



EaseQuotePDF

Automate quote PDF generation on status change

*User Manual to install app for Salesforce CRM users to create automated
Quote PDF on Quote Status.*

INDEX

About EaseQuotePDF.....	3
Pre-requisites.....	4
How to Download the App	4
How to Configure Quote Status and Template ID	6
EaseQuotePDF working	19
Behavior of EaseQuotePDF on Quote Line Change.....	22
Other Apps by Advanz101	30
About Advanz101	31

About EaseQuotePDF

EaseQuotePDF App provides user the ability to automate Quote PDF generation as per the status configured for automatic PDF generation.

Currently salesforce doesn't create a quote document automatically when a quote reaches a specific status. EaseQuotePDF helps you configure quote status on which you want to generate a quote document automatically.

Pre-requisites

You have to enable Quotes in your Salesforce Org. Please refer the following Salesforce link to enable Quotes.

https://help.salesforce.com/s/articleView?id=sf.quotes_enable.htm&type=5

How to Download the App

Installation of EaseQuotePDF App from Salesforce App Exchange.

Connect Your Salesforce Account to Your Trailblazer.me Profile

- 1.1. In a new browser tab, open **AppExchange**.
- 1.2. Click your avatar to open your Trailblazer.me account menu, then click **Settings**.
- 1.3. Under the Salesforce Accounts header in the Connected Accounts section, click **Connect**.
- 1.4. If you see the Choose a Username page, click **Log In with a Different Username**. If you see a login page, skip to the next step.
- 1.5. Enter your Salesforce username and password, then click **Log In**.
- 1.6. Click **Link Account**.

2. Steps to Install Application to Salesforce Org-

- 2.1. In a new browser tab, open **AppExchange**.
- 2.2. Search for **EaseQuotePDF**.
- 2.3. Click on **Apply Filters** button and choose Solution type as Apps to narrow down search result.
- 2.4. Click on the **EaseQuotePDF** App Name.
- 2.5. Now click on **Get it Now** button.
- 2.6. You will see 2 options **Install in Production** and **Install in Sandbox**.
- 2.7. In Install in Production, you will see all the connected salesforce accounts.
- 2.8. If you cannot find the username, for the account in which you want to install, then check **Connect Your Salesforce Account to Your Trailblazer.me Profile** i.e. section **Error! Reference source not found.**
- 2.9. Choose the username and click Install in Production.

- 2.10. You will see a page where you can confirm your details.
- 2.11. Select the checkbox **I have read and agree to the terms and conditions** only if you have read and agree to terms and conditions.
- 2.12. Click on **Confirm and Install**, it will take you to the login screen.
- 2.13. If you want to Install in Sandbox then click on **install in Sandbox** button.
- 2.14. You will see a page where you can confirm your details.
- 2.15. Select the checkbox **I have read and agree to the terms and conditions** only if you have read and agreed to the terms and conditions.
- 2.16. Click on **Confirm and Install** it will take you to the login screen.
- 2.17. Provide your login credentials and select for which users you want to install the application.
- 2.18. After that application installation will start.

***We strongly recommend not to use any file that you receive from any unauthorized source or any source not mentioned above.**

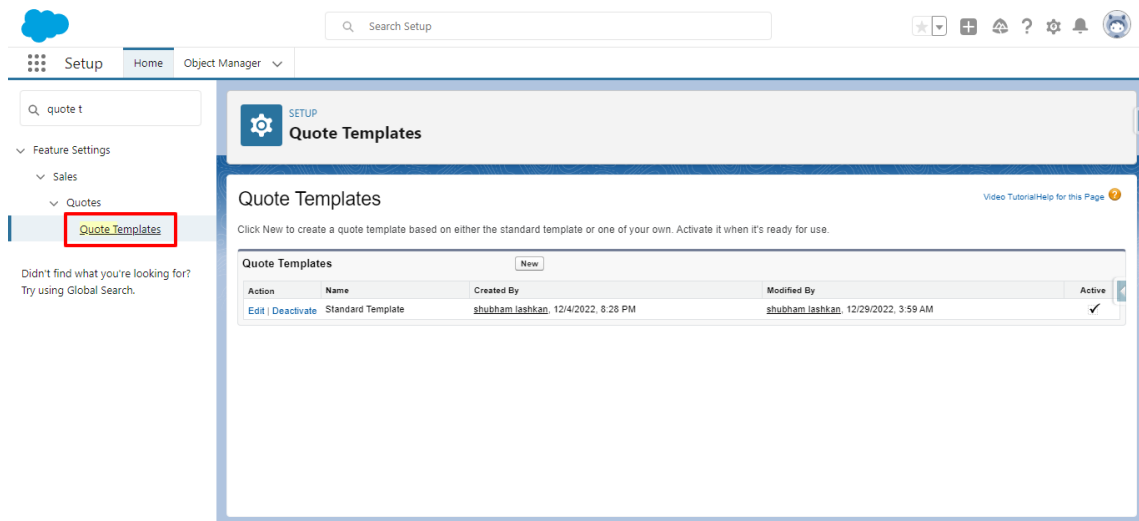
How to Configure Quote Status and Template ID

This is a Salesforce out of the box functionality, you can refer this help document for more details

https://help.salesforce.com/s/articleView?id=sf.quotes_template_create.htm&type=5

Step 1- Create Quote Template

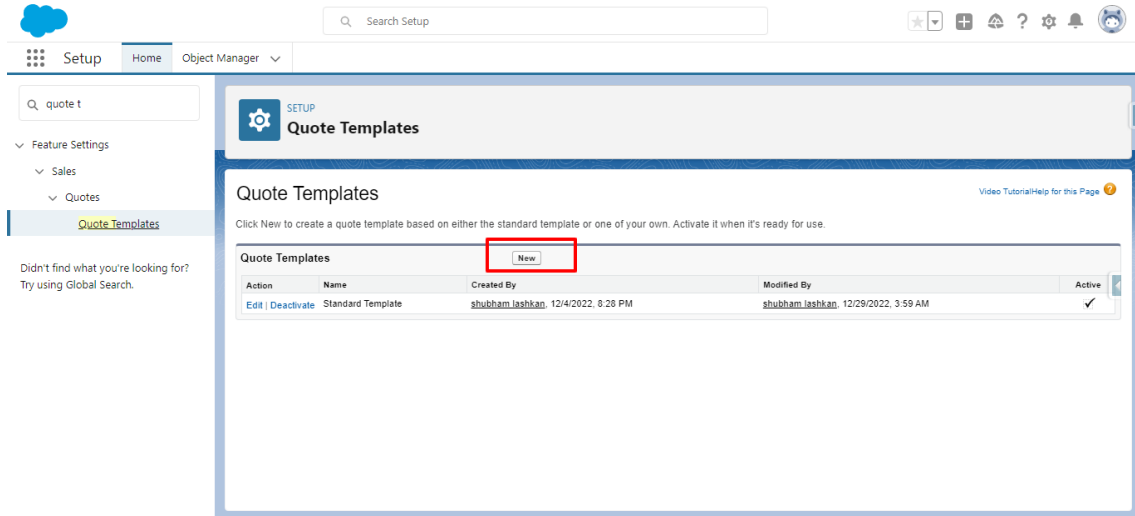
1. Go to **Setup** --> Type **Quote Template** in Quick Find Box and Select Quote Template.



