



Installation Guide for Quote Editor for Salesforce Professional Edition

For Quote Editor 2.105.

Use this document to install Quote Editor in Salesforce Professional Edition.

For other Salesforce Editions (such as Enterprise edition) and for other documentation about Quote Editor, refer to Quote Editor page in Salesforce AppExchange:

<https://appexchange.salesforce.com/listingDetail?listingId=a0N30000001rAGOE2>

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

Installation Guide for Quote Editor for Salesforce Professional Edition

Introduction

Content

Installation

1. Install Package
2. Set Quote Page Layout
3. Set Quote Line Item Page Layout
4. Override Quote Line Items buttons
5. Override Opportunity Products buttons (Optional)
6. Customizing quote Editor

Installation

1. Install Package

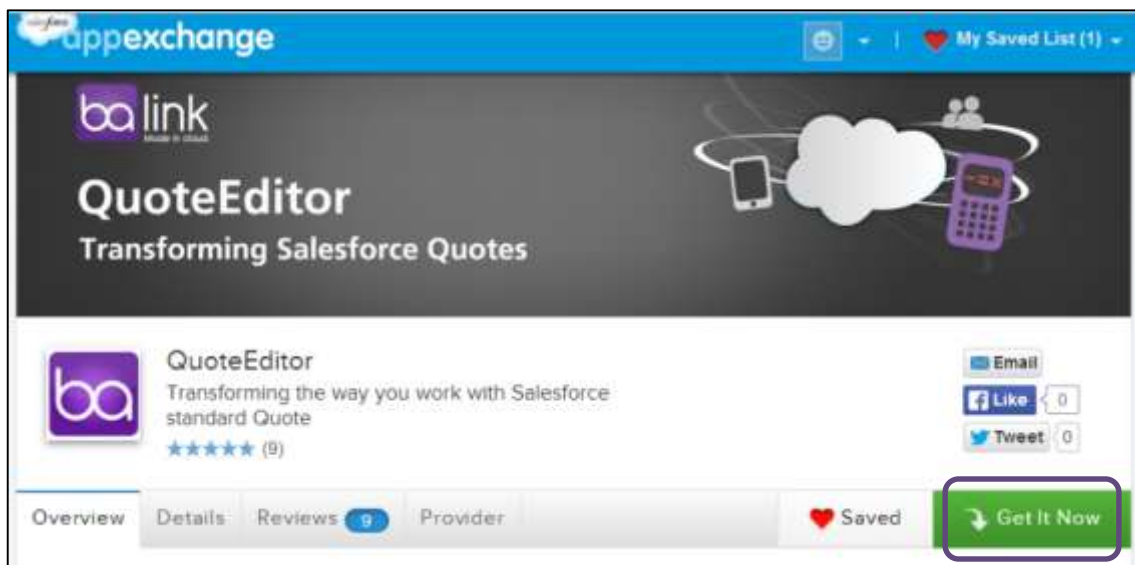
1.1 Make sure Quotes are enabled in your Org.

