



## Customization Guide for Quote Editor

For Quote Editor 2.105

Use this document to configure Quote Editor for Salesforce.

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](mailto:support@balink.net) or visit our website: <http://www.balink.net>

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#### Customization Guide for Quote Editor

*Introduction*

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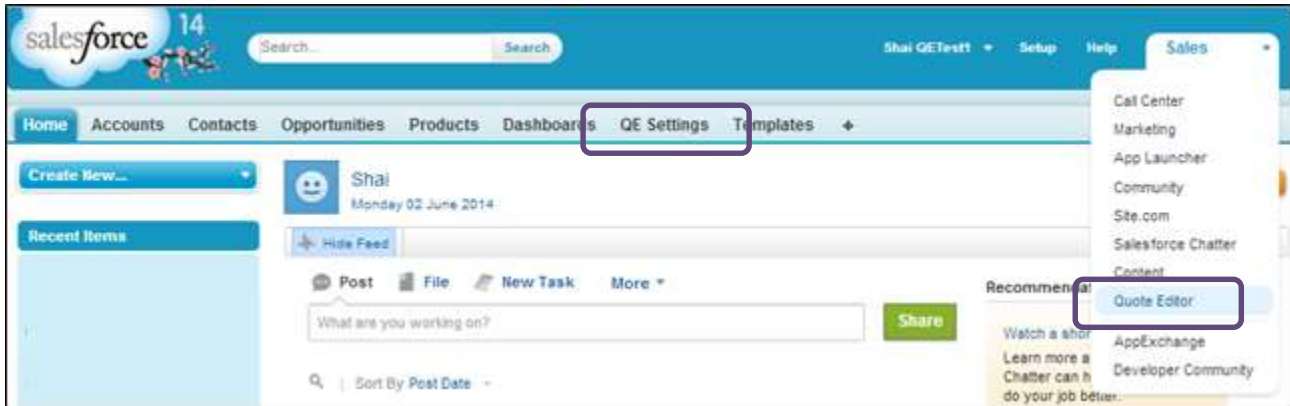
*Customization (Settings)*

1. Product Search & Selection
2. Opportunity Product Calibration
3. Quote Product Calibration
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## Customization (Settings)

You can customize Quote Editor using QE Settings tab.

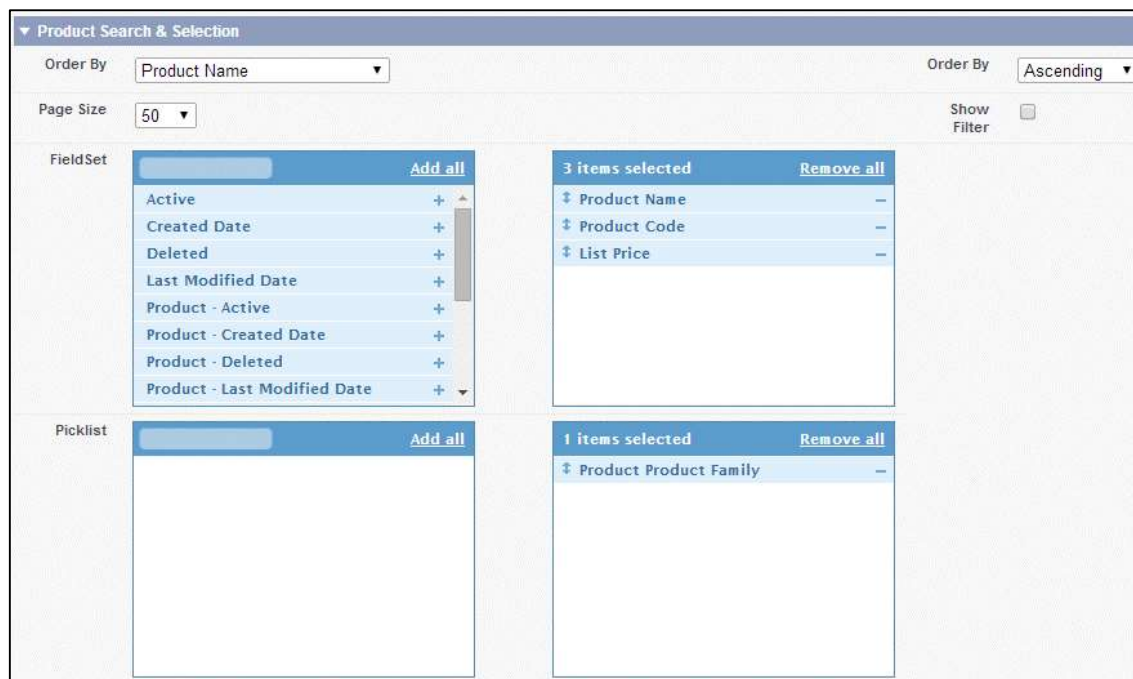
To open QE Settings page, open the app "Quote Editor", and open the tab "QE Settings".



