



Quote Editor Templates Management Guide

For version 2.105

Use this document to create and edit Quote Editor templates for quotes PDF documents creation.

For other documentation about Quote Editor, refer to Quote Editor page in Salesforce AppExchange:

(https://appexchange.salesforce.com/listingDetail?listingId=a0N30000001rAGOEA2)

Introduction

Balink's Quote Editor helps transform the Salesforce standard Quote into a highly effective tool for making quotations with enhanced and customizable product search and grid modules, and an advanced Quote Template, fully embedded into Salesforce Quote.

For support contact us at support@balink.net or visit our website: http://www.balink.net

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Create Template

- 1. Open "Quote Editor" App.
- 2. Open "Templates" Tab.
- 3. Click "New" button.
- 4. Customize the template as explained in the next chapter, "Edit Template".

Edit Template

Open "Templates" Tab in "Quote Editor" App, and select a template.

The template edit page contains these sections:

Quote layout

Example for a one-page quote layout:

First Page Header
Quote Preamble
Quote Line Items table
Summary
Signature
Quote Post Face
First Page Footer



Example for a two-page quote layout:

Page 1:	Page 2:
First Page Header	Page Header
Quote Preamble	Quote Line Items table
Quote Line Items table	Summary
	Signature
	Quote Post Face
First Page Footer	Page Footer

1. Template Info

Template Name, Description

Active: Allows users to select this template for quotes.

2. Preamble / Post Face

<u>Quote Preamble</u>: Text to display above the Quote Line Items table.



Fully supports HTML and CSS (Notice the "Source" button).

Use "Add Merge Fields" to Generate code for the field names and paste it in the edit box.



The quote preamble will be displayed only if the option "<u>Preamble Editable</u>" below is unchecked.

Quote Line Item Fields:

Select which fields should be displayed in the Quote's PDF document.

Quote Line tem Fields		Add all	10 items selected	Remove all
	Created Date	+ 📩	‡ Quantity	- 1
	Date	+	\$ Sales Price	-
	Deleted	+	‡ Total Price	-
	Discount	+	‡ Line Item Description	-
	Index	+	‡ Comments	-
	Last Modified Date	+	Product - Product Cost	
	List Price	+	Total Price	-
	Optional	+ -	\$ Unit Cost	-

These fields may be different than the fields displayed in the Quote Grid edit page.

Add fields by drag and drop, or by the '+', '-' links.

Use the search box to easily find fields.

<u>Summary Options</u>: Select which fields will be displayed in the summary of the quote.

Summary Options	 Show Summary Show Tax Show Global Discount Show Shipping 	
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<u>Signature</u>: Text to display under the quote table and summary, above Quote Post Face.

Add Merge Fields	Add Merge Field
Signature	E source 🖬 🗋 🐼 🛅 📽 隆 🚔 🖘 🗚 🏤 📰 🥔 💿 🔜 🔡 📑 🗕
	$ \begin{array}{c ccccccccccccccccccccccccccccccccccc$
	Thank you for your business Signature
	• Name • Business Title • Date

Fully supports HTML and CSS (Notice the "Source" button).

Use "Add Merge Fields" to Generate code for the field names and paste it the edit box.



The quote signature will be displayed only if the option "<u>Signature Editable</u>" below is unchecked.

Add Merge Fields	Add Merge Field
Quote Post Face	🗏 Source 🔒 🗆 🕼 🐇 📽 🛍 🚔 🦘 🖗 🎎 📰 🥔 🕬 👪 📰
	B <i>I</i> <u>U</u> ↔ X ₂ X ² ≟ ⊟ ∉ ₩ ₩ ≡ ≡ ≡ 8 ♣ ♠ № ⊠ ≡ Ω ∉
	Styles 💌 Format 💌 Font 🔍 Size 🔍 🗛 🛪 🚇 🖏 💽
	Terms and Conditions
	PLEASE REVIEW THESE TERMS AND CONDITIONS (THIS "AGREEMENT") CAREFULLY AS IT CONSTITUTES A LEGAL AGREEMENT BETWI "CUSTOMER") AND Balink CORPORATION ("Balink"). BY PURCHASING, DOWNLOADING, INSTALLING, OR OTHERWISE USING Balink FOR "APPLICATION"), YOU HEREBY AGREE TO BE BOUND BY EACH OF THE TERMS AND CONDITIONS SET FORTH HEREIN. IF YOU DO NOT # TERM OR CONDITION, YOU MAY NOT PURCHASE, DOWNLOAD, INSTALL, COPY OR OTHERWISE USE THE APPLICATION.
	1. USE OF APPLICATION WITH THE SERVICE. The Application provides the Customer with an interface between Customer's Salesforce a and services. In order to use the Application, Customer must subscribe for, and maintain in good standing, an Balink customer account (th Accordingly, Customer's use of the Application is, and shall be, subject to the terms and conditions set forth in Balink's end user services www.balink.net (the "EUSA"), which is incorporated herein by reference and which hereby is accepted by Customer. For purposes here "Service" set forth in Section 1 of the EUSA shall be amended to include the Application to the extent applicable (as determined by Balink is the service).
	li li

