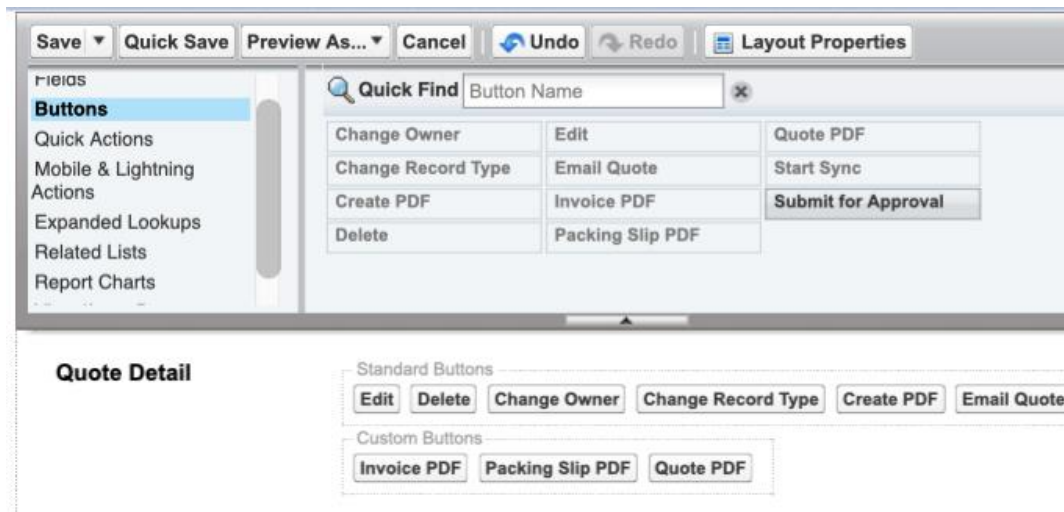
Custom Buttons:

Quote Information (Header visible on edit only)

Quote Number	GEN-2004-001234	Expiration Date	11/30/2018
Quote Name	Sample Text	Syncing	✓
Opportunity Name	Sample Text	Status	Sample Text
Account Name	Sample Text	Description	Sample Text
Billing Frequency	Sample Text	Invoice Number	Sample Text
Opportunity Products	Sample Text	Purchase End Date	11/30/2018
Invoice Paid	Sample Text	Number of Deliveries	Sample Text
Template Header Line 1	Sample Text	Template Header Line 2	Sample Text
Template Header Line 3	Sample Text	Template Header Line 4	Sample Text
Template Header Line 5	Sample Text		

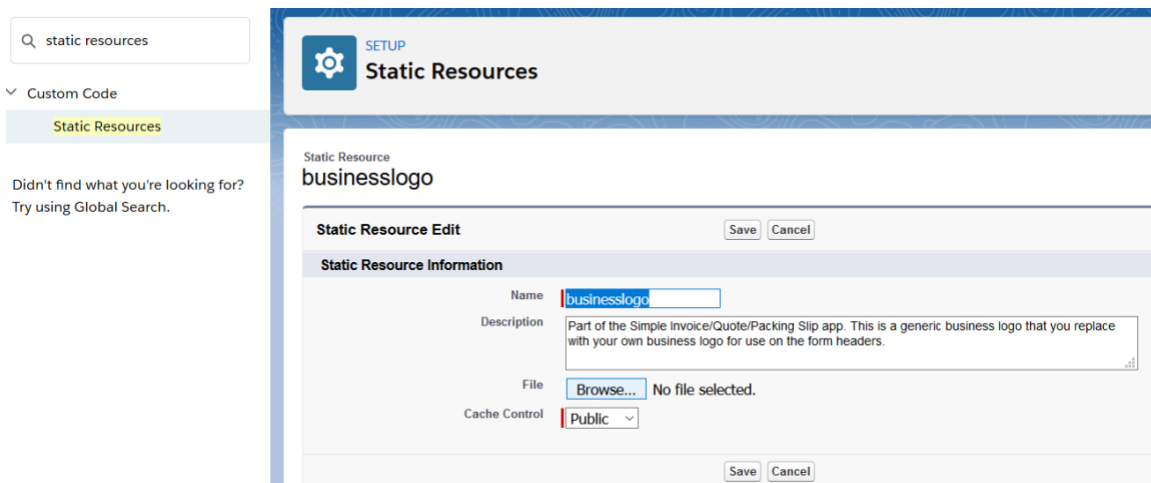
- b. Easy PDF includes a Custom Buttons that should be placed on the Quote Page Layout(s):
 - i. Quote PDF
 - ii. Invoice PDF
 - iii. Packing Slip PDF

Drag the above Buttons into the "Custom Buttons" region of the Quote Page Layout:



5. Change the Static Resource "businesslogo" to your logo

- a. In Setup find "Static Resources"
- b. Click "Edit" to the left of "businesslogo"
- c. Click "Browse..." under File