1.1.1 If not, go to page: Setup -> Customize -> Quotes -> Settings

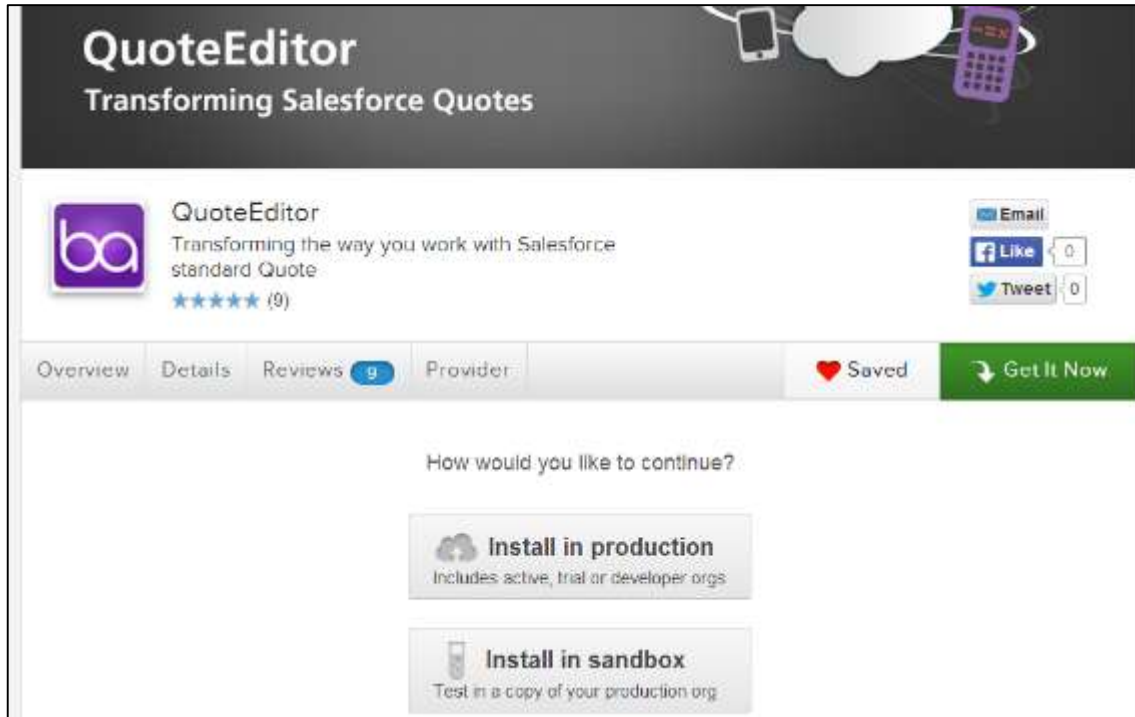
1.1.2 Check "Enable Quotes" and save.

1.2 Go to Quote Editor page in Salesforce AppExchange and click "Get it now".

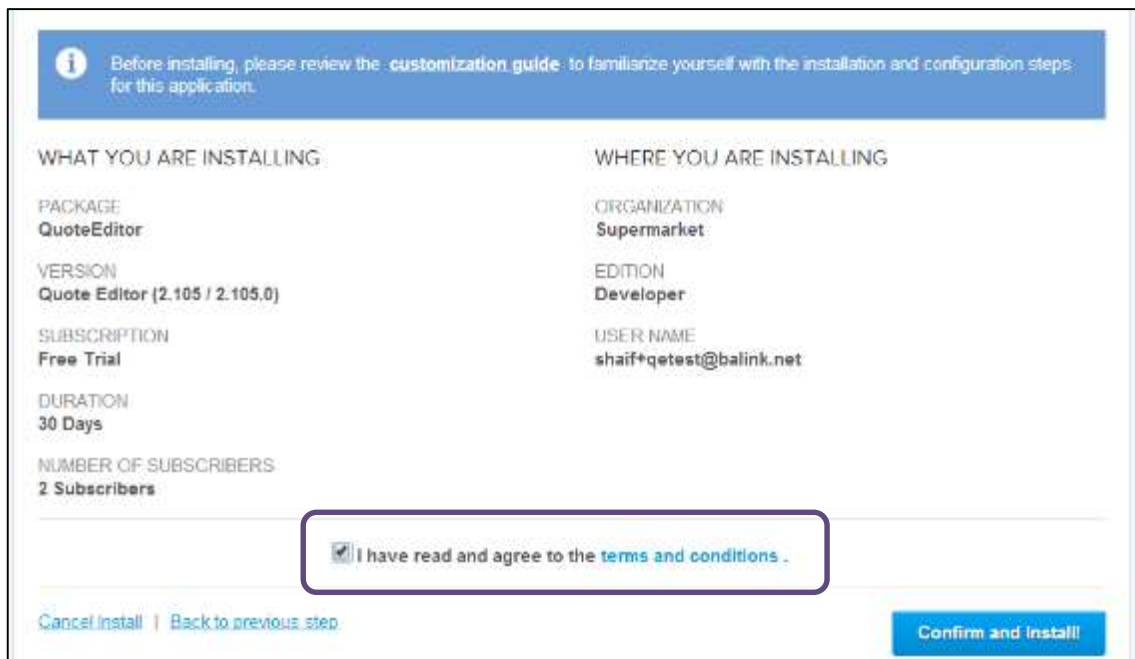
<https://appexchange.salesforce.com/listingDetail?listingId=a0N30000001rAGOE2>



