

Admin Setup Steps

If you have not installed the App for all users, create a permission set to add specific users who can generate quotes using the custom buttons and follow the below steps.

Quick Find / Search...

Select Metadata:
Apex Classes (8)

Advanced Search

Expand All | Collapse All


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Salesforce Mobile Quick Start

Home

Administer

Release Updates

Manage Users

Users

Mass Email Users

Roles

Permission Sets

Permission Set Groups

Profiles

User Management Settings

Public Groups

Queues

Login History

Identity Provider Event Log

Identity Verification History

Profile

Custom: Sales Profile

Find Settings... Clone Delete Edit Properties

Profile OverviewAssigned Users

Description	Salesforce	Custom Profile	☒
User License	☒	Created By	MLQuote Developer, 10/9/2017 12:55 PM
Last Modified By	salesforce.com, inc., 7/9/2022 9:38 AM		

Apps

Settings that apply to Salesforce apps, such as Sales, and custom apps built on the Lightning Platform
[Learn More](#)

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 that specify which record types, page layouts, and tabs are visible

App Permissions
Permissions to perform app-specific actions, such as "Manage Call Centers"

Apex Class Access
Permissions to execute Apex classes

Visualforce Page Access
Permissions to execute Visualforce pages

External Data Source Access
Permissions to authenticate against external data sources

Named Credential Access
Permissions to authenticate against named credentials

Flow Access
Permissions to execute Flows

Custom Permissions
Permissions to access custom processes and apps

Custom Metadata Types
Permissions to access custom metadata types

Custom Setting Definitions
Permissions to access custom settings

Click on Custom Setting Definitions

This screenshot shows the Salesforce interface for the 'Custom: Sales Profile' profile. The top navigation bar includes links for Home, Campaigns, Leads, Accounts, Contacts, Opportunities, Forecasts, Contracts, Orders, Cases, Solutions, Products, Reports, Dashboards, and Quotes. A banner at the top promotes 'It's Better in Lightning' with buttons for 'Tell Me More' and 'Check Readiness'. The left sidebar contains a search bar, 'Select Metadata' (Apex Classes (8)), 'Advanced Search', and a 'Lightning Experience Transition Assistant' button. The main content area is titled 'Custom: Sales Profile' and includes a 'Find Settings...' search bar and buttons for 'Clone', 'Delete', and 'Edit Properties'. Below this, a tabbed interface shows 'Custom Setting Definitions' as the active tab, with an 'Edit' button. The 'Custom Setting Definition' table is currently empty, and the 'Installed Package' tab is also empty.

Click on "Edit" and move the two Custom Settings to Enabled section and Save

This screenshot shows the same Salesforce interface as the previous one, but with the 'Custom Setting Definitions' tab active. The 'Available Custom Setting Definitions' list on the left contains '--None--'. The 'Enabled Custom Setting Definitions' list on the right contains two items: 'lcm_miqquote.Quote Template Language' and 'lcm_miqquote.Quote Templates'. Between the two lists are 'Add' and 'Remove' buttons. The 'Save' and 'Cancel' buttons are visible at the top of the main content area.

Make sure access to below objects are added to the Permission set

Visualforce Page

lcrm_mlquote.ChooseQuoteTemplate

lcrm_mlquote.ChooseQuoteTemplatewithLanguage

lcrm_mlquote.ChooseQuoteTemplatewithLanguageFilter

APEX Class

lcrm_mlquote.ChooseQuoteTemplateController

lcrm_mlquote.ChooseQuoteTemplateControllerLang

lcrm_mlquote.ChooseQuoteTemplateControllerLangFilter

lcrm_mlquote.changeUserParameters

Custom Objects

Quote Translation Languages

Read permission for all users

Read/Edit/Create/Delete permission to Admins

Field permissions

All fields to have Read permission for users

Below fields to have Edit permission to Admins

Currency

Do Not Translate?

