

Configurable Quote Packs for Utilities and B2B Services

Build a branded quote pack from the Quote record, with grouped line items, chosen images and a library of standard paragraphs.

The situation: every quote is a little different

Energy suppliers, utilities, telecoms providers and B2B service companies quote multi-part offers: supply or service charges, equipment, installation and recurring fees, often with different tax treatments on different lines. A good quote pack groups those lines so the customer can read them, shows pictures of what is being supplied, and includes the standard paragraphs that apply to this deal and no others. Without automation, reps build that pack by copying tables from a spreadsheet, pasting paragraphs from a library document, and hoping they picked the current wording.

CloudFiles Document Generation, part of CloudFiles Document Automation for Salesforce, lets the rep assemble the whole pack from the Quote record, in a screen flow, from one Word template the business maintains itself.

How do you generate branded PDF quotes from Opportunity and Quote records?

1. The object and its data

The master record is the Quote. The template reaches:

- Quote fields, the related Opportunity and Account, and the customer contact.
- The quote line items, each with product, product family, tax type, quantity and price.
- The running user, so the pack names the rep.
- Values chosen by the rep at run time.

2. The template, built in Word with the add-in

The quote pack is one Word template built with the CloudFiles Office add-in:

- **Branding.** The logo as a picture, the company's custom fonts embedded in the template, which survive PDF conversion, and currency patterns with locale formatting.
- **Grouped line items.** A Record Collection resource on the quote line items, grouped by tax type and then by product family, with SUM for each group's subtotal. The customer sees supply charges, equipment and services in separate, totalled sections.

- **Images chosen by a field value.** Conditional sections wrap pictures, so the image of the product or service shown in the pack follows a field on the quote, such as the product family or the tariff.
- **An image uploaded at run time.** The screen flow lets the rep upload an image for this quote, such as a site photo, and the template places it in the pack.
- **A library of standard paragraphs.** Each standard paragraph, such as a warranty clause, a site access note or a payment option, is wrapped in a condition tied to a runtime variable. The rep ticks the paragraphs that apply, and only those appear. When a condition is false, the paragraph is removed with no gap.

Build, preview against a real quote, then publish.

3. The trigger

A quick action on the Quote opens a screen flow.

4. The Flow action

The screen flow shows the paragraph library as a checklist, takes the uploaded image, and collects any other runtime values the template needs. It then calls Generate Document (Sync), which returns the document, a Download URL and a Preview URL in the same flow. The last screen shows the preview, so the rep checks the pack before it goes to the customer.

5. Where the file goes

The pack is saved as a Salesforce File linked to the Quote. With CloudFiles Document Management, it can go to the account's or opportunity's folder in SharePoint, OneDrive, Google Drive, Box or Dropbox. The same template produces a PDF for the customer and a DOCX for the rare case where a rep needs to edit the Word file by hand.

What happens after the quote pack is sent?

- **Signing.** The Word template carries DocuSign Signature, Text and Date Signed form fields. Recipients come from the Quote's contact fields, typed as Signer or Carbon Copy, and the signing sequence is set in Signing Settings. The rep sends from the Doc-Gen component with Send for Signing, through the company's own DocuSign account.
- **Status.** When the envelope is completed, the signed pack comes back to the Quote, and a document-signed event lets a flow mark the quote as accepted and notify the account team.

Why the business can own this template

- The template is a Word document. Sales operations can change a paragraph, swap an image or add a product family section without code.
- Grouping and subtotals come from the template, not from formulas someone maintains on the side.
- Excel and PowerPoint templates can sit next to it: an Excel pricing schedule with fields and tables, or a PowerPoint proposal deck with fields and pictures, generated from the same Quote.

What to set up

- Install CloudFiles from AgentExchange and the CloudFiles Office add-in from Microsoft AppSource.
- Build the quote pack template: branding, grouped line-item tables, conditional images, the upload placeholder and the paragraph library.
- Preview against quotes with different product families and tax types, then publish.
- Build the screen flow with the paragraph checklist, the image upload and Generate Document (Sync), and add it as a quick action on the Quote.
- Connect DocuSign under Document Generation, Integrations, and place signature fields in the template.
- Give reps a permission set with access to the CloudFiles generation actions, since screen flows run as the user.

Each generated document uses one credit.

Get started

Install CloudFiles from AgentExchange and start a free 14-day trial, or book a demo at cloudfiles.io.