



Installation and Customization Guide for Quote Editor

For Quote Editor 2.105

Use this document to install Quote Editor for Salesforce Enterprise Edition.

For Salesforce Professional Edition and 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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Installation and Customization Guide for Quote Editor

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Installation

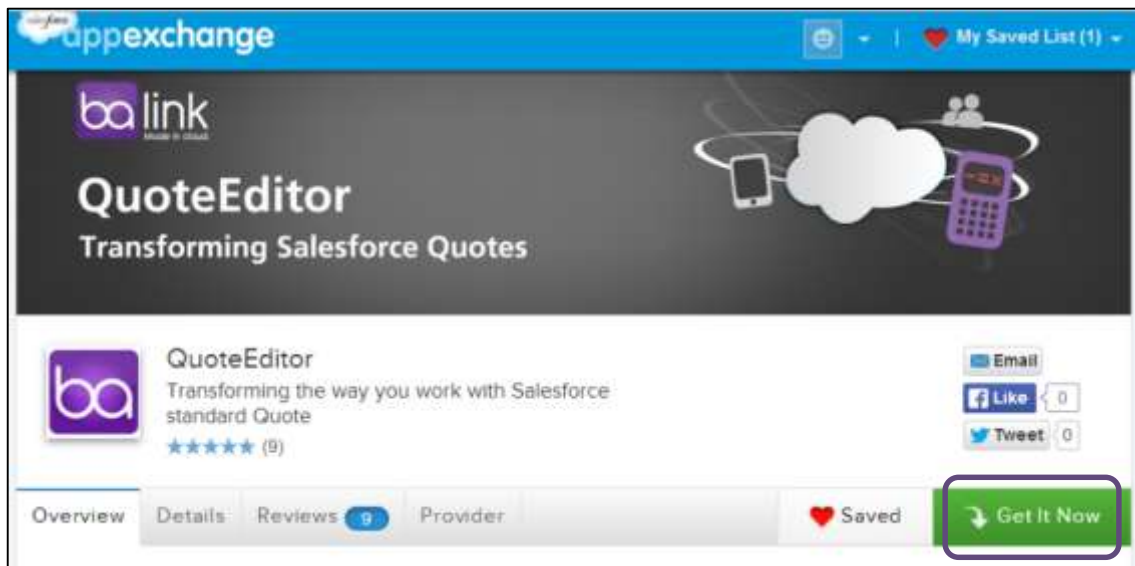
1. Install Package
2. Set Quote Page Layout
3. Override Quote Line Items buttons
4. Override Opportunity Products buttons (Optional)
5. Customizing quote Editor