The settings page contains these sections:

### 1. Product Search & Selection

This section contains settings of the Product Selection page, which is used to add products (line items) to a quote.



- Page size: Maximum number of products in page.

- **FieldSet**: Fields that will be shown in the products list.
- **PickList**: PickList Fields in the search area, at the top of the page.
- **Show Filter**: Displays criteria fields in the search area (Field, Operator and Value).

An example for Product Selection page after customization:

The screenshot shows the 'Product Selection' page. At the top, there's a search bar with a 'Select' button and a 'Cancel' button. Below the search bar, there's a section titled 'Find Products [17]'. This section contains a 'By Keyword' search bar, a 'Product Family' dropdown menu (labeled 'PickList'), and a 'Field' dropdown menu (labeled 'Filter'). To the right of the 'Field' dropdown is an 'Operator' dropdown menu. Further right is a 'Value' input field. Below these fields are 'More filters>>' and 'Clear filters' links. A 'Search' button is located below the 'By Keyword' search bar. Below the search filters, there's a table with the following columns: 'Product Name', 'Product Code', 'List Price', 'Product Family', and 'Product Description'. The table is labeled 'FieldSet' in the top right corner. The table contains three rows of data: 'GenWatt Diesel 1000kW', 'GenWatt Diesel 10kW', and 'GenWatt Diesel 200kW'. Each row has a checkbox in the 'Product Name' column. The table is paginated with 'Previous Page (1-17) Next Page' links.

## 2. Opportunity Product Calibration

This section contains settings of the Opportunity Products Grid, and is relevant only if you had override Opportunity Products buttons, as explained in the installation guide.

The screenshot shows the 'Opportunity Product Calibration' settings page. At the top, there's a section titled 'Opportunity Product Calibration'. Below this, there's a checkbox labeled 'Use Standard Grid (after product selection)'. Below the checkbox, there's a 'Product Grid' section. This section contains two columns of fields. The left column is titled 'Add all' and contains a list of fields: 'Created Date', 'Deleted', 'Last Modified Date', 'List Price', 'Price Book Entry - Active', 'Price Book Entry - Created Date', 'Price Book Entry - Deleted', and 'Price Book Entry - Last Modified Date'. The right column is titled 'Remove all' and contains a list of fields: 'Price Book Entry - Product Name', 'Line Description', 'Quantity', 'Sales Price', 'Date', and 'Product - Last Modified Date'. Each field in the right column has a checkbox and a minus sign next to it.

Use Standard Grid: After selecting products to add to the opportunity, the Product Selection page will redirect the user to the standard "Edit All" page, instead of Quote Editor's Product Grid page.

Product Grid: Select which fields will be displayed in the Opportunity Products Grid (including your custom fields).

### 3. Quote Product Calibration

This section contains settings of the Quote Line Items Grid page, which is used to edit sections and Products (Quote Line Items) in a quote.