Language

Name

Owner

Quote Setup

Read Permission for all users

Read/Edit/Create/Delete permission to Admins

Field permissions

All fields to have Read permission for users

Below fields to have Edit permission to Admins

Template ID

Type

Value

Combined

Name

Assigned Apps to Admins

Multi Lingual Quote Setup (lcrm_mlquote__Multi_Lingual_Quote_Setup_Lightning)

Multi Lingual Quote Setup (lcrm_mlquote__Multi_Lingual_Quote_Setup)

Go to Setup -> Translation Workbench -> Translate

Add below translations for the 3 custom buttons for all languages used in org

Home Quote Translation Languages Quote Setup +

It's Better in Lightning
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Tell Me More Check Readiness

Quick Find / Search... 🔍

Select Metadata:
Apex Classes (10) 🔄

Advanced Search

Expand All | Collapse All

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Home

Translation Workbench
Translate [Help for this Page](#)

To get started in the Translation Workbench:

1. Select a language (if you're a translator for more than one language).
2. Select a setup component.
3. If necessary, select an object and aspect. For example, a workflow task has an object (Account, Contact, etc.) and aspect (Subject or Comment) to filter for translatable terms.
4. Double click in the translation column to enter new values. You can tab to jump to the next row.

Select the filter criteria:

Language: French

Setup Component: Button and Link Label

Object: Quote

Master Button or Link Label	Button or Link Label Translation	Button or Link Name	Out of Date
Create Pdf (Language & Template)	Créer un PDF (langue et modèle)	Select_Language_Create_Pdf_Filter	☐
Create Pdf (Template & Language)	Créer un PDF (modèle et langue)	Select_Language_Create_Pdf	☐
Create Pdf (Template)	Créer un PDF (Modèle)	Create_Pdf_Custom	☐

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Page 1 of 1

Go to Setup -> Custom Settings

Custom Setting -> "Quote Templates"

This Custom Setting is used to associate a Quote template with Quote RecordTypes and make it available in the selection list for user. This is used when user clicks either "Create Pdf (Template)" or "Create Pdf (Template & Language)" or "Create Pdf (Language & Template)" button. Get the Template ID by going to Salesforce Classic and editing the Template (You can get the ID from URL of the page)

Click "Manage" and add new record

The screenshot shows the Salesforce Setup interface for the Custom Setting Definition "Quote Templates". The page includes a navigation bar at the top with links like Home, Chatter, Profile, Groups, Files, Leads, Accounts, Contacts, Opportunities, Reports, Dashboards, Products, Getting Started, Unsubscribe, Pending Approvals, B2O Requests, and a search bar. A banner for "It's Better in Lightning" is visible. The main content area is titled "Custom Setting Definition: Quote Templates" and includes a "Manage" button. Below this, the "Custom Setting Definition Detail" section shows the following information:

Label	Quote Templates	Object Name	Quote_Templates
API Name	lcrm_miqquote__Quote_Templates__c	Setting Type	List
Visibility	Public	Description	Quote Template Association with Quote Record Types
Namespace Prefix	lcrm_miqquote	Created Date	7/11/2022 8:01 PM
Last Modified Date	7/11/2022 8:01 PM	Record Size	375

The "Custom Fields" section shows a table with the following data:

Action	Field Label	API Name	Installed Package	Data Type	Indexed	Modified By
Edit	Quote Recordtypes	lcrm_miqquote__Quote_Recordtypes__c	Multilingual Quote Generator	Text(255)		7/11/2022 8:01 PM
Edit	TemplateId	lcrm_miqquote__TemplateId__c	Multilingual Quote Generator	Text(20)		7/11/2022 8:01 PM

Below the table, it says "Deleted Fields (0)". The left sidebar contains links for "Quick Find / Search...", "Select Metadata:", "Apex Classes (1700)", "Advanced Search", "Lightning Experience Transition Assistant", "Salesforce Mobile Quick Start", "Home", and "Administer".

HomeChatterProfileGroupsFilesLeadsAccountsContactsOpportunitiesReportsDashboardsProductsGetting StartedUnsubscribePending ApprovalsB2O Requests

It's Better in Lightning

Move to Lightning Experience and give your users a productivity boost.

Tell Me More

Check Readiness

Quick Find / Search...

Select Metadata:

Apex Classes (1700)

Advanced Search

Expand All | Collapse All

Lightning Experience Transition Assistant

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Salesforce Mobile Quick Start

Home

Administer

Release Updates

Quote Templates Edit

Provide values for the fields you created. This data is cached with the application.

