



Installation, Configuration, and Technical Guide

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Introduction to AgileQuote

Companies have a lot of options when it comes to quote creation in Salesforce®, but few of those options provide the value and ease of configuration found with AgileQuote.

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!

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

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.

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.

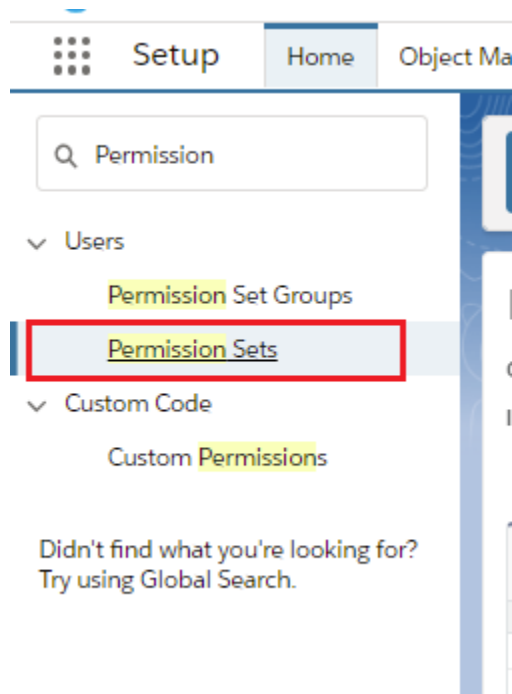
At CloudFirst Labs, we specialize in delivering intuitive, speedy, and robust applications built for Salesforce® and the Lightning Experience.

AgileQuote Administration

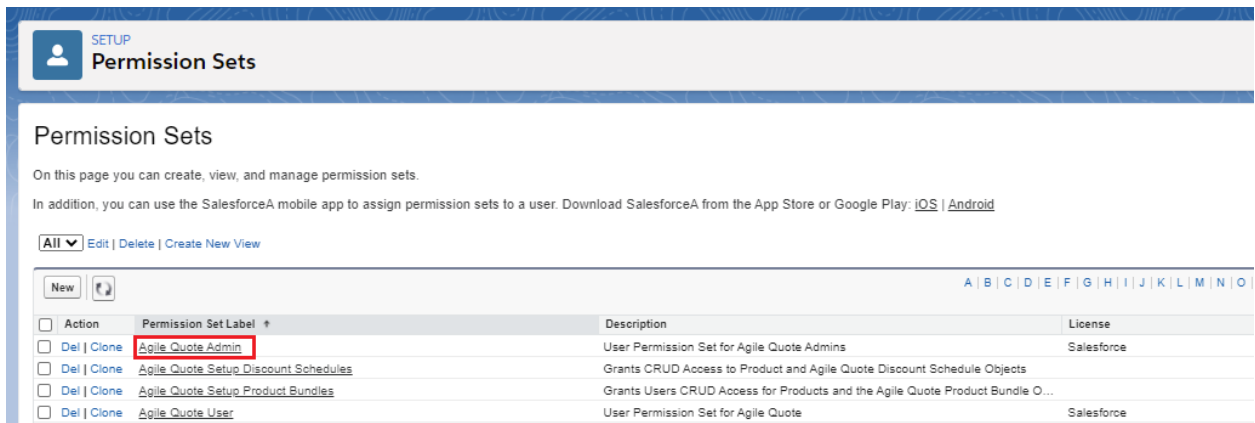
Requirements

In Order to successfully Administrate the AgileQuote, users must be granted permissions via the **Agile Quote Admin** Permission Set. To Assign:

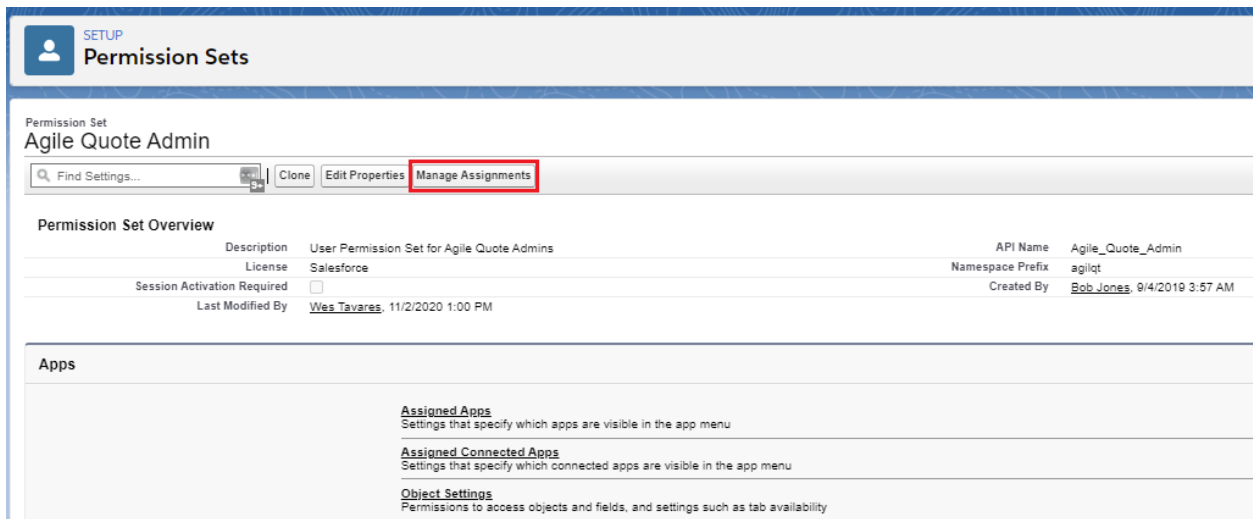
1. In Setup, Search for Permission Sets in the Quick Find Box. Then Click Permission Sets.



2. On the Permission Sets screen locate the **Agile Quote Admin** permission set, and click it.



3. On the Agile Quote Admin permission set, click the Manage Assignments button.



SETUP
Permission Sets

Permission Set
Agile Quote Admin

Find Settings... Clone Edit Properties **Manage Assignments**

Permission Set Overview

Description	User Permission Set for Agile Quote Admins	API Name	Agile_Quote_Admin
License	Salesforce	Namespace Prefix	agilqt
Session Activation Required	☐	Created By	Bob Jones, 9/4/2019 3:57 AM
Last Modified By	Wes Tavares, 11/2/2020 1:00 PM		

Apps

Assigned Apps
Settings that specify which apps are visible in the app menu

Assigned Connected Apps
Settings that specify which connected apps are visible in the app menu

Object Settings
Permissions to access objects and fields, and settings such as tab availability

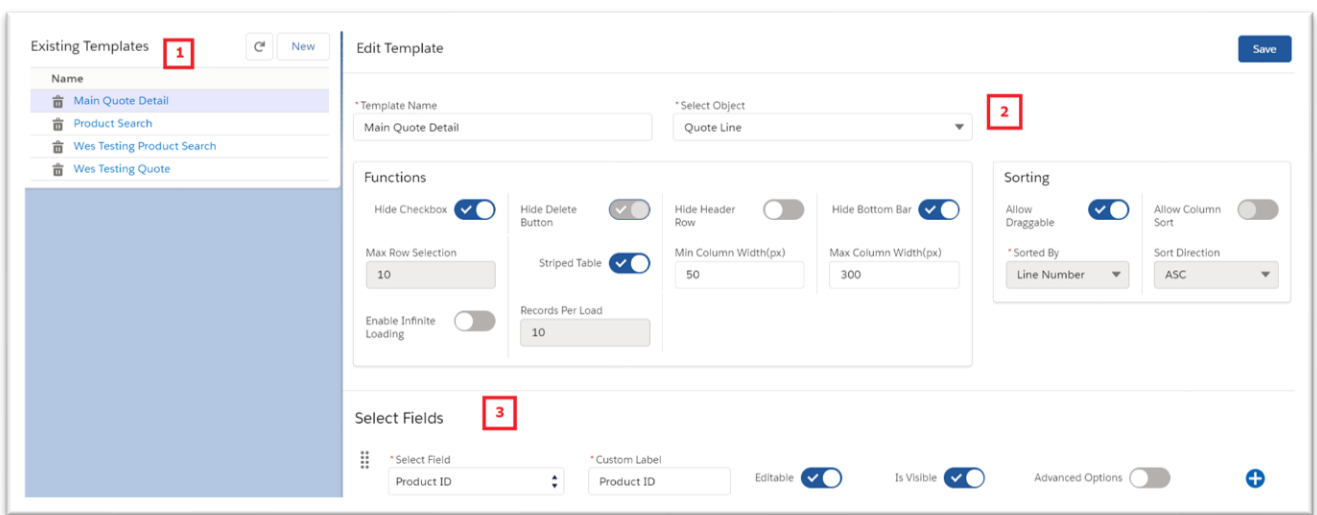
4. To grant access to users, click the Add Assignments button and then choose all users you wish to give rights to.

Detail Templates

The Detail Templates screen is where each data table templates are created and edited.

The Detail Templates screen is made up of 3 sections:

1. The Existing Templates panel
2. The Template Property section
3. The Template Fields section



The screenshot shows the 'Detail Templates' interface. On the left is the 'Existing Templates' panel (labeled 1) with a list of templates: 'Main Quote Detail', 'Product Search', 'Wes Testing Product Search', and 'Wes Testing Quote'. The main area is the 'Edit Template' section (labeled 2) which includes:

- '* Template Name' field with 'Main Quote Detail'.
- '* Select Object' dropdown with 'Quote Line'.
- 'Functions' section with various toggles: 'Hide Checkbox' (checked), 'Hide Delete Button' (checked), 'Hide Header Row' (unchecked), 'Hide Bottom Bar' (checked), 'Max Row Selection' (10), 'Striped Table' (checked), 'Min Column Width(px)' (50), 'Max Column Width(px)' (300), 'Enable Infinite Loading' (unchecked), and 'Records Per Load' (10).
- 'Sorting' section with 'Allow Draggable' (checked), 'Allow Column Sort' (unchecked), '* Sorted By' (Line Number), and 'Sort Direction' (ASC).

 At the bottom is the 'Select Fields' section (labeled 3) with:

- '* Select Field' dropdown with 'Product ID'.
- '* Custom Label' field with 'Product ID'.
- 'Editable' toggle (checked).
- 'Is Visible' toggle (checked).
- 'Advanced Options' toggle (unchecked).

Existing Templates Panel

The left panel of the screen is the list of already existing templates. On this panel, an Admin can create new templates, select existing templates for edit, or delete templates.

Detail Template Property Section

The first section in the right panel of the Detail Templates Screen is the Template Properties Section. Here is a breakdown of all the different template properties to work with.

Property	Type	Description
Template Name	Text	Custom name of the template

Select Object	Picklist	Choose between Product or Quote Line. More info below.
Hide Checkbox	Checkbox	Specifies whether data rows will be selectable or not
Max Row Selection	Number	Max number of record rows allowed to be selected
Hide Header Row	Checkbox	Hides or Shows data table column headers
Striped Table	Checkbox	Stripes data table rows for every other record
Enable Infinite Loading	Checkbox	When active, user can load more records as they scroll down the data table
Records Per Load	Number	Number of new records to display every time a new load activates
Min Column Width	Number	Smallest width allowed per column
Max Column Width	Number	Largest width allowed per column
Allow Draggable	Checkbox	When Active, Users can Drag and Drop to reorder records. More info below.
Hide Bottom Bar	Checkbox	Adds the Save/Cancel buttons to the bottom of the data table for row edits
Sorted By	Picklist	The Column that the data table will be sorted, by default
Sorted Direction	Picklist	Sort by Ascending or Descending order, by default
Allow Column Sort	Checkbox	Allows users to manually change the sorting column
Hide Delete Button	Checkbox	Allows rows to be deleted, if permissions allow it.

Template Types – Quote Line or Product

There are two separate template types to choose from:

- Product
- Quote Line.

The template type dictates the fields that will be available to display on the data table:

- Quote Line – QuoteLineItem fields and all related object fields
- Product – PriceBookEntry fields and all related object fields

Allow Draggable

This feature's main use is for the quick re-order of Quote Line Items via data table row drag and drop. When active, the Allow Column Sorting will be disabled when Allow Draggable is active, and the Sorted By will also be disabled and automatically be changed to the 'Line Number' Quote Line Item field. Allow Draggable is not available for Product object Detail Templates.

When Active, a column (with 2 sets of 4 vertical dots) will be added to the data table that the user can utilize to easily re-order rows as shown below:

▼			Product Name	Quantity	Unit Price	Subtotal
1		☐	GenWatt Diesel 1	1	\$100,0...	\$100,000.00
3		☐	GenWatt Diesel 2	2	\$32.00	\$64.00
2		☐	GenWatt Gasoline	2	\$32.00	\$64.00
3		☐	GenWatt Diesel 2	2	\$32.00	\$64.00
4		☐	GenWatt Gasoline	2	\$34.00	\$68.00

Detail Template Fields Section

Below the Property Section of the Detail Templates is the Fields Section, in which fields are selected to display as columns in the data table. This section is made up of three components:

1. A column property section, to determine fields, visibility, editability, etc. for each column.
2. Add/Delete section to quickly and easily add/remove columns.
3. A drag and drop icon. To allow admins to quickly re-order columns on the fly



The Select Fields Properties:

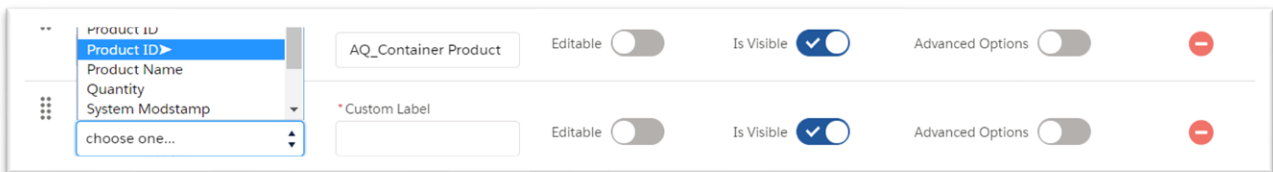
Property	Type	Description
Select Field	Picklist	The select object field that will be displayed as a column. Related Object fields are selectable here, see below for more info.
Custom Label	Text	The label of the column.
Editable	Checkbox	Users will be able to edit data in this column when active.
Is Visible	Checkbox	The column will not be displayed when inactive.
Advanced Options	Checkbox	Shows/Hide Advanced Field Properties.
Column Width	Number	Advanced Option - The default width of the column.
Cell Attributes	Checkbox	Advanced Option – Allows Admins to add additional features and details, such as icons to their column data

Type Attributes	Checkbox	Advanced Option – Allows Admins to add additional features and details to their column data based on the data type of field. Such as # of digits for number type fields.
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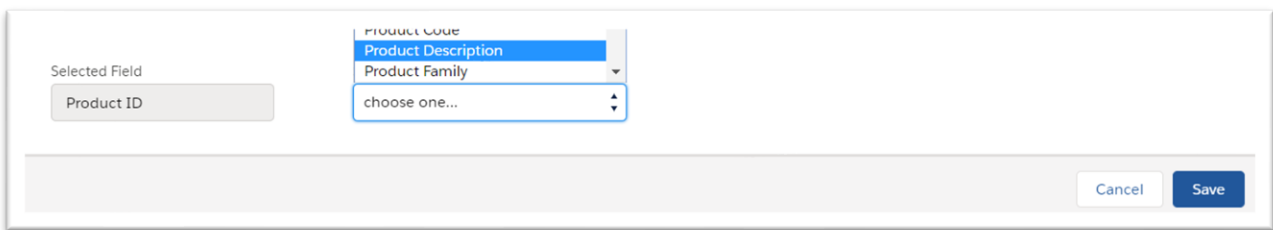
Related Object Fields

Related object fields refer to the lookup type fields on the two main objects. Agile Quote allows users to go up to 4 levels deep.

For example, if there was a specific field on the Product2 object that needs to be displayed to the user, such as Product Description, that can be done on a Product Type Template by selecting the Product Id → Product Description field.



Field Selection	Field Name	Editable	Is Visible	Advanced Options
PRODUCT ID Product ID Product Name Quantity System Modstamp choose one...	AQ_Container Product	☐	☒	☐
* Custom Label choose one...		☐	☒	☐



Selected Field

Product ID

Product Code
Product Description
Product Family
choose one...

