QRG QT.2 – Configuring a Quote

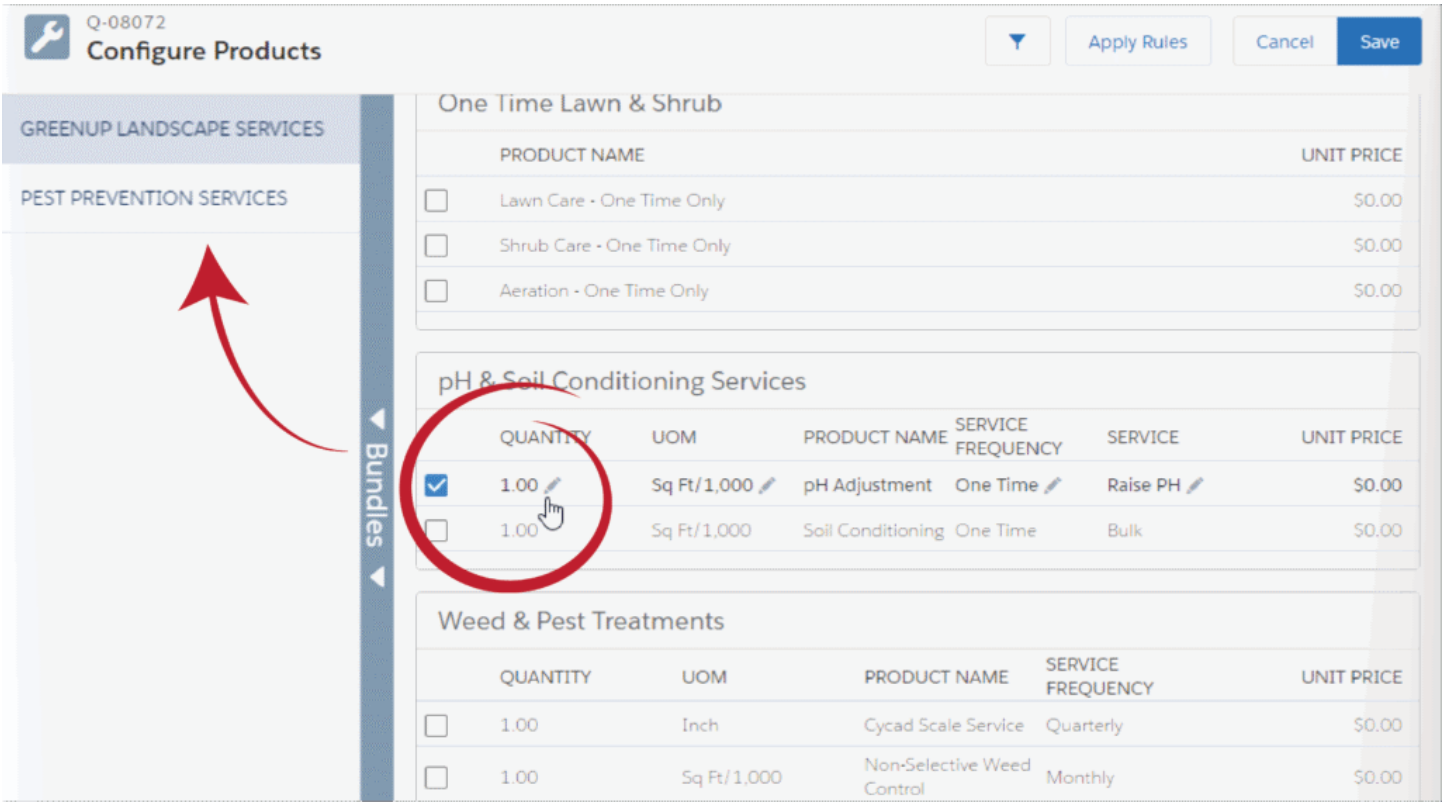
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Adding & Configuring Products

1. After clicking Select, the **Configure Product** window will automatically appear.
2. Use the check boxes to add services and products.
3. Update quantities of selected items using the **pencil** (✏)icon.
4. For multiple Services, use the **Bundles** menu to switch between them to continue configuring.
5. Click **Save** to finish.

Finishing the Quote

5. The **Edit Quote** screen will appear with the line items.
6. Here you can:
    - add more products
    - copy, delete, favorite, and reconfigure
    - use **Quick Save** to save a draft of your work
7. Click **Calculate** to force Salesforce to check the math.
8. Click **Save** to save the Quote for approvals and presenting it to the Customer.



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