<u>Quote Post Face</u>: Text to display at the end of the quote (Above page footer).

Fully supports HTML and CSS (Notice the "Source" button).

Use "Add Merge Fields" to Generates code for the field names and paste it the edit box.

The quote post face will be displayed only if the option "<u>Post Face Editable</u>" below is unchecked.

3. Options

▼ Options		
Print Options	Page break after Header Page break before Footer	
Template Options	 Preamble Editable Signature Editable Postface Editable 	

Page break after Header, Page break before Footer.

<u>Preamble Editable</u>: Defines whether to use the template's preamble, or edit each quote preamble in "Print Setup" page.

<u>Signature Editable</u>: Defines whether to use the template's signature, or edit each quote signature in "Print Setup" page.



<u>Post Face Editable</u>: Defines whether to use the template post face, or edit each quote post face in "Print Setup" page.

4. Header / Footer

First Page Header, Page Header, First Page Footer, Page Footer:

Can be used to display company logo, company contact details etc.



Text to display in the header of footer of the pages.

Fully supports HTML and CSS (Notice the "Source" button).

Use "Add Merge Fields" to Generates code for the field names and paste it the edit box.

5. CSS

Paste in a CSS code, to change the look of the Quote components in the PDF document.



An example can be seen in the Basic Template that is included in Quote Editor package.



CSS Class Names:

Custom	1 CSS Prea	mble					
 .intro_ .heade .heade .heade .heade 	 .intro_height span.quote-to .header span.label .header span.value .header .quote-expires 		ote To: Nam2 First Na Billing S Billing P Billing P is quote expires on 8	is quote with ever	ry shipment in orde		
1 Photo	Matwacturer	Product Name	Sales Price	Quantity	Subtotal	Discount	Total Price
© []	Samuung	Galaxy S3 3	640,00 €	1.00	640.00 €	0.00%	640.00 €
Custor	m CSS Tabl	le	420.00 %	4	42000 €	5 w 9	action €1 660.00
1 table	eresult thisection	n	Sales Price	Quantity	Subtotal	Discount	Total Price
3 table	td.quoteLineIte	emCell	100 000.00 €	4.00	400 000,00 €	0.00%	400 000,00 €
4 table5 table	.result tr td.tota td.total .label_	totalSection	5,00 €	4.00	20.00 €	0.00%	20,00 €
6 table	td.total .value_	totalSection	20 000 00 2	45.00	1 120 000,00 €	Total Sector	rs €1,187,520.00





https://appexchange.salesforce.com/servlet/servlet.FileDownload?file=00P3000000FBCvJEAX

Set Default Template

- 1. Open "QE Settings" Tab in "Quote Editor" App.
- 2. In the "Quote Product Calibration" section, select default template and save.
- 3. Refer to Customization Guide in Quote Editor page in Salesforce AppExchange, for more information.