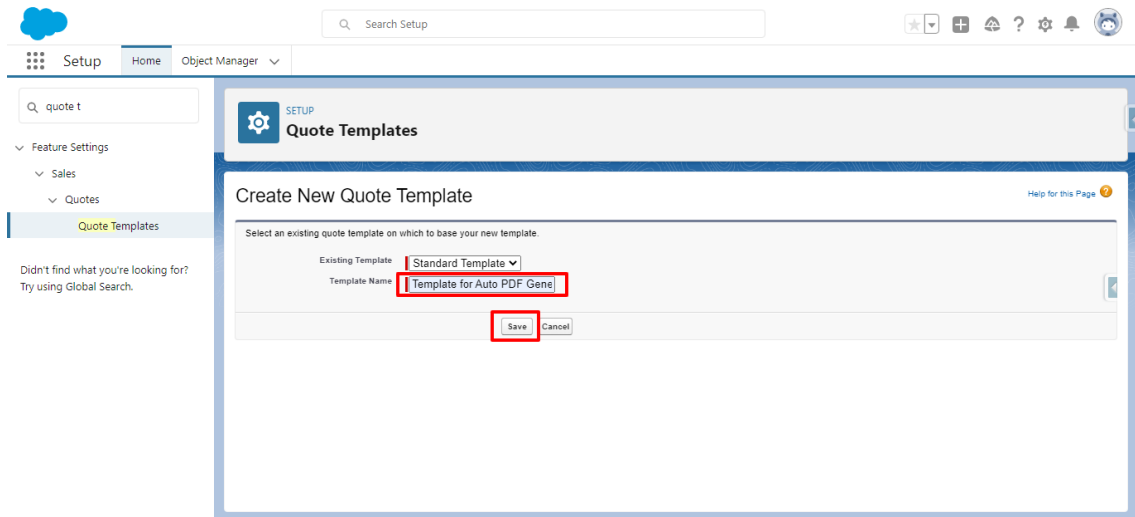
The screenshot shows the Salesforce Setup interface. In the left sidebar, under 'Feature Settings' > 'Sales' > 'Quotes', the 'Quote Templates' link is highlighted with a red box. The main content area is titled 'Quote Templates' and includes a 'New' button. Below this is a table with the following data:

Action	Name	Created By	Modified By	Active
Edit Deactivate	Standard Template	shubham.lashkan	shubham.lashkan	☒

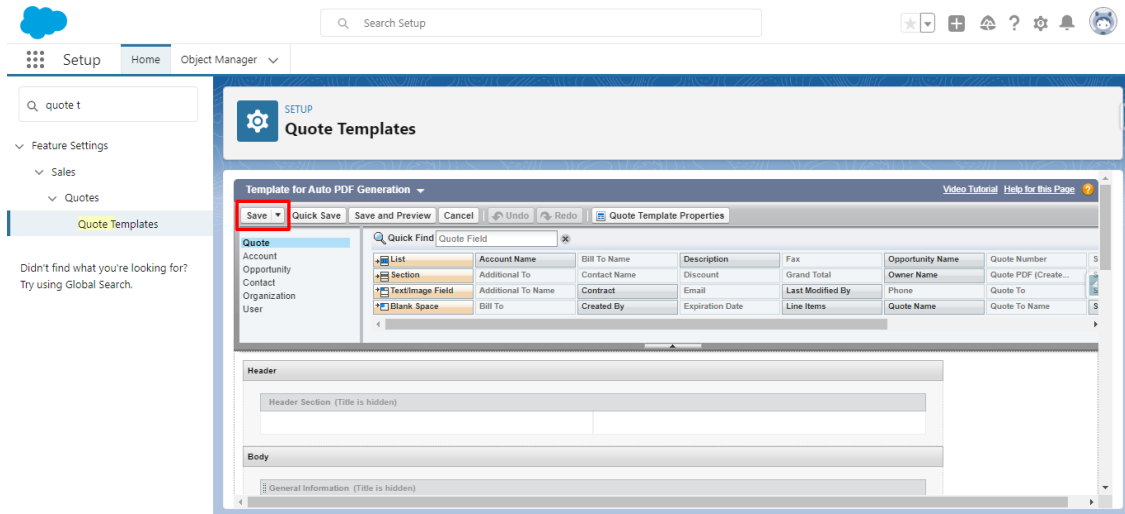
2. Create New Template by clicking on **new** button.



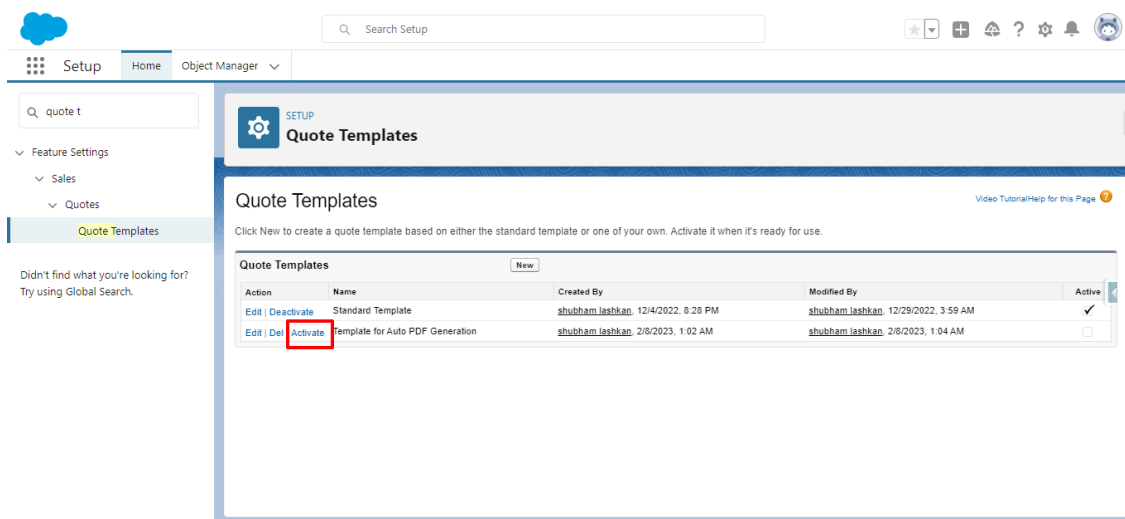
3. Select any existing template & enter name for Template as per your requirement and click on **Save** button.



- Below page will open up from which you can select the fields you want to show on generated PDFs. Click on **save** button after configuring the template.

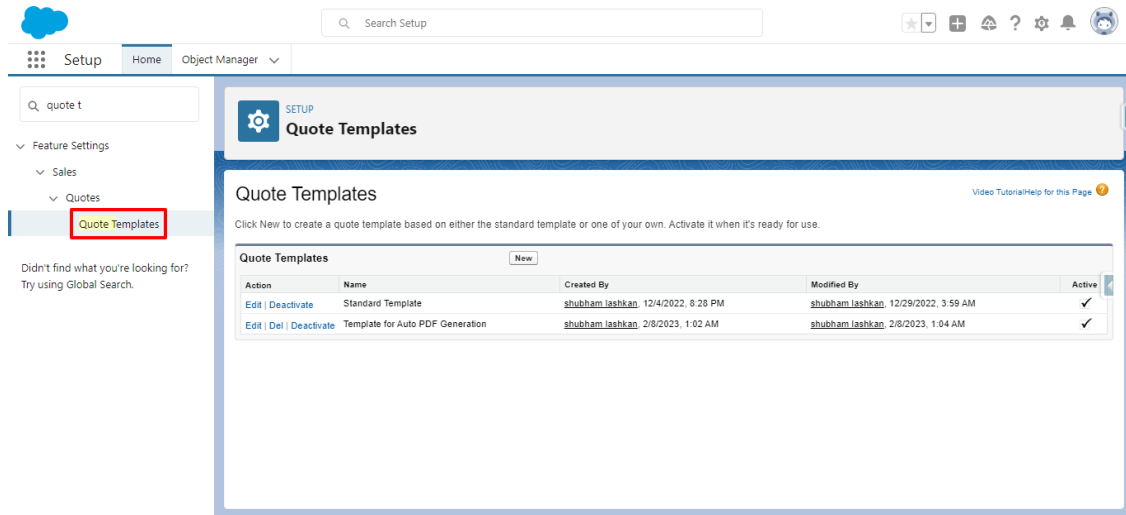


- Once you click on **Save** button you will be redirected to quote template list view. Click on **Activate** for the template you just created. Now the template will be activated.