Installation

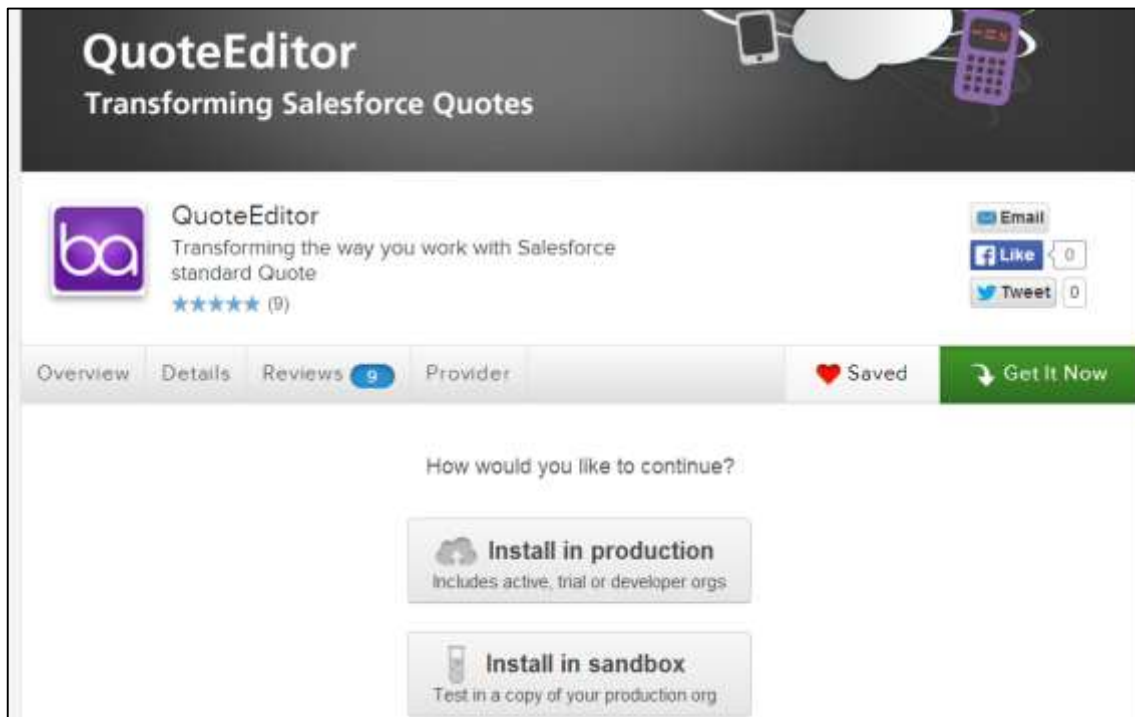
1. Install Package

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

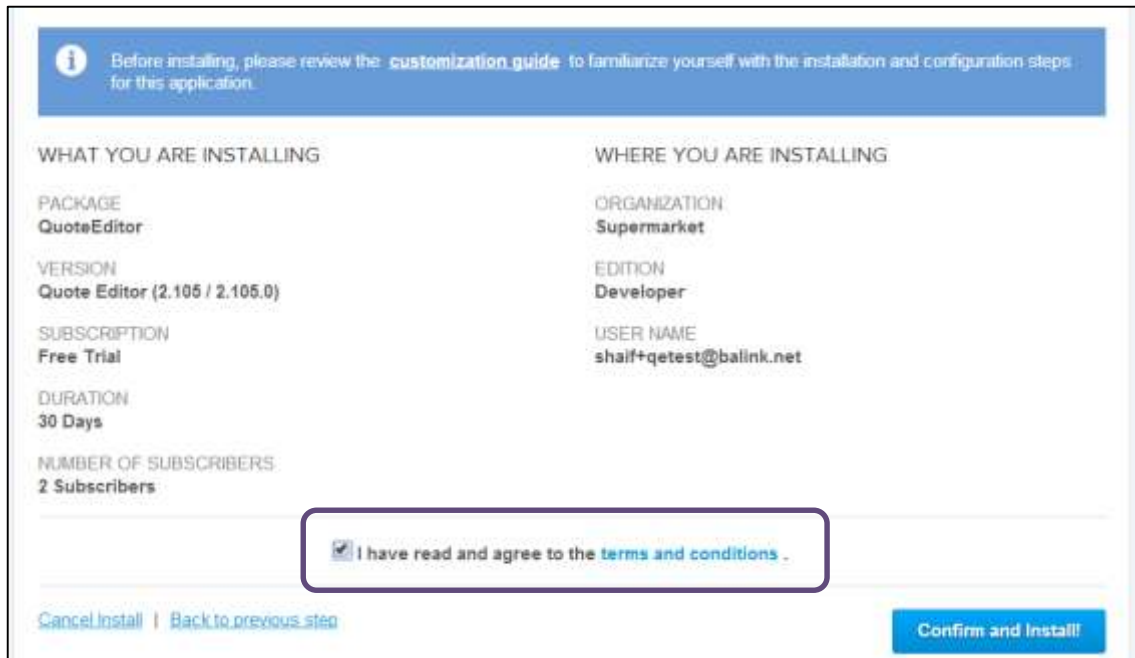
(<https://appexchange.salesforce.com/listingDetail?listingId=a0N30000001rAGOE2>)