Cancel

Save

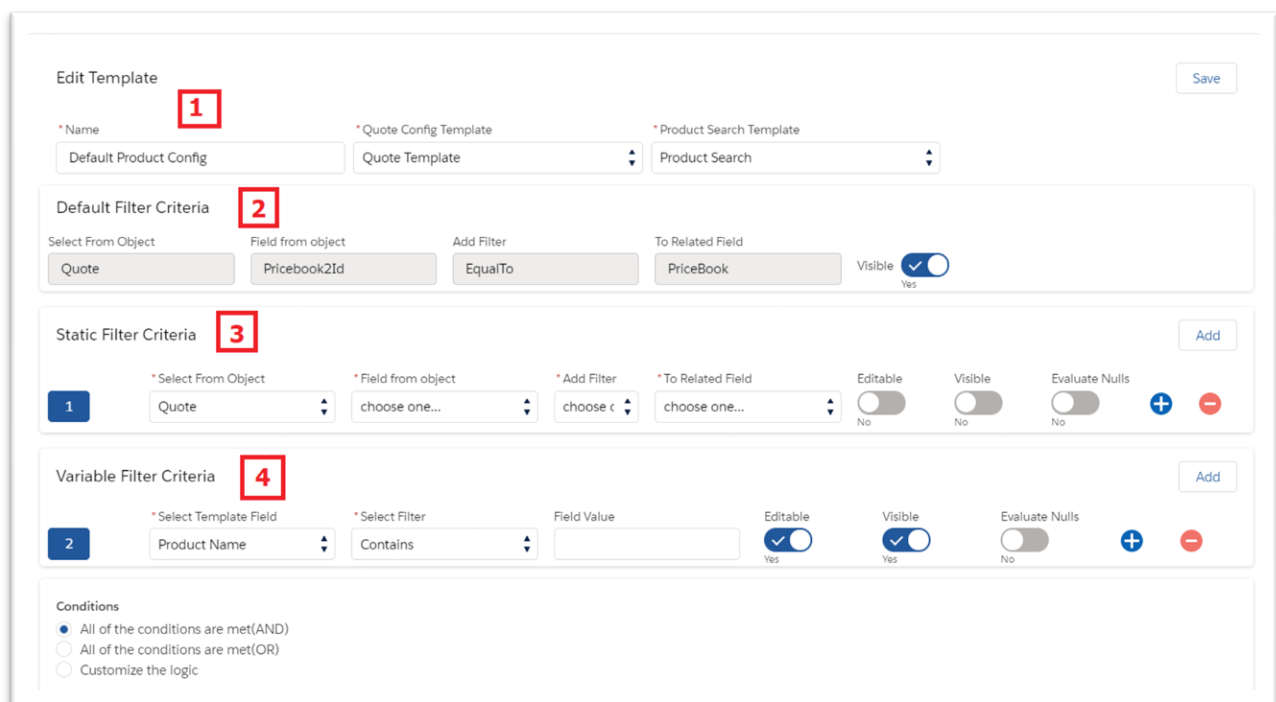
Product Filters

Summary

The Product Filter screen is where the Admin sets up how the product search screen filters products that can be added to a quote. Here a Product Detail Template is set, as well as specific filter criteria, based on field comparisons or user-editable variables. The Product Filter screen is made of 4 sections:

1. the basic properties
2. the unchangeable Default Filter
3. Static Filters
4. Variable Filters.

Note that only ONE single Product Filter can exist at a time for your entire org.



The screenshot shows the 'Edit Template' interface for Product Filters. It is divided into four main sections, each highlighted with a red box and a number:

- 1. Edit Template:** Contains three fields: '* Name' (Default Product Config), '* Quote Config Template' (Quote Template), and '* Product Search Template' (Product Search). A 'Save' button is in the top right.
- 2. Default Filter Criteria:** Contains 'Select From Object' (Quote), 'Field from object' (Pricebook2Id), 'Add Filter' (EqualTo), 'To Related Field' (PriceBook), and a 'Visible' toggle (checked).
- 3. Static Filter Criteria:** Contains a list of criteria. The first criterion has: '* Select From Object' (Quote), '* Field from object' (choose one...), '* Add Filter' (choose c...), '* To Related Field' (choose one...), 'Editable' (No), 'Visible' (No), and 'Evaluate Nulls' (No). There are '+', '-', and 'Add' buttons.
- 4. Variable Filter Criteria:** Contains a list of criteria. The first criterion has: '* Select Template Field' (Product Name), '* Select Filter' (Contains), 'Field Value' (empty), 'Editable' (checked), 'Visible' (checked), and 'Evaluate Nulls' (No). There are '+', '-', and 'Add' buttons.

At the bottom, there are 'Conditions' radio buttons: 'All of the conditions are met(AND)' (selected), 'All of the conditions are met(OR)', and 'Customize the logic'.

Product Filter Prerequisites

To properly setup Product Filter records, a Product type Detail Template is required. Refer to the [Detail Templates](#) section for more information on Product type Detail Templates. The **Static Filter** and **Variable Filter** (More on these below) sections each have a Template Field drop-down which is populated with all the fields supplied on the

chosen Product Detail Template. If the desired field does not show under the Template Field drop-down, it likely needs to be added to the Product Detail Template first.

Product Filter Properties

Property	Type	Description
Name	Text	Custom Name for Product Filter template
Product Search Template	Picklist	Select a created Product Detail Template for the Product Filter to utilize

Default Filter Criteria Section

For every template, there is a system-generated and read-only Default Product Filter for Pricebook created. This assists the Filter in determining what Products are displayed on the Add Products screen on a quote and is the basic/minimum filter needed (the value of the Pricebook set on the quote). An Admin can show or hide this default filter and showing will simply allow users to see what Pricebook their quote is set to.

Default Filter Section on Product Filter Screen

Default Filter Criteria

Select From Object

Field from object

Add Filter

To Related Field

Visible ☒

Quote

Pricebook2Id

EqualTo

PriceBook

Yes

Add Product Screen when Default Filter Visible

Select Products

Price Book Id

Product Name(Contains)

Standard Price Book

42 Items.

	Product Name ↑	List Price	Quantity
☐	Admin Hour	\$30.00	1
☐	Asus Rog Laptop	\$1,599.00	1
☐	Cloud Storage 1GB	\$15.00	1

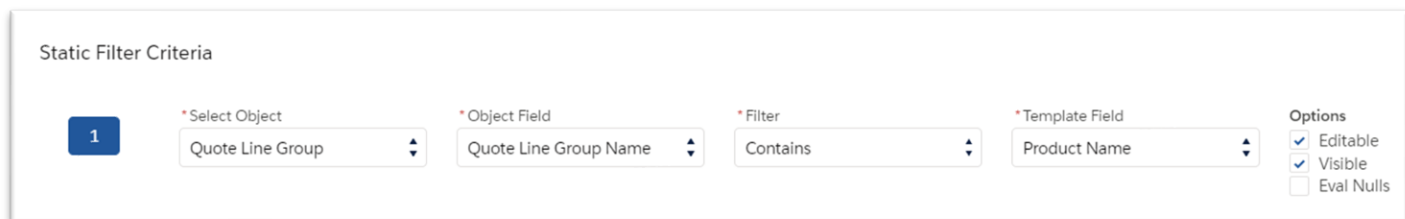
Static Filter Criteria Section

This section is used to set up filters based on set values from fields on the Quote record, or fields on the Quote Groups associated with the Quote record. These values are compared to values of selected fields that have been added to the Product Detail Template that is associated with the selected Product Filter record. The result is a filtered list of Products to help users identify what to add to their quote at a faster and more productive rate.

Note that the **Template Field** drop-down in the Static Filters section is filtered based on the type of the **Object Field** drop-down chosen. So if the selected Object Field is a Currency type field, the Template Field options will be only Currency type fields.

Static Filter Example

In the below image, a static filter has been set up so that the Product Search screen will be filtered where the Quote Group Name contains the name of the Products. The filter has been marked visible and editable so that the user can change the filter value on the fly if necessary.



The screenshot shows the 'Static Filter Criteria' configuration window. It contains the following fields and options:

- 1**: A blue square icon with the number 1.
- * Select Object**: A dropdown menu with 'Quote Line Group' selected.
- * Object Field**: A dropdown menu with 'Quote Line Group Name' selected.
- * Filter**: A dropdown menu with 'Contains' selected.
- * Template Field**: A dropdown menu with 'Product Name' selected.
- Options**: A section with three checkboxes:
 - ☒ Editable
 - ☒ Visible
 - ☐ Eval Nulls

The next image shows that we are looking at a Quote record that has 2 separate Groups added to it. Group names are 'Genwatt' and 'SLA'

Related

Quote Lines

Group Name
Genwatt

Group Total
\$4,681.50

+

		Product ID	Quantity	Sales Price	Subtotal	Discount	Total Price	Bundle Total
1		Laptop Bundle	5	\$500.00	\$2,500.00		\$2,500.00	\$4,661.50
2		Warranty	1	\$20.00	\$20.00		\$20.00	\$20.00

Group Name
SLA

Group Total
\$0.00

+

		Product ID	Quantity	Sales Price	Subtotal	Discount	Total Price	Bundle Total
--	--	------------	----------	-------------	----------	----------	-------------	--------------

Finally, if we click the Add Products (+) button on the 'Genwatt' group, the Add Products screen opens and is automatically filtered to display only products in which the Product Name contains the word 'Genwatt'. Likewise, if the button is clicked on the SLA group only 'SLA' Product Name products are displayed. Note the filter value at the top of the Add Products screen which can be changed and the search can be re-run at any time.

Price Book Id
Standard Price Book

Quote Line Group Name(Contains)
Genwatt

Search

9 Items.

	Product Name	List Price	Quantity	Product Code Number	Description	Created Date	Last Modified Date
☐	GenWatt Diesel 1000kW	\$100,000.00	2	GC1060	Tea pot	12/17/2018	6/11/2020
☐	GenWatt Diesel 10kW	\$5,000.00	5	GC1020	Best of 2018	12/17/2018	8/27/2019
☐	GenWatt Diesel 200kW	\$25,000.00	1	GC1040	Genwat Diesel Best of 20	12/17/2018	8/29/2019
☐	GenWatt Gasoline 2000kW	\$150,000.00	5	GC5060		12/17/2018	9/16/2019
☐	GenWatt Gasoline 300kW	\$35,000.00	4	GC5020		12/17/2018	8/27/2019
☐	GenWatt Gasoline 750kW	\$75,000.00	5	GC5040		12/17/2018	8/27/2019
☐	GenWatt Propane 100kW	\$15,000.00	3	GC3020		12/17/2018	8/27/2019
☐	GenWatt Propane 1500kW	\$120,000.00	5	GC3060		12/17/2018	8/28/2019
☐	GenWatt Propane 500kW	\$50,000.00		GC3040		12/17/2018	12/17/2018

Add selected Products
Add selected And Exit
Close

Variable Filter Criteria Section

This section is used to set up filters on the Product Search screen based on specific variable values being compared to Product field records rather than comparing Quote/Group record fields to Product record fields. These filters are run by default when the Product Search screen loads initially but can have visibility and editability set so that users can change their search on the fly if needed.

Variable Filter Example

We will use a similar example to the Static Filter example to show the differences between Static and Variable Filters. In the below image, two variable filters have been set up to limit Products where the Name contains 'Genwatt' and the Price is greater than \$50,000. Note, the two filters have been marked for Editable and Visible.

Variable Filter Criteria

Add

1

*Template Field
Product Name

*Filter
Equals

Field Value
Genwatt

Options
☒ Editable
☒ Visible
☐ Eval Nulls

+ -

2

*Template Field
List Price

*Filter
Greater than

Field Value
50000

Options
☒ Editable
☒ Visible
☐ Eval Nulls

-

Conditions
☒ All of the conditions are met(AND)
☐ All of the conditions are met(OR)
☐ Customize the logic

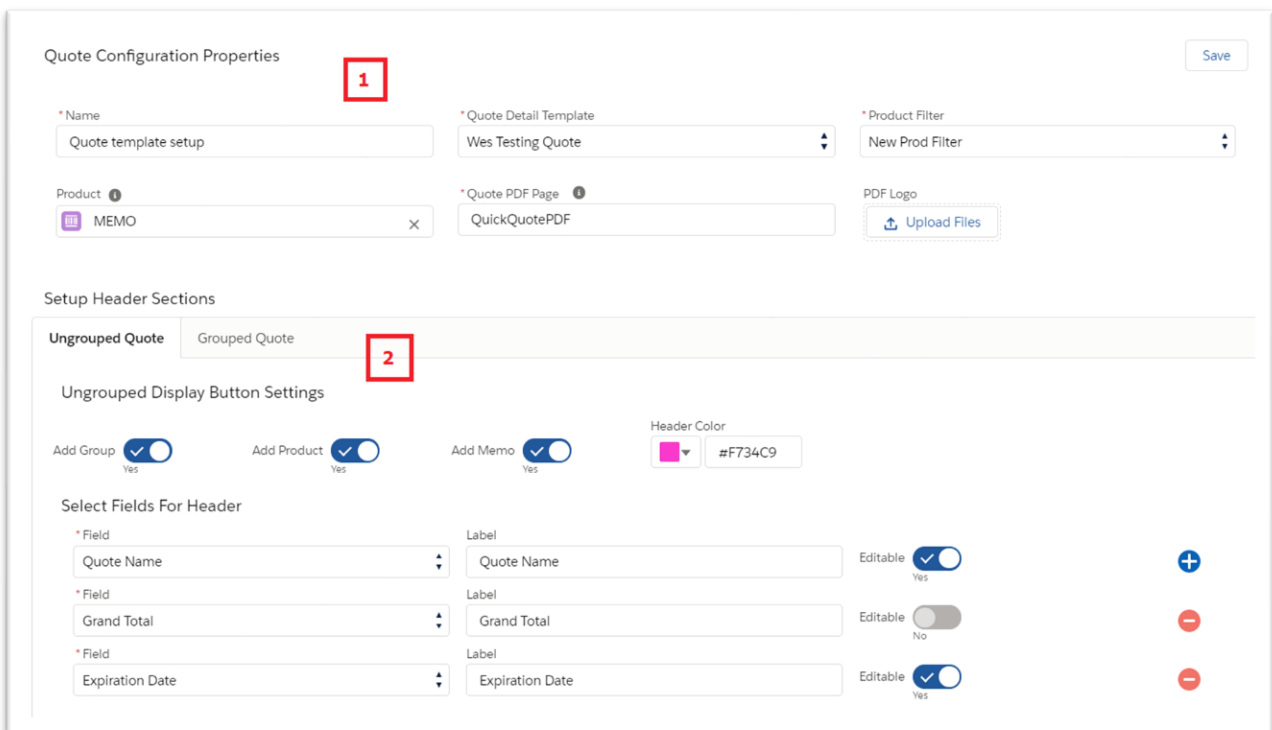
Back on the quote, the Add Products button can be clicked (on any group) and the Product Search screen will be loaded and filtered via the 2 variable filters setup by default. From there the user can change the values of the variables and re-run the search how they choose.

Price Book Id Standard Price Book	Product Name(Contains) Genwatt	List Price(GreaterThan) 50,000	Search				
4 Items.	Product Name	List Price	Quantity	Product Code Number	Description	Created Date	Last Modified Date
☐	GenWatt Diesel 1000kW	\$100,000.00	2	GC1060	Tea pot	12/17/2018	6/11/2020
☐	GenWatt Gasoline 2000kW	\$150,000.00	5	GC5060		12/17/2018	9/16/2019
☐	GenWatt Gasoline 750kW	\$75,000.00	5	GC5040		12/17/2018	8/27/2019
☐	GenWatt Propane 1500kW	\$120,000.00	5	GC3060		12/17/2018	8/28/2019

Quote Configuration

The Quote Configuration screen controls how the tool will function on the Quote Object record page. The two sections allow a user to configure different groups of properties:

1. Here you can set items such as the Quote Detail Template and Product Filter, the Quote PDF VisualForce Page name, the Memo line Product, and Logo image for the PDF.
2. Ungrouped and grouped quote header display options can be set up.



Quote Configuration Properties Save

1

*Name: Quote template setup

*Quote Detail Template: Wes Testing Quote

*Product Filter: New Prod Filter

Product: MEMO

*Quote PDF Page: QuickQuotePDF

PDF Logo: Upload Files

Setup Header Sections

Ungrouped Quote | Grouped Quote **2**

Ungrouped Display Button Settings

Add Group: Yes | Add Product: Yes | Add Memo: Yes

Header Color: #F734C9

Select Fields For Header

*Field	Label	Editable	
Quote Name	Quote Name	Yes	+
Grand Total	Grand Total	No	-
Expiration Date	Expiration Date	Yes	-

Quote Configuration Prerequisites

To set up a Quote Configuration, at least one Quote Line Type Detail Template and one Product Filter must be set up first. Refer to the [Detail Template](#) and [Product Filter](#) sections of this document for more information.

