

Custom Quote Sync Setup Guide

Installation

If you are having issue while installing the app, try check “Ignore Apex test failures that may cause the installed application not to function properly” on “Step 3. Install Package.”

The installation problem could be caused by custom required fields on Opportunity, OpportunityLineItem, Quote or QuoteLineItem that the tests are not aware of. Ignoring the test failures during installation could avoid the problem but it would not affect the functionality of the app.

However, you should test the app after installed to ensure that it’s working correctly in your org, especially if there are other custom triggers on on Opportunity, OpportunityLineItem, Quote or QuoteLineItem that develop natively or installed from other package.

Problem 1

Unable to Access Page Invalid parameter value

_ZSbZSZimv5cgXu.dtGrdozxVumv3UAw.5R3ApVkfLG1EPBmEZFoivZ6PrtMI2TiQqAB0f485PV3FBHYwlmUUmhU87afCecPDS3bEMjmxaf_pLPS4qDbtAp05D.6QNzIEWoyG8_ZplxQJNPqHi4ue4tPn9VjVaQcPyUNMc2D1fjupE54T2MbFaPIO04LKUq2O ... (original length: 21774)" for parameter "error_message".

Error: The value of the parameter specified above contains a character that is not allowed or the value exceeds the maximum allowed length. Remove the character from the parameter value or reduce the value length and re-submit. If the error still persists, please report it to our Customer Support team and provide the URL of the page you were requesting as well as any other related information.

Problem 2

URL No Longer Exists

You have attempted to reach a URL that no longer exists on salesforce.com.

You may have reached this page after clicking on a direct link into the application. This direct link might be:

- A bookmark to a particular page, such as a report or view
- A link to a particular page in the Custom Links section of your Home Tab, or a Custom Link
- A link to a particular page in your email templates

If you reached this page through a bookmark, you are probably trying to access something that has moved. Please update your bookmark.

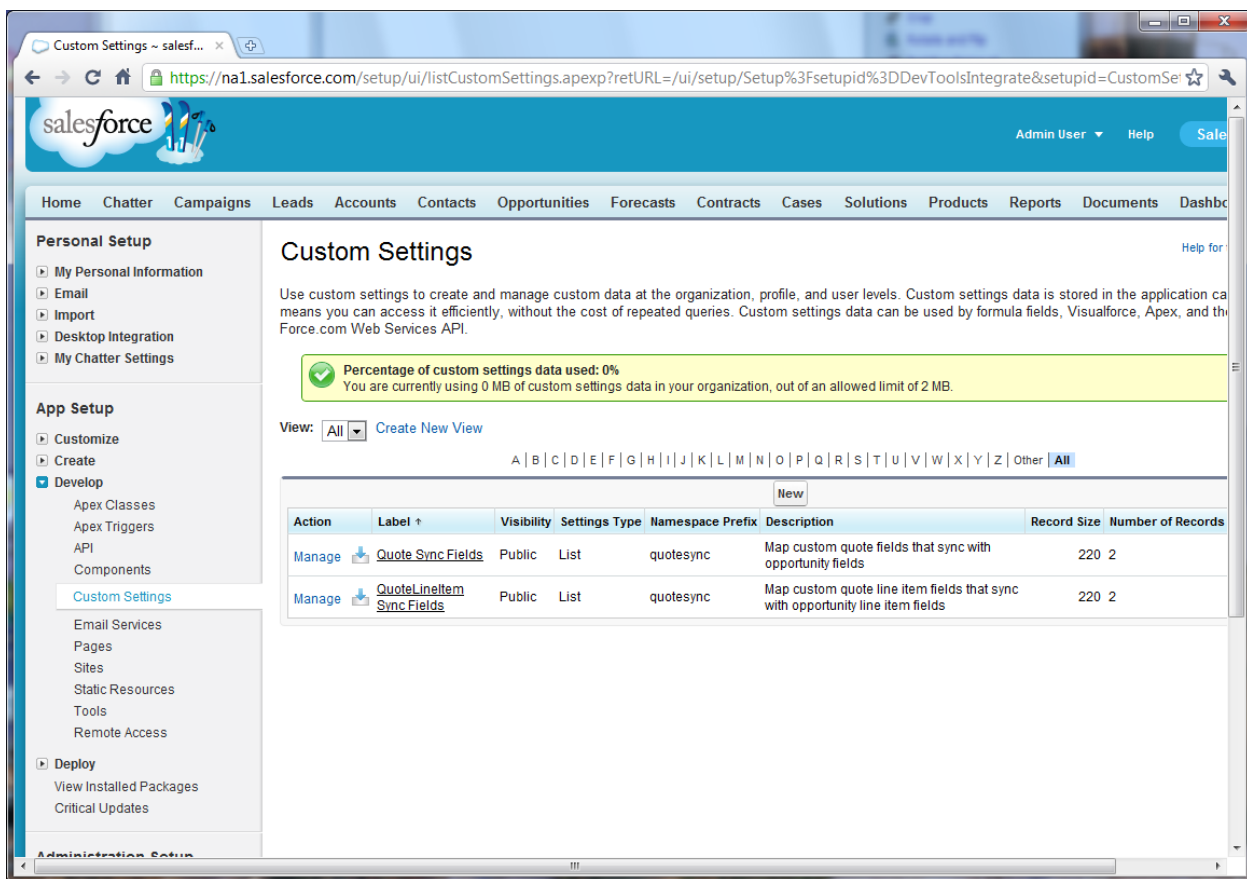
If you reached this page through any of the other direct links listed above, please notify your administrator to update the link.