Edit Quote Templates

SaveSave & NewCancel

Quote Templates Information

= Required Information

Name

Global English

Quote Recordtypes

Global

TemplateId

0EHR0000002Bt9r

Custom Setting -> "Quote Template Language"

This Custom Setting is used to associate a Quote template to the corresponding language and is used when user clicks "Create Pdf (Template)" or "Create Pdf (Template & Language)" or "Create Pdf (Language & Template)" button. Make sure to specify the Quote Template Id and the language code in the concatenated value field. (Use the language code provided by Salesforce)

Click "Manage" and add new record

Setup

Home

Object Manager

Quick Find

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Release Updates

Lightning Experience Transition Assistant

New Salesforce Mobile App QuickStart

Lightning Usage

Optimizer

ADMINISTRATION

Users

Data

Email

PLATFORM TOOLS

Custom Settings

Quote Template Language

View: All

Create New View

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

Action

Name

Edit | Del

English

Edit | Del

French

Edit | Del

German

Edit | Del

German.2

Quick Find / Search...

Select Metadata:
Apex Classes (1700)

Advanced Search
[Expand All](#) | [Collapse All](#)

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Salesforce Mobile Quick Start

Home

Administer
[Release Updates](#)
[Manage Users](#)

Quote Template Language Edit

Provide values for the fields you created. This data is cached with the application.

[Help for this Page](#)

Edit Quote Template Language

[Save](#) [Save & New](#) [Cancel](#)

Quote Template Language Information

Name

French

Concatenatedvalue

0EHR0000002BIBKfr

Language

French

Template ID

0EHR0000002BIBK

= Required Information

Search Setup

Setup

Home

Object Manager

Quick Find

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Release Updates

Lightning Experience Transition Assistant

New Salesforce Mobile App QuickStart

Lightning Usage

Optimizer

ADMINISTRATION

> Users

SETUP

Custom Settings

Quote Template Language Edit

Provide values for the fields you created. This data is cached with the application.

[Help for this Page](#)

Edit Quote Template Language

[Save](#) [Save & New](#) [Cancel](#)

Quote Template Language Information

Name

German 2

Template ID

0EH8W000002XFIV

Language

German

Concatenatedvalue

0EH8W000002XFIVde

= Required Information

Adding Buttons to Quote layout

Add the button(s) that you would like the users to have in Quote layouts

The screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected. The 'Quote' object is chosen, and the 'Page Layouts' section is active. A 'Quick Find' dialog is open, displaying a list of buttons that can be added to the layout. Below the dialog, the 'Quote Detail' layout is shown with a list of buttons: 'Edit', 'Delete', 'Change Owner', 'Change Record Type', 'Printable View', 'Create PDF', 'Email Quote', and 'Start Sync'. The 'Quote Information' section is visible at the bottom, showing fields like 'Quote Number', 'Quote Name', 'Opportunity Name', and 'Account Name' with their respective values.

Setup > OBJECT MANAGER
Quote

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Quick Find Button Name

Buttons	Buttons	Buttons
Change Owner	Create Pdf (Templ...	Email Quote
Change Record Type	Create Pdf (Templ...	Printable View
Create PDF	Delete	Start Sync
Create Pdf (Langu...	Edit	Submit for Approval

Actions in this section are currently inherited from the global publisher layout. You can [override the global publisher layout](#) to set a customized list of actions for the publisher on pages that use this layout.

Salesforce Mobile and Lightning Experience Actions

Actions in this section are predefined by Salesforce. You can [override the predefined actions](#) to set a customized list of actions on Lightning Experience and mobile app pages that use this layout. If you customize the actions in the Quick Actions in the Salesforce Classic Publisher section, and have saved the layout, then this section inherits that set of actions by default when you click to override.