Grouped vs. Ungrouped Header Display

The main portion of the Quote Config screen is dedicated to the customization of the Grouped and the Ungrouped Header Displays. Below is a quick example of what the Quote Tool header looks like on a Quote record.

Quote Config Header view from Quote record

Group Name

Group-1

Group Total

\$521.00

Product Name

Quantity

Unit Price

Subtotal

Disc %

Total

Bundled U...

Bundle PPU

1

Laptops

1

\$21.00

\$21.00

\$21.00

\$367.00

\$388.00

2

IT Professional Pa

1

\$500.00

\$500.00

\$500.00

\$1,415.00

\$1,915.00

What is meant by Grouped vs. Ungrouped? The tool will have a different header display based on whether or not there are groups on the quote record. Each display can be customized by the Admin, to show specific buttons, fields for fast views/edits, and control the header color. There are a few differences between the Ungrouped and Grouped Header Displays:

- Ungrouped Display supports only Quote object fields for display/edit
- Grouped Display supports Quote Group and Quote object fields for display/edit
- Group Display has several extra button features available specific to Groups

The following images show a breakdown of each display section:

Ungrouped Display

Ungrouped Display

Ungrouped Display Button Settings

Add Group ☒ Yes

Add Product ☒ Yes

Add Memo ☐ No

Header Color

#1BCAC4

Action Button

* Action Type

choose one...

Action Name

Action Label

+

Select Fields For Header

* Field

Quote Name

Label

Quote Name

Editable ☒ Yes

+

* Field

Expiration Date

Label

Expiration Date

Editable ☒ Yes

-

* Field

Quote Number

Label

Quote Number

Editable ☐ No

-

* Field

Grand Total

Label

Grand Total

Editable ☐ No

-

Property	Type	Description
Add Group	Toggle	Enables/Disables the Add Group Button
Add Product	Toggle	Enables/Disables the Add Product Button
Add Memo	Toggle	Enables/Disables the Add Memo Button. The Memo Line Product must be set on the Quote Config.
Header Color	Color Picker	Choose a custom color for the display header
Action Section	Custom Buttons Section	For Advanced Admins
Fields Section	Section	Add/Remove Fields from the Quote object to the header for a quick view/edit

Grouped Display

Grouped Display

Grouped Display Button Settings

Add Group ☒

Delete Group ☒

Clone Group ☒

Add Product ☒

Add Memo ☐

Header Color

#9C9AD0

Action Button

* Action Type choose one...

Action Name

Action Label

+

Select Fields For Header

* Select Object Quote Line Group

* Field Quote Line Group Name

Label Group Name

Editable ☒

+

* Select Object Quote Line Group

* Field Group Total

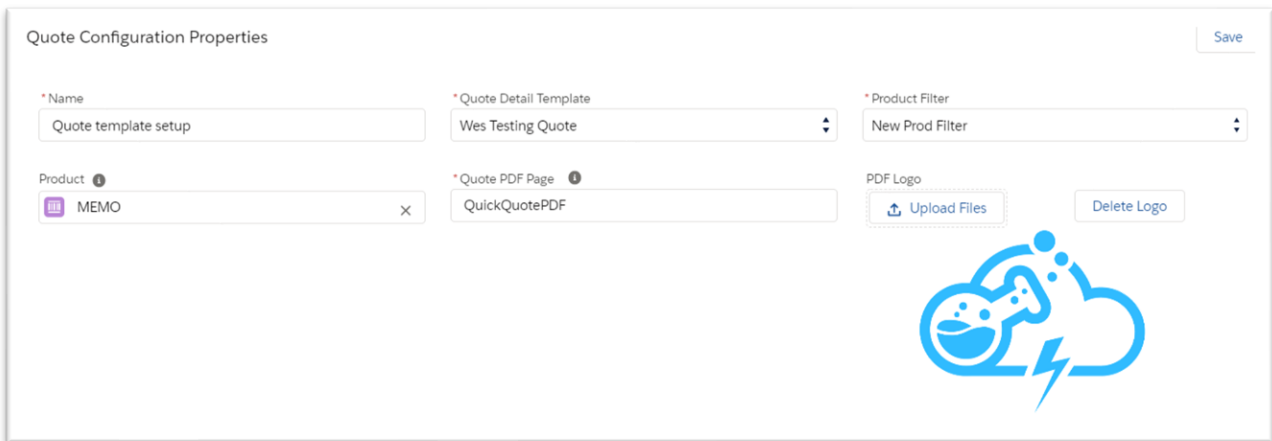
Label Group Total

Editable ☐

-

Property	Type	Description
Add Group	Toggle	Enables/Disables the Add Group Button
Delete Group	Toggle	Enables/Disables the Delete Group Button
Clone Group	Toggle	Enables/Disables the Clone Group Button
Add Product	Toggle	Enables/Disables the Add Product Button
Add Memo	Toggle	Enables/Disables the Add Memo Button. The Memo Line Product must be set on the Quote Config.
Header Color	Color Picker	Choose a custom color for the display header
Action Section	Custom Buttons Section	For Advanced Admins
Fields Section	Section	Add/Remove Fields from the Quote and Quote Group objects to the header for a quick view/edit

Quote Configuration Properties



The screenshot shows a web form titled "Quote Configuration Properties" with a "Save" button in the top right corner. The form contains several fields and controls:

- Name:** A text input field containing "Quote template setup".
- Quote Detail Template:** A dropdown menu showing "Wes Testing Quote".
- Product Filter:** A dropdown menu showing "New Prod Filter".
- Product:** A field with a purple icon and the text "MEMO", followed by a close button (x).
- Quote PDF Page:** A text input field containing "QuickQuotePDF".
- PDF Logo:** A section with an "Upload Files" button (with a plus icon) and a "Delete Logo" button.

A large blue logo, identical to the CloudFirst Labs logo, is positioned in the bottom right area of the form.

Quote Detail Template

Use this property to set the Quote Line Type Template data table that will be associated with the selected Quote Configuration record.

Product Filter Template

Use this property to set the Product Filter associated with the selected Quote Configuration record. Each Quote Configuration record can be associated with a unique Product Filter record.

Quote PDF Page

The Agile Quote tool comes with a VisualForce PDF page called QuickQuotePDF. The PDF is overridable though, and an Admin can do that by entering the name of their own custom PDF Visualforce page in this field.

Set Memo Product

The Agile Quote tool allows users to use a specific product in the system for memo lines. This field can be set on the General Config tab of the AQ Quote Config under Product. When there is a product set in this field, the **Add Memo** button can be activated on the Display Headers

Set PDF Logo

The logo shown on the default PDF VisualForce page can be set on the Quote Configuration record. This logo can be overwritten or deleted if needed.

Example - Basic Setup from Start to Finish

Here is a quick guide for the complete setup of each of the administrative steps needed to be taken before the Agile Quote tool is ready to be used on Quotes.

Default Quote Line and Product Detail Template Setup

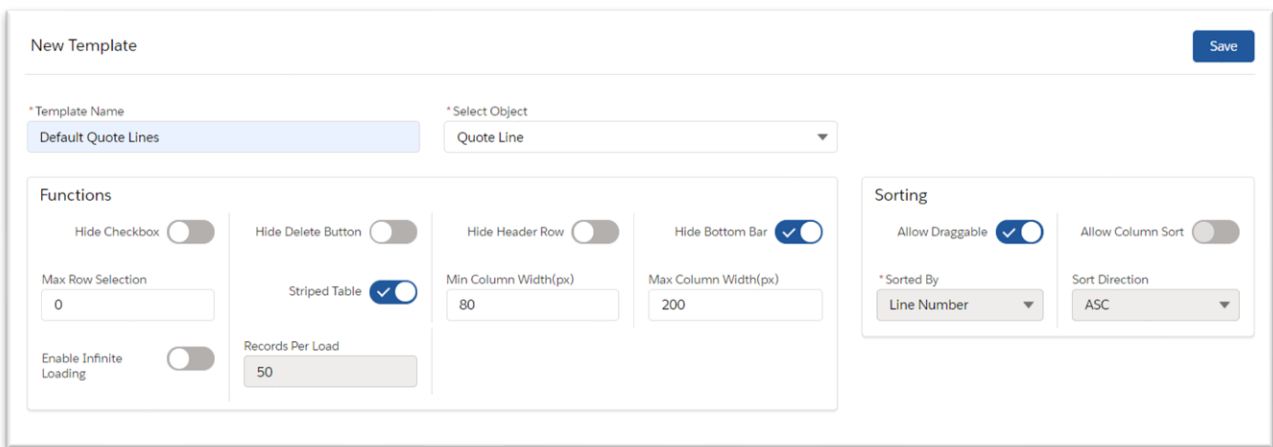
Step 1 – Navigate to the Detail Templates Screen

- In Lightning, click the App Launcher icon  on the top left corner of Salesforce
- In the App Launcher, search for the Agile Quote Manager App and select. You will be redirected to the Detail Template screen within the App.

Step 2 – Create a Quote Line Detail Template

- On the Detail Template tab, in the Existing Templates section, click the **New** button
- Fill in the Template Properties as follows:

Property	Value
Template Name	Default Quote Lines
Select Object	Quote Line
Allow Draggable	Checked
Min Column Width	80
Max Column Width	200
Hide Bottom Bar	Checked
Striped Table	Checked



New Template Save

* Template Name: * Select Object:

Functions

Hide Checkbox ☐ Hide Delete Button ☐ Hide Header Row ☐ Hide Bottom Bar ☒

Max Row Selection: Striped Table ☒ Min Column Width(px): Max Column Width(px):

Enable Infinite Loading ☐ Records Per Load:

Sorting

Allow Draggable ☒ Allow Column Sort ☐

* Sorted By: Sort Direction:

In the **Select Fields** section, add the following fields with values in order:

Field	Label	Editable	Is Visible	Extra
ProductId.Name	Product	False	True	Use ProductId Related lookup to get to Product Name Check Advanced Options and set Column Width to 175
Quantity	Quantity	True	True	
Sales Price	Sales Price	True	True	
Subtotal	Subtotal	False	True	
Discount	Discount %	True	True	
Total Price	Total Price	False	True	

Select Fields

Select Field

Product2.Name

Custom Label

Product

Editable

Is Visible

Advanced Options

Cell Attributes

Type Attributes

Column Width

175

px

Select Field

Quantity

Custom Label

Quantity

Editable

Is Visible

Advanced Options

Select Field

Sales Price

Custom Label

Sales Price

Editable

Is Visible

Advanced Options

Select Field

Subtotal

Custom Label

Subtotal

Editable

Is Visible

Advanced Options

Select Field

Discount

Custom Label

Discount

Editable

Is Visible

Advanced Options

Select Field

Total Price

Custom Label

Total Price

Editable

Is Visible

Advanced Options

- Click **Save**.

Step 3 – Create a Product Search Detail Template

- On the AgileQuote Detail Template tab, in the Existing Templates section, click the **New** button
- Fill in the Template Properties as follows:

Property	Value
Template Name	Default Product Search
Select Object	Product
Striped Table	Checked
Enable Infinite Loading	Checked
Min Column Width	50
Max Column Width	200
Allow Column Sort	Checked
Records Per Load	50
Sorted By	Product Name
Sorted Direction	ASC

Edit Template
Save

* Template Name
Default Product Search

* Select Object
Product

Functions

Hide Checkbox
☐

Max Row Selection
0

Enable Infinite Loading
☒

Hide Delete Button
☒

Striped Table
☒

* Records Per Load
50

Hide Header Row
☐

Min Column Width(px)
50

Hide Bottom Bar
☒

Max Column Width(px)
200

Sorting

Allow Draggable
☐

* Sorted By
Product Name

Allow Column Sort
☒

Sort Direction
ASC

- In the **Select Fields** section, add the following fields with values in order:

Field	Label	Editable	Is Visible	Extra
Product Name	Product	False	True	Check Advanced Options and set Column Width to 175
ProductId.Description	Description	False	True	Use ProductId Related Lookup to get to Description Check Advanced

				Options and set Column Width to 200
Quantity	Quantity	True	True	
List Price	Price	True	True	

Select Fields

* Select Field

Product Name

* Custom Label

Product Name

Editable

Is Visible

Advanced Options

+

Cell Attributes

Type Attributes

Column Width

175

px

* Select Field

Product2.Description

* Custom Label

Product Description

Editable

Is Visible

Advanced Options

-

Cell Attributes

Type Attributes

Column Width

200

px

* Select Field

List Price

* Custom Label

List Price

Editable

Is Visible

Advanced Options

-

Cell Attributes

Type Attributes

Column Width

px

* Select Field

Quantity

* Custom Label

Quantity

Editable

Is Visible

Advanced Options

-

Cell Attributes

Type Attributes

Column Width

px

- Click **Save**

At this time, both types of Detail Templates have been created, next comes a Product Filter

Default Product Filter Setup

Step 1 – Navigate to the Product Filters Screen

- On the AgileQuote Manager App, click on the Product Filters tab.

Step 2 – Create a new Product Filter

- On the Product Filters tab, in the Templates section, click the **New** button
- Fill in the Template Properties as follows:

Property	Value
Name	Default Product Filter
Product Search Template	Default Product Search

Step 3 – Add a Simple and Reusable Variable Filter

- In the Variable Filter Criteria Section, click the Add button

Property	Value
Template Field	Product Name
Filter	Contains
Field Value	(Leave blank)
Editable	Checked
Visible	Checked

- Make sure Conditions are set to AND

Step 4 – Click the Save button

Edit Template Save

* Name

Default Product Filter

* Product Search Template

Default Product Search

Default Filter Criteria

Select From Object

Quote

Field from object

PriceBook2Id

Add Filter

EqualTo

To Related Field

PriceBook

Visible

no

Static Filter Criteria

Add

No Static Filters found on this record.

Variable Filter Criteria

Add

1

* Template Field

Product Name

* Filter

Contains

Field Value

Options

☒ Editable
 ☒ Visible
 ☐ Eval Nulls

Conditions

☒ All of the conditions are met(AND)
 ☐ All of the conditions are met(OR)
 ☐ Customize the logic

Default Quote Configuration Setup

Step 1 – Navigate to the Quote Configurations Screen

- On the AgileQuote Manager App, click on the Quote Configurations tab.

Step 2 – Create a new Quote Configuration

- On the Quote Configuration tab, in the Templates section, click the **New** button
- Fill in the Template Properties as follows:

Property	Value
Name	Default Quote Setup
Quote Detail Template	Default Quote Lines
Product Filter	Default Product Filter
Quote PDF Page	QuickQuotePDF

Step 3 – Setup Header Sections

- Ungrouped Quote

Property	Value
Add Group	Yes
Add Product	Yes

Header Color	#039EFF
--------------	---------

- Fields

Field	Editable
Quote Name	Yes
Grand Total	No

- Grouped Quote

Property	Value
Add Group	Yes
Delete Group	Yes
Clone Group	Yes
Add Product	Yes
Header Color	#12BDD7

- Fields

Object	Field	Editable
Quote Line Group	Quote Line Group Name	Yes
Quote Line Group	Group Total	No

Step 3 – Click the Save Button

Quote Configuration Properties

Save

* Name

* Quote Detail Template

* Product Filter

Product ⓘ

* Quote PDF Page ⓘ

PDF Logo

Upload Files

Setup Header Sections

Ungrouped Quote

Grouped Quote

Ungrouped Display Button Settings

Add Group
☒
Yes

Add Product
☒
Yes

Add Memo
☐
No

Header Color

Select Fields For Header

* Field

Label

Editable
☒
Yes

+

* Field

Label

Editable
☐
No

-

Save

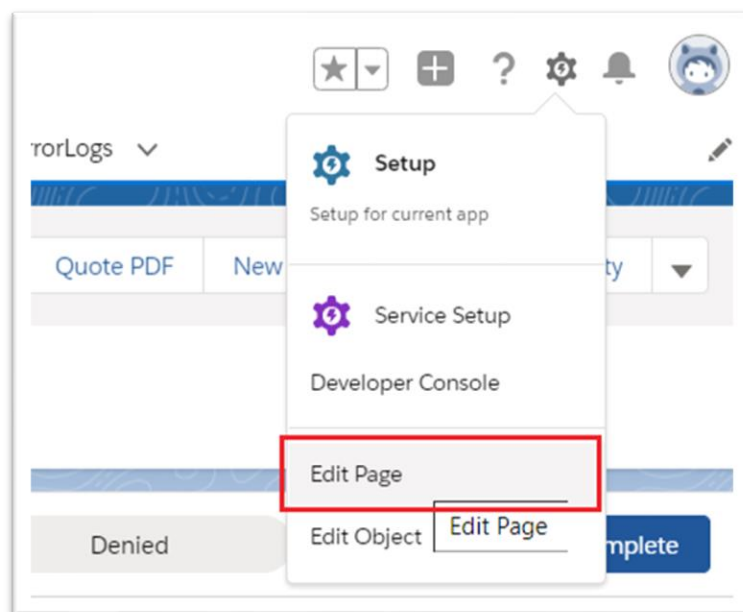
Adding AgileQuote to a Quote Lightning Record Page

Once the three main templates for the Quote Tool have been created, the Lightning Component is ready to be placed onto the Quote Screen. Here is a quick guide on how that can be done. For this example, the component will be placed within a separate tab on the quote, similar to the existing 'Related' and "Details" Tabs.