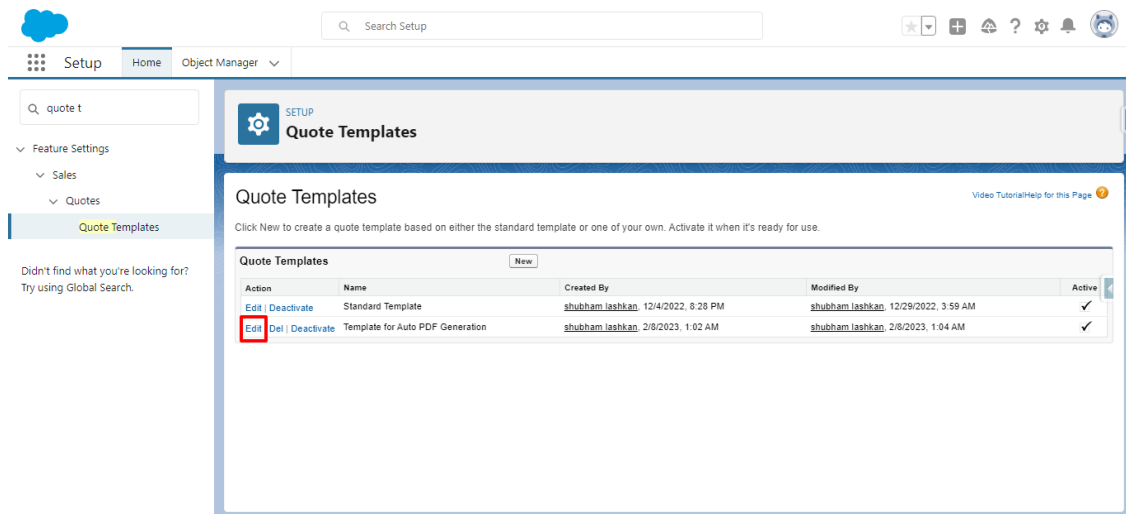


Step 2 – Copy Quote Template Id

1. Go to **Setup** --> Type **Quote Template** in Quick Find Box and Select Quote Template.

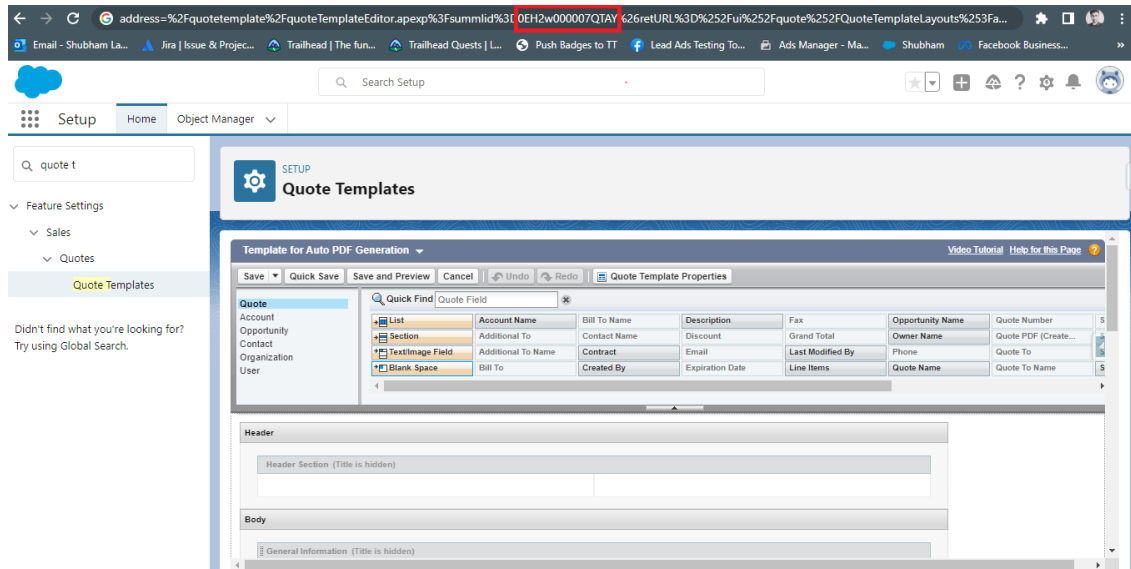


2. Click on **edit** button for the template you want to use for Quote PDF Generation. Here we are selecting the template which we created in the last Step.



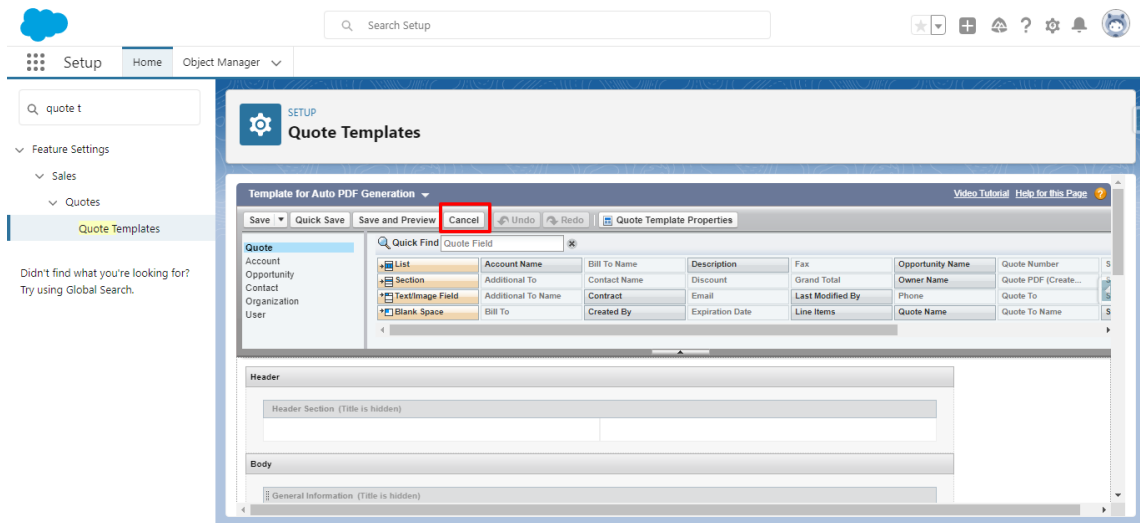
3. Quote template editor page will open. Copy the template id from the URL of the page.

Note: *Template Id will always start with 0EH and end just before % sign as highlighted in below image.*



<https://instance-dev-ed.develop.lightning.force.com/lightning/setup/QuoteTemplateEditor/page?address=%2Fquotetemplate%2FquoteTemplateEditor.apexp%3Fsummlid%3D0EH2w000007QTAY%26retURL%3D%252Fui%252Fquote%252FquoteTemplateLayouts%253FretURL%253D%25252Fsetup%25252Fhome%2526appLayout%253Dsetup%2526tour%253D%2526isdt%253Dp1%2526sfdcIFrameOrigin%253Dhttps%25253A%25252F%25252Fadvanz101systemspvtltd6-dev-ed.develop.lightning.force.com%2526sfdcIFrameHost%253Dweb%2526nonce%253Dec84bb507bbfb6d152b01673626fc0063e332b45dac0a506c2ad0fa2b816b5db%2526clc%253D1>

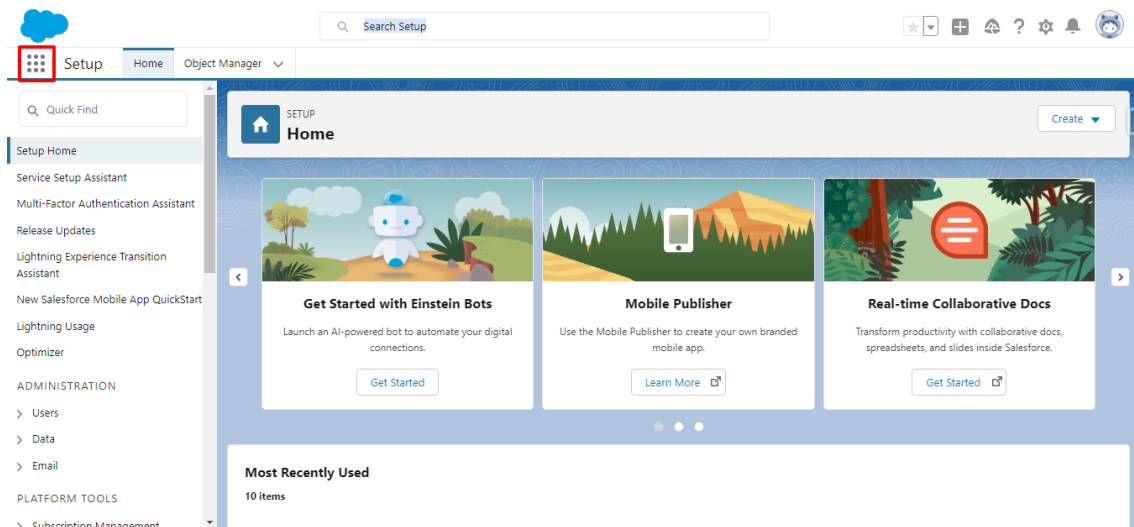
- Once you are done copying template id save it in clipboard for use in next step and click on **cancel** button.