Examples of Templates CSS code

• Basic Template

ba	link Mode in cloud								
Gadgets									
Product Name	Product Description	Quantity	Sales Price	Total Price	Line Item Description	Comments	Product Cost	Total Price	Unit Cost
GenWatt Gasoline 300kW		1.00	\$35,000.00	\$35,000.00				\$35,000.00	
Installation: Portable		1.00	\$5,000.00	\$5,000.00				\$5,000.00	
								Total Section	\$40,909.00
						Total Price	\$40,000	0.00	
					G	ilobal Discount (%	0.00%		
						Total Quote	\$40,000	0.00	
						Sales Tai	\$0.00		
					Ship	oping and Handling	\$0.00		
						Grand Tota	\$40,000	0.00	
				www.bai	ink.net				

CSS code:

```
table.result th.section { Background:#dddddd !important; color:#444444 !important;}table.result th {
background:#fff !important; border-bottom:1px #ddd solid !important; color:#545454 !important;}
 table.result { table-layout:auto !important;} table.result tr td { vertical-align:top !important;}
 .odd {
                 background:#fff !important;
                                                 } /* Row color */
                                                                          .even {
                                                                                          background:#fff
!important;
                 } /* Row color */
                                         .intro_height span.quote-to { background:#fff !important;font-
                         .second-page p { border:1px #ccc solid !important; margin:5pt 2pt !important;
size:10pt !important;}
padding:7pt !important;} h3.terms { margin:0 !important;} .total-all td { padding:2px 0 !important;}
 .signature ul li {
                         font-size:10pt; border-bottom: 1px #999 solid; width: 200pt;
                                                                                          padding: 4pt 0
4pt 0;} .total-all td.summaryLabel { padding-right: 10pt !important;} .header_page { border:1px solid
#eee !important; background-color:#eee; color:#999; text-align:center; width:90pt;margin: 0 auto;/*line-
height: 12pt;*/} .first_footer { }
                                         .footer { }
```



• Ocean Template

1				1	our company Na
					330 University Ave Toronto
150 429 50					
Gadgets					
Product Name	Sales Price	Quantity	Subtotal	Discount	Total Price
GenWatt Gasoline 900kW	\$35,000.00	1.00	\$35,000.00	0.00%	\$35,000.00
nstallation: Portable	\$5,000.00	1,00	\$5,000.00	0.00%	\$5,000.00
				Yotat	Section \$40,000.00
			Total Price	00	\$40,000.0
			Global Discount (1	6)	0.00
			Total Quo	le i	\$40,000.0
			Sales Ta	ак	\$0.0
			Grand Tol	last	\$40,000.0
			Th	ank you for y	your busines

CSS code:





```
table.result td {
 font-weight:normal !important; }
.odd {
background:#ced0d5!important; color:#555555!important;
} /* Row color */
.even {
background:#dbdbdb!important; color:#555555!important;
} /* Row color */
table.result tr td.total {
background:#8a8ea8 !important;
} /* Table Total Title */
.total-all {
line-height: 16px !important
} /* SUMMARY */
table. total-all td.summaryLabel {
background:#d6d6d6 !important; padding-top:2px;
}/* SUMMARY Label*/
.total-all td.summaryLabel { border-bottom:1px #fff solid; background:#eee; }
                                               }
.total-all td.summaryValue { text-align:right
.grandTotal { color:#060;font-weight:bold }
@page {
 @bottom-right {
         content: "Page " counter(page); font-weight:normal; font-size:9pt; font-family:arial, sans-
serif; }
}
```

• Landscape Template

Com Guotas	npany name on example							
Gadgets								
Comments	Discount	List Price	List Price	Product Name	Photo		Quantity	Total Price
	0.00%	\$35,000.00	\$35,000.00	GenWatt Gasoline 300kW	E Star		1.00	\$35,000.00
	0.00%	\$5,000:00	\$5,000.00	Installation: Portable	9		1.00	\$5,000.00
							Total S	ection \$40,000.00
						Total Price	\$40,000.00	
						Global Discount (%)	0.00%	
						Total Quote	\$40,000.00	
						Sales Tax	\$0.00	
						Grand Total	\$40,000.00	
							Comp	any name footer



CSS code:

```
.summaryTable table.result {
 width:720pt !important;
 max-width:720pt !important;
}
.firstdiv {
 max-width:720pt !important;
 width:720pt !important;
margin-left:-10px !important;
}
.summaryTable {
}
.header_page {
margin-bottom:20px !important;
}
@page {
size: letter landscape !important;
}
.intro_height {
}
.footer_center {
 margin-left:-35pt!important;
}
.intro_height span.quote-to, .intro_height quote-expires, .intro_height p {
 padding-left:4px;
}
table.summaryTable, table.result {
 margin-top:20px;
}
.second-page { margin-top:20px !important;}
```