Step 1 – Open Quote Lightning Page in the Lightning App Builder

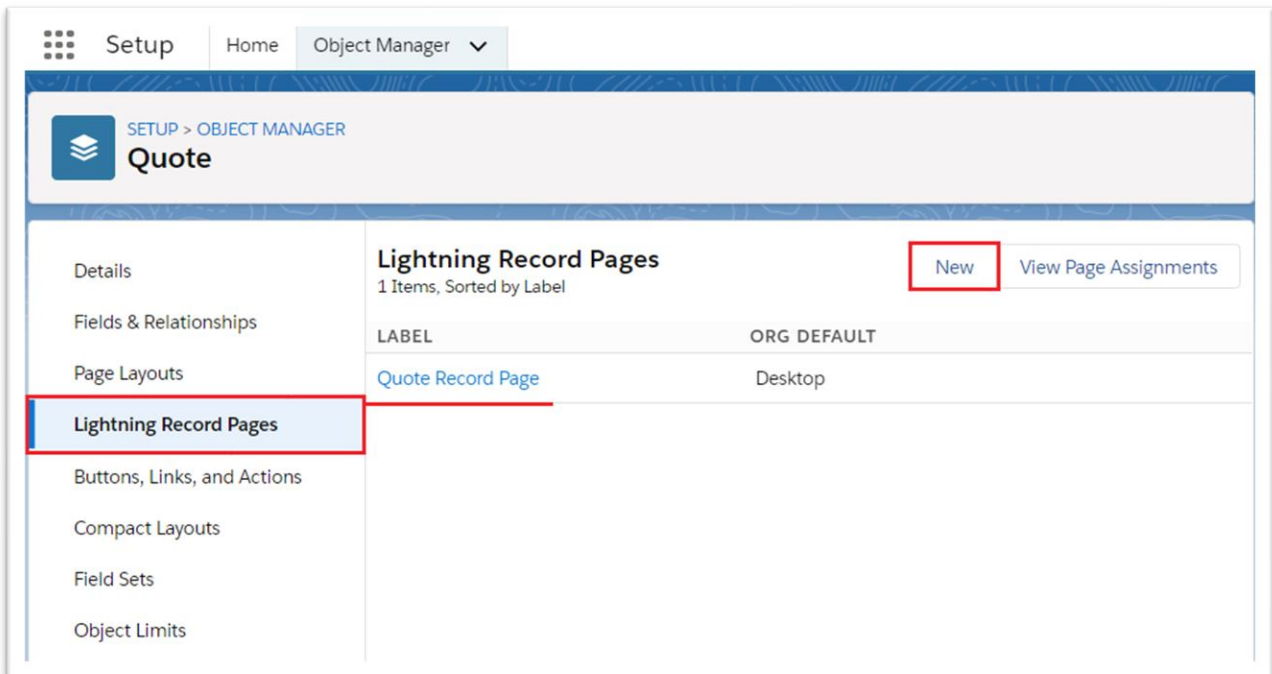
From Record

- Navigate to any Quote record page. Click the Gear icon at the top right of the screen, then click **Edit Page**



From Setup

- From Setup, click on the **Object Manager** tab
- In Object Manager, search for and select the Quote Object
- On the left-hand side of the object page, click the **Lightning Record Pages** tab
- Click on the desired Lightning Page, and then click **Edit** on the detail page.
- If there are no Lightning Pages to select, create **New** and follow the wizard. Be sure to create a **Record Page**



Setup | Home | Object Manager ▾

SETUP > OBJECT MANAGER
Quote

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits

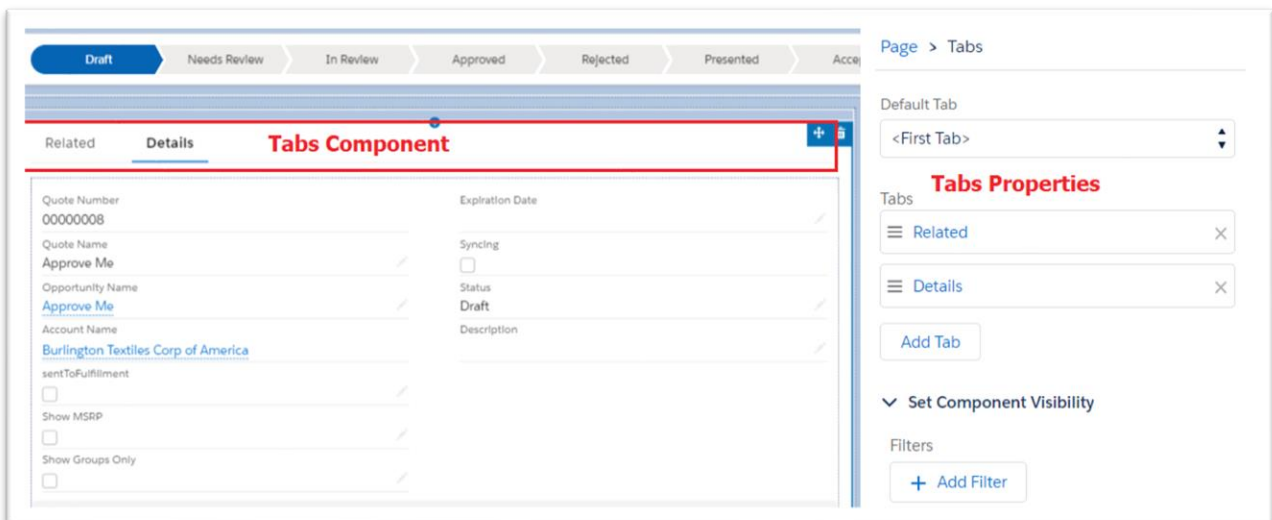
Lightning Record Pages
1 Items, Sorted by Label

New View Page Assignments

LABEL	ORG DEFAULT
Quote Record Page	Desktop

Step 2 – Add New Tab to Page

- Once in the Lightning App Builder, click on the Tabs component that is already on the page. This will make the Tab Properties show on the right.



Draft | Needs Review | In Review | Approved | Rejected | Presented | Accepted

Related | Details | **Tabs Component**

Quote Number: 00000008
Quote Name: Approve Me
Opportunity Name: Approve Me
Account Name: Burlington Textiles Corp of America
sentToFulfillment: ☐
Show MSRP: ☐
Show Groups Only: ☐

Expiration Date
Syncing: ☐
Status: Draft
Description

Page > Tabs

Default Tab: <First Tab>

Tabs Properties

Tabs: Related, Details

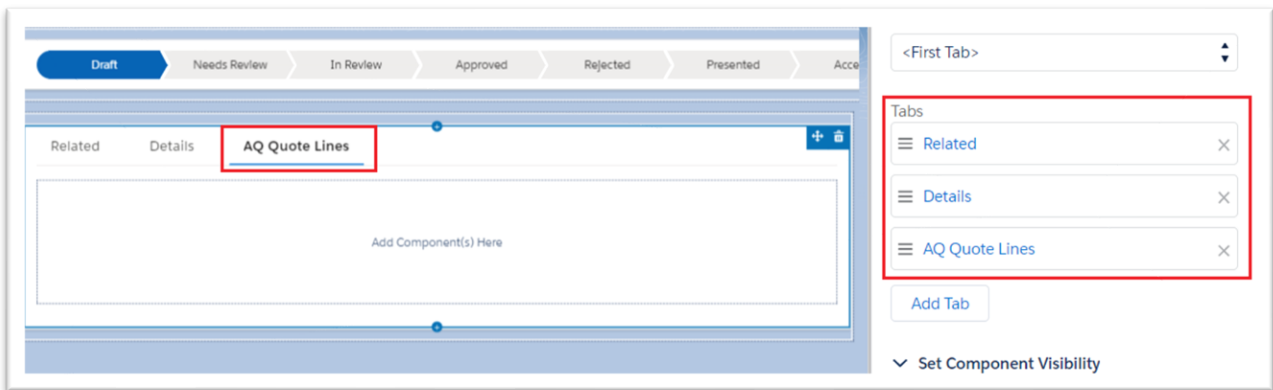
Add Tab

Set Component Visibility

Filters: + Add Filter

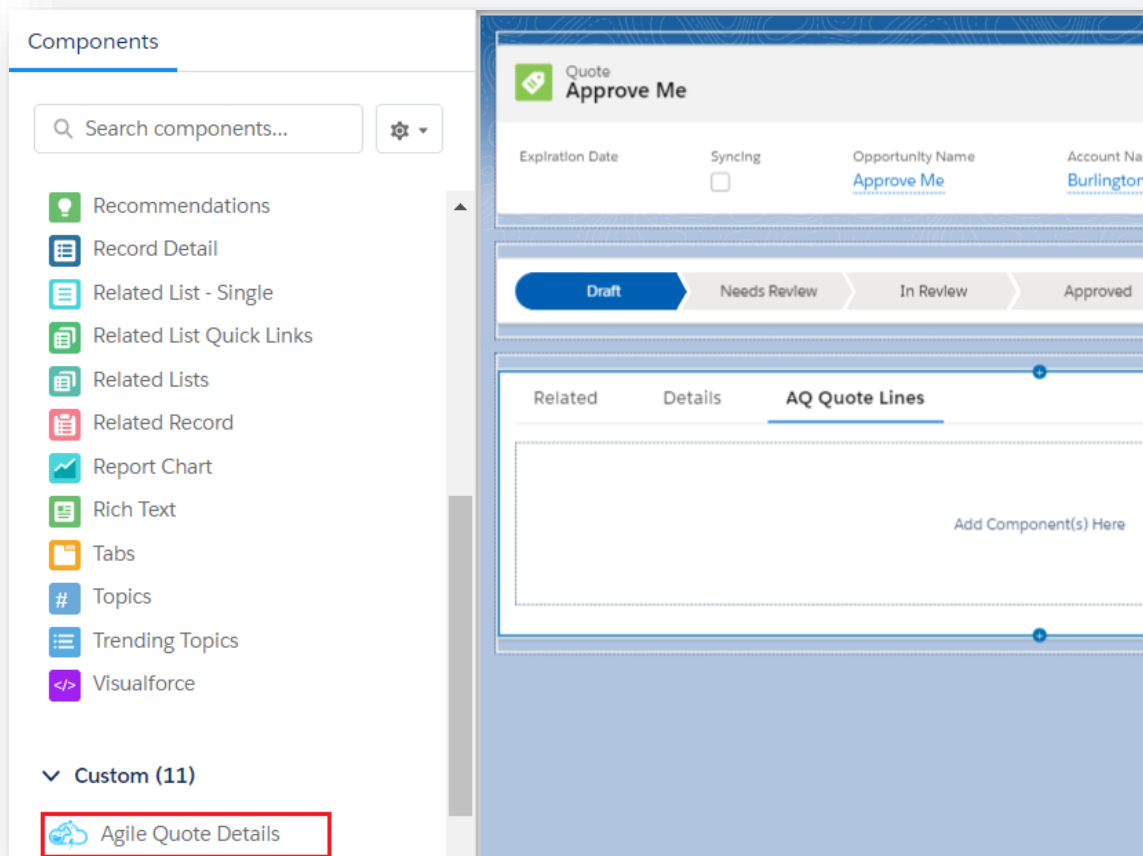
- On Tabs Properties Click **Add Tab**
- Click on the newly created tab to edit, Select **Tab Label** picklist and choose **Custom**, for Custom Label set to 'AQ Quote Lines'

- Click Done.

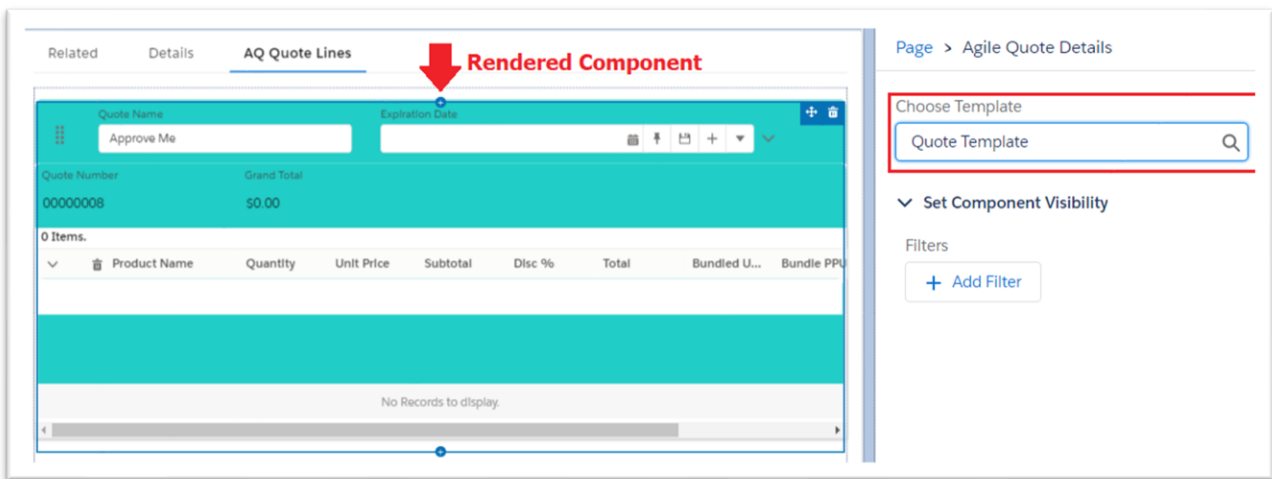


Step 3 – Add Agile Quote Details Component to Tab

- On the left side of Lightning App Builder is the components panel. Scroll down to custom until you find the **Agile Quote Details** component:



- Drag custom component and drop onto the empty tab
- The Agile Quote Details component properties will pop up asking for a Template to be chosen. This is required for the component to work. Choose the [Quote Configuration](#) template you would like this tool to be set to.
- The Component will render in the tab



Step 4 – Save and Activate Page

- Click the **Save** button to finish changes to the Lightning Record Page
- If the Record Page has not been activated, you will receive a message to do so. Click the **Activate** button and then follow the steps to complete the activation of the Lightning Page.

Now the new tab and the Agile Quote Details component are displayed on each Quote record screen.

Set up Product Bundles

Bundle Basics

The Agile Quote tool supports the setup and use of Bundle Products on standard Salesforce Quotes. Users can configure default Product Bundles with custom-made Bundle Groups and Bundle Items, with specific quantities and prices, as well as adding constraints to those bundles, and include or exclude specific items, if necessary. There are also options available to allow users to edit bundles, quantities, and prices when adding these products as Quote Line Items, or limit to default Bundles only.

The Setup of Bundle Items is completed on two separate screens, on the Product Record and the Bundle Config screen. Setup begins on the product record.