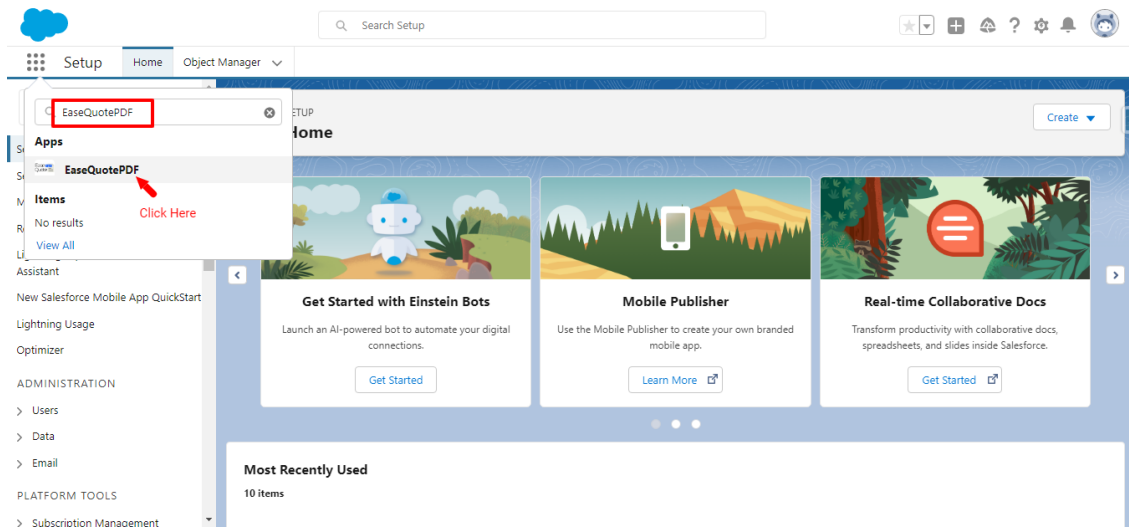
Step-3 Configure Quote Status with Template Id.

This is the quote status at which automatic Quote PDF will be generated.

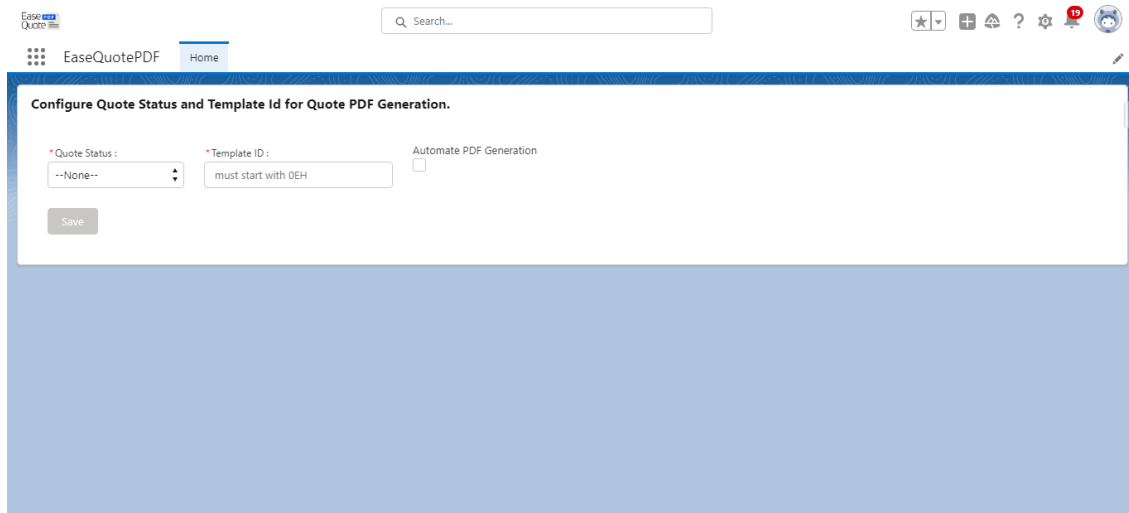
- Click on the App Launcher Icon.



2. Search for EaseQuotePDF.



3. EaseQuotePDF App will open and you will see following screen for the first time.



4. Select the Quote Status on which you want to automate Quote PDF generation. Now paste the copied Quote template Id along with selecting the checkbox and click on save.

EaseQuotePDF Home

Q Search...

Configure Quote Status and Template Id for Quote PDF Generation.

*Quote Status : Approved

*Template ID : 0EH2w000007QTAY

Automate PDF Generation ☒

Save

5. Once you click on **Save** button all the configuration will be saved.

EaseQuotePDF Home

Q Search...

Configure Quote Status and Template Id for Quote PDF Generation.

Quote Status	Template ID	Automate PDF Generation	Action
Approved	0EH2w000007QTAY	Yes	Edit

- Click on the **edit** button to change the Status or Template Id if required.

Configure Quote Status and Template Id for Quote PDF Generation.

Quote Status	Template ID	Automate PDF Generation	Action
Approved	0EH2w000007QTAY	Yes	Edit

*Quote Status : *Template ID : Automate PDF Generation ☒

[Save](#) [Cancel](#)

- Do the required changes and click on save button.

Step-4 Add customInformationMessage component to Quote Record Page.

Adding this component on the Quote Record Page will remind you if you are referencing an outdated Quote PDF.

- Open a Quote Record and click on **gear** icon.

Quote for Coffee Products

Quote Number: 00000005 | Expiration Date: | Syncing: ☐ | Opportunity Name: Advanz101 10-02-2023 Old | Account Name: Advanz 101 | Grand Total: \$0.00

Draft | Needs Revi... | In Review | Approved | Rejected | Presented | Accepted | Denied | [Mark Status as Complete](#)

Related | Details

Quote Line Items (0) [Add Products](#)

Quote PDFs (0)

Notes & Attachments (0) [Upload Files](#)

[Upload Files](#)

Or drop files

Activity

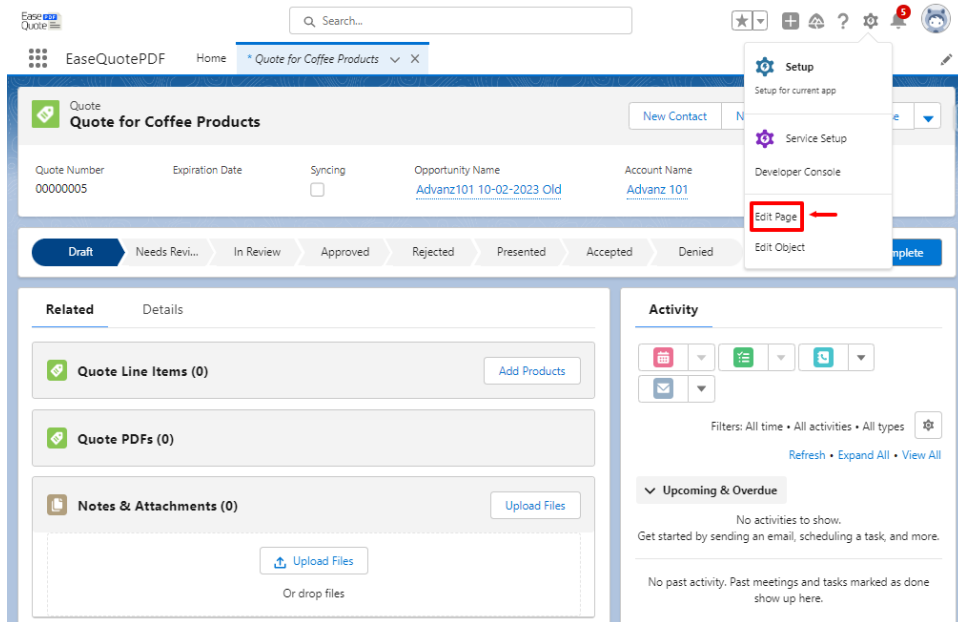
Filters: All time • All activities • All types [Refresh](#) [Expand All](#) [View All](#)