**Quote Product Calibration**

Default Section Name:

Default Template:

Use Standard Grid (after product selection): ☒

View Tax as %: ☒ Default:

**Quote Grid**

| Quote Grid            | Add all | 5 items selected                | Remove all                          |
|-----------------------|---------|---------------------------------|-------------------------------------|
| Created Date          | +       | Price Book Entry - Product Name |                                     |
| Date                  | +       | Comments                        | <input type="checkbox"/>            |
| Deleted               | +       | Quantity                        |                                     |
| Index                 | +       | Sales Price                     | <input checked="" type="checkbox"/> |
| Last Modified Date    | +       | Discount                        | <input checked="" type="checkbox"/> |
| Line Item Description | +       |                                 |                                     |
| List Price            | +       |                                 |                                     |
| Optional              | +       |                                 |                                     |

JS File URL:

Use Section Header: ☒

Use Section Footer: ☒

**Tips:**

- Check the Checkboxes (where available) to set fields as INPUT fields instead of OUTPUT fields.
- Reorder the fields' appearance by dragging.
- Aggregate fields for each row will always appear in the right hand side of the grid and are **not** listed here.
- Maximum number of selected fields: 20.

- Default Section Name: default name for new section that will be created by adding new Line Items.
- Default Template: Will be used for creating PDF for quotes. It is recommended to use this setting.
- Use Standard Grid: After selecting products to add to the quote, the Product Selection page will redirect the user to the standard "Edit All" page, instead of Quote Editor's Quote Line Items Grid page.
- View Tax as %: View and edit the tax rate by percentage instead of a fixed number.

You can also set a default tax rate. This option is enabled only for percentage rate.

- Quote Grid: Fields that will be shown in the Quote Grid.

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

Check the fields that should be editable.

- JS File URL: URL of external JavaScript file that will be embedded in the page.
- Use Section Header/Footer: Allow the user to enter header or footer text for each section in the quote. This text will be displayed also in the quote's PDF document.

An example for Quote Line Items Grid page after customization:

| Section <b>Default Section Name</b>                                                       |                                 |          |          |             |          |                       |
|-------------------------------------------------------------------------------------------|---------------------------------|----------|----------|-------------|----------|-----------------------|
| Section                                                                                   |                                 |          |          |             |          |                       |
| Section Header: This text will be shown in the head of this section <b>Section Header</b> |                                 |          |          |             |          |                       |
| Action                                                                                    | Product Name                    | Comments | Quantity | Sales Price | Discount | Total Price           |
| <input type="checkbox"/> <input type="checkbox"/>                                         | Installation: Industrial - High |          | 5.00     | 85,000.00   | 0.00     | \$425,000.00          |
| <input type="checkbox"/> <input type="checkbox"/>                                         | GenWatt Diesel 200kW            |          | 40.00    | 25,000.00   | 0.00     | \$1,000,000.00        |
| <input type="checkbox"/> <input type="checkbox"/>                                         | GenWatt Diesel 200kW            |          | 2.00     | 25,000.00   | 0.00     | \$50,000.00           |
| <b>Total Section</b>                                                                      |                                 |          |          |             |          | <b>\$1,475,000.00</b> |

| Summary                                                                                                                                                                                                                                                                                                                                                      |  | Gross Margin                                                                            |  |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|-----------------------------------------------------------------------------------------|--|
| <div>Price</div> <div>Total Price \$1,500,000.00</div> <div>Global Discount (%) <input type="text"/> Global Discount (\$) <input type="text"/></div> <div>Total Quote \$1,500,000.00</div> <div>Tax <input type="text"/> Tax % <input type="text"/></div> <div>Shipping and Handling <input type="text"/></div> <div>Grand Total <b>\$1,502,560.00</b></div> |  | <div>Additional Expenses <input type="text"/></div> <div>Gross Margin <b>%100</b></div> |  |

## 4. Create PDF Options

This section contains settings of the PDF creation page:



The screenshot shows a configuration panel titled "Create PDF Options". It contains two main settings: "Add Custom Button" with a checkbox, and "Custom Button Label" with a text input field. Below these, there is a "Custom Button URL" with a text input field. At the bottom of the panel are three buttons: "Quick Save", "Save", and "Cancel".

- Add Custom Button: You can add a custom button to the page header (in addition to the buttons: "Save", "Save & Email" and "Cancel"). Choose label for the button, and fill the page address. For example: "myPage".

When the user will press this button, he will be redirected to:

<https://someserver.visual.force.com/apex/mypage?id=<QuoteId>>