



Ceili GoPDF

End User Manual

14.3.2023
Ceili Oy

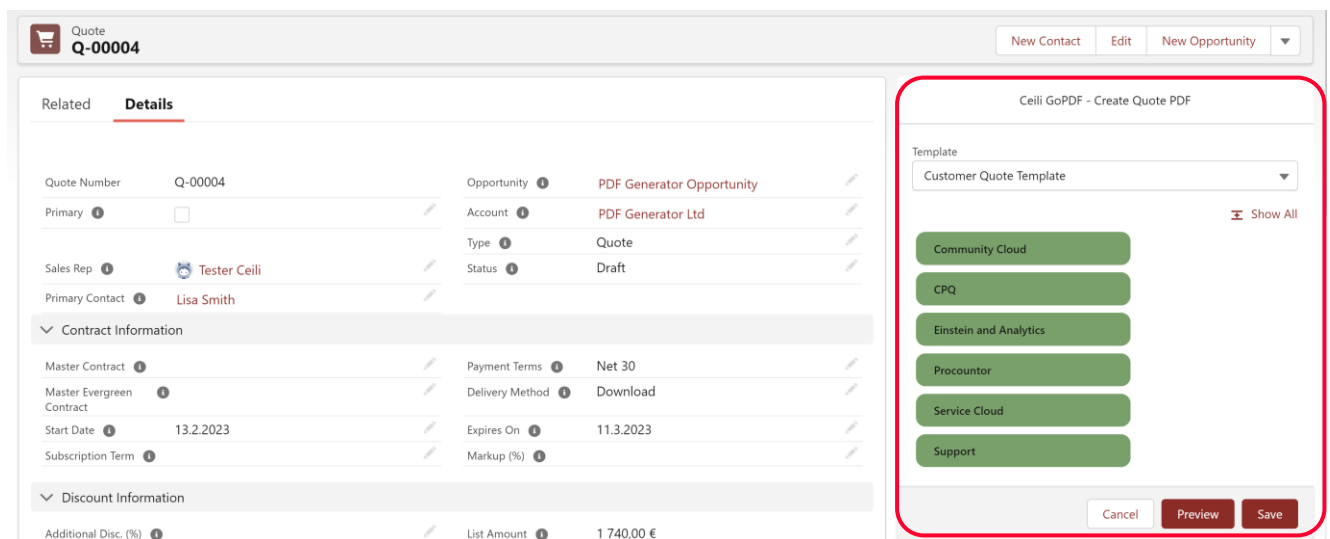
End User Manual

Description

Your organization has taken a step to use Ceili GoPDF for CPQ Generator and now it is your time to create Quote PDF. Before you can do this, your Administrator need to create Ceili GoPDF Templates for your use and assign right permissions. This manual is for 'how you create Quote PDF with Ceili GoPDF'.

How to create PDF out of Quote

1. Open Quote
 - a. You can see Ceili GoPDF generator on record page as below. This is where you start working with Ceili GoPDF

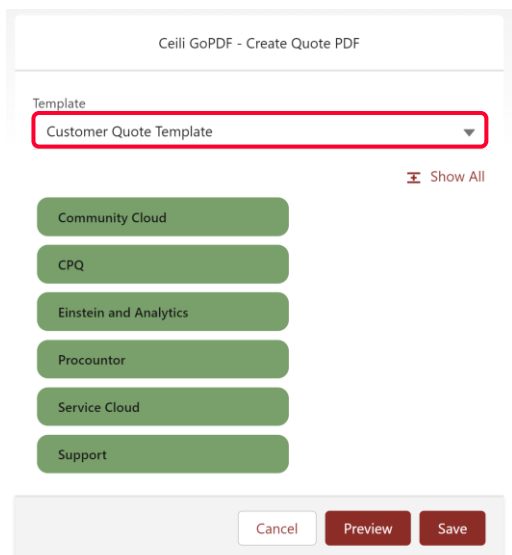


The screenshot displays the Ceili GoPDF interface. On the left, a 'Quote' record (Q-00004) is shown with details including Quote Number, Opportunity, Account, Sales Rep, Primary Contact, Contract Information, and Discount Information. On the right, a 'Ceili GoPDF - Create Quote PDF' dialog is open, showing a 'Template' dropdown menu with 'Customer Quote Template' selected. Below the dropdown, a list of templates is displayed: Community Cloud, CPQ, Einstein and Analytics, Procountor, Service Cloud, and Support. At the bottom of the dialog are 'Cancel', 'Preview', and 'Save' buttons.

Quote Q-00004		Opportunity PDF Generator Opportunity	
Quote Number	Q-00004	Opportunity	PDF Generator Opportunity
Primary	☐	Account	PDF Generator Ltd
Sales Rep	Tester Ceili	Type	Quote
Primary Contact	Lisa Smith	Status	Draft
Contract Information			
Master Contract		Payment Terms	Net 30
Master Evergreen Contract		Delivery Method	Download
Start Date	13.2.2023	Expires On	11.3.2023
Subscription Term		Markup (%)	
Discount Information			
Additional Disc. (%)		List Amount	1 740,00 €

2. Choose Quote Template

- You can see all active templates from Template Dropdown. It is your admin's job to create templates to your use. If there are any changes needed, contact your admin.



