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QuoteEditor
Transforming Salesforce Quotes

Installation
Guide

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

Content

Create Template

1. Open "Quote Editor" App.

2. Open "Templates" Tab.

3. Click "New" button.

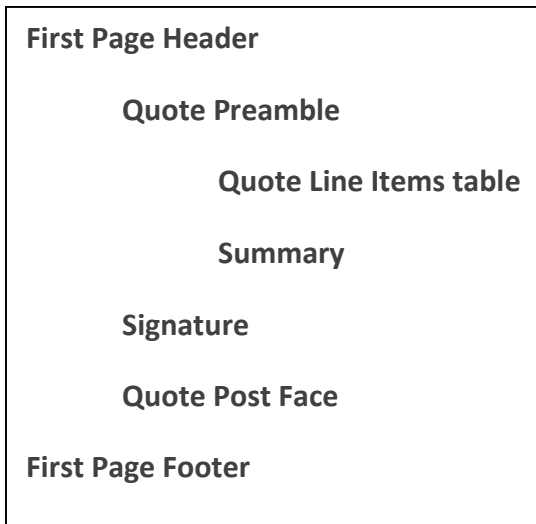4. Customize the template as explained in the next chapter, "Edit Template".

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:

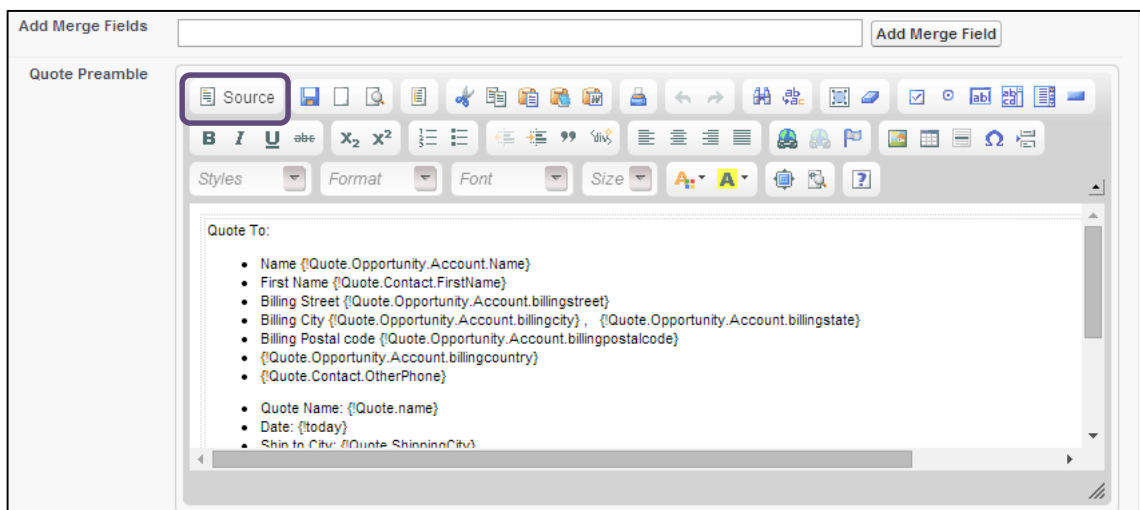| Page 1:	Page 2:
First Page Header	**Page Header**
Quote Preamble	**Quote Line Items table**
Quote Line Items table	**Summary**
	Signature
	Quote Post Face
First Page Footer	**Page Footer**

1. Template Info

Template Name, Description

Active: Allows users to select this template for quotes.

2. Preamble / Post Face

Quote Preamble: 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 "Preamble Editable" below is unchecked.

Quote Line Item Fields:

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

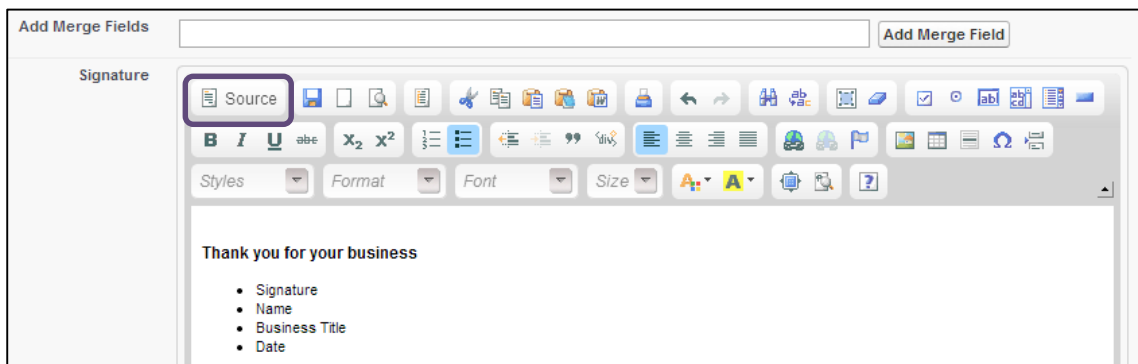These fields may be different than the fields displayed in the Quote Grid edit page.