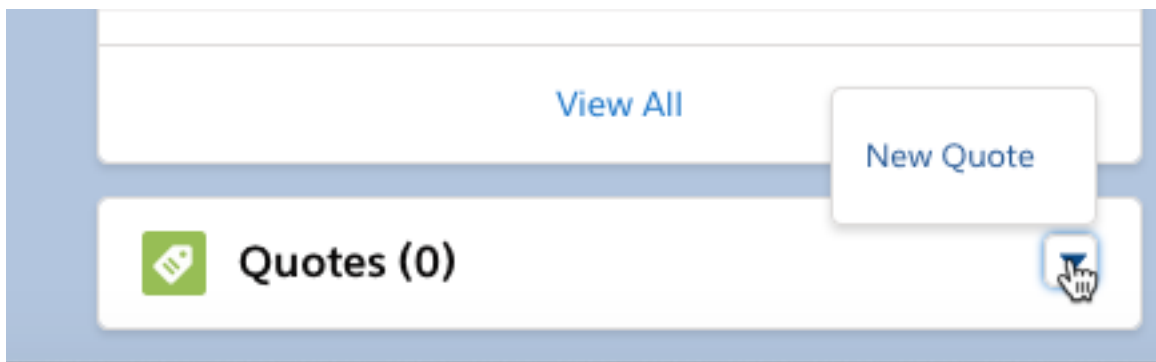


- d. Select an image of your company's logo so that it will display on the header. Then click Save.

Congrats! You're done with Setup.


How to use Easy PDF overview: Familiarity with Quotes, Easy PDF buttons, and the basics of customization.

1. Out of the box, Easy PDF is used on the Quote object. In case you are not familiar with the Quote object, here's what you need to know: you can create a quote from the "Quote" related list on an opportunity record. Here's information on getting started with Quotes: https://help.salesforce.com/articleView?id=quotes_create.htm&type=5
Here's what creating a Quote from the related list looks like:



- a. Easy PDF fields on the Opportunity and Quote object populate fields on Quote, Invoice and Packing Slip PDFs. This is a list of the Easy PDF fields that the Salesforce Admin has to choose from depending on your business needs:
 - i. Billing Frequency
 - ii. Opportunity Products (If you're not syncing Quote and Opportunities, use this to select the opportunity associated with this quote so that all of the products associated with the opportunity can automatically pull onto Quote)
 - iii. Purchase End Date
 - iv. Invoice Paid
 - v. Number of Deliveries
 - vi. Template Header Line 1
 - vii. Template Header Line 2
 - viii. Template Header Line 3
 - ix. Template Header Line 4
 - x. Template Header Line 5
 - xi. **Invoice number will automatically match the Quote Number so users do not input that when creating a new Quote

Here's a visual representation of some of the Easy PDF features when creating a Quote

Billing Frequency	Invoice Number
Monthly	00000001
Opportunity Products	Purchase End Date
 salesforce.com - 1,000 Widgets	
Invoice Paid	Number of Deliveries
No	2
Template Header Line 1	Template Header Line 2
Easy PDF	Salesforce
Template Header Line 3	Template Header Line 4
1 Market Street	San Francisco, CA
Template Header Line 5	
EasyPDF.com	

2. Make a PDF from a Quote

- You can access the quote in a few ways: search, the Quote related list on the opportunity, the Quote tab, etc.
- Out of the box, Easy PDF comes with these buttons:
 - Quote PDF
 - Invoice PDF
 - Packing Slip PDF

Quote
San Ramon Refinery

Edit Delete Create PDF

Quote Number: 00000001 Expiration Date: 12/12/2018 Syncing: ☐ Opportunity Name: [salesforce.com - 1,000 Widgets](#) Account Name: [salesforce.com](#) Grand Total: \$0.00

✓ ✓ In Review Approved Rejected Presented Accepted Denied ✓ Mark Status

Related Details

Quote Line Items (0) Add Products

Activity

Filters: All time • All activities • All types

Refresh Expand All

Dropdown menu options: Email Quote, Start Sync, Packing Slip PDF, Invoice PDF, Quote PDF

c. Click each button to see the PDF that Easy PDF generates. For example:



Easy PDF
Salesforce
1 Market Street
San Francisco, CA
EasyPDF.com

Quote: 00000001
Quote Date: December 8,
2018
Prepared for: Point San
Pablo

Address Information

Account Name: Point San Pablo
Bill To:
1900 Stenmark Dr.
Richmond, CA 94801

Ship To:
1950 Stenmark Dr.
Richmond, CA 94801

Products

Product	Description	Quantity	Unit Price	Total Price
Crude Oil		500.00	\$54.00	\$27,000.00
Heating Oil		1,450.00	\$1.80	\$2,610.00
				Total: \$29,610.00

Terms and Conditions

Quote Expiration Date: 12/12/2018

Test Easy PDF

Point San Pablo

Signature

Signature

Name

Name

Title

Title

Date

Date

Copyright Test Easy PDF.

- d. From there you can save the PDF to distribute it

Customization Overview: In essence, we've made this as open as possible so that those with basic Visualforce and Apex skills can make any Salesforce record into a PDF.

Any of the 3 Quote object templates that we provide can be tweaked or re-purposed. All of these templates come with markup notes for developers. Our app also uses an Apex class for our 3 customized templates so that the product line items can be displayed in our PDFs. Developers can customize that as well.

In addition to the vision of creating Quotes, Invoices, and Packing Slips, we provide a generic template. We have called this generic template "Opportunity PDF" and you can customize it if you want to create PDFs from the Opportunity object. The Opportunity PDF template has a corresponding "Opportunity" button provided so that the Admin can place that Button on the Opportunity Page Layout.

Lastly, if you would like to leave a honest review on the AppExchange, it would be greatly appreciated so that we can get feedback and improve this app.