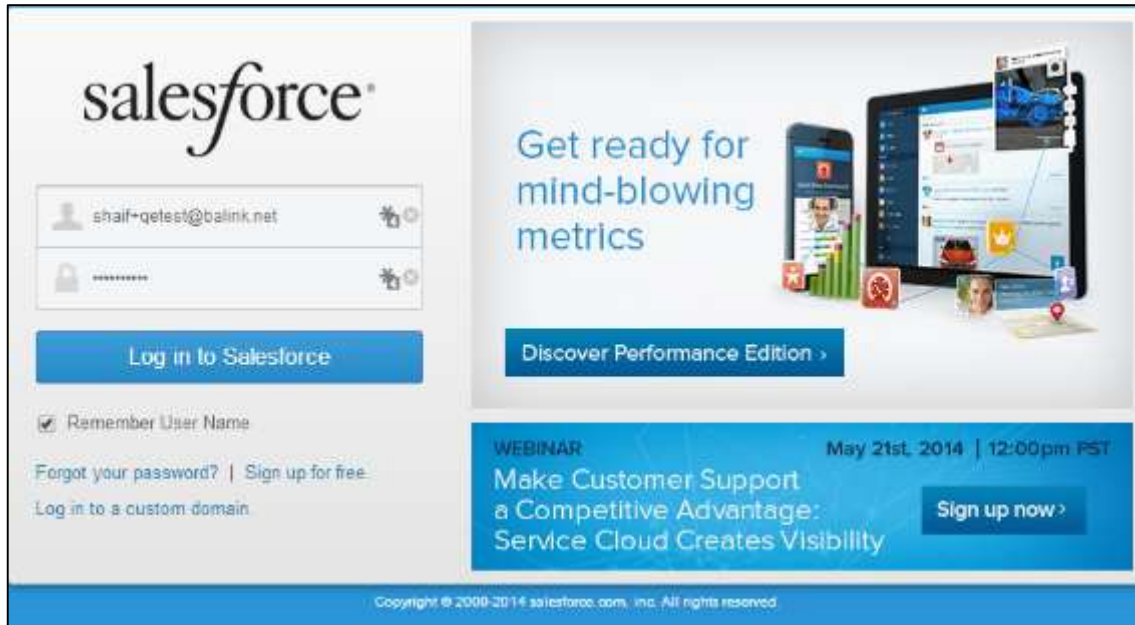
1.3 Select whether to install Quote Editor on production org or on sandbox.



1.4 Check "I have read and agree to the terms and conditions" checkbox, and click "Confirm and install".



1.5 You will be redirected to Salesforce login page. Login to your organization and click "Continue".



1.6 Click Continue.

Package Installation Details [Help for this Page ?](#)

Package Name	Quote Editor
Version Name	2.105
Version Number	2.105
Publisher	BALINK
Description	

[Continue](#) [Cancel](#)

Package Components

▼ Tabs (2)

Action	Component Name	Parent Object	Component Type	Installation Notes
Create	QE Settings		Tab	This is a brand new component.
Create	Template		Tab	This is a brand new component.

1.7 Approve package permissions by clicking "Next".

Step 1. Approve Package API Access

Step 1 of 2

These settings control the access that s-controls and other components in this package have to standard objects via the API. The access will still be constrained by the user's profile. You can view and edit the package API access to standard objects after the package is installed from the package detail page. [Tell me more](#)

Package Custom Objects

This Package will have the user's access (via the API) to all Custom Objects in your Organization.

Extended Object Permissions

	Read	Create	Edit	Delete		Read	Create	Edit	Delete
Accounts	☒	☒	☒	☒	Leads	☒	☒	☒	☒
Assets	☒	☒	☒	☒	Opportunities	☒	☒	☒	☒
Campaigns	☒	☒	☒	☒	Orders	☒	☒	☒	☒
Cases	☒	☒	☒	☒	Price Books	☒	☒	☒	☒
Contacts	☒	☒	☒	☒	Products	☒	☒	☒	☒
Contracts	☒	☒	☒	☒	Quotes	☒	☒	☒	☒
Documents	☒	☒	☒	☒	Solutions	☒	☒	☒	☒

General User Permissions

This Package will be able to use all of the General User Permissions from the user's Profile.

Administrative Permissions

This Package will be able to use all of the Administrative Privileges from the user's Profile.

Next

Cancel

1.8 Confirm the installation by clicking "Install".

Package Installer

Quote Editor

Help for this Page ?

Step 2. Install Package

Step 2 of 2

The package is ready to be installed. Click Install to continue.

Previous

Install

Cancel

1.9 Installation process will take a few minutes. You will be notified when the installation process is completed.

2. Set Quote Page Layout

Quote Editor allows you to create a full customized PDF document for a quote. To use this functionality, you must add Quote Editor's buttons and custom fields to the Quote page layout.