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

Use the search box to easily find fields.

Summary Options: Select which fields will be displayed in the summary of the quote.

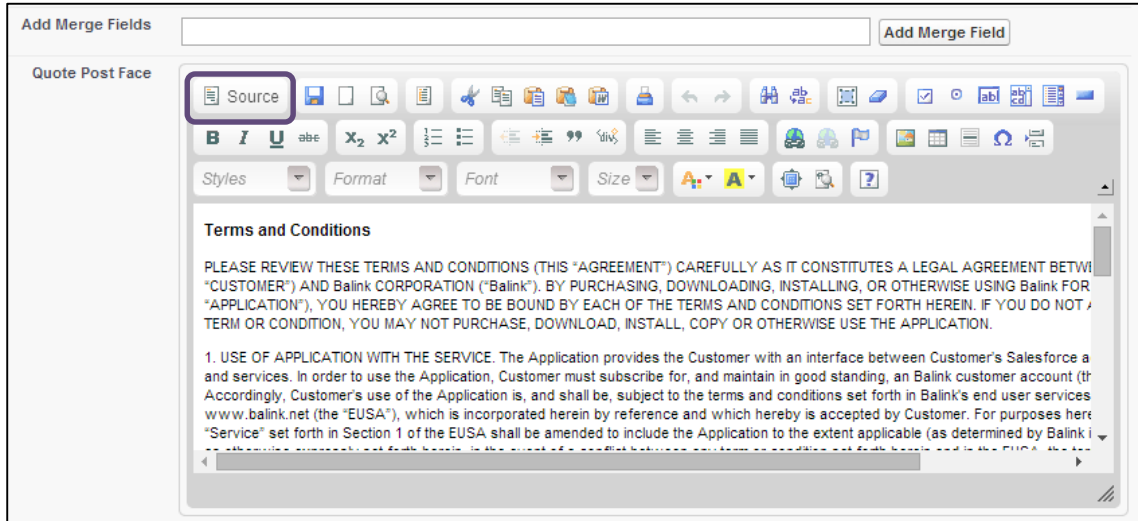Signature: Text to display under the quote table and summary, above Quote Post Face.

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 "Signature Editable" below is unchecked.

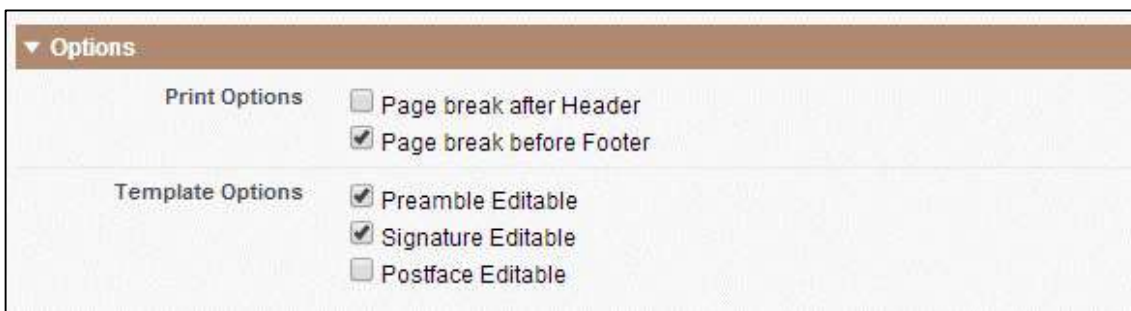Quote Post Face: Text to display at the end of the quote (Above page footer).

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 "Post Face Editable" below is unchecked.

3. Options

Page break after Header, Page break before Footer.