Upcoming & Overdue

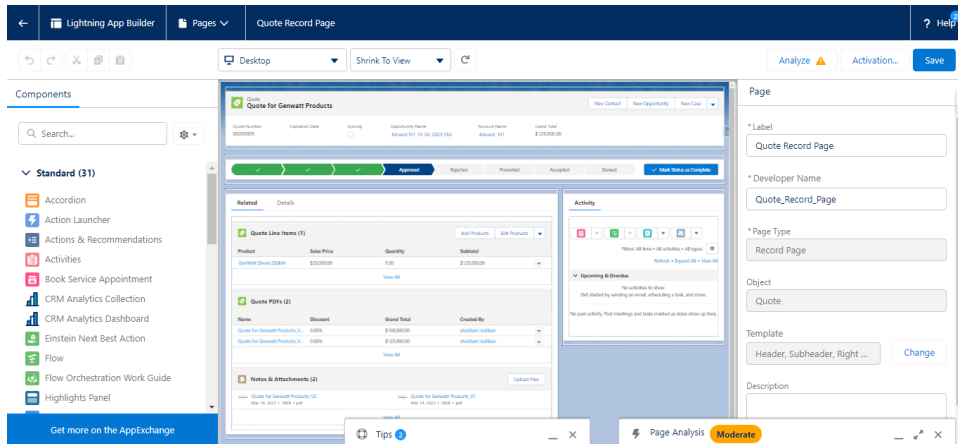
No activities to show. Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

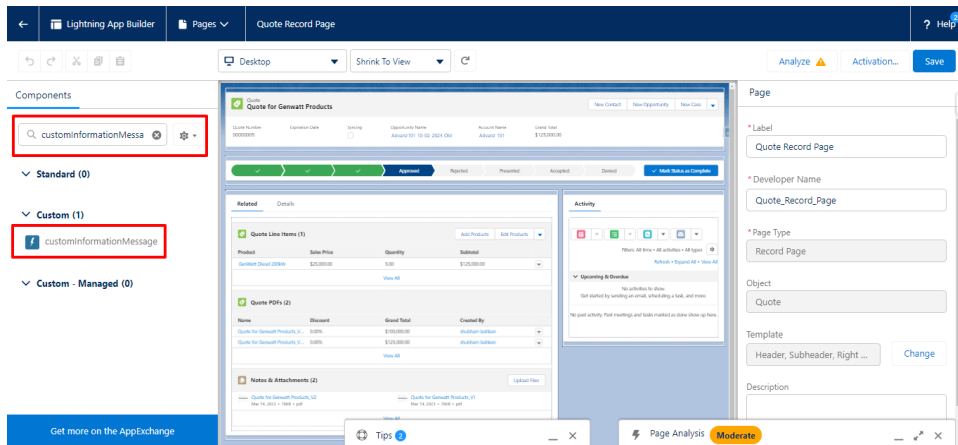
2. Now click on **Edit Page**.



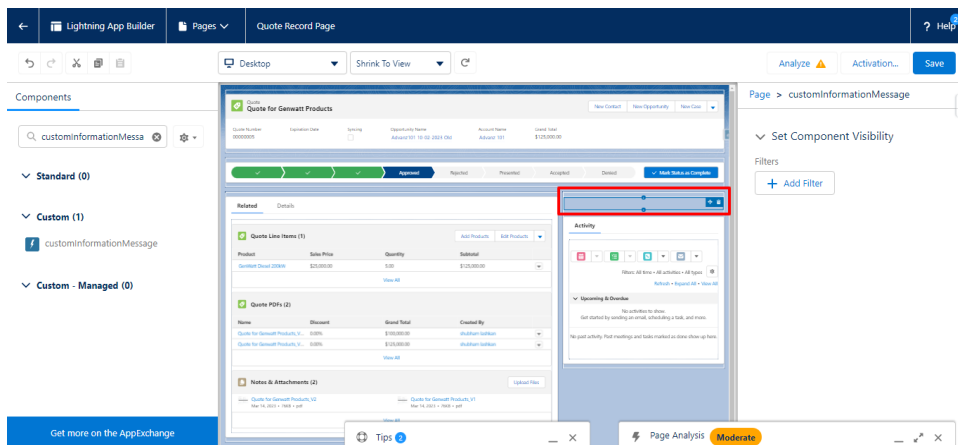
3. You will see the following page.



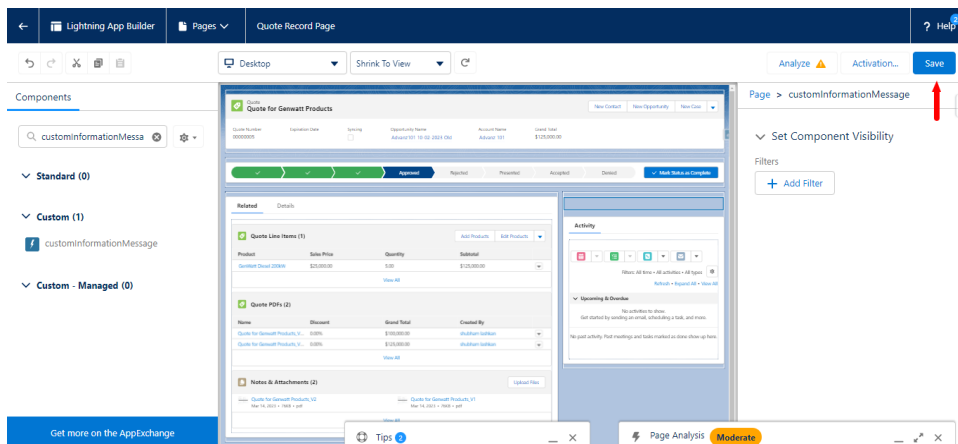
4. Now search for the **customInformationMessage** Component.



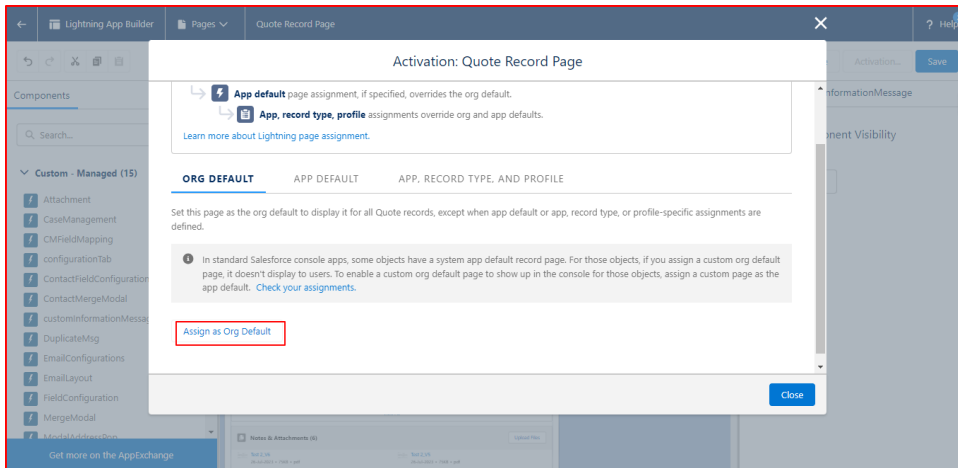
5. Drag the component on the top of Activity.



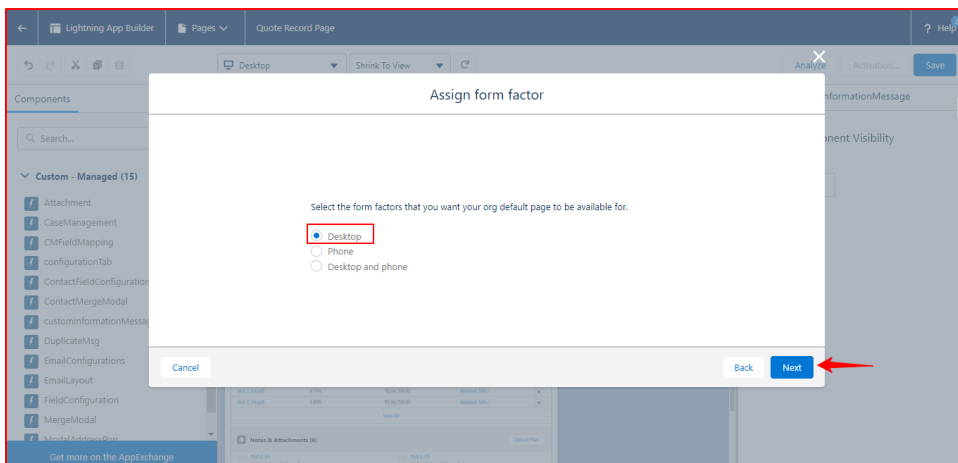
6. Click on **Save** button.