Requirements

Product Record

The Product object contains three fields related to the Product :

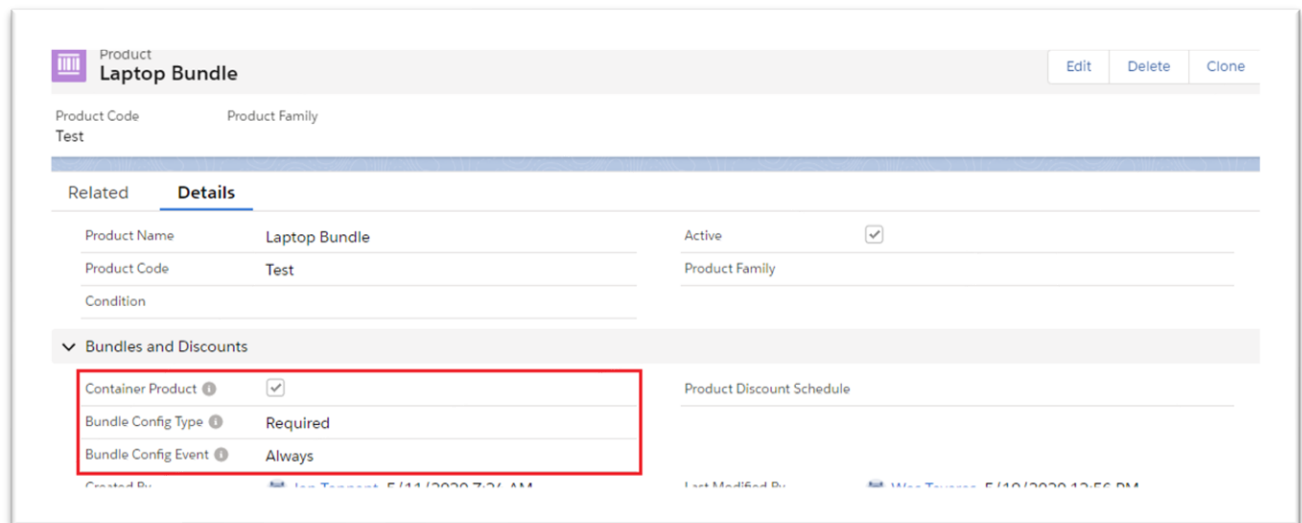
Field	Type	Description
Container Product	Checkbox	This field is required to begin setting up a Bundle. Products will not even appear on the Bundle Config until this field is checked
Bundle Config Type	Picklist	Determines if you can configure Products on Quote Lines: - Allowed: User can configure on Add or Edit of line item. - Required: User must configure on Add and Edit of line item. - Disabled: Bundle Product is unconfigurable.
Bundle Config Event	Dependent Picklist	Extension of 'Allowed' Bundle Config Type. - Add: User can configure product only on addition of line item. - Edit: User can configure product only after the addition of line item. - Always: User can configure product anytime.

The following table describes the field dependencies between Bundle Config Type and Bundle Config Event:

Field Dependencies

Config Type	Allowed	Required	Disabled
Config Event	Add	Add	Add
	Edit	Edit	Edit
	Always	Always	Always

To begin setting up a product as a bundle, set these 3 fields on an existing product record as shown below:



Product **Laptop Bundle** [Edit](#) [Delete](#) [Clone](#)

Product Code: Test Product Family:

Related Details

Product Name: Laptop Bundle Active: ☒

Product Code: Test Product Family:

Condition:

▼ Bundles and Discounts

Container Product ☒

Bundle Config Type

Bundle Config Event

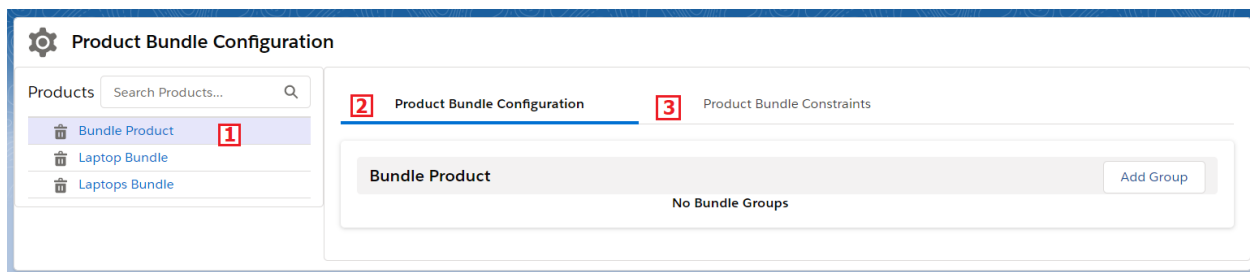
Product Discount Schedule:

Created By: Last Modified By:

Bundle Config

Once a product has been marked as a Container Product, it will display on the Bundle Config screen for setup to be completed. The Bundle Config screen is made up of 3 sections:

1. The Products list contains all Products marked as Container Product = Checked
2. Product Bundle Configuration tab, where Groups and Items will be created for a selected Product
3. Product Bundle Constraints tab, where constraints for the selected Product are setup.



Product Bundle Configuration Tab

This tab is the main section users will work in while setting up Bundles. Here users can perform multiple actions:

- (1) create a group
- (2) delete groups
- (3) create Bundle Items within those groups,
- (4) view the related table per group.
- (5) edit or delete Existing Bundle Items

The following is an example of a built-out Bundle Product with multiple Groups and Items:

Product Bundle Configuration

Product Bundle Constraints

Laptop Bundle

1

Add Group

3

+

-

2

4

Index	Product Bun...	Bundle Com...	Type	Unit Price	Quantity	Selected	Required	Bundled	
1	Dell Laptop	Dell Laptop	Component	\$0.00	1	false	false	true	▼
2	HP Laptop	HP Laptop	Component		1	false	false	false	▼
2	test	Dell Laptop	Component	\$123.00	1	true	true	false	▼
3	Lenovo Laptop	Lenovo Laptop	Component		1	false	false	false	▼

Edit

Delete

5

> Peripherals

+

-

▼ Printing

+

-

Index	Product Bun...	Bundle Com...	Type	Unit Price	Quantity	Selected	Required	Bundled	
1	Laser Printer	Laser Printer	Component		1	true	false	false	▼
2	Toner	Toner	Accessory		1	false	false	false	▼

Creating Groups

A group can be added by clicking the **Add Group** button. The create group screen consists of 3 fields, shown below. At this time, Groups cannot be edited once they are created, they will need to be deleted and re-created.

Field	Type	Description
Bundle Group Name	Text	Name of the Group
Parent Product	Lookup (Product)	The Container Product the Group belongs to. This field is filled automatically and read-only.
Index	Number	Display order of Group

Create Product Bundle Group

Product Bundle Group

New Group

Parent Product ⓘ

 Laptop Bundle ×

*Index ⓘ

6

Cancel
Save

Each group appears as a collapsible table containing all Bundle Items associated:

Product Bundle Configuration

Product Bundle Constraints

Laptop Bundle

Add Group

Computers

Product Bundle Items

Index	Item Name	Item Product	Type	Unit Price	Quantity	Selected	Required	Bundled	
1	Dell Laptop	Dell Laptop	Component	\$0.00	5	true	true	true	▼
1	Dell Laptop T	Dell Laptop	Component		1	false	false	false	▼
2	HP Laptop	HP Laptop	Component		1	false	false	false	▼
3	Lenovo Laptop	Lenovo Laptop	Component		1	false	false	false	▼

Peripherals

Printing

Networking

Subscriptions

Deleting Groups

A Bundle Group can be deleted by clicking the  within the Group.

Creating Bundle Items

Bundle Items are like child Products to the parent Container Product. Users use Bundle Items to attach these products to the parent. This requires that these Products already exist in the system before they can be used as Items. To add a Bundle Item to a Group, click the  button on the desired Group. The Create Bundle Item screen consists of the following fields:

Field	Type	Description
Bundle Item Name	Text	Name of the Item, leaving blank will default to the name of the selected Product.
Parent Product	Lookup (Product)	The Container Product the Item belongs to. This field is filled automatically and read-only.
Product	Lookup (Product)	The Product this Item refers to
Bundle Group	Lookup (Bundle Group)	The Bundle Group the Item belongs to. This field is filled automatically and read-only on create but can be edited after creation.
Type	Picklist	The type of Bundle Item: - Use "Component" if this option, including quantity, is dependent on the parent. - Use "Accessory" if this option is dependent on the parent but quantity is independent. - Use "Related Product" for related but fully independent products.
Index	Number	The display order of the Bundle Item within its Group
Selected	Checkbox	If checked, the Item will automatically be selected for addition during the Quote configuration of the Bundle Product as a line.
Required	Checkbox	If checked, the Item is forced to be added during the Quote configuration of the Bundle Product as a line.
Unit Price	Currency	The custom price of this Bundle Item when it is a part of the Bundle Product. If left blank, the Price will default to its Price Book Entry value.
Price Editable	Checkbox	Allows the user to change the price of the Item during the Quote configuration of the Bundle Product as a line.

Bundled	Checkbox	If checked, the Item is considered 'Included' with the Bundle Product, and its Price will be set to \$0.00
Quantity	Number	The default quantity of the Item
Quantity Editable	Checkbox	Allows the user to change the quantity of the Item during the Quote configuration of the Bundle Product as a line.
Min Quantity	Number	Minimum Quantity user can set within a single instance of a Product Bundle
Max Quantity	Number	Maximum Quantity user can set within a single instance of a Product Bundle

Create Product Bundle Item

General

Product Bundle Item Name

Lenovo

Parent Product

Laptop Bundle

* Bundle Comp Product

Lenovo Laptop

Product Bundle Group

Computers

* Type

Component

* Index

4

Selected

☒

Required

☐

Pricing

Unit Price

\$475.00

Price Editable

☒

Bundled

☐

Quantities

* Quantity

1

Quantity Editable

☒

Min Quantity

1

Max Quantity

10

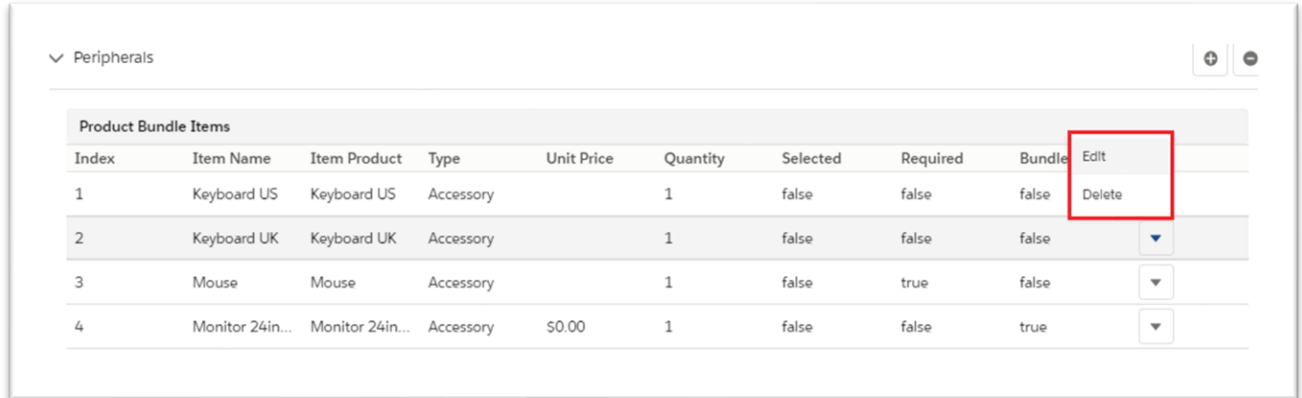
Cancel

Save

Save And New

Editing and Deleting Bundle Items

Bundle Items can be edited or deleted by clicking the Menu drop-down arrow  next to the item in the group list and then choosing 'Edit' or 'Delete'. Editing an item will re-open the above screen.



Product Bundle Items								
Index	Item Name	Item Product	Type	Unit Price	Quantity	Selected	Required	Bundle
1	Keyboard US	Keyboard US	Accessory		1	false	false	false
2	Keyboard UK	Keyboard UK	Accessory		1	false	false	false
3	Mouse	Mouse	Accessory		1	false	true	false
4	Monitor 24in...	Monitor 24in...	Accessory	\$0.00	1	false	false	true

Bundle Constraints

Constraints within Bundles can be used to relate two or more separate bundle items to force items to be either included or excluded with the 'parent' constraining product when that product is selected.

Setting up Bundle Constraints is simple and can be done from the same Product Bundle screen where Bundles are set up, but is a separate tab on the top.

Bundle Constraints are made up of two parts:

- **A Constraining Product** – a 'parent' Bundle Item which controls the list of child Bundle Items when selected to be included in the Bundle when added to the Quote. Constraining Products appear as a collapsible table of associated 'child' items, similar to how the Bundle Groups are displayed on the Product Bundle Configuration tab.

Product Bundle Configuration
Product Bundle Constraints

Laptop Bundle
Add Constraining Product

Dell

Constrained Products

Constrained Item Name	Item Constrained	Constraining Item	Type	Active
HP Ex	HP Laptop	Dell	Exclusion	true
Key Inc	Keyboard US	Dell	Dependant	true

> WiFi Router

- A Constrained Product** – a ‘child’ Bundle Item which can be set to be either included or excluded when the ‘parent’ is selected. A Constraining Product can have multiple Constrained Products associated with it. Constrained Products are the items within each table of the Constraining Products.

Product Bundle Configuration
Product Bundle Constraints

Laptop Bundle
Add Constraining Product

Dell

Constrained Products

Constrained Item Name	Item Constrained	Constraining Item	Type	Active
HP Ex	HP Laptop	Dell	Exclusion	true
Key Inc	Keyboard US	Dell	Dependant	true

> WiFi Router

Constraining Products Properties

A constraining product can be added simply by clicking the **Add Constraining Product** button. The create constraining product screen consists of 3 fields, shown below:

Field	Type	Description
Constraining Name	Text	The name of the constraining product
Item	Text	Required field. Bundle item which will be affecting other bundle items.
Container Product	Lookup (Product)	The bundle to which the product belongs. This field is filled automatically and is read-only.

Create Constraining Product

Constraining Name

Wifi

*Item ⓘ

Wifi Router

×

Container Product ⓘ

Laptop Bundle

×

Cancel

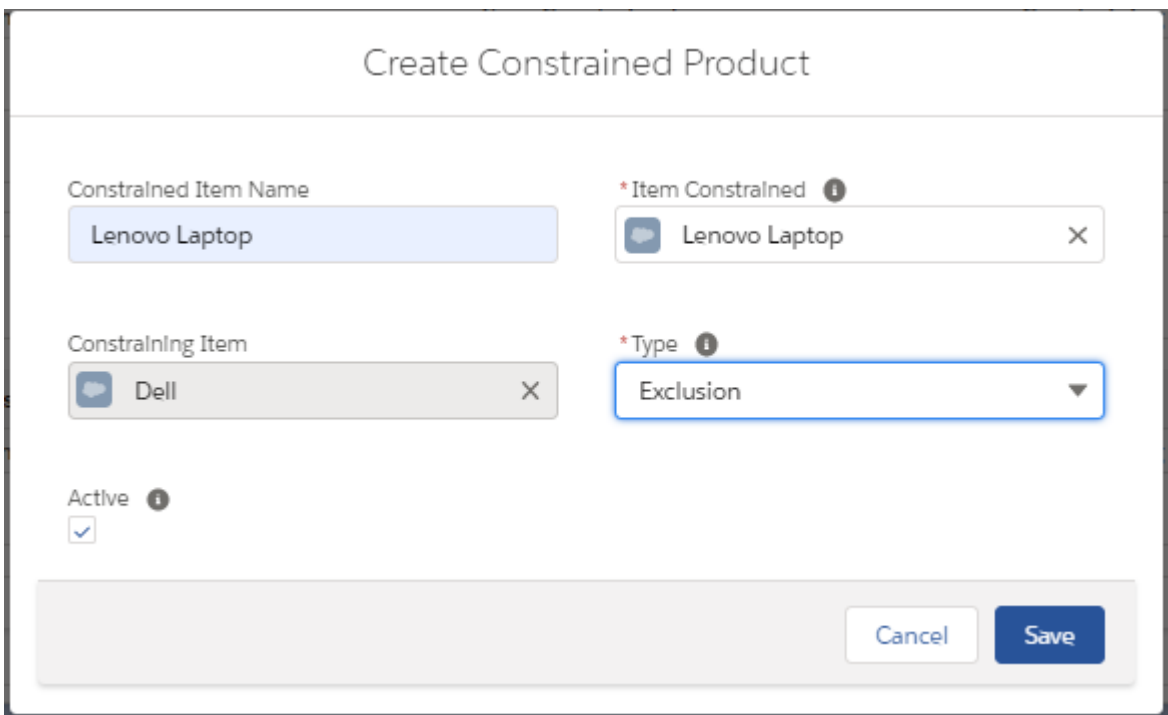
Save

Constrained Products Properties

As stated above, Constraining Products appear as groups on the screen. Each

Constraining Product Section has a  button that can be used to add a Constrained Product to the desired Constraining Product. Below are the fields for Constrained Products:

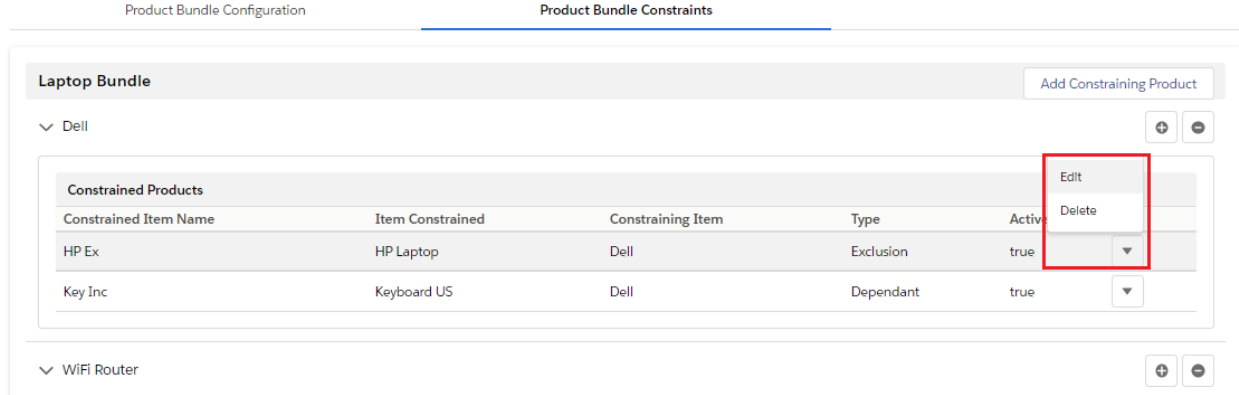
Field	Type	Description
Constrained Item Name	Text	The name of the constrained item
Item Constrained	Text	The bundle item that is being affected by the constraining bundle item
Constraining Item	Lookup (Product)	The Bundle to which the product belongs. This is a required field and read-only.
Type	Picklist	Can be either Dependent or Exclusion. Dependency means inclusion is required while exclusion means the option constraint is not selected when the constraining option is or vice versa.
Active	Checkbox	Choose whether the constraint is active by selecting or deselecting the checkbox



Editing and Deleting Constraining and Constrained Products

Editing and deleting Constrained Products works the same as Bundle Items. There is a drop-down arrow menu option on the right side of each Constrained Product in the

data table with the option to Edit or Delete. Editing will open up the same Create screen shown above:



Product Bundle Configuration Product Bundle Constraints

Laptop Bundle Add Constraining Product

▼ Dell + -

Constrained Item Name	Item Constrained	Constraining Item	Type	Active	
HP Ex	HP Laptop	Dell	Exclusion	true	Edit Delete
Key Inc	Keyboard US	Dell	Dependant	true	▼

▼ WiFi Router + -

There is no way to edit a Constraining Product. The user must delete using the button and then re-create if they want to make changes.

