



**Productivity. Accuracy. Efficiency.**

AgileQuote is a streamlined quoting tool, designed to empower Salesforce users to create quotes with efficiency and accuracy. Unlike other quoting apps, our Lightning Application is a pure extension of the Standard Quote objects, allowing for faster product entry, editing, and re-ordering, with minimal clicks on the same screen!



## Increase **Productivity** with Streamlined Adoption

The adoption of AgileQuote is simple, and the setup is effortless. Editing quotes directly on the quote record page allows your team to spend more time selling, and less time navigating. You can also:

- Modify lines, quantities, prices, bundles, and discounts in-line
- Group, clone or delete items
- Drag and drop quote line and groups, to easily reorder
- Configuration screens allow you to quickly modify appearance and behavior

## **Accuracy** of Data with the Use of Product Filters, Bundles, and Discount Schedules

AgileQuote's product bundles enable additional up-selling opportunities by associating related products and their rules with bundle constraints. Product filters dynamically restrict available products based on specific quote parameters. Pricing issues are not a factor, due to the ability to predefine price breaks and volume pricing with discount schedules.

## **Efficiency** Achieved

Within the tool's administrative console, template creation provides a consistent, fluid workflow for quoting. Customized search functionality can be created by using look-up fields and product filters to select compatible configurations, avoid mismatched items, and reduce pricing errors. Product Grouping and line reordering allows for representing items in a logical and meaningful manner.



**CloudFirst**  
LABS

[cloudfirstlabs.com](http://cloudfirstlabs.com)



**Platform****Built In Salesforce**

As a 100% native Lightning app, AgileQuote works seamlessly with your Salesforce instance, featuring all the simplicity, flexibility, and security benefits you expect

**Flexible Configuration****Customize With Clicks Not Code**

Administer the many features and options of AgileQuote:

- Configure multiple templates for quote line and product search layouts
- Configure multiple views through templates
- Configure group header for quick edits
- Configure product filtering

**Customizable Metadata**

Declaratively sum product line values into group headers using customizable metadata/settings, and set up twin field capability between product and lines

**Customizable Line Item /Visual Cues**

Easily configure business line item rules or conditions, to notify users of out of bounds conditions

**Discount Schedules**

Creating discount schedules is simple and supports:

- Set via step or tier
- Reconfigure for specific line item requirements
- Per unit price discounts
- Disable at a line item level on quote
- Percentage discounts
- Utilizes standard discount field

**Productivity/Efficiency****Drag and Drop**

AgileQuote allows dragging and dropping to:

- Reorder line items
- Line items between groups
- Reorder groups

**Create Quotes from Other Objects**

Create quotes directly from accounts, contacts using flow, provided flow templates, and have opportunities created automatically

**Group Product Lines**

Logically group quote products by category, type or any method you choose

**Clone Quotes**

Clone quote on an existing opportunity, or a new one

**Easy Configurable Product Bundles**

With AgileQuote, managing product bundles is a breeze, providing the ability to:

- Create includes/excludes rules
- Grouping of items
- Display/hide bundle items on quote
- Customized pricing
- Re-configure on the quote screen

**Quote Document**

- Use provided PDF with your own company logo
- Create your own using Visualforce
- Use packaged document generating tools like S-Docs, Nintex, or Conga\*