If you reached this page through a link on our site, please [report the broken link directly to our Support Team](#) and we will fix it promptly. Please indicate the page you were on when you clicked the link as well as any other related information. We apologize for the inconvenience.

Thank you again for your patience and assistance. And thanks for using salesforce.com!

Setup

Configure custom fields mapping between Opportunity and Quote, and custom fields on OpportunityLineItem and QuoteLineItem thru Custom Settings. The mapped fields will be synchronized automatically similar to the standard Quote Sync process.



Custom Settings ~ salesf... x

https://na1.salesforce.com/setup/ui/listCustomSettings.apexp?retURL=/ui/setup/Setup%3Fsetupid%3DDevToolsIntegrate&setupid=CustomSe

Admin User Help Sales

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Personal Setup

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App Setup

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Administration Setup

Custom Settings

Use custom settings to create and manage custom data at the organization, profile, and user levels. Custom settings data is stored in the application cache, which means you can access it efficiently, without the cost of repeated queries. Custom settings data can be used by formula fields, Visualforce, Apex, and the Force.com Web Services API.

Percentage of custom settings data used: 0%
You are currently using 0 MB of custom settings data in your organization, out of an allowed limit of 2 MB.

View: [Create New View](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | **All**

Action	Label ↑	Visibility	Settings Type	Namespace Prefix	Description	Record Size	Number of Records
Manage	Quote Sync Fields	Public	List	quotesync	Map custom quote fields that sync with opportunity fields	220	2
Manage	QuoteLineItem Sync Fields	Public	List	quotesync	Map custom quote line item fields that sync with opportunity line item fields	220	2

NOTE: Use all lowercase character for your field mappings value. However, you don't have to rename the actual field name, because the API field name is case insensitive. E.g. use “custom_number_field__c” instead of “Custom_Number_Field__c”

1. Configure Quote custom fields mapping thru Custom Setting

- Go to Setup | Develop | Custom Settings | Quote Sync Fields | Manage | New

- Set the Name value to a Quote field, and set the Opportunity Sync Field value to the corresponding field to sync on Opportunity.

Quote Sync Fields ~ sales... x

https://na1.salesforce.com/setup/ui/editCustomSettingsData.apexp?com.salesforce.visualforce.ViewStateCSRF=0oXoZjf8PYTD3vzXR94b2wA7z

Admin User Help Save

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Administration Setup

Quote Sync Fields Edit

Provide values for the fields you created. This data is cached with the application.