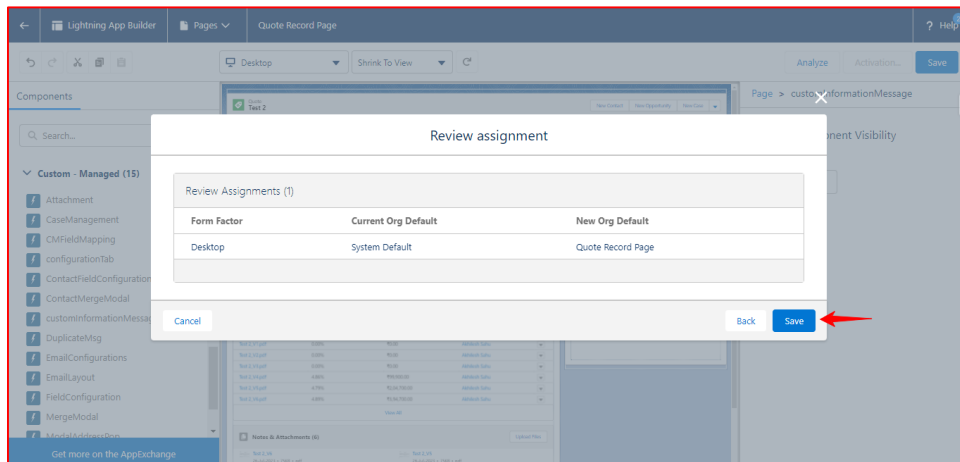
- Once done with saving, a box modal will appear **Activation Quote Record page** if page is not activated, scroll down a bit and click on **Assign as Org Default**.



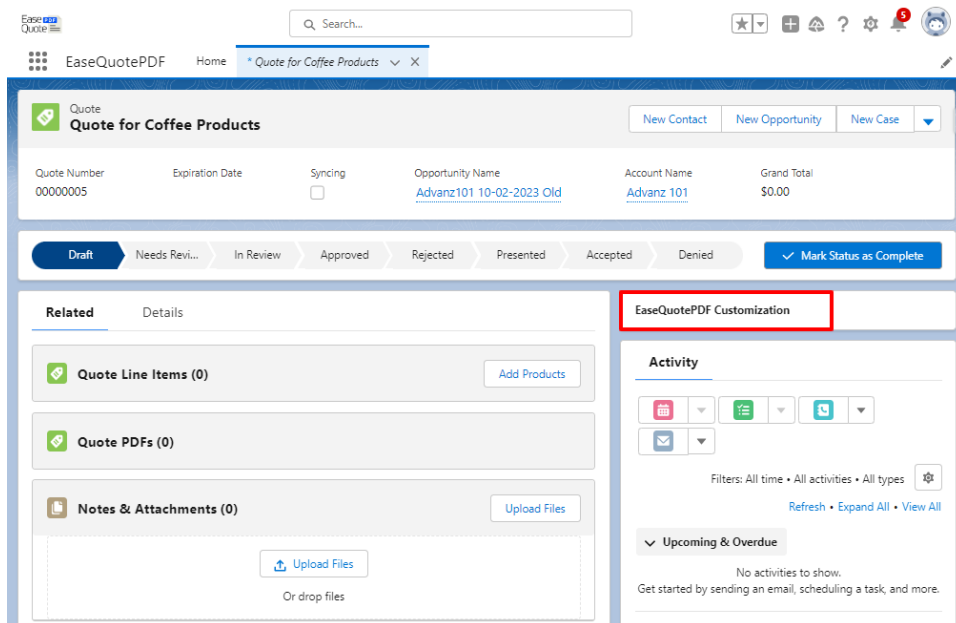
- Keep **Assign Form Factor** as **Desktop** radio button checked, then click on **Next**.



9. Review the assignment and then click on **save**.



10. Finally, click on back icon to go back to quote record. You will see a Component saying **"EaseQuotePDF Customization"** placed on the top of Activity



EaseQuotePDF working

Prerequisite: User must Configure Quote Status & Template Id from last section.

1. Open a Quote Record.

The screenshot displays the EaseQuotePDF web application interface. At the top, there's a navigation bar with a search bar and various icons. Below it, the main header shows 'Quote for Coffee Products' with buttons for 'New Contact', 'New Opportunity', and 'New Case'. A quote details table lists fields like Quote Number (00000005), Expiration Date, Syncing, Opportunity Name (Advanz101 10-02-2023 Old), Account Name (Advanz 101), and Grand Total (\$73.00). A status bar below the details shows a sequence of status options: Draft (highlighted with a red box), Needs Revi..., In Review, Approved, Rejected, Presented, Accepted, and Denied. A 'Mark Status as Complete' button is also present. The 'Related' section on the left contains 'Quote Line Items (1)' with a table showing 'Americano Coffee' at \$73.00, and 'Quote PDFs (0)' (also highlighted with a red box). Below this is a 'Notes & Attachments (0)' section with an 'Upload Files' button. On the right, the 'EaseQuotePDF Customization' section includes an 'Activity' feed with filters and a message about no activities being shown.

2. On the above quote record the Status is **Draft** and in Quote PDFs related list you can see PDF count as 0. Let us assume that in the last section we have set the automated generation on "**Approved Status**".

3. Change the quote status to **Approved**. Once the status is Approved, the quote PDF will be generated automatically and it will be visible under Quote PDFs related list.

The screenshot displays the Advanz 101 EaseQuotePDF interface. At the top, there's a search bar and navigation icons. The main header shows the quote title "Quote for Coffee Products" and buttons for "New Contact", "New Opportunity", and "New Case". Below this, a summary row includes fields for Quote Number (00000005), Expiration Date, Syncing (checkbox), Opportunity Name (Advanz101 10-02-2023 Old), Account Name (Advanz 101), and Grand Total (\$73.00).

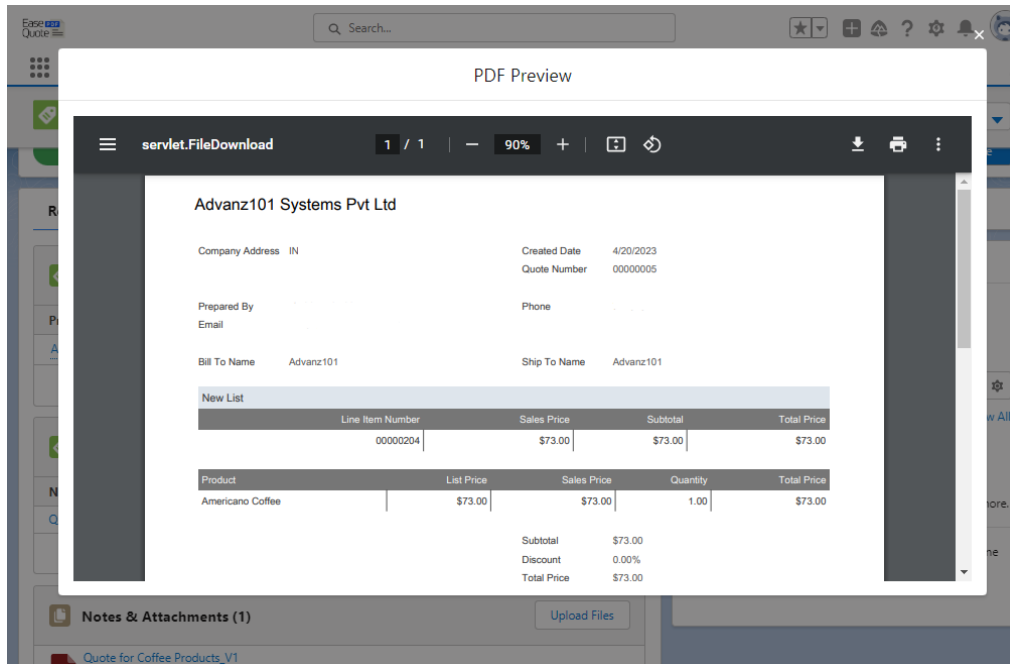
A status bar below the summary row features a sequence of buttons: a green checkmark, a green checkmark, a green checkmark, a blue button labeled "Approved" (highlighted with a red box), a grey button labeled "Rejected", a grey button labeled "Presented", a grey button labeled "Accepted", a grey button labeled "Denied", and a blue button labeled "Mark Status as Complete".

The "Related" section on the left contains three sub-sections:

- Quote Line Items (1)**: A table with columns Product, Sales Price, Quantity, and Subtotal. It lists "Americano Coffee" at \$73.00 for 1.00 quantity, totaling \$73.00. A "View All" link is present.
- Quote PDFs (1)**: A table with columns Name, Discount, Grand Total, and Created By. It lists "Quote for Coffee Pr..." with a 0.00% discount, a total of \$73.00, and created by "shubham lashikan". A "View All" link is present.
- Notes & Attachments (1)**: A section showing a file named "Quote for Coffee Products_V1" (Mar 30, 2023, 75KB, pdf) with a "View All" link.