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



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



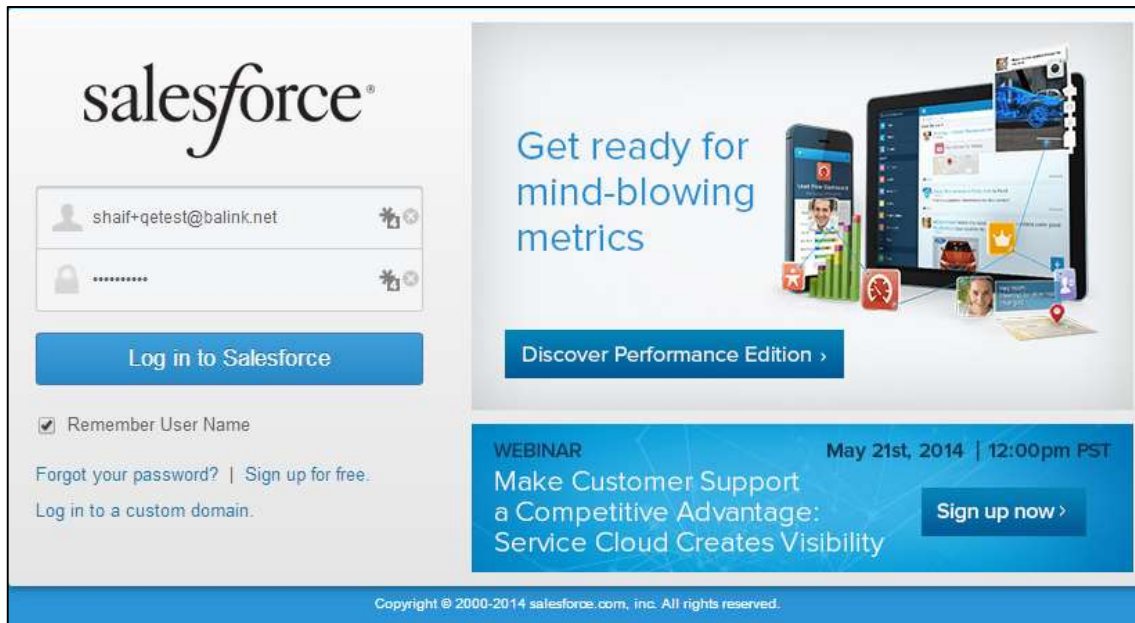
Before installing, please review the [customization guide](#) to familiarize yourself with the installation and configuration steps for this application.

WHAT YOU ARE INSTALLING	WHERE YOU ARE INSTALLING
PACKAGE QuoteEditor	ORGANIZATION Supermarket
VERSION Quote Editor (2.105 / 2.105.0)	EDITION Developer
SUBSCRIPTION Free Trial	USER NAME shaif+qetest@balink.net
DURATION 30 Days	
NUMBER OF SUBSCRIBERS 2 Subscribers	

☒ I have read and agree to the [terms and conditions](#).

[Cancel Install](#) | [Back to previous step](#) [Confirm and Install!](#)

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



salesforce®

[Log in to Salesforce](#)

☒ Remember User Name

[Forgot your password?](#) | [Sign up for free.](#)

[Log in to a custom domain.](#)

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1.5 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.

1.6 Approve package permissions by clicking "Next".

Package Installer
Quote Editor
[Help for this Page ?](#)

Step 1. Approve Package API Access
Step 1 of 3

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	✓	✓	✓	✓	Goals	✓	✓	✓	✓
Assets	✓	✓	✓	✓	Goal Collaborators	✓	✓	✓	✓
Campaigns	✓	✓	✓	✓	Goal Links	✓	✓	✓	✓
Cases	✓	✓	✓	✓	Ideas	✓	✓	✓	✓
Coaching	✓	✓	✓	✓	Leads	✓	✓	✓	✓
Contacts	✓	✓	✓	✓	Opportunities	✓	✓	✓	✓
Contracts	✓	✓	✓	✓	Performance Cycles	✓	✓	✓	✓
Documents	✓	✓	✓	✓	Price Books	✓	✓	✓	✓
Feedback	✓	✓	✓	✓	Products	✓	✓	✓	✓
Feedback Questions	✓	✓	✓	✓	Push Topics	✓	✓	✓	✓
Feedback Question Sets	✓	✓	✓	✓	Quotes	✓	✓	✓	✓
Feedback Requests	✓	✓	✓	✓	Solutions	✓	✓	✓	✓

