

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.

Q-08072
Configure Products

GREENUP LANDSCAPE SERVICES

PEST PREVENTION SERVICES

One Time Lawn & Shrub

	PRODUCT NAME	UNIT PRICE
<input type="checkbox"/>	Lawn Care - One Time Only	\$0.00
<input type="checkbox"/>	Shrub Care - One Time Only	\$0.00
<input type="checkbox"/>	Aeration - One Time Only	\$0.00

pH & Soil Conditioning Services

	QUANTITY	UOM	PRODUCT NAME	SERVICE FREQUENCY	SERVICE	UNIT PRICE
<input checked="" type="checkbox"/>	1.00	Sq Ft/1,000	pH Adjustment	One Time	Raise PH	\$0.00
<input type="checkbox"/>	1.00	Sq Ft/1,000	Soil Conditioning	One Time	Bulk	\$0.00

Weed & Pest Treatments

	QUANTITY	UOM	PRODUCT NAME	SERVICE FREQUENCY	UNIT PRICE
<input type="checkbox"/>	1.00	Inch	Cycad Scale Service	Quarterly	\$0.00
<input type="checkbox"/>	1.00	Sq Ft/1,000	Non-Selective Weed Control	Monthly	\$0.00

Bundles