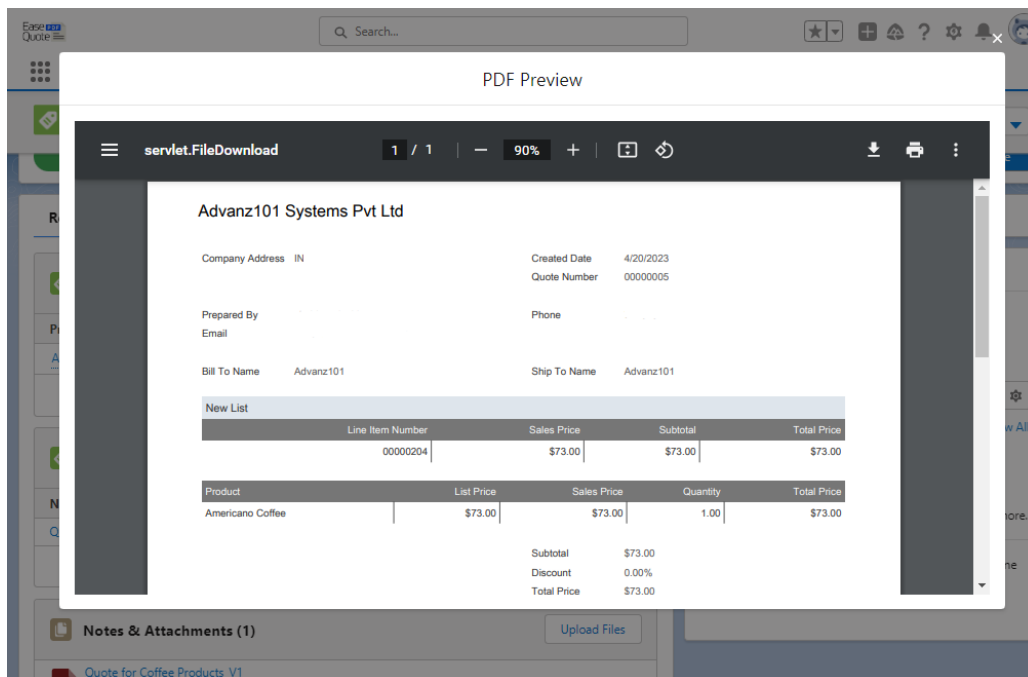
The right sidebar contains an "EaseQuotePDF Customization" section with an "Activity" tab. It shows filters for "All time", "All activities", and "All types", along with "Refresh", "Expand All", and "View All" options. Below this, an "Upcoming & Overdue" section indicates "No activities to show" and "No past activity".

4. Below you can see the screenshot of the PDF generated.

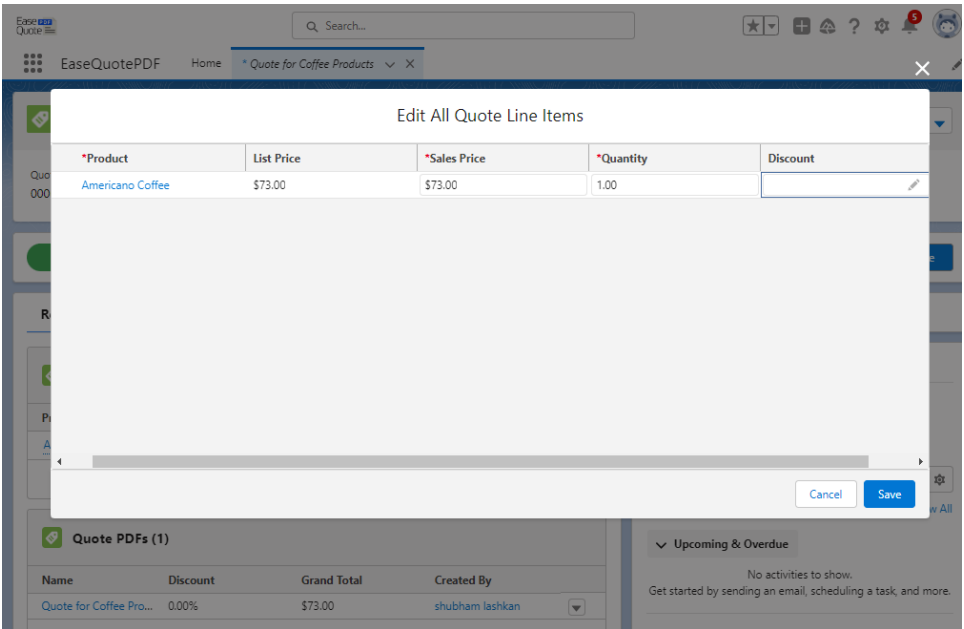


Behavior of EaseQuotePDF on Quote Line Change

1. Currently the Status of Quote is **Approved** which is equal to the status set for automated generation of PDF. Now if we do any change in quote line or add/delete quote line then a new version of PDF will be generated.



2. Click on **Edit products** button a new window will open like below.



- Do the changes as per your requirement here we are Setting **Discount** as **5%**. Click on **Save** button. You will see a new PDF generated.

The screenshot displays the Advanz 101 EaseQuotePDF interface. At the top, there's a search bar and navigation icons. The main header shows 'Quote for Coffee Products' with buttons for 'New Contact', 'New Opportunity', and 'New Case'. Below this, a summary bar includes fields for Quote Number (00000005), Expiration Date, Syncing (unchecked), Opportunity Name (Advanz101 10-02-2023 Old), Account Name (Advanz 101), and Grand Total (\$69.35).

A status bar below the summary shows a sequence of steps: 'Approved' (highlighted with a red box), 'Rejected', 'Presented', 'Accepted', and 'Denied'. A 'Mark Status as Complete' button is also present.

The 'Related' section on the left contains three sub-sections:

- Quote Line Items (1)**: A table with columns Product, Sales Price, Quantity, and Subtotal. It lists 'Americano Coffee' at \$73.00 for 1.00 quantity, totaling \$73.00.
- Quote PDFs (2)**: A table with columns Name, Discount, Grand Total, and Created By. It lists two PDFs: 'Quote for Coffee Pr...' with 0.00% discount and \$73.00 total, and 'Quote for Coffee Pr...' with 5.00% discount and \$69.35 total (highlighted with a red box).
- Notes & Attachments (2)**: A list of two PDF attachments: 'Quote for Coffee Products_V2' and 'Quote for Coffee Products_V1'.

The right sidebar shows the 'EaseQuotePDF Customization' section with an 'Activity' tab. It includes filters for 'All time', 'All activities', and 'All types', and a section for 'Upcoming & Overdue' activities.

4. Now if we move to some other status and do the changes in Quote Lines then a new PDF will not be generated.
5. Below you can see we have a Quote with 1 Quote Line Item and status set to **Accepted**. Also, we already have 2 Quote PDF created. And we have set automated generation of PDF on "Approved Status".

The screenshot displays the Advanz 101 EaseQuotePDF interface. At the top, there's a search bar and navigation icons. The main header shows the quote title "Quote for Coffee Products" and buttons for "New Contact", "New Opportunity", and "New Case". Below this, a summary bar includes fields for Quote Number (00000005), Expiration Date, Syncing (checkbox), Opportunity Name (Advanz101 10-02-2023 Old), Account Name (Advanz 101), and Grand Total (\$69.35).

A progress bar below the summary shows several green checkmarks, with the final status "Accepted" highlighted in a red box. To the right of the progress bar are buttons for "Denied" and "Mark Status as Complete".

The main content area is divided into three sections:

- Quote Line Items (1)**: A table with columns Product, Sales Price, Quantity, and Subtotal. It lists "Americano Coffee" with a sales price of \$73.00 and a quantity of 1.00, resulting in a subtotal of \$73.00. A "View All" link is present.
- Quote PDFs (2)**: A table with columns Name, Discount, Grand Total, and Created By. It lists two PDFs: "Quote for Coffee Pr..." with a 0.00% discount and a grand total of \$73.00, and "Quote for Coffee Pr..." with a 5.00% discount and a grand total of \$69.35. Both were created by "shubham lashkan". A "View All" link is present.
- Notes & Attachments (2)**: A section with an "Upload Files" button. It lists two attachments: "Quote for Coffee Products_V2" (Mar 30, 2023, 76KB, pdf) and "Quote for Coffee Products_V1" (Mar 30, 2023, 75KB, pdf). A "View All" link is present.