Edit Quote Sync Fields Save Save & New Cancel

Quote Sync Fields Information * Required

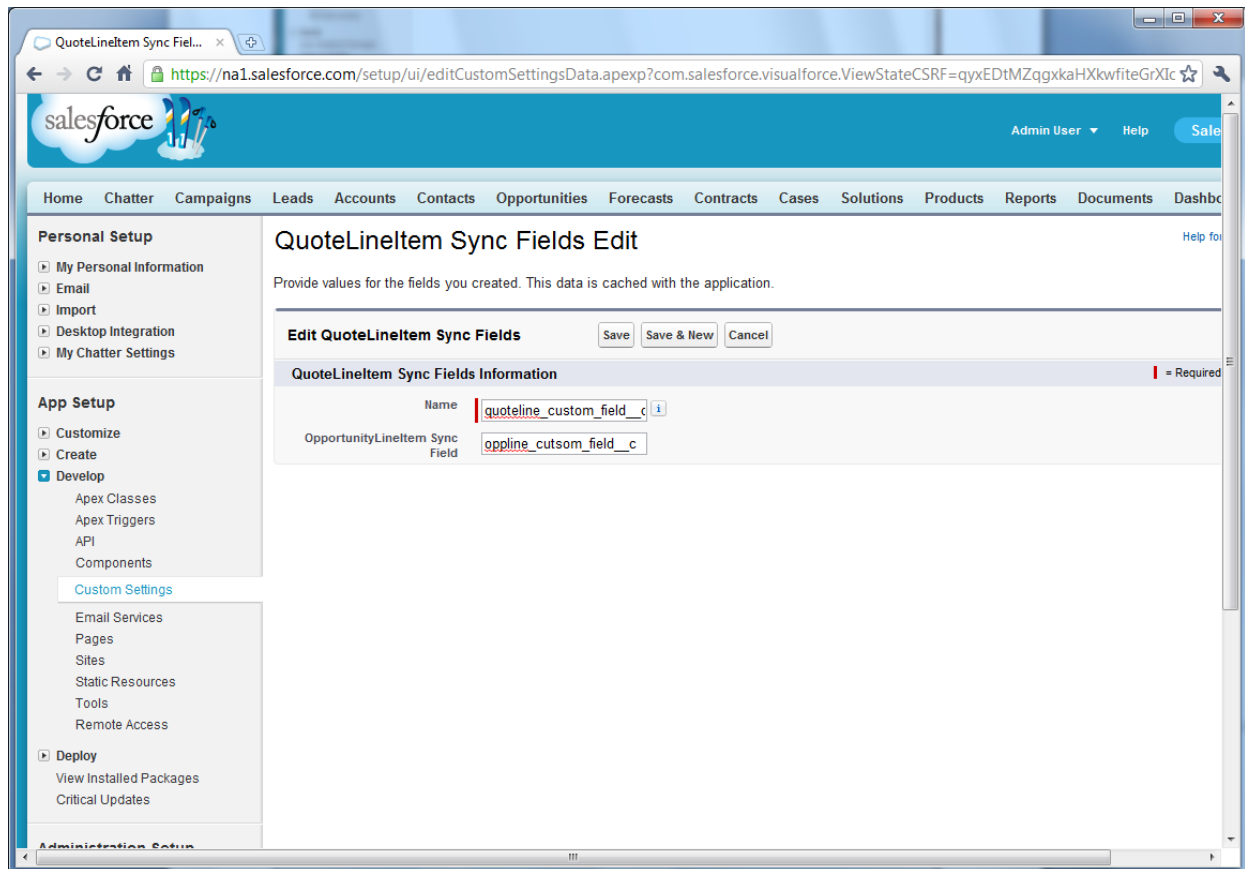
Name quote_custom_field__c

Opportunity Sync Field opp_custom_field__c

2. Configure QuoteLineItem custom fields mapping thru Custom Setting

- Go to Setup | Develop | Custom Settings | QuoteLineItem Sync Fields | Manage | New

- Set the Name value to a QuoteLineItem field, and set the OpportunityLineItem Sync Field value to the corresponding field to sync on OpportunityLineItem.



Troubleshooting

If you are getting this error while create or edit Opportunity, OpportunityLineItem, Quote or QuoteLineItem records, check your field mappings and use all lower case character for your field mappings value. (See NOTE above)

Error: Invalid Data.

Review all error messages below to correct your data.

**Apex trigger quotesync.OppSyncTrigger caused an unexpected exception, contact your administrator:
quotesync.OppSyncTrigger: execution of AfterUpdate caused by: System.NullPointerException:
Attempt to de-reference a null object: (quotesync)**