Quote Detail

Standard Buttons: Edit Delete Change Owner Change Record Type Printable View Create PDF Email Quote Start Sync

Custom Buttons: Create Pdf (Template & Language) Create Pdf (Language & Template) Create Pdf (Template)

Quote Information (Header visible on edit only)

Field	Value	Field	Value
Quote Number	GEN-2004-001234	Expiration Date	10/13/2022
Quote Name	Sample Text	Syncing	✓
Opportunity Name	Sample Text	Status	Sample Text
Account Name	Sample Text	Description	Sample Text

“Create pdf (Template)” button

This allows the quote to be generated in the language the template is associated in the Custom Setting. The section headers are also shown in the same language as given in the template.

The screenshot shows the Salesforce interface for a 'Test EU Quote' record. The 'Quote PDFs (6+)' section is expanded, displaying a table of PDFs. A context menu is open over the 'Test EU Quote_V22' PDF, showing the 'Create Pdf (Template)' option.

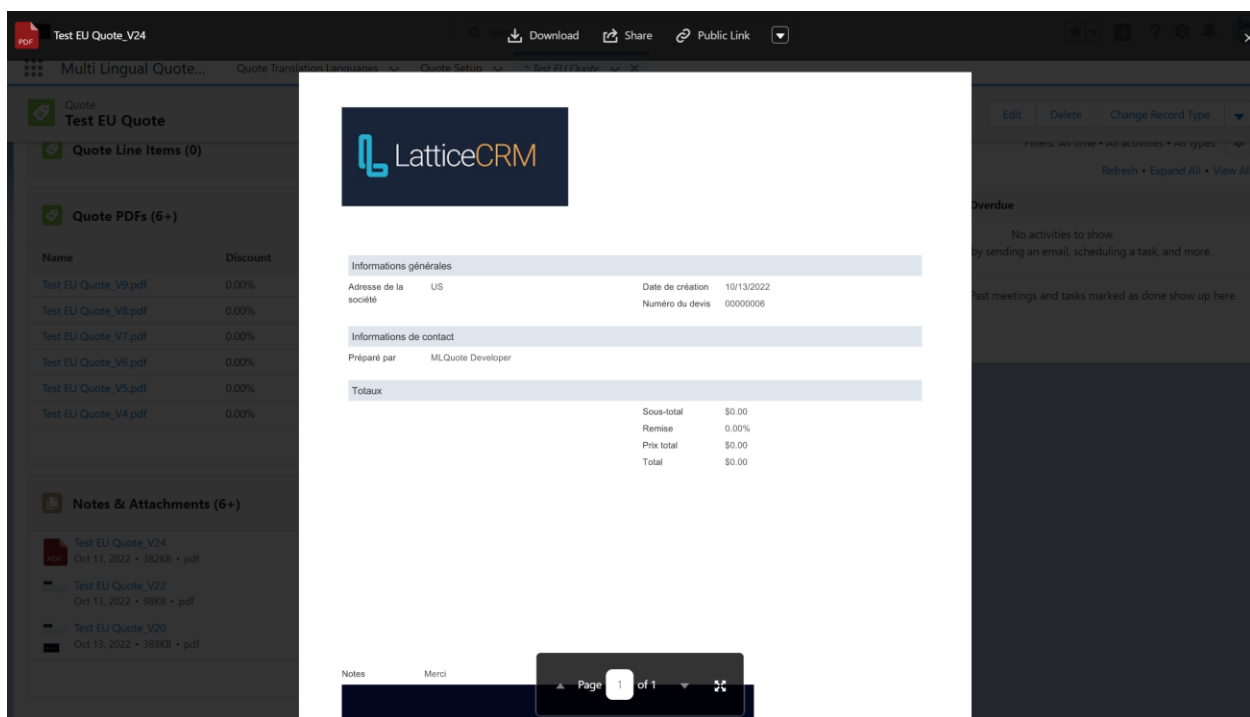
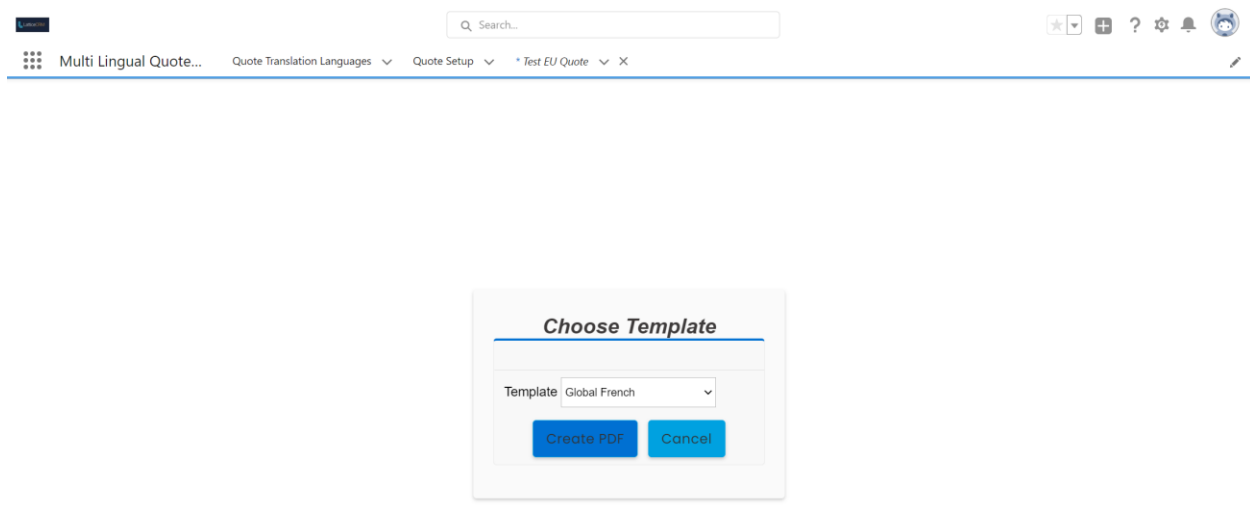
Name	Discount	Grand Total	Created By
Test EU Quote_V9.pdf	0.00%	\$0.00	MLQuote Developer
Test EU Quote_V8.pdf	0.00%	\$0.00	MLQuote Developer
Test EU Quote_V7.pdf	0.00%	\$0.00	MLQuote Developer
Test EU Quote_V6.pdf	0.00%	\$0.00	MLQuote Developer
Test EU Quote_V5.pdf	0.00%	\$0.00	MLQuote Developer
Test EU Quote_V4.pdf	0.00%	\$0.00	MLQuote Developer