Preamble Editable: Defines whether to use the template's preamble, or edit each quote preamble in "Print Setup" page.
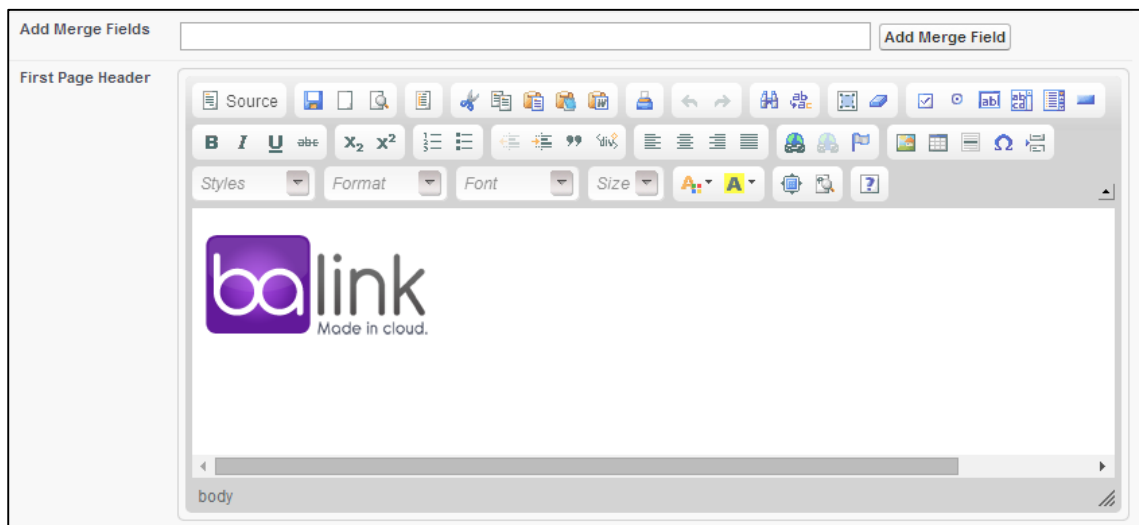
Signature Editable: Defines whether to use the template's signature, or edit each quote signature in "Print Setup" page.

Post Face Editable: 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.
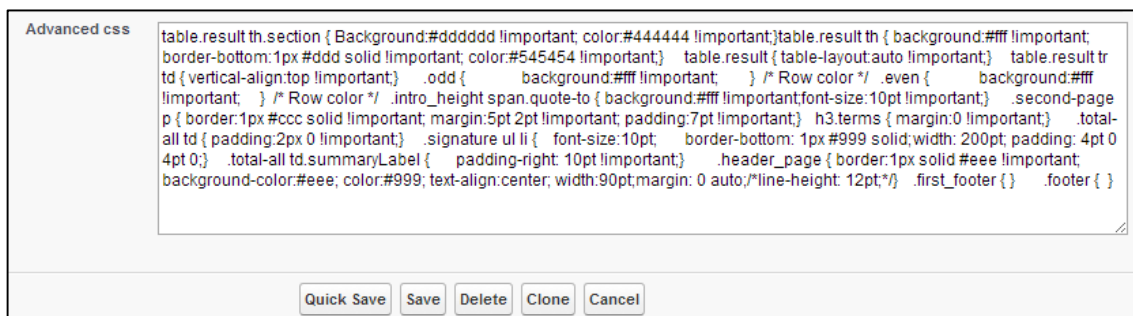

Text to display in the header of footer of the pages.

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 *CSS* Preamble

1. .intro_height span.quote-to
2. .header span.label
3. .header span.value
4. .header .quote-expires

Your Company name

Quote To:

Name   Balin
First Name
Billing Street   4 New York Plaza
Billing City   New York , NY
Billing Postal code   10004

This quote expires on 8/31/2012, **please include a copy of this quote** with every shipment in order

Photo	Manufacturer	Product Name	Sales Price	Quantity	Subtotal	Discount	Total Price
📱	Samsung	Galaxy S3	640.00 €	1.00	640,00 €	0.00%	640,00 €
📱	Samsung	Galaxy S2	420.00 €	1.00	420,00 €	0.00%	420,00 €
							tal Section €1 ′90.00

Custom *CSS* Table

1. table.result th.section
2. table th.fieldLabelCell
3. table td.quoteLineItemCell
4. table.result tr td.total
5. table td.total .label_totalSection
6. table td.total .value_totalSection