Ceili GoPDF - Create Quote PDF

Template
Customer Quote Template

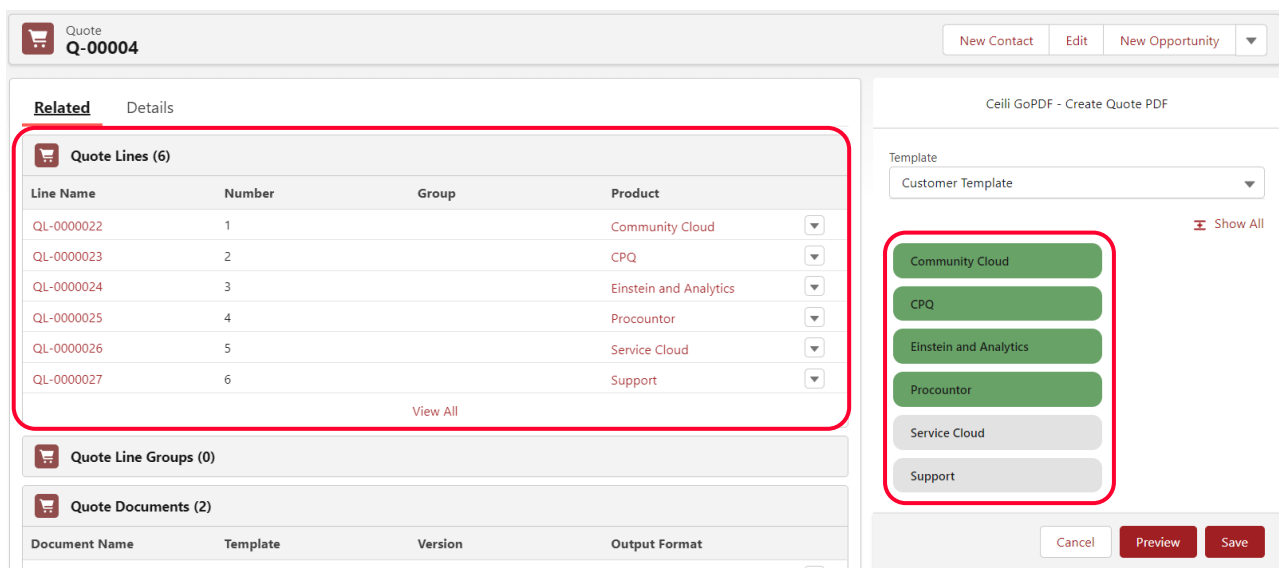
Show All

- Community Cloud
- CPQ
- Einstein and Analytics
- Procurement
- Service Cloud
- Support

Cancel Preview Save

3. Select Quote Lines

- You can see Quote Line Items below Templates. If Line Item is green, it will be included to Quote PDF. If grey, it will be excluded. You can choose this by clicking the Item from Ceili GoPDF Generator.



Quote Q-00004

New Contact Edit New Opportunity

Related Details

Quote Lines (6)

Line Name	Number	Group	Product
QL-0000022	1		Community Cloud
QL-0000023	2		CPQ
QL-0000024	3		Einstein and Analytics
QL-0000025	4		Procurement
QL-0000026	5		Service Cloud
QL-0000027	6		Support

View All

Quote Line Groups (0)

Quote Documents (2)

Document Name Template Version Output Format

Ceili GoPDF - Create Quote PDF

Template
Customer Template

Show All

- Community Cloud
- CPQ
- Einstein and Analytics
- Procurement
- Service Cloud
- Support

Cancel Preview Save

4. Preview

- Click "Preview" to see your Quote PDF before Saving. Quote PDF will open as below.
- After preview, you can go "Back", or you can click "Save" to create Quote PDF.

Ceili GoPDF - Create Quote PDF

1 / 2
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Customer Offer

RECIPIENT
Recipient Name
Recipient Street
Recipient City
Recipient Country

Recipient Contact
Recipient Title
Recipient Contact Email
Recipient Contact Phone Number

SENDER
Sender Name
Sender Street
Sender City
Sender Country

Sender Contact
Sender Title
Sender Email
Sender Phone Number

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2 (2)

Main header

Terms

This offer is for Customer.

Products

Product Name	Quantity	Unit Price	Net Total
Community Cloud	1.00	100.00	90.00
CPQ	1.00	900.00	810.00
Einstein and Analytics	1.00	50.00	45.00
Procountor	1.00	500.00	450.00
Service Cloud	1.00	60.00	54.00

Partner Information

Partner	Ceili Oy
Partner Discount	10.00

Signatures

Sender Name _____

Recipient Name _____

Footer

Cancel Back Save

5. Finish

- Now you have created Quote PDF for your Quote and you can find it from Related List "Quote Documents".

Quote Line Groups (0)

Quote Documents (1)

Document Name	Template	Version	Output Format
Q-00004 - 2023-02-10 - V1		1	PDF

View All

Additional Documents (0)

New

Notes & Attachments (1)

Upload Files

Q-00004 - 2023-02-10 - V1
10.2.2023 • 19KB • pdf

View All