The screenshot shows the Salesforce interface for a 'Test EU Quote' record. The 'Quote PDFs (6+)' section is expanded, displaying a table of PDFs. A context menu is open over the 'Test EU Quote_V22' PDF, showing the 'Create Pdf (Template)' option.

Choose Template

Template: -- Select One --

- Select One --
- Global English
- Global French
- Global German
- Global German 2



“Create Pdf (Template & Language)” button

This shows all templates associated to the Quote’s record type and generates the pdf in the language selected by the user but note that the section information, if shown in the quote, will not be converted to the selected language.

The screenshot shows the Salesforce interface for a Quote record titled "Test EU Quote". The record details include: Quote Number 00000006, Expiration Date, Syncing checkbox, Opportunity Name "Test Oppty", Account Name "Test Account", and Grand Total \$0.00. A dropdown menu is open for the "Change Record Type" button, showing options: "Create PDF", "Email Quote", "Start Sync", "Create Pdf (Template & Language)", "Create Pdf (Language & Template)", and "Create Pdf (Template)". The "Related" section shows "Quote Line Items (0)" and "Quote PDFs (6+)" with a table of generated PDFs. The "Activity" section shows filters and a message: "No activities to show. Get started by sending an email, scheduling a task, and more."

Name	Discount	Grand Total	Created By
Test EU Quote_V9.pdf	0.00%	\$0.00	MLQuote Developer
Test EU Quote_V8.pdf	0.00%	\$0.00	MLQuote Developer
Test EU Quote_V7.pdf	0.00%	\$0.00	MLQuote Developer
Test EU Quote_V6.pdf	0.00%	\$0.00	MLQuote Developer
Test EU Quote_V5.pdf	0.00%	\$0.00	MLQuote Developer

The screenshot shows the "Choose Template & Language" dialog box. It has a "Template" dropdown menu set to "Global English". Below the dropdown are four buttons: "English", "French", "German" (highlighted in blue), and "Thai". At the bottom are two buttons: "Create PDF" and "Cancel".