General User Permissions

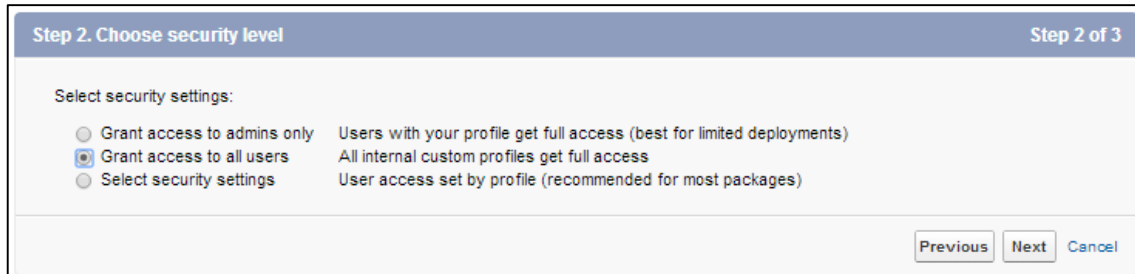
This Package will be able to use all of the General User Permissions from the user's Profile.

Administrative Permissions

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

Next
Cancel

1.7 Select Security Settings and click "Next".



The screenshot shows a window titled "Step 2. Choose security level" with a sub-header "Step 2 of 3". Below the header, it says "Select security settings:". There are three radio button options:

- ☐ Grant access to admins only: Users with your profile get full access (best for limited deployments)
- ☒ Grant access to all users: All internal custom profiles get full access
- ☐ Select security settings: User access set by profile (recommended for most packages)

At the bottom right, there are three buttons: "Previous", "Next", and "Cancel".

1.8 Confirm the installation by clicking "Install".



The screenshot shows a window titled "Package Installer" with a sub-header "Quote Editor" and a link "Help for this Page ?". Below the header, it says "Step 3. Install Package" with a sub-header "Step 3 of 3". Below the header, it says "The package is ready to be installed. Click Install to continue." At the bottom right, there are three buttons: "Previous", "Install", and "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 to the Quote page layout.

You can add Quote Editor buttons to the standard Quote page layout, or use Quote Editor included page layout.

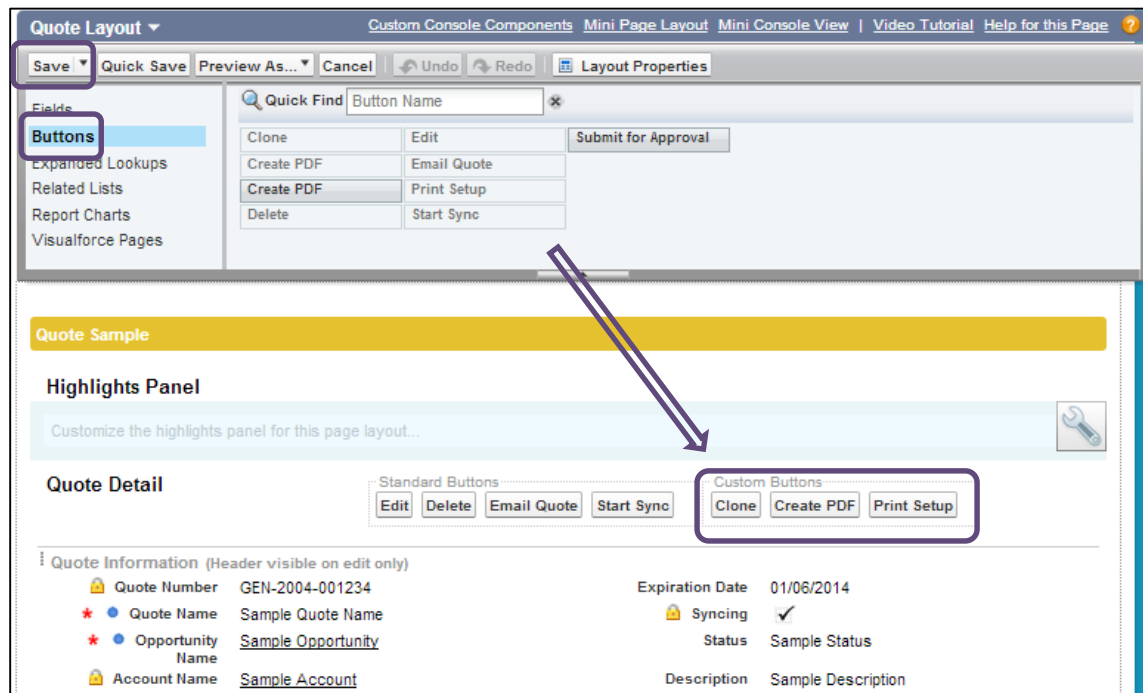
2.1 To add Quote Editor buttons to the standard quote page layout:

2.1.1 Go to page: Setup -> Customize -> Quotes -> Page Layouts



2.1.2 Click "Edit" next to the standard page layout.

2.1.3 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).



2.1.4 Click "Save".

2.2 To use Quote Editor included Page Layout:

2.2.1 Go to page: Setup -> Customize -> Quotes -> Page Layouts

Quote Page Layout [Help for this Page](#)

This page allows you to create different page layouts to display Quote data.
After creating page layouts, click the Page Layout Assignment button to control which page layout users see by default.

Search: [Disable Autocomplete](#)

Quote Page Layouts [New](#) [Page Layout Assignment](#)

Action	Page Layout Name	Installed Package	Created By	Modified By
Edit Del	Quote Layout		Shai Fisher , 16/02/2014 09:46	Shai Fisher , 28/05/2014 10:48
Edit Del	Quote Layout	Quote Editor	Shai Fisher , 28/05/2014 11:17	Shai Fisher , 28/05/2014 11:17

2.2.2 Click "Edit Assignment" button.

2.2.3 Select User Profiles you want to assign the page layout to (Multi select by holding Ctrl key).

2.2.4 In the select list "Page Layout to use", choose: "Quote Layout (Installed Package: Quote Editor)".

Edit Page Layout Assignment [Help for this Page](#)

Quote

The table below shows the page layout assignments for different profiles. Use SHIFT + click or click and drag to select a range of adjacent cells. Use CTRL + click to select multiple cells that are not adjacent. Then choose a new page layout from the drop-down.

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

Page Layout To Use: [Quote Layout \(Installed Package: Quote Editor\)](#) ▼ **6 Selected** **6 Changed**

Profiles	Page Layout
Contract Manager	Quote Layout (Installed Package: Quote Editor)
Custom: Marketing Profile	Quote Layout (Installed Package: Quote Editor)
Custom: Sales Profile	Quote Layout (Installed Package: Quote Editor)
Custom: Support Profile	Quote Layout
Gold Partner User	Quote Layout
Marketing User	Quote Layout (Installed Package: Quote Editor)
Partner Community Login User	Quote Layout
Partner Community User	Quote Layout
Read Only	Quote Layout
Solution Manager	Quote Layout
Standard User	Quote Layout (Installed Package: Quote Editor)
System Administrator	Quote Layout (Installed Package: Quote Editor)

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

2.2.5 Click "Save".

3. 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:

3.1 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: [Disable Autocomplete](#)

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

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

Label: Add Line Item
 Name: AddQuoteLine
 Default: Standard Salesforce.com Page

Override With: ☐ No Override (use default) ☒ Visualforce Page [SelectProductQuote \[qe__SelectProductQuote\]](#)

Comment:

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

3.3 Click "Save".

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

4. 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:

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

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

Opportunity Product

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		☐

4.2 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	
Label	Add Product
Name	AddProduct
Default	Standard Salesforce.com Page
Override With	☐ No Override (use default) ☒ Visualforce Page SelectProduct [qe__SelectProduct] ▼
Comment	

Save Cancel

4.3 Click "Save".

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

Override: Standard Button or Link Help for this Page ?

EditAllProduct

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	Edit All
Name	EditAllProduct
Default	Standard Salesforce.com Page
Override With	☐ No Override (use default) ☒ Visualforce Page ProductGrid [qe__ProductGrid] ▼
Comment	

Save Cancel

4.5 Click Save.

5. 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>)