Dependent vs. Exclusion

Constrained Products have two possible types: **Dependent** and **Exclusion**. This just identifies what happens with the Constrained Product when the Constraining Product is selected on the front end.

If the Constrained Product is dependent, then it will automatically be checked as selected when the Constraining Product is selected. The user will not be able to unselect the dependent Constrained Product unless the first unselect the Constraining Product.

If the Constrained Product is excluded, then it will automatically be unchecked when the Constraining Product is selected. Similarly, the user will not be allowed to manually select the excluded Constrained Product for as long as the Constraining Product is selected.

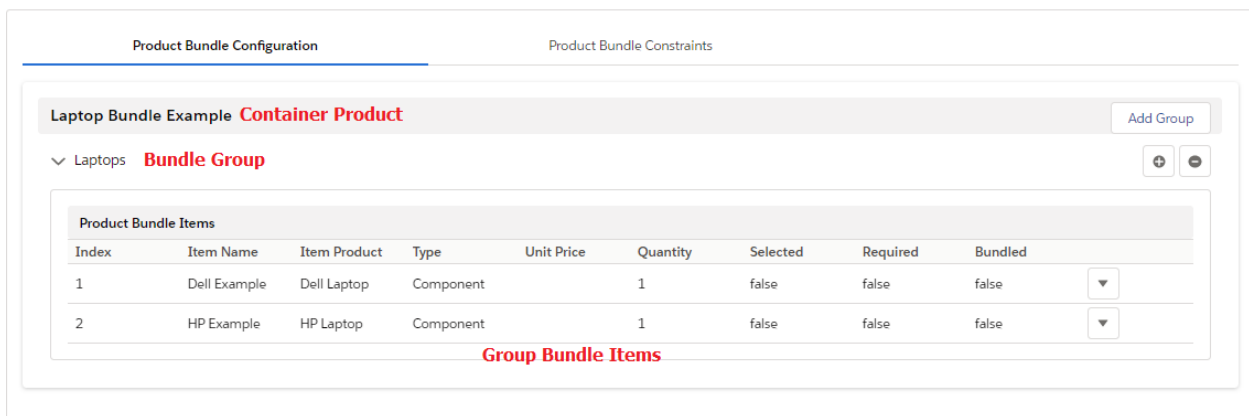
To better understand how constraints work, follow this example:

Bundle Constraints Example

The purpose of this example is to help understand how Constraints are set up on the back end and then used on the front end. The example will be split into two parts for Dependent Constraints and Exclusion Constraints.

Understanding Exclusion Constraints

For this example, we will be working with a 'Laptop Bundle Example' Container Product that contains a Laptops Bundle Group. The group contains 2 Bundle Items: Dell Laptop, and HP Laptop. As shown below:

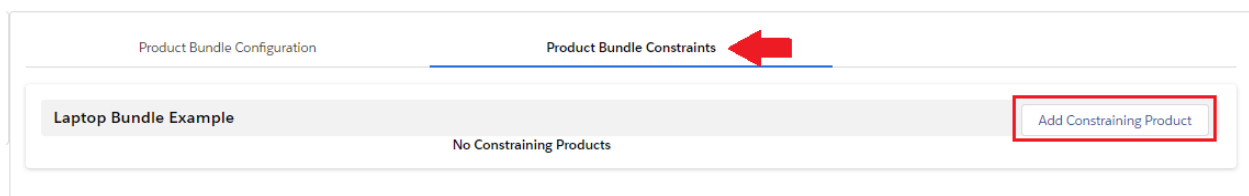


Index	Item Name	Item Product	Type	Unit Price	Quantity	Selected	Required	Bundled
1	Dell Example	Dell Laptop	Component		1	false	false	false
2	HP Example	HP Laptop	Component		1	false	false	false

We want to set up exclusion constraints to limit the user to only be able to select either a Dell Laptop or an HP Laptop, but not both. To accomplish this, we must set up 2 Constraining Products (one for each of the Bundle Items), then each of the constraining products must have an exclusion constrained product set up for the opposite bundle item.

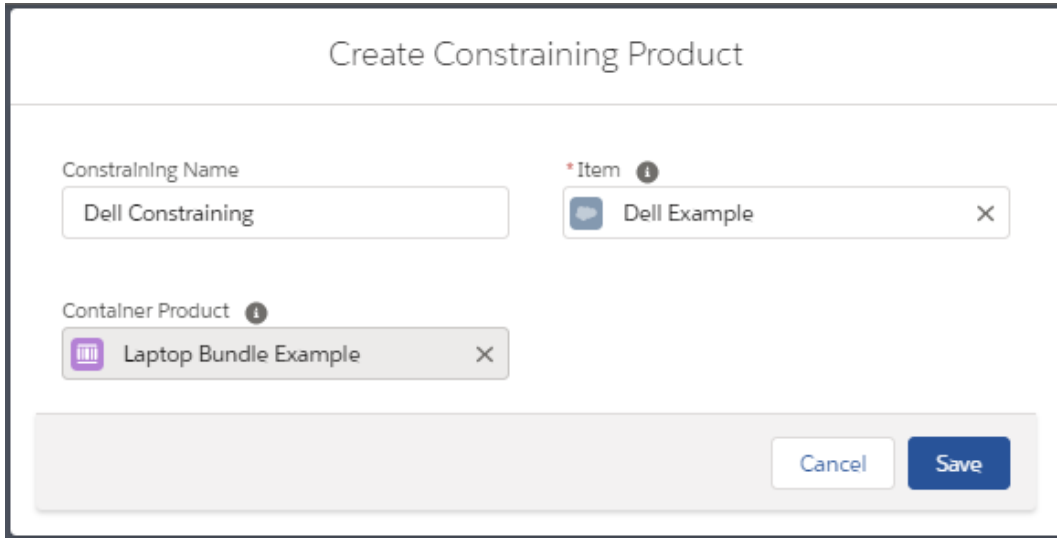
To do this:

1. Click on the Product Bundle Constraints tab.
2. On the Constraints tab, click the **Add Constraining Product** button



3. The Create Constraining Product screen will open
 - a. Set Constraining Name field to **Dell Constraining**

- b. Set Item lookup field to **Dell Example** (Name of the Bundle Item in the original example screenshot)
- c. The Container Product field will automatically be set to **Laptop Bundle Example**



Create Constraining Product

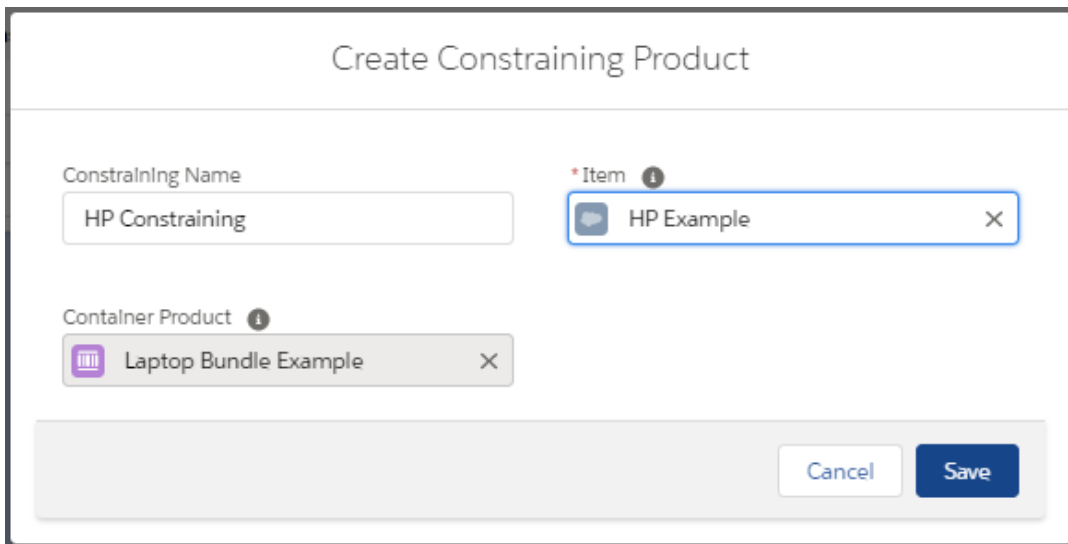
Constraining Name: Dell Constraining

* Item: Dell Example

Container Product: Laptop Bundle Example

Cancel Save

- 4. Click Save
- 5. Repeat steps 2-4 to create an HP Constraining Product
 - a. Set Constraining Name field to **HP Constraining**
 - b. Set Item lookup field to **HP Example**



Create Constraining Product

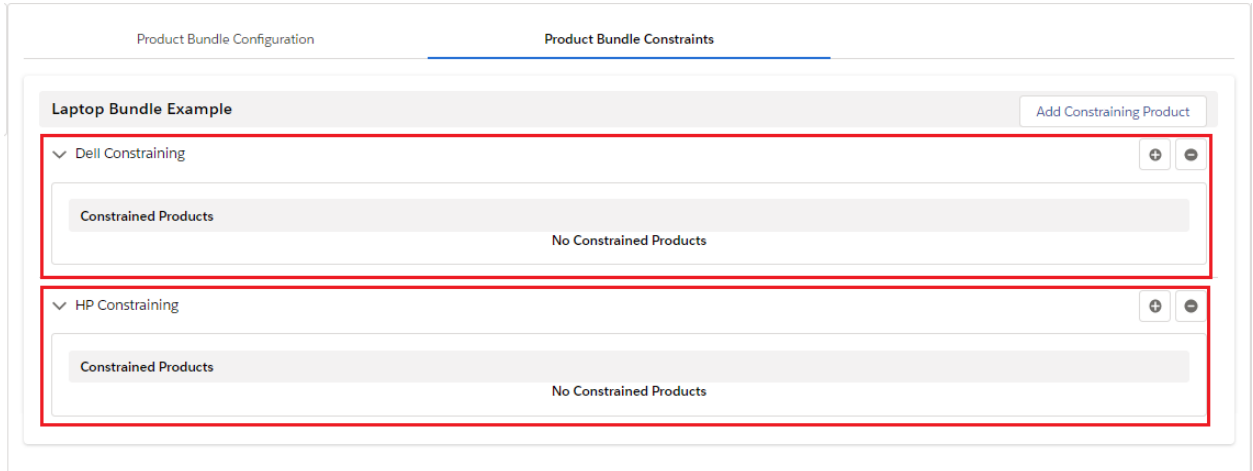
Constraining Name: HP Constraining

* Item: HP Example

Container Product: Laptop Bundle Example

Cancel Save

6. Now we have successfully created 2 Constraining Products. But these do not yet have Constrained Products associated. We will set this up now. Remember: Each Constrained Product will be the opposite of that which is Constraining it.



7. In the **Dell Constraining** section, click the  button
8. The Create Constrained Product screen will open
- Set Constrained Item Name field to **HP Excluded**
 - Set Item Constrained lookup field to **HP Example**
 - Constraining Item lookup field should be automatically filled with **Dell Constraining**
 - Set Type dropdown to **Exclusion**
 - Check Active
9. Click Save.

Create Constrained Product

Constrained Item Name	* Item Constrained ⓘ
HP Excluded	HP Example
Constraining Item	* Type ⓘ
Dell Constraining	Exclusion
Active ⓘ	
☒	

10. In the **HP Constraining** section, click the  button
11. The Create Constrained Product screen will open
 - a. Set Constrained Item Name field to **Dell Excluded**
 - b. Set Item Constrained lookup field to **Dell Example**
 - c. Constraining Item lookup field should be automatically filled with **HP Constraining**
 - d. Set Type dropdown to **Exclusion**
 - e. Check Active
12. Click Save.

Create Constrained Product

Constrained Item Name

* Item Constrained ⓘ

Constraining Item

* Type ⓘ

Active ⓘ
☒

Once complete, the Exclusion Constraints have been set up successfully. On the front end, if we add the Container Product to a quote and configure it; selecting the Dell Bundle Item will prevent from selecting the HP Bundle Item, and vice versa:

Configure Product Bundle

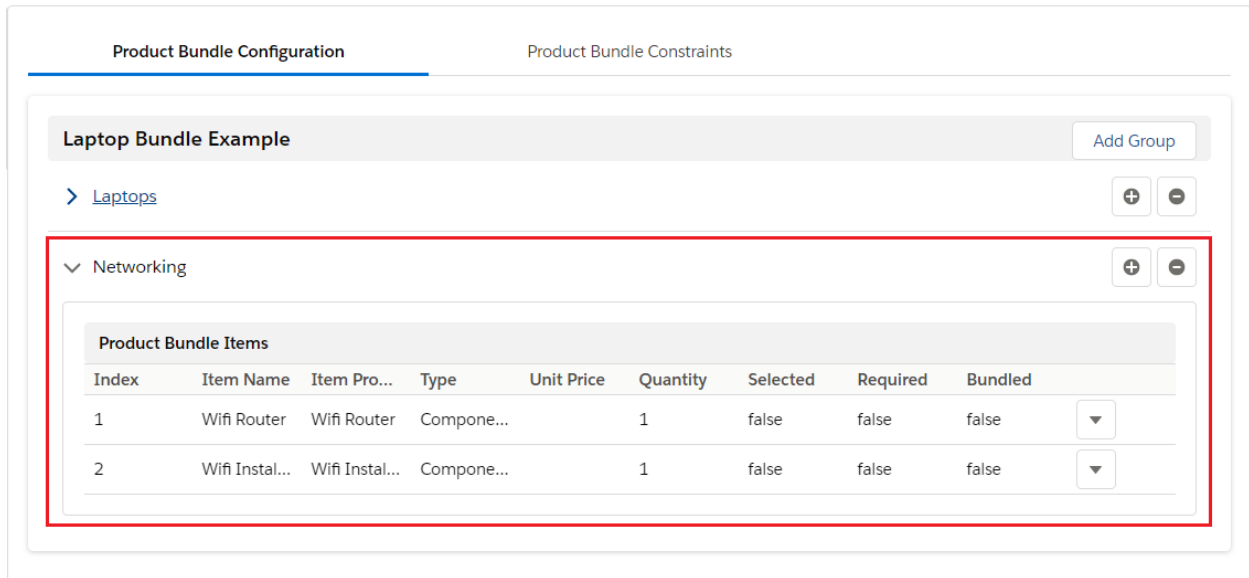
Laptop Bundle Example

Laptops

	Item Name	Type	Quantity
☒	Dell Example	Component	1.00
☐	HP Excluded Constraint HP Example	Component	1.00

Understanding Dependent Constraints

For this example, we will be working with the 'Laptop Bundle Example' Container Product from the last example. A new group has been added (Networking) and contains 2 Bundle Items: Wifi Router and Wifi Installation. As shown below:



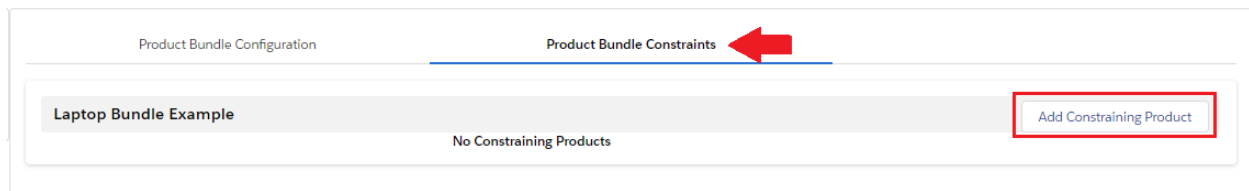
The screenshot shows the 'Product Bundle Configuration' tab selected. Under the 'Laptop Bundle Example' container, a 'Networking' group is expanded, revealing a table of 'Product Bundle Items'.