PDF

Test EU Quote_V22

DownloadSharePublic Link

SalesHomeOpportunitiesLeadsTasksFilesAccountsContactsCampaignsDashboardsReportsCalendarCasesForecastsQuotes

Quote

Test EU Quote

Quote Line Items (0)

Quote PDFs (6+)

Name	Discount
Test EU Quote_V9.pdf	0.00%
Test EU Quote_V8.pdf	0.00%
Test EU Quote_V7.pdf	0.00%
Test EU Quote_V6.pdf	0.00%
Test EU Quote_V5.pdf	0.00%
Test EU Quote_V4.pdf	0.00%

Notes & Attachments (6+)

Test EU Quote_V22

Oct 13, 2022 • 98KB • pdf

Test EU Quote_V20

Oct 13, 2022 • 388KB • pdf

Test EU Quote_V18

Oct 13, 2022 • 75KB • pdf

LatticeCRM

General Information

UnternehmensadresseUSErstelldatum10/13/2022Angebotsnummer00000006

Contact Information

Vorbereitet vonMLQuote Developer

Totals

Zwischensumme	\$0.00
Rabatt	0.00%
Gesamtpreis	\$0.00
Gesamtübersicht	\$0.00

Page 1 of 1

EditDeleteChange Record Type

Filters: All ItemsAll AccountsAll Types

RefreshExpand AllView All

Overdue

No activities to show.

by sending an email, scheduling a task, and more.

Test meetings and tasks marked as done show up here.

“Create Pdf (Language & Template)” button

This shows only the templates associated to the Quote’s record type and to the selected Language by the user. It generates the pdf in the language selected by the user. So, if you have two templates in a specific language and associated both to the Quote record type using the custom setting, this will show both the templates.

The screenshot shows the Salesforce interface for a 'Test EU Quote' record. The record details include: Quote Number 00000006, Expiration Date, Syncing checkbox, Opportunity Name 'Test Oppy', Account Name 'Test Account', and Grand Total '\$0.00'. The record is in the 'Draft' stage. The 'Related' section shows 'Quote Line Items (0)' and 'Quote PDFs (6+)'. The 'Activity' section shows 'Upcoming & Overdue' activities. The 'Create Pdf (Language & Template)' button is highlighted in the dropdown menu.

Name	Discount	Grand Total	Created By
Test EU Quote_V9.pdf	0.00%	\$0.00	MLQuote Developer
Test EU Quote_V8.pdf	0.00%	\$0.00	MLQuote Developer
Test EU Quote_V7.pdf	0.00%	\$0.00	MLQuote Developer
Test EU Quote_V6.pdf	0.00%	\$0.00	MLQuote Developer

The screenshot shows the 'Choose Language & Template' dialog box. The 'German' language is selected. The 'Template' dropdown menu is open, showing 'Global German' and 'Global German 2' as options.

Choose Language & Template

English
French
German
Thai

Template: -- Select One --
-- Select One --
Global German
Global German 2

Choose Language & Template

English

French

German

Thai

Template: Global German 2

Create PDF

Cancel

Test EU Quote_V23

Download

Share

Public Link

Multi Lingual Quote...

Quote Translation Languages

Quote Setup

Quote PDF Preview

Quote

Test EU Quote

Quote Line Items (0)

Quote PDFs (6+)

Notes & Attachments (6+)

LatticeCRM

Algemeine Informationen

Accountname: Test Account
Erstelldatum: 10/13/2022
Unternehmensadres: US
Angebotsnummer: 00000006

Kontaktinformationen

Vorbereitet von: MLQuote Developer

Summen

Zwischensumme: \$0.00

Rabatt: 0.00%

Gesamtpreis: \$0.00

Gesamtübersicht: \$0.00

Edit

Delete

Change Record Type

Refresh

Expand All

View All

Overdue

No activities to show.