On the right side, there's a sidebar with "EaseQuotePDF Customization" and an "Activity" section. The activity section shows filters (All time, All activities, All types) and a "Refresh" button. Below this, it says "Upcoming & Overdue" and "No activities to show. Get started by sending an email, scheduling a task, and more." At the bottom, it says "No past activity. Past meetings and tasks marked as done show up here."

6. Let's update the existing quote line and set the **quantity** to 5. Click on **Edit Products**.

The screenshot shows the Advanz 101 Quote interface. At the top, there's a search bar and navigation icons. Below that, the quote details are displayed: Quote Number 00000005, Expiration Date, Syncing checkbox, Opportunity Name Advanz101 10-02-2023 Old, Account Name Advanz 101, and Grand Total \$69.35. A progress bar shows the quote status as 'Accepted'. The 'Related' section contains two tables: 'Quote Line Items (1)' and 'Quote PDFs (2)'. In the 'Quote Line Items (1)' table, the 'Edit Products' button is highlighted with a red box. The 'Quote PDFs (2)' table shows a discount of 0.00% and a grand total of \$73.00. The 'Activity' section on the right shows no activities to show.

Product	Sales Price	Quantity	Subtotal
Americano Coffee	\$73.00	1.00	\$73.00

Name	Discount	Grand Total	Created By
Quote for Coffee Pr...	0.00%	\$73.00	shubham lashkan

7. You will see the following screen. Change the quantity from 1 to 5 and click on **Save** button.

The screenshot shows the 'Edit All Quote Line Items' dialog box. It contains a table with columns: Product, List Price, Sales Price, Quantity, and Discount. The 'Quantity' field for 'Americano Coffee' is highlighted with a red box, showing the value 1.00. The 'Save' button is visible at the bottom right of the dialog box.

*Product	List Price	*Sales Price	*Quantity	Discount
1 Americano Coffee	\$73.00	\$73.00	1.00	5.00%

8. You will see a message on screen which says "Due to latest editing, old Quote PDF is not same as existing quote. Please re-generate new Quote PDF manually or go to "Approved" Status for auto generation of latest Quote PDF." Also, you can see Quantity of quote line is changed & PDF Count is still 1.

The screenshot displays the Advanz 101 EaseQuotePDF interface. At the top, a search bar and navigation icons are visible. Below the navigation bar, a red-bordered box highlights an information message: "Info Due to latest editing, old Quote PDF is not same as existing quote. Please re-generate new Quote PDF manually or go to 'Approved' Status for auto generation of latest Quote PDF." Below this message, a table shows quote details: Quote Number (00000005), Expiration Date, Syncing (checkbox), Opportunity Name (Advanz101 10-02-2023 Old), Account Name (Advanz 101), and Grand Total (\$346.75). A progress bar indicates the quote is "Accepted". The main content area is divided into three sections: "Quote Line Items (1)", "Quote PDFs (2)", and "Notes & Attachments (2)". The "Quote Line Items" table shows a single item: "Americano Coffee" with a Sales Price of \$73.00, a Quantity of 5.00 (highlighted with a red box), and a Subtotal of \$365.00. The "Quote PDFs" table shows two PDFs: "Quote for Coffee Pr..." with a Discount of 0.00% and a Grand Total of \$73.00, and "Quote for Coffee Pr..." with a Discount of 5.00% and a Grand Total of \$69.35. The "Notes & Attachments" section shows two PDF attachments: "Quote for Coffee Products_V2" (Mar 30, 2023, 76KB) and "Quote for Coffee Products_V1" (Mar 30, 2023, 75KB). On the right side, the "EaseQuotePDF Customization" section includes an "Activity" panel with filters and a "Upcoming & Overdue" section.

9. As per the message we have 2 options to generate updated PDF either change the Quote Status we have set at the time of configuration or manually generate the PDF.

10. Let's change the quote status to **Approved**. A new PDF will be generated.

EaseQuotePDF

Quote for Coffee Products

Quote Number: 00000005 | Expiration Date: | Syncing: ☐ | Opportunity Name: Advanz101 10-02-2023 Old | Account Name: Advanz 101 | Grand Total: \$346.75

Approved | Rejected | Presented | Accepted | Denied | Mark Status as Complete

Related | Details

Quote Line Items (1) | Add Products | Edit Products

Product	Sales Price	Quantity	Subtotal
Americano Coffee	\$73.00	5.00	\$365.00

[View All](#)

Quote PDFs (3)

Name	Discount	Grand Total	Created By
Quote for Coffee Pr...	0.00%	\$73.00	shubham lashkan
Quote for Coffee Pr...	5.00%	\$69.35	shubham lashkan
Quote for Coffee Pr...	5.00%	\$346.75	shubham lashkan

[View All](#)

Notes & Attachments (3) | Upload Files

- Quote for Coffee Products_V3
Mar 30, 2023 • 76KB • pdf
- Quote for Coffee Products_V2
Mar 30, 2023 • 76KB • pdf
- Quote for Coffee Products_V1
Mar 30, 2023 • 75KB • pdf

[View All](#)

EaseQuotePDF Customization

Activity

Filters: All time • All activities • All types

[Refresh](#) • [Expand All](#) • [View All](#)

Upcoming & Overdue

No activities to show.
Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

11. Note that the naming convention of generated PDF is Quote Name followed with version number. As visible in below image the name of Quote is **Quote for Coffee Products**.

The screenshot shows the 'Quote for Coffee Products' details page in the EaseQuotePDF application. The quote number is 00000005, and the status is 'Approved'. The opportunity name is 'Advanz101 10-02-2023 Old' and the account name is 'Advanz 101'. The grand total is \$346.75. The 'Quote Name' field is highlighted with a red box, showing 'Quote for Coffee Products'. The 'Totals' section shows a subtotal of \$365.00 and a discount of 5.00%.

Quote Number	Expiration Date	Syncing	Opportunity Name	Account Name	Grand Total
00000005		☐	Advanz101 10-02-2023 Old	Advanz 101	\$346.75

Quote Number	Expiration Date	Syncing	Status	Description
00000005		☐	Approved	

Totals	
Subtotal	\$365.00
Discount	5.00%
Tax	
Shipping and Handling	

Hence the name of generated PDF will be **Quote for Coffee Products_VNumber**. As you can see in the image below. The latest file will be the one having the highest number and the oldest being V1.

The screenshot shows the 'Quote PDFs' section in the EaseQuotePDF application. It displays a list of 5 generated PDF files for the quote 'Quote for Coffee Products'. The files are named 'Quote for Coffee Products_V1.pdf' through 'Quote for Coffee Products_V5.pdf'. The 'Quote for Coffee Products_V1.pdf' file is highlighted with a red box. The table shows the discount, grand total, and created by for each file.

Name	Discount	Grand Total	Created By
Quote for Coffee Products_V1.pdf	0.00%	\$73.00	shubham lashkan
Quote for Coffee Products_V2.pdf	5.00%	\$69.35	shubham lashkan
Quote for Coffee Products_V3.pdf	5.00%	\$69.35	shubham lashkan
Quote for Coffee Products_V4.pdf	5.00%	\$346.75	shubham lashkan
Quote for Coffee Products_V5.pdf	5.00%	\$346.75	shubham lashkan

Other Apps by Advanz101

- **SplitEase**
Split Service Contract into multiple contracts manually to avoid large cart errors.
- **MergeEase**
Merge multiple service contract.
- **PartEase**
User can select Contract Line Items available in-Service Contract and Renew only selected Contract Line Items.
- **AutoSplit**
Split Service Contract into multiple contracts to avoid large cart errors.
- **MoveEase**
Transfer Asset from one account to another.
- **CaseAutoMail**
Transform Case Communication with CaseAutoMail.
- **AccountMerge**
Merge accounts and contacts with added functionality like smart filtering, previewing before merging and retaining critical data on merge.

Hope you find EaseQuotePDF App useful. We would love to hear about our app from you. In case of any query or further clarification please feel free to reach us at info@advanz101.com

Please keep following us as many new apps are under development. Follow us at www.advanz101.com

About Advanz101

ADVANZ101 Business Systems Inc. is a registered Salesforce partner providing best-in-class solutions for global business houses and brands. Our team is equipped to meet the SaaS demands of modern enterprises with due diligence in today's business landscape of hybrid IT.

For additional information, please feel free to connect with us at info@advanz101.com