2.1 Go to page: Setup -> Customize -> Quotes -> Page Layout.

2.2 Drag the next fields down to the one of the fields' areas:

Additional Discount, Additional Expenses, Global Discount, Grand Total, Quote Post Face, Quote Preamble, Quote Signature, Show Optional, Show Signature, Tax Percent, Template, Total Price, Total Quote

The screenshot shows the Salesforce Quote Editor interface. At the top, there are buttons: Save, Quick Save, Preview, Cancel, Undo, Redo, and Layout Properties. Below these is a 'Quick Find' search bar. A list of fields is displayed in a grid:

ote To	Ship To Name	Subtotal	Template
ote To Name	Show Optional	Syncing	Total Price
ipping and Hand...	Show Signature	Tax	Total Price
ip To	Status	Tax Percent	Total Quote

Below the fields list is a preview of a quote document. The document contains the following information:

Contact Name: [Sample Contact](#)
 Email: sarah.sample@company.com
 Phone: 1-415-555-1212
 Fax: 1-415-555-1212

Address Information

Bill To Name: Sample Bill To Name	Ship To Name: Sample Ship To Name
Bill To: Suite 300, The Landmark @ One Market San Francisco, CA 94105 US	Ship To: Suite 300, The Landmark @ One Market San Francisco, CA 94105 US

System Information

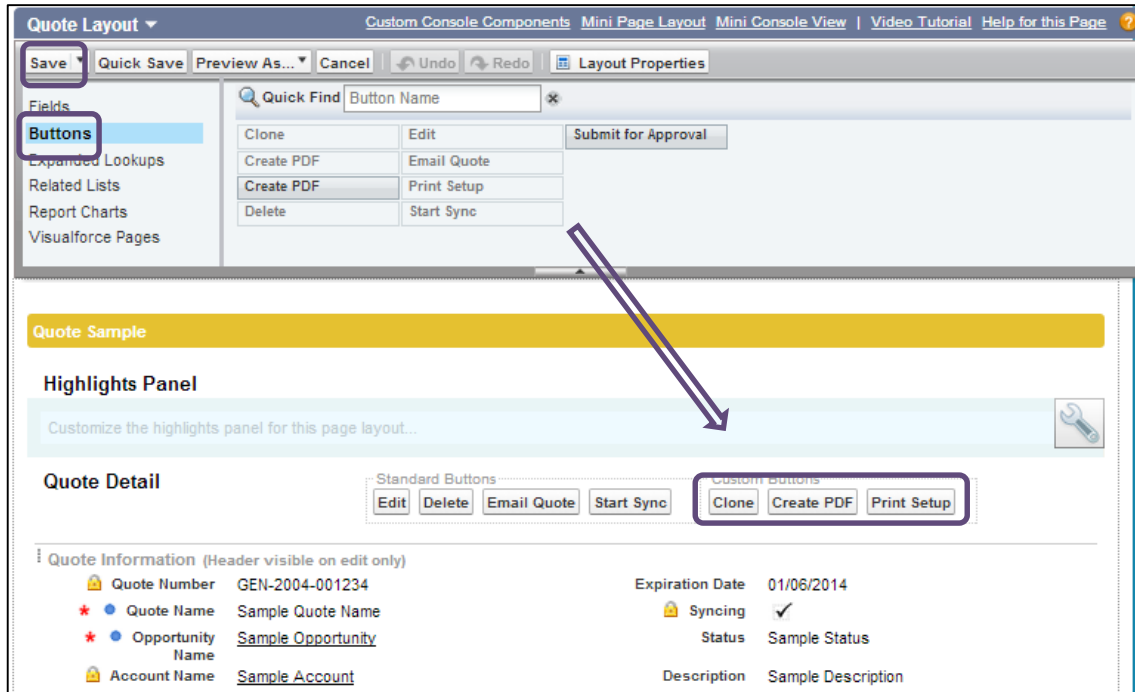
Template: [Sample Template](#)
 Created By: [Sample User](#)
 Last Modified By: [Sample User](#)

A purple arrow points from the 'Total Price' field in the fields list to the 'Total Price' field in the preview document.

2.3 Add any other of your own custom fields that you want to use in Quote Editor in the same way.

2.4 In the top menu, click "Buttons", and drag the buttons "Clone", "Create PDF" and "Print Setup" to the Custom Button area. (Note: There are two buttons named "Create PDF": the standard button, and Quote Editor button. If you can't add one of them to the Custom Buttons area, add

the other).