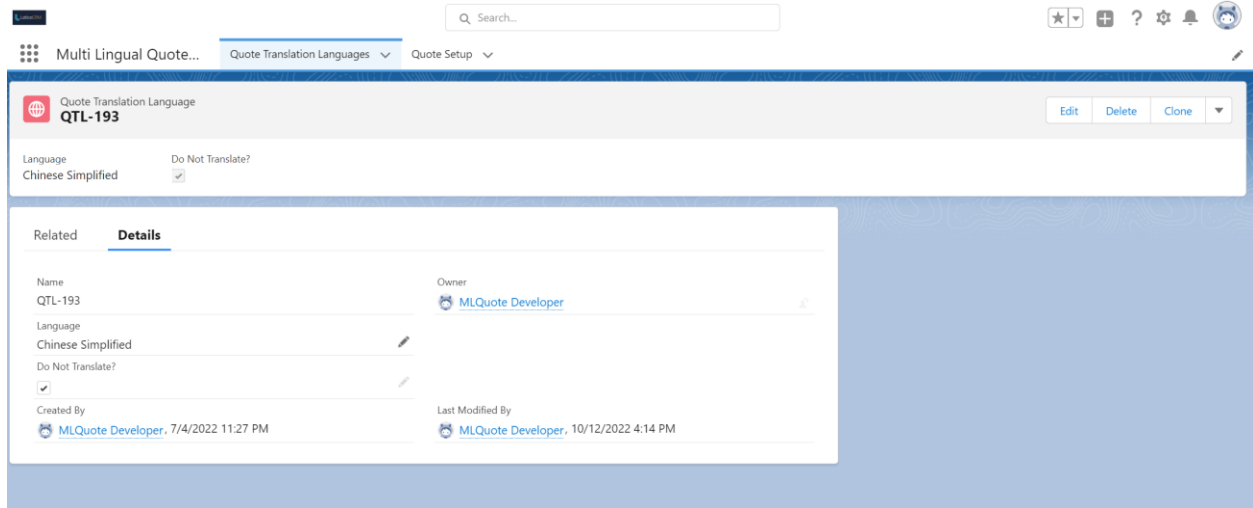
... sending an email, scheduling a task, and more.

... meetings and tasks marked as done show up here.

Page 1 of 1

To Display/Hide Languages for selection

Go to “Multi Lingual Quote Setup” App and in Quote Translation Languages, create records for each language that should not be allowed and make sure “Do Not Translate?” field is set to True.



The screenshot shows the 'Multi Lingual Quote Setup' app interface. The 'Quote Translation Languages' tab is selected. A record titled 'QTL-193' is displayed. The 'Language' field is set to 'Chinese Simplified' and the 'Do Not Translate?' checkbox is checked. The 'Details' section shows the record's metadata: Name (QTL-193), Owner (MLQuote Developer), Language (Chinese Simplified), Do Not Translate? (checked), Created By (MLQuote Developer, 7/4/2022 11:27 PM), and Last Modified By (MLQuote Developer, 10/12/2022 4:14 PM).

