QRG QT.2 - CONFIGURING A QUOTE

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

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