Index	Item Name	Item Pro...	Type	Unit Price	Quantity	Selected	Required	Bundled
1	Wifi Router	Wifi Router	Compone...		1	false	false	false
2	Wifi Instal...	Wifi Instal...	Compone...		1	false	false	false

For this example, we want to set up a dependent constraint to force the Wifi Installation to be included when the user selects the Wifi Router.

To do this:

1. Click on the Product Bundle Constraints tab.
2. On the Constraints tab, click the **Add Constraining Product** button



The screenshot shows the 'Product Bundle Constraints' tab selected. The interface displays 'Laptop Bundle Example' and 'No Constraining Products'. A red arrow points to the 'Add Constraining Product' button, which is highlighted with a red box.

3. The Create Constraining Product screen will open
 - a. Set Constraining Name field to **Wifi Constraining**
 - b. Set Item lookup field to **Wifi Router** (Name of the Bundle Item in the original example screenshot)
 - c. The Container Product field will automatically be set to **Laptop Bundle Example**
4. Click Save.

Create Constraining Product

Constraining Name

Wifi Constraining

*Item ⓘ

Wifi Router

×

Container Product ⓘ

Laptop Bundle Example

×

Cancel

Save

5. Now we have created our parent constraining product. We need to now create a constrained product for the Wifi Installation and make it dependent so that a selection is forced when the Wifi Router is selected.
6. In the **Wifi Constraining** section, click the  button
7. The Create Constrained Product screen will open
 - a. Set Constrained Item Name field to **Wifi Installation Dep**
 - b. Set Item Constrained lookup field to **Wifi Installation**
 - c. Constraining Item lookup field should be automatically filled with **Wifi Constraining**
 - d. Set Type dropdown to **Dependent**
 - e. Check Active
8. Click Save.

Create Constrained Product

Constrained Item Name

*Item Constrained ⓘ

Wifi Installation
✕

Constraining Item

Wifi Constraining
✕

*Type ⓘ

Dependant
▼

Active ⓘ

☒

Cancel
Save

The Dependent Constraint has been set up successfully. On the front end, if we add the Container Product to a quote and configure it; selecting the Wifi Router Bundle Item will automatically select the Wifi Installation Bundle Item and vice versa:

Configure Product Bundle

▼ Laptop Bundle Example

▼ Laptops

	Item Name	Type	Quantity
☐	Dell Example	Component	1.00
☐	HP Example	Component	1.00

▼ Networking

	Item Name	Type	Quantity
☒	Wifi Router Ex	Component	1.00
☒	Dependent Constraint Wifi Installation Ex	Component	1.00

Add selected Products and Exit
Close

Product Discount Schedules

Introduction

AgileQuote Admins can easily set up Discount Schedules on products to automatically add discounts, in the form of percentages or direct amounts, based on quantity ranges that are set up as tiers. For a single line item, a discount can be applied as:

- Tier – All line item quantity is discounted based on the quantity tier that the line item falls into
- Step – The line item will receive a summed discount based on all the tiers that the total quantity falls into.

Discount Schedules are not unique across all products and quote lines within the system, so AgileQuote allows for Discount Schedules to be set up for users to make changes to them on the front-end for each quote line.

Setup of Discount Schedules is simple and straightforward because it uses the Standard Salesforce object record screens! Discount Schedules are made up of 2 custom objects:

- Product Discount Schedules
- Product Discount Schedule Details

Requirements

To set up Discount Schedules, a user must be granted permission via one of two permission sets:

- Agile Quote Admin
- Agile Quote Setup Discount Schedules

Product Discount Schedules Objects

Product Discount Schedule Header

The Header level object of Discount Schedules

Field	Type	Description
Product Discount	Text	Custom name of the Discount Schedule

Schedule Name		
Active	Checkbox	Determines whether Discount Schedule is active or not
Type	Picklist	The default Type of the discount schedule when it is originally added to the quote. Types are Tier and Step .
Product	Lookup	Ignore - Depreciated functionality.
Allow Modification	Checkbox	Determines whether the front-end user will be able to modify the Discount Schedule, outside the default setup, on an individual Quote Line basis.
Allow Deactivation	Checkbox	Determines whether the front-end will be able to deactivate the Discount Schedule on an individual Quote Line basis.

Product Discount Schedule Detail

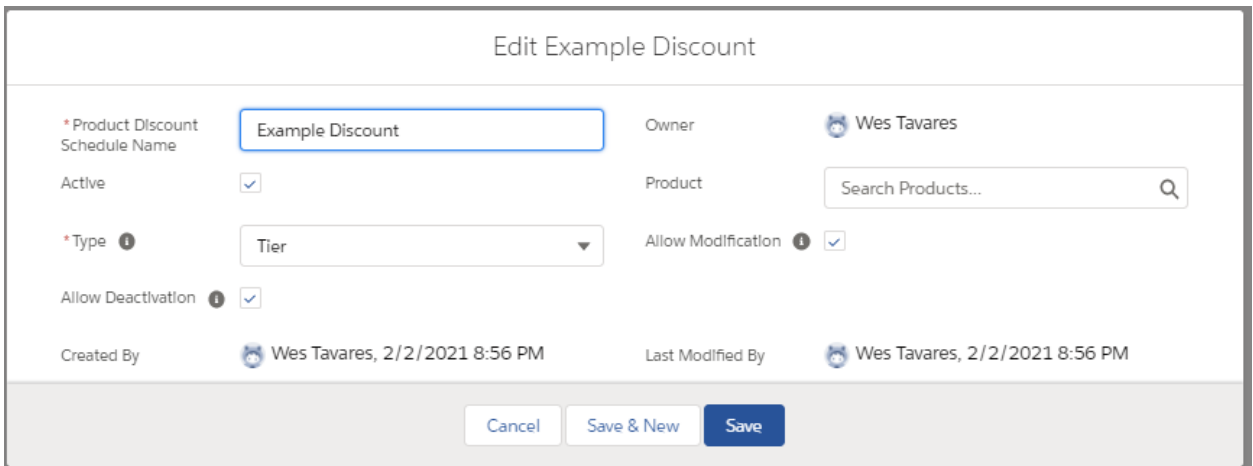
The Detail Object Records represent the different tiers of the Discount Schedule. Each will store a range of Quantity values and a discount amount and type.

Field	Type	Description
Discount Schedule Detail Name	Text	Custom name of the Discount Schedule Detail record
Lower Bound	Number	The Lower end for Quantity
Upper Bound	Number	The Upper end for Quantity
Discount Type	Picklist	How the discount will be applied: Amount, Percent, Amount per Unit
Discount In Amount	Number	Amount of discount if Type is Amount or Amount per Unit
Discount In Percent	Percent	% Amount of Discount if Type is Percent

Setting Up and Using Discount Schedules

Discount Schedules are set up simply by utilizing the Standard Salesforce Record pages, however, a Discount Schedule must be connected to a Product via the Product record, Here we will illustrate the setup of a simple Discount Schedule with 3 tiers and associate it with a Product.

1. In the Agile Quote Manager App, Navigate to the Product Discount Schedules tab.
2. Click the New button on the List
3. Fill in data:
 - a. Product Discount Schedule Name – **Example Discount**
 - b. Active – **Checked**
 - c. Type – **Tier**
 - d. Allow Modification – **Checked**
 - e. Allow Deactivation – **Checked**
4. Click Save



5. You will be redirected to the newly created Discount Schedule. Then navigate to the Product Discount Schedule Detail Related List and click New
6. Fill in data:
 - a. Product Discount Schedule Detail Name – **Tier 1**
 - b. Product Discount Schedule – **Example Discount**
 - c. Lower Bound – **1**
 - d. Upper Bound – **5**
 - e. Discount in Percent – **5**

Edit Tier 1

* Product Discount Schedule Detail Name	Tier 1	Product Discount Schedule	Example Discount
* Lower Bound ⓘ	1	* Discount Type	Percent
Upper Bound ⓘ	5	Discount In Percent	5.00%
		Discount In Amount	
Created By	 Wes Tavares, 2/2/2021 9:02 PM		Last Modified By
	 Wes Tavares, 2/2/2021 9:02 PM		

7. Click Save & New. Repeat Step 6 to create two more tiers. Data:

- a. Product Discount Schedule Detail Name – **Tier 2**
 - b. Product Discount Schedule – **Example Discount**
 - c. Lower Bound – **6**
 - d. Upper Bound – **10**
 - e. Discount in Percent – **10**
-
- a. Product Discount Schedule Detail Name – **Tier 3**
 - b. Product Discount Schedule – **Example Discount**
 - c. Lower Bound – **11**
 - d. Upper Bound – **15**
 - e. Discount in Percent – **15**

Product Discount Schedule

Genwatt Discount

Related

Product Discount Schedule Detail (3)

New

3 items • Updated a few seconds ago

	Product Discount S... ▾	Discount Type ▾	Lower Bound ▾	Upper Bound ▾	Discount In Amount ▾	Discount In Percent ▾	
1	Tier 1	Percent	1	5		5.00%	▾
2	Tier 2	Percent	6	10		10.00%	▾
3	Tier 3	Percent	11	15		15.00%	▾

View All

8. Now that the Discount Schedule has been fully set up, it needs to be associated with a Product. Go to a Product Record
9. On the Product record enter the Example Discount in the Product Discount Schedule lookup field. And then click Save.

Edit Printer Paper

* Product Name	Printer Paper	Active	☒
Product Code		Product Family	--None--
Condition	--None--		
Disable Reconfiguration	☐		

Bundles and Discounts

Container Product ? ☐

Product Discount Schedule

Example Discount
×

Bundle Config Type ?

View all dependencies

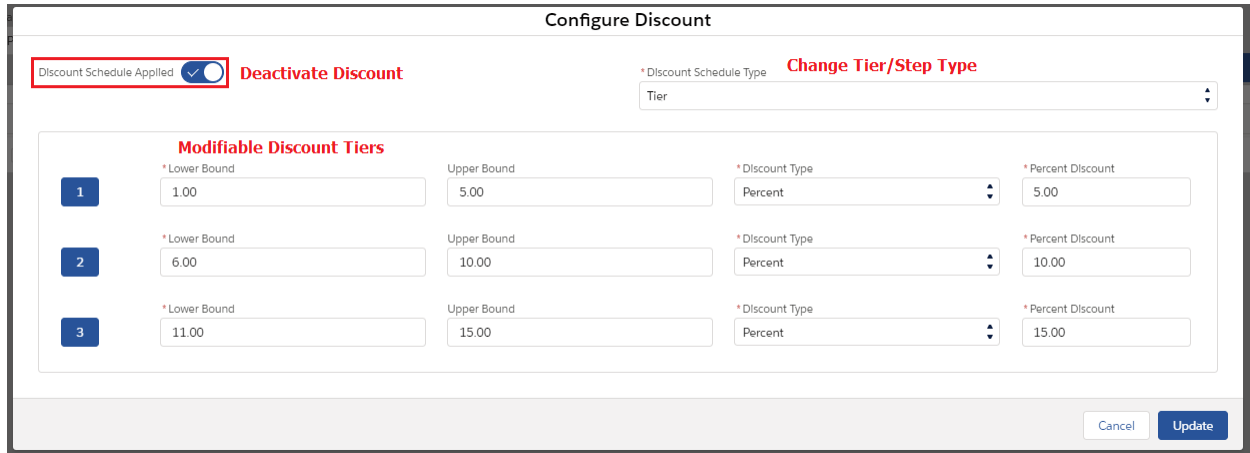
Bundle Config Event ?

View all dependencies

10. The Discount Schedule has been successfully created and associated with a Product. To test the discounts and see them in action, do the following:
 - a. Go to a Quote record
 - b. On Quote, click the Add Product Button +
 - c. On the Add Products screen search for the Product that you set up the Discount Schedule for
 - d. Notice the little money bag icon that appears in the first column of the Product that was searched for. This means that there is a Discount Schedule associated with the Product:

Select Products				
Product Name(Contains)				
Printer Paper Search				
1 Items.				
Product ↑	Product Description	List Price	Unit Price	Quantity
☐	Printer Paper	\$3.00		1

- e. Clicking the money bag icon opens the **Configure Discount** modal window. This screen can be used to see the details of the discount, as well as modify the discount or deactivate the discount if the Discount Schedule was configured for such:

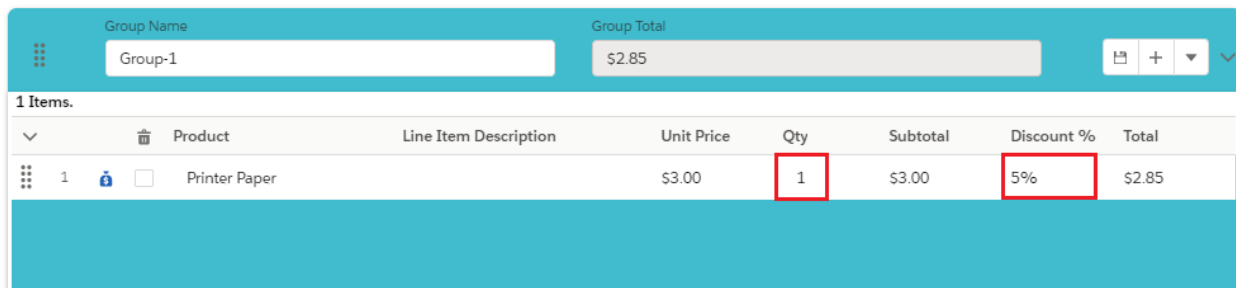


The **Configure Discount** modal window shows the discount schedule configuration. At the top, there is a toggle for "Discount Schedule Applied" (checked) and a "Deactivate Discount" button. To the right, there is a "Change Tier/Step Type" dropdown menu. Below this, the "Modifiable Discount Tiers" section displays three tiers:

Tier	Lower Bound	Upper Bound	Discount Type	Percent Discount
1	1.00	5.00	Percent	5.00
2	6.00	10.00	Percent	10.00
3	11.00	15.00	Percent	15.00

At the bottom right, there are "Cancel" and "Update" buttons.

- f. Close the Configure Discount screen, select the Product and then add it to the quote
- g. Notice immediately just by adding the product to the quote a Discount is added. This is because the Line was added with a default 1 Quantity which falls into the first tier range of the Discount Schedule:



Group Name		Group Total					
Group-1		\$2.85					
1 Items.							
	Product	Line Item Description	Unit Price	Qty	Subtotal	Discount %	Total
1	Printer Paper		\$3.00	1	\$3.00	5%	\$2.85

- h. Now change the Quantity to 11 and Save the Quote. The Discount will jump to 15% because 11 now falls into Tier 3 of the Discount Schedule:

Group Name

Group-1

Group Total

\$28.05

+

1 Items.

		Product	Line Item Description	Unit Price	Qty	Subtotal	Discount %	Total
	1		Printer Paper	\$3.00	11	\$33.00	15%	\$28.05

- i. Now change the Discount Schedule on that Line Item. Click the Money Bag  on the Line Item to open the Configure Discount screen.
- j. Change the Tier 3 Discount Percent from 15 to 20. Then click the **Update** button:

Configure Discount

Discount Schedule Applied ☒

* Discount Schedule Type: Tier

1	* Lower Bound: 1.00	Upper Bound: 5.00	* Discount Type: Percent	* Percent Discount: 5.00
2	* Lower Bound: 6.00	Upper Bound: 10.00	* Discount Type: Percent	* Percent Discount: 10.00
3	* Lower Bound: 11.00	Upper Bound: 15.00	* Discount Type: Percent	* Percent Discount: 20.00

- k. The screen will close and the Quote Line will automatically be updated. Since we are still at 11 Qty we are still in Tier 3 so the 15% Discount jumps to 20%:

Group Name

Group-1

Group Total

\$28.05

+

1 Items.

		Product	Line Item Description	Unit Price	Qty	Subtotal	Discount %	Total
	1		Printer Paper	\$3.00	11	\$33.00	20%	\$26.40

- l. Lastly, let us turn off the Discount Schedule for that individual line completely. Click the Money Bag  on the Line Item to open the Configure Discount screen.

m. Uncheck the **Discount Schedule Applied** box and then click the **Update** button:

Configure Discount

Discount Schedule Applied ☐

* Discount Schedule Type
Tier

1	* Lower Bound 1.00	Upper Bound 5.00	* Discount Type Percent	* Percent Discount 5.00
2	* Lower Bound 6.00	Upper Bound 10.00	* Discount Type Percent	* Percent Discount 10.00
3	* Lower Bound 11.00	Upper Bound 15.00	* Discount Type Percent	* Percent Discount 20.00

Cancel

Update

n. The screen will close and the Quote Line will automatically be updated.