Multi Lingual Quote Setup

Quote Translation Languages

Quote Setup

Quote Translation Language

QTL-193

Language: Chinese Simplified

Do Not Translate? ☒

Related

Details

Name: QTL-193

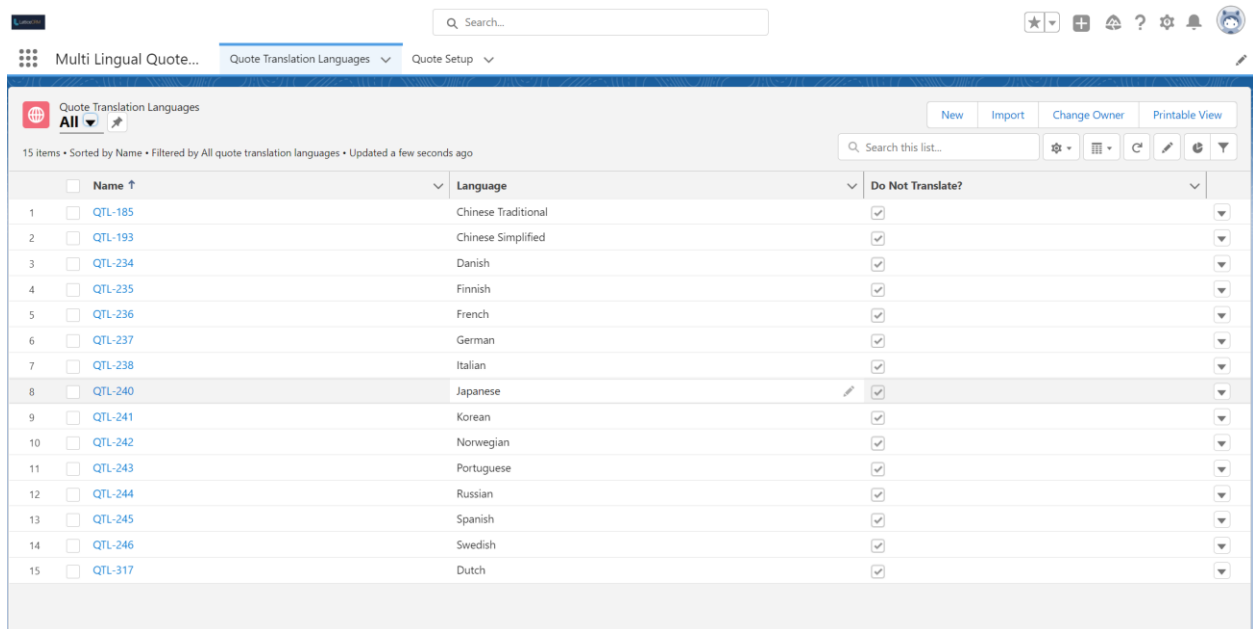
Owner: MLQuote Developer

Language: Chinese Simplified

Do Not Translate? ☒

Created By: MLQuote Developer, 7/4/2022 11:27 PM

Last Modified By: MLQuote Developer, 10/12/2022 4:14 PM



The screenshot shows the 'Multi Lingual Quote Setup' app interface. The 'Quote Translation Languages' tab is selected. A list of 15 items is displayed, sorted by Name. The list includes columns for Name, Language, and Do Not Translate?.

Name	Language	Do Not Translate?
QTL-185	Chinese Traditional	☒
QTL-193	Chinese Simplified	☒
QTL-234	Danish	☒
QTL-235	Finnish	☒
QTL-236	French	☒
QTL-237	German	☒
QTL-238	Italian	☒
QTL-240	Japanese	☒
QTL-241	Korean	☒
QTL-242	Norwegian	☒
QTL-243	Portuguese	☒
QTL-244	Russian	☒
QTL-245	Spanish	☒
QTL-246	Swedish	☒
QTL-317	Dutch	☒

Choose Template & Language

Template

Global English

English

Spanish (Mexico)

Thai

Create PDF

Cancel

Quote Setup Tab

To change the default Height of Header and Footer of a template (Default value is 188 pixels)

Search...

★

+

?

⚙️

🔔

👤

Multi Lingual Quote...

Quote Translation Languages

Quote Setup

Quote Setup

All

New

Import

Change Owner

Printable View

6 items

Sorted by Name

Filtered by All quote setup

Updated a few seconds ago

Search this list...

⚙️

🗑️

🔄

✎

🔍

☐	Name ↑	Template ID	Type	Value	
1	☐ QS-01	0EH1I00000058I9	Header Height	200	▼
2	☐ QS-02	0EH1I00000058I9	Footer Height	350	▼
3	☐ QS-03	0EH8W000002XEQo	Header Height	200	▼
4	☐ QS-04	0EH8W000002XEQo	Footer Height	200	▼
5	☐ QS-05	0EH1I00000058fj	Header Height	200	▼
6	☐ QS-06	0EH1I00000058fj	Footer Height	200	▼

Multi Lingual Quote...

Quote Translation LanguagesQuote Setup

Quote Setup

All

NewImportChange OwnerPrintable View

6 items • Sorted by Name • Filtered by All quote setup • Updated a few seconds ago

Search this list...

Name ↑

1 ☐ QS-01

2 ☐ QS-02

3 ☐ QS-03

4 ☐ QS-04

5 ☐ QS-05

6 ☐ QS-06

New Quote Setup

Information

Name

* Template ID ⓘ

0EH11000005819

* Type

Header Height

* Value

200

Cancel

Save & New

Save