

QRG QT.1 - NEW QUOTE



Creating a Quote

1. Open the relevant Opportunity and click **New Quote** in the Quick Action ribbon.
2. Select the **Default Service Location** in the New Quote window, then click **Save**.
3. Scroll down and open the Quote created by Salesforce.

Adding Services to a Quote

4. In a Quote, click on **Edit Lines**.
5. Click **Add Products**.
6. Select the services using the check boxes.
7. Use the down arrows to expand a category to choose a specific service.
8. Click **Select** to save.



PRODUCT CODE	PRODUCT NAME	PRODUCT FAMILY	PRODUCT DESCRIPTION	LIST PRICE
<input checked="" type="checkbox"/> Lawn (1) 6				▼
<input type="checkbox"/> Irrigate (1)				▼
<input type="checkbox"/> Pest (2)				▼
<input type="checkbox"/> Mosquito (3)				▼
<input type="checkbox"/> Termite (7) 7				▲
<input type="checkbox"/> TERM1001	Subterranean Liquid Application	Termite	Liquid Application to prevent Subterranean Termites	\$4.40
<input type="checkbox"/> TERM1003	Termite Baiting System	Termite	Baiting Treatment to prevent Subterranean Termites	\$4.40
<input type="checkbox"/> TERM1006	Fumigation	Termite	Fumigation Treatment to prevent Drywood Termites	\$0.00
<input type="checkbox"/> TERM10016	Direct Wood Treatment - Standalone	Termite		\$0.00
<input type="checkbox"/> TERM1010	Localized Spot Treatment	Termite	Drywood Termites	\$4.40
<input type="checkbox"/> TERM1014	WDO Inspection	Termite	Wood Destroying Organisms Report	\$0.00
<input type="checkbox"/> TERM1011	Ventilation	Termite		\$0.00
<input type="checkbox"/> Lighting (3)				▼