The Money Bag  is now red to show that there is a Discount Schedule available for this line but it is inactive. The 20% Discount has also been removed:

Group Name

Group-1

Group Total

\$28.05

+

1 Items.

		Product	Line Item Description	Unit Price	Qty	Subtotal	Discount %	Total
	1		Printer Paper	\$3.00	11	\$33.00		\$33.00

Understanding Discount Schedule Types

As mentioned in the introduction, there are 2 separate types of Discount Schedules:

- Tier – All line item quantity is discounted based on the quantity tier that the line item falls into
- Step – The line item will receive a summed discount based on all the tiers that the total quantity fell into.

If we have a product with a discount schedule with 3 simple tiers:

- Tier 1: Quantity Range 1-5 → Discount 5%
- Tier 2: Quantity Range 6-10 → Discount 10%
- Tier 3: Quantity Range 11-15 → Discount 15%

Product Discount Schedule Genwatt Discount						
Related						
Product Discount Schedule Detail (3)						
3 Items • Updated a few seconds ago						
Product Discount S...	Discount Type	Lower Bound	Upper Bound	Discount In Amount	Discount In Percent	
1 Tier 1	Percent	1	5		5.00%	▼
2 Tier 2	Percent	6	10		10.00%	▼
3 Tier 3	Percent	11	15		15.00%	▼
View All						

Now we add the product to a quote and give it a quantity of 12.

- In a Tier discount, 12 quantity would fall into Tier 3 and all 12 Quantity would receive a 15% discount. As shown below:

1 Items.								
▼	Product	Line Item Description	Unit Price	Qty	Subtotal	Discount %	Total	
1	GenWatt Diesel 10kW	Tier Type Discount	\$5,000.00	12	\$60,000.00	15%	\$51,000.00	

- In a Step discount, the 12 Quantity would still fall into Tier 3, but the first 5 quantity would be given a 5% Tier 1 discount, the next 5 quantity would be given a 10% Tier 2 discount, and the remaining 2 quantity would get the 15% Tier 3 discount. The result is a 9% total Discount, as shown below:

1 Items.								
▼	Product	Line Item Description	Unit Price	Qty	Subtotal	Discount %	Total	
1	GenWatt Diesel 10kW	Step Type Discount	\$5,000.00	12	\$60,000.00	9%	\$54,750.00	

Discount Schedules Allow Modification

Admins have the option of allowing their users the ability to modify Discounts on an individual line item level by setting the **Allow Modification** flag on the Product Discount Schedule Header object record. A Discount Schedule line item will have a blue Money Bag . Clicking the Money Bag icon will open the Configure Discount Schedule screen:

Group Name

Group-1

Group Total

\$54,768.90

+

2 Items.

		Product	Line Item Description	Unit Price	Qty	Subtotal	Discount %	Total
1		GenWatt Diesel 10kW	Step Type Discount	\$5,000.00	12	\$60,000.00	9%	\$54,750.00
2		Edit Discount Schedule						
				\$3.00	7	\$21.00	10%	\$18.90

Discount Schedules Allow Deactivation

Admins also have the option of allowing their users the ability to deactivate Discounts for individual lines by setting **Allow Deactivation** flag on the Product Discount Schedule Header object record. A deactivated Discount Schedule line item will appear with a red Money Bag  next to it:

Group Name

Group-1

Group Total

\$28.05

+

1 Items.

		Product	Line Item Description	Unit Price	Qty	Subtotal	Discount %	Total
1		☐	Printer Paper	\$3.00	11	\$33.00		\$33.00

Understanding Tier Discount Types

Every Discount Detail Tier has a Discount Type which can be one of three options:

1. **Percent** – When this option is chosen it takes a % discount off the Subtotal (Quantity * Sales Price) of the Quote Line. The Tier record determines the % based on the entered value of the **Discount in Percent** field on the record.
2. **Amount** – When this option is chosen, the Discount Schedule takes an amount based on the value in the **Discount in Amount** field and subtracts that from the Subtotal (Quantity * Sales Price) of the Quote Line to determine the Discount % to apply.
 - a. For example, if you had a line with 10 Quantity for \$10 Sales Price per item, the Subtotal would come out to \$100, but we have a \$5 Amount Discount Schedule applied. The schedule would take the \$5 off the Subtotal to determine what the Discount % should be, which in this case is 5%:

Group Name

Group-1

Group Total

\$100.00

+

1 Items.

		Product	Line Item Description	Unit Price	Qty	Subtotal	Discount %	Total
	1		Printer Paper	\$10.00	10	\$100.00	5%	\$95.00

3. **Amount Per Unit** – When this option is chosen, the Discount Schedule takes an amount based on the value in the **Discount In Amount field** off each quantity, and then sums that and subtracts from the Subtotal to determine what the Discount % should be.
 - a. For example, if we take the same scenario from the previous example and changed it to Amount Per Unit, the Discount changes drastically. Instead of taking \$5 off the Subtotal, it takes \$5 * Qty off the Subtotal, which becomes a 50% discount:

Group Name

Group-1

Group Total

\$100.00

+

1 Items.

		Product	Line Item Description	Unit Price	Qty	Subtotal	Discount %	Total
	1		Printer Paper	\$10.00	10	\$100.00	50%	\$50.00

Advanced Agile Quote Administration

Quote Line Erroring Visual Queue

AgileQuote contains fields on the Quote Line Item object that can be utilized and manipulated to display erroring, depending on the requirements of the environment. When a line errors, it will be outlined in by a red box as shown below:

Group Name

Group-1

Group Total

\$50.00

+

1 Items.

Product

Line Item Description

Unit Price

Qty

Subtotal

Discount %

Total

1

Printer Paper

Red outline around errored line item

\$10.00

10

\$100.00

10%

\$90.00

The two fields on the Quote Line Item object that are used for visual erroring are:

- Line Item Error - agilqt__sysLineItemError__c – Formula (Checkbox)
- quoteLineErrorCount - agilqt__quoteLineErrorCount__c – Number

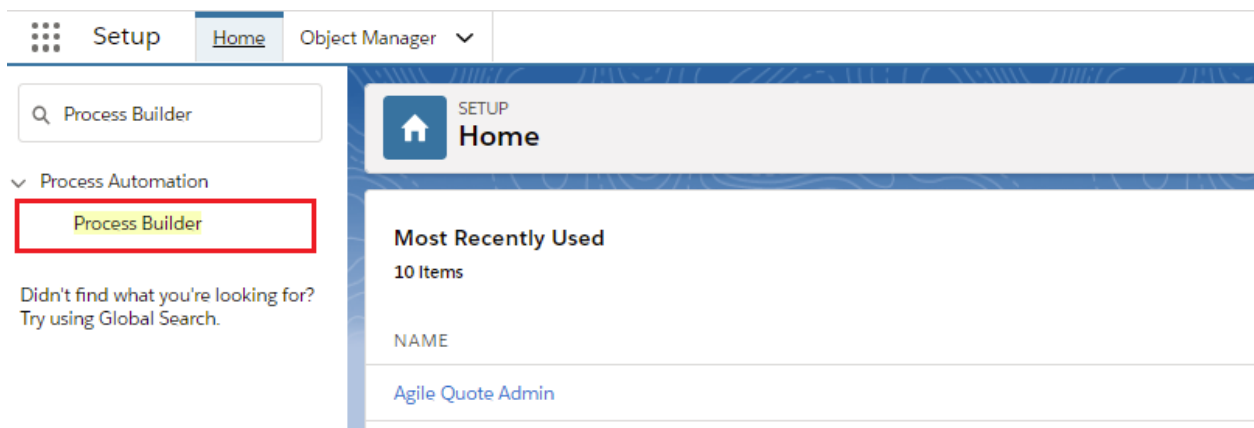
To utilize Quote Line Erroring, automated processes would need to be created to change the value of the Quote Line Error Count field of a Quote Line record. The formula checkbox just marks true when the count is greater than 0, false otherwise. The formula checkbox will then need to be added to the Quote Line Detail Template (It does not need to be visible) and then AgileQuote will know based on that field to outline the field in red, or not.

NOTE – Adding the Line Item Error checkbox field to the active Quote Line Detail Templates is required for Visual Line Erroring to work properly. However, the field does not need to be visible within the data table.

Line Erroring Example

For this example, there is a use case defined that says the user needs to be notified via visual line erroring whenever they mark a Quote Line with a discount of 10% or higher. To accomplish this we will create a simple Process Builder which will do the check and then update the Line Error Count if necessary (Or remove the Line Error Count if the line is under 10%). We will then add the Line Item Error checkbox to the Quote Line Detail Template, and then see it in action. To start:

1. In Setup, type Process Builder into the Quick Find box. Click Process Builder.



2. In Process Builder, click the **New** button to create a new Process.
3. Under Process Name, type **Error on Discount over 10%**.
4. For Process starts when: Select **A Record Changes**
5. Click Save

New Process

Process Name *

Error on Discount over 10%

API Name * ⓘ

Error_on_Discount_over_10

Description

The process starts when *

A record changes ▼

Cancel

Save

6. You will be redirected to the newly created process to build upon it. Click the **Add Object** button and select **Quote Line Item**. Then under Start the process, select **when a record is created or edited**. Click Save.

Choose Object and Specify When to Start the Process ⓘ

Object * ⓘ

Quote Line Item ▼

Start the process *

☐ only when a record is created

☒ when a record is created or edited

> Advanced

7. Now click the **Add Criteria** button. In the Define Criteria box, enter the following:
- Criteria Name: **10 or Greater**
 - Criteria for Executing Actions: **Conditions are met**

- c. Set Conditions:
 - i. Field - **QuoteLineItem.Discount**
 - ii. Operator - **Is changed**
 - iii. Type - **Boolean**
 - iv. Value - **True**

 - i. Field - **QuoteLineItem.Discount**
 - ii. Operator - **Greater Than or Equal To**
 - iii. Type - **Number**
 - iv. Value - **10**
 - d. Conditions: **All of the conditions are met (AND)**
8. Click Save

Define Criteria for this Action Group ?

Criteria Name * i

Is Greater than 10

Criteria for Executing Actions *

☒ Conditions are met

☐ Formula evaluates to true

☐ No criteria—just execute the actions!

Set Conditions

	Field *	Operator *	Type *	Value *	
1	[QuoteLineItem... Q	Is changed ▼	Boolean ▼	True ▼	×
2	[QuoteLineItem... Q	Greater than or ▼	Number ▼	10	×
+ Add Row					

Conditions *

☒ All of the conditions are met (AND)

☐ Any of the conditions are met (OR)

☐ Customize the logic

> Advanced

9. Under Immediate Actions click the **Add Action** button. For Action Type, select **Update Records**.
10. Under Action Name, enter **Set Error Line Item**. Under Record Type, choose **Select the QuoteLineItem record that started your process**. Under Criteria for Updating Records, select **No criteria – just update the records!**
11. Under Field choose **quoteLineErrorCount**. For Type choose **Number**. For Value enter **1**.
12. Click Save.

Update Records ?

Action Name * i

Set Error Line item

Record *

[QuoteLineItem]

Criteria for Updating Records *

☐ Updated records meet all conditions

☒ No criteria—just update the records!

Set new field values for the records you update

Field *	Type *	Value *
quoteLineErrorCount	Number	1
+ Add Row		

13. Click the Add Criteria button again. We need to set up the process to remove the Line Error Count when the Discount is less than 10%. Enter the following:
 - a. Criteria Name: **Less than 10**
 - b. Criteria for Executing Actions: **Conditions are met**
 - c. Set Conditions:
 - i. Field - **QuoteLineItem.Discount**

- ii. Operator – **Is changed**
 - iii. Type – **Boolean**
 - iv. Value – **True**

 - v. Field – **QuoteLineItem.Discount**
 - vi. Operator – **Less Than**
 - vii. Type – **Number**
 - viii. Value – **10**
 - d. Conditions: **All of the conditions are met (AND)**
14. Click Save.
15. Under Immediate Actions click the **Add Action** button. For Action Type, select **Update Records**.
16. Under Action Name, enter **Remove Error Line Item**. Under Record Type, choose **Select the QuoteLineItem record that started your process**. Under Criteria for Updating Records, select **No criteria – just update the records!**
17. Under Field choose **quoteLineErrorCount**. For Type choose **Number**. For Value enter **0**.
18. Click Save
19. Click Activate
20. The Process Builder has been successfully set up and activated. Now we will check to see that it is working properly. But first, we need to make sure the Line Item Error Checkbox is added to the Quote Line Detail Template.
21. Navigate to the **Agile Quote Manager** app. Once there click on the Detail Templates Tab.
22. On Detail Templates, click the Default Agile Quote Lines existing template, it will load on the right.
23. Under Fields, click the **Add (+)** button. It will appear at the bottom of all fields.
24. Under Select Field, choose **Line Item Error**.
25. Make sure Is Visible is unchecked, then save the template.
26. Navigate to a Quote record.
27. Update a Quote Line to have a discount of 10% or higher. The Line should get outlined in red
28. Update the Quote Line to have a discount less than 10%. The Line should remove the red outline.

This is just a simple example of how visual erroring works. You can utilize this to setup visual erroring in any way you would like. From there you could set up validation rules to prevent Quotes from moving anywhere unless there are no errors. The options are unlimited.

Twin Fields and Template Field Mapping Custom Metadata

When a product gets selected on the Add Products screen, AgileQuote has twin field capabilities in place already that will pass any field on the PriceBookEntry record to the Quote Line Item record that shares the same API Name. For example, the value of the ListPrice field on the PriceBookEntry product record will automatically pass to the ListPrice field on the QuoteLineItem record because they share the same name.

Additionally, if you have values from fields on the PriceBookEntry record that do not share the same name as a field on the QuoteLineItem record, but you want to pass the data to it anyways, AgileQuote has Custom Metadata set up to allow this. To configure the system to pass field data:

1. In Setup, type **Custom Metadata** into the Quick Find box, then select Custom Metadata Types
2. On Custom Metadata Types screen, select **Template QuoteLine Field Mapping**
3. This Metadata contains 2 custom fields:
 - a. Object Field API Name
 - b. Quote Line Field API Name

To set up a custom field mapping, simply create a new record on the Custom Metadata and fill in the two fields with their respective Object API Names to map them together.

Rollup Quote Group Line Custom Metadata

There is no Master-Detail relationship between the custom Quote Line Group object and Quote Line Item records. For this reason, AgileQuote uses Custom Metadata to allow users to setup custom rollup fields between QuoteLineItem fields and Quote Line Group fields. To configure the system to rollup Quote Line Fields into Quote Group fields:

1. In Setup, type Custom Metadata into the Quick Find box, then select Custom Metadata Types.
2. On Custom Metadata Types screen, select **For Rollup Quote Group Line Mapping**
3. This Metadata contains 2 custom fields:
 - a. Quote Line Field API Name

b. Quote Group Field API Name

To set up a custom group rollup, simply create a new record on the Custom Metadata and fill in the two fields with their respective Object API Names to map them together.

Example:

By Default AgileQuote has a custom Group Rollup Metadata setup. This rolls up the Quote Line Unit Prices into the Quote Group Group Total field. The metadata has the two fields filled out:

1. Quote Line Field API Name = UnitPrice
2. Quote Group Field API Name = agilqt__groupTotal__c

Be sure to enter the full API Name of the fields in the two metadata fields. This includes the namespace if the field comes from a managed package.