2.5 Click "Save".

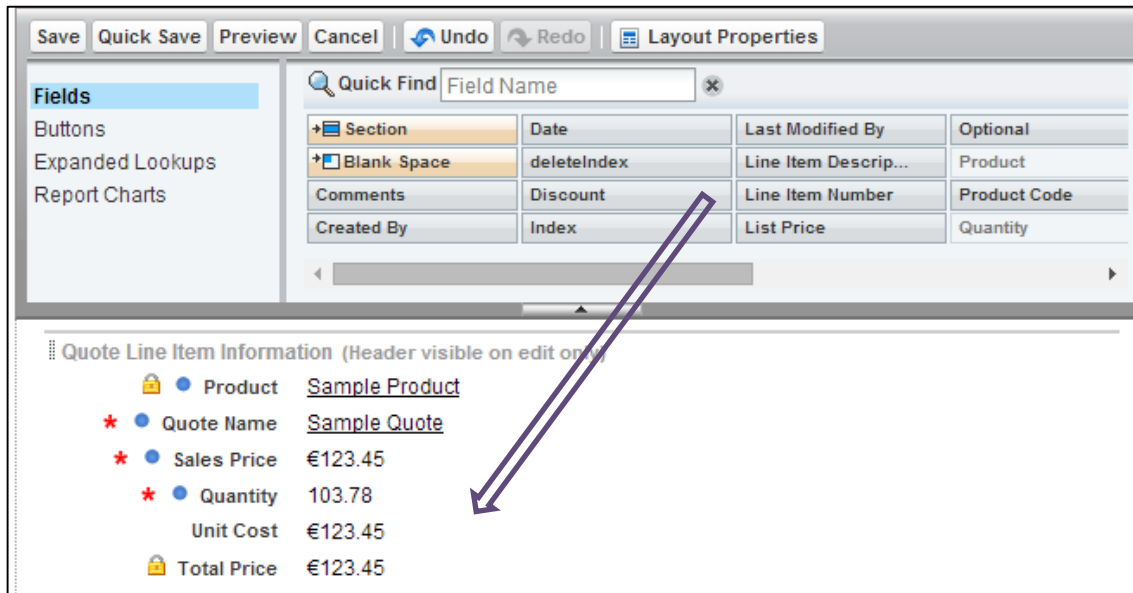
3. Set Quote Line Item Page Layout

In order to use Quote Editor custom Fields, you must set the permission of these fields by adding them to the Page Layout.

3.1 Go to page: Setup -> Customize -> Quote Line Items -> Page Layout.

3.2 Drag the next fields down to the one of the fields' areas:

Comments, DeleteIndex, Index, Optional, schedule, Section, SectionObject, Section Picklist, subIndex, Total Price, Unit Cost.



3.3 Add any other of your own custom fields that you want to use in Quote Editor in the same way.

3.4 Click "Save".

4. Override Quote Line Items buttons

Quote Editor has two main functionalities: Product selector – to add products to the quote, and Quote Grid – to edit sections and line items. In order to use these functionalities, you must override the standard Quote Line Items buttons functionality:

4.1 Go to page: Setup -> Customize -> Quotes -> Quote Line Items -> Buttons and Links.

Buttons, Links, and Actions Help for this Page ?

Quote Line Item

Below are the buttons and links for Quote Line Items. To add custom links to the links section of the Quote Line Items detail page, edit the page layout.

Buttons can display on detail pages, related lists, and list views:

- To customize buttons on detail pages, edit the Quote Line Items page layout.
- To customize buttons on related lists, edit the related list properties on the page layout where the Quote Line Items related list appears.
- To customize buttons on list views, edit the Quote Line Items list view layout in Search Layouts.

Search:

Custom Links Custom Links Help ?

Action	Label	Name	Description	Type	Content Source	Icon	Overridden
Edit	Add Line Item	AddQuoteLine			Standard Salesforce.com Page		☐
Edit	Delete	Delete			Standard Salesforce.com Page		☐
Edit	Edit	Edit			Standard Salesforce.com Page		☐
Edit	Edit All	EditAllQuoteLine			Standard Salesforce.com Page		☐

4.2 Edit the custom link "Add Line Item" and select VisualForce Page: "SelectProductQuote".

Override Standard Button or Link Help for this Page ?