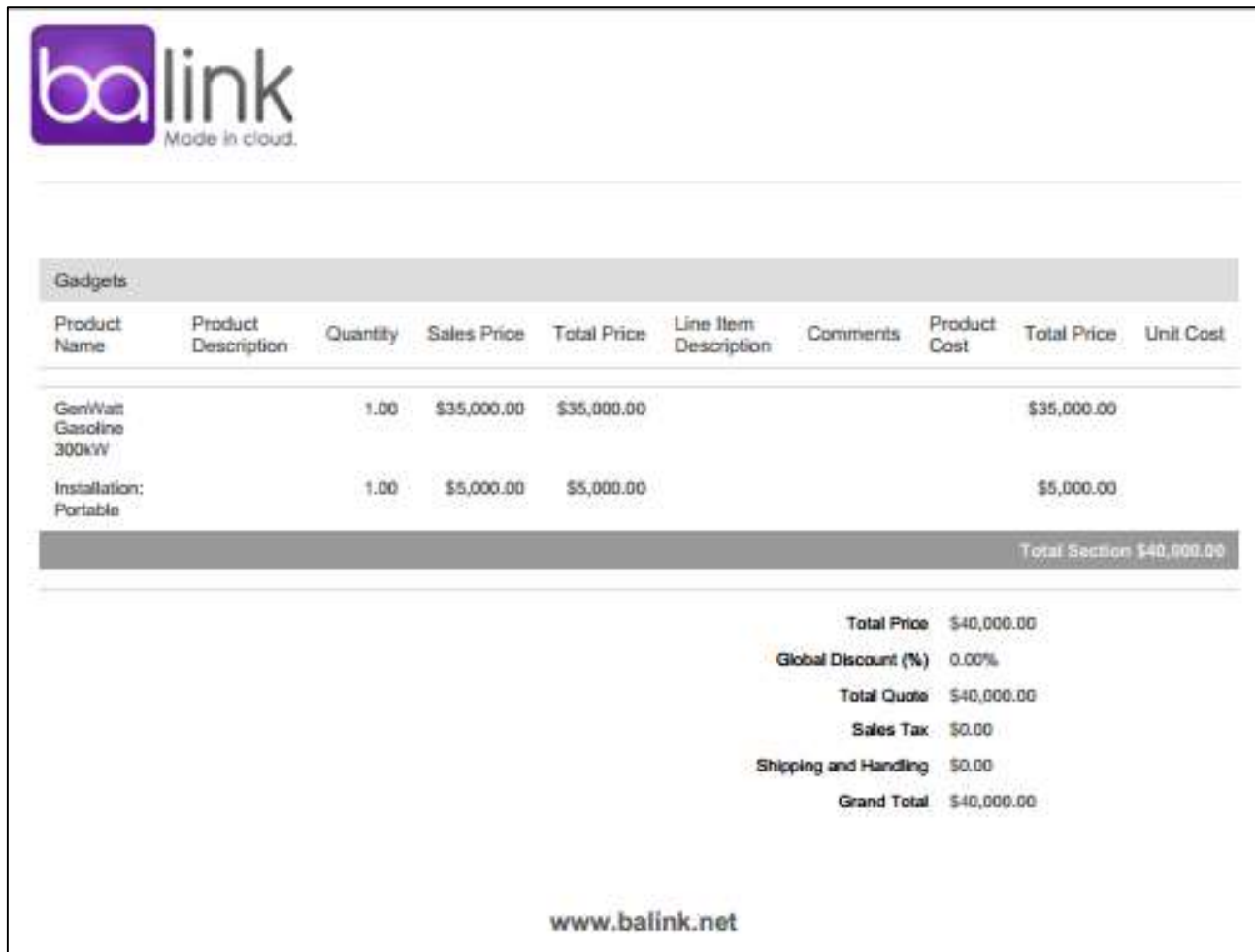| Sales Price	Quantity	Subtotal	Discount	Total Price
100 000,00 €	4.00	400 000,00 €	0.00%	400 000,00 €
5,00 €	4.00	20,00 €	0.00%	20,00 €
25 000,00 €	45.00	1 125 000,00 €	30.00%	787 500,00 €
			Total Section €1,187,520.00	

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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

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-
size:10pt !important;}     .second-page p { border:1px #ccc solid !important; margin:5pt 2pt !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

CSS code:

```
.header {
  background:url(https://www.dropbox.com/s/pv8cwi7krbmgneh/company-name.jpg?dl=1) scroll no-repeat 0 0px;
  height: 100px;   margin:20px 0;   width: 320pt;float:left !important;        }
/**** Inner Table Style *****/
table.result th.section {
  background:#8a8ea8 !important;
} /* Section Title */
table.result th {
  background:#adb0c6!important;    color:#fff !important;   font-weight:bold !important;
} /* Label Section Title */
```

```
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

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;}
```