AddQuoteLine

Overriding standard buttons and links changes the meaning of the salesforce.com URL and any calls to that URL such as a salesforce.com page, a browser shortcut, or an external system. You can replace the salesforce.com URL for a standard button or link with a custom s-control or Visualforce Page.

Select the custom s-control or Visualforce Page to use in place of the salesforce.com URL for this standard button or link.

Override Properties

Label: Add Line Item
 Name: AddQuoteLine
 Default: Standard Salesforce.com Page
 Override With: ☐ No Override (use default) ☒ Visualforce Page ▼
 Comment:

4.3 Click "Save".

4.4 Do the same with the custom link "Edit All" and select VisualForce Page: "QuoteGrid".

5. Override Opportunity Products buttons (Optional)

Quote Editor's Product Selection page, and Line Items Grid page can be used also with Opportunities Products.

If you would like to use our product also with Opportunity Products:

5.1 Go to page: Setup -> Customize -> Opportunities-> Opportunity Products -> Buttons and Links.

Buttons, Links, and Actions
Opportunity Product [Help for this Page ?](#)

Below are the buttons and links for Opportunity Product. To add custom links to the links section of the Opportunity Product detail page, edit the page layout.

Buttons can display on detail pages, related lists, and list views:

- To customize buttons on detail pages, edit the Opportunity Product page layout.
- To customize buttons on related lists, edit the related list properties on the page layout where the Opportunity Product related list appears.
- To customize buttons on list views, edit the Opportunity Product list view layout in Search Layouts.

Custom Links [New Button or Link](#) [Default Custom Links](#) [Custom Links Help ?](#)

Action	Label	Name	Description	Type	Content Source	Icon	Overridden
Edit	Add Product	AddProduct			Standard Salesforce.com Page		☐
Edit	Choose Price Book	ChoosePricebook			Standard Salesforce.com Page		☐
Edit	Delete	Delete			Standard Salesforce.com Page		☐
Edit	Edit	Edit			Standard Salesforce.com Page		☐
Edit	Edit All	EditAllProduct			Standard Salesforce.com Page		☐
Edit	View	View			Standard Salesforce.com Page		☐

5.2 Edit the custom link "Add Product" and select VisualForce Page: "SelectProduct".

Override Standard Button or Link [Help for this Page ?](#)

AddProduct

Overriding standard buttons and links changes the meaning of the salesforce.com URL and any calls to that URL such as a salesforce.com page, a browser shortcut, or an external system. You can replace the salesforce.com URL for a standard button or link with a custom s-control or Visualforce Page.

Select the custom s-control or Visualforce Page to use in place of the salesforce.com URL for this standard button or link.

Override Properties [Save](#) [Cancel](#)

Label: Add Product
Name: AddProduct
Default: Standard Salesforce.com Page

Override With: ☐ No Override (use default) ☒ Visualforce Page **SelectProduct [qe__SelectProduct]**

Comment:

[Save](#) [Cancel](#)

5.3 Click "Save".

5.4 Edit the custom link "Edit All" and select VisualForce Page: "ProductGrid".

The screenshot shows the 'Override Standard Button or Link' configuration window for the 'EditAllProduct' button. The window has a title bar 'Override: Standard Button or Link' and a 'Help for this Page' link. Below the title, there is a description: 'Overriding standard buttons and links changes the meaning of the salesforce.com URL and any calls to that URL such as a salesforce.com page, a browser shortcut, or an external system. You can replace the salesforce.com URL for a standard button or link with a custom s-control or Visualforce Page.' Below this, it says 'Select the custom s-control or Visualforce Page to use in place of the salesforce.com URL for this standard button or link.'

The main section is titled 'Override Properties' and contains the following fields:

- Label:** Edit All
- Name:** EditAllProduct
- Default:** Standard Salesforce.com Page
- Override With:** A dropdown menu with two options: 'No Override (use default)' and 'Visualforce Page'. The 'Visualforce Page' option is selected, and the dropdown shows 'ProductGrid [qe__ProductGrid]'.
- Comment:** A text area for additional notes.

There are 'Save' and 'Cancel' buttons at the top right and bottom right of the 'Override Properties' section.

5.5 Click Save.

6. Customizing quote Editor

For further information about customizing Quote Editor, please refer to the Customization Guide in our product page in AppExchange:

(<https://appexchange.salesforce.com/listingDetail?listingId=a0N30000001rAGOEa2>)