
Exercise 5: Create a Proposal

Scenario

The quote is valid, the pricing has been checked. It's time for Sophia to create a proposal to send to Sai.

Goals

- Create a proposal based on a quote
- Review the proposal
- Upload a proposal to a quote
- Locate existing proposals on an account

Tasks

1. Create a proposal for the Acme New York Office
2. Upload the proposal onto the quote

Time: 5 mins



NOTE:

Completing your learning with Trailhead? This exercise relates to Unit 4 of the the Industries CPQ Quotes and Proposals badge. Ensure you've completed this unit before you undertake Exercise 5.

Task 1: Create a proposal for the Acme New York Office

1. Open the Acme New York Office quote.
2. From the action menu in the cart header, click **Generate Document PDF**.



ALERT:

There's a minor URL configuration issue with the proposals in the training org for this release only. This creates an error saying the ID is not valid for the Order standard controller.

Please change the word **Order** in your URL to **Quote**, and you'll see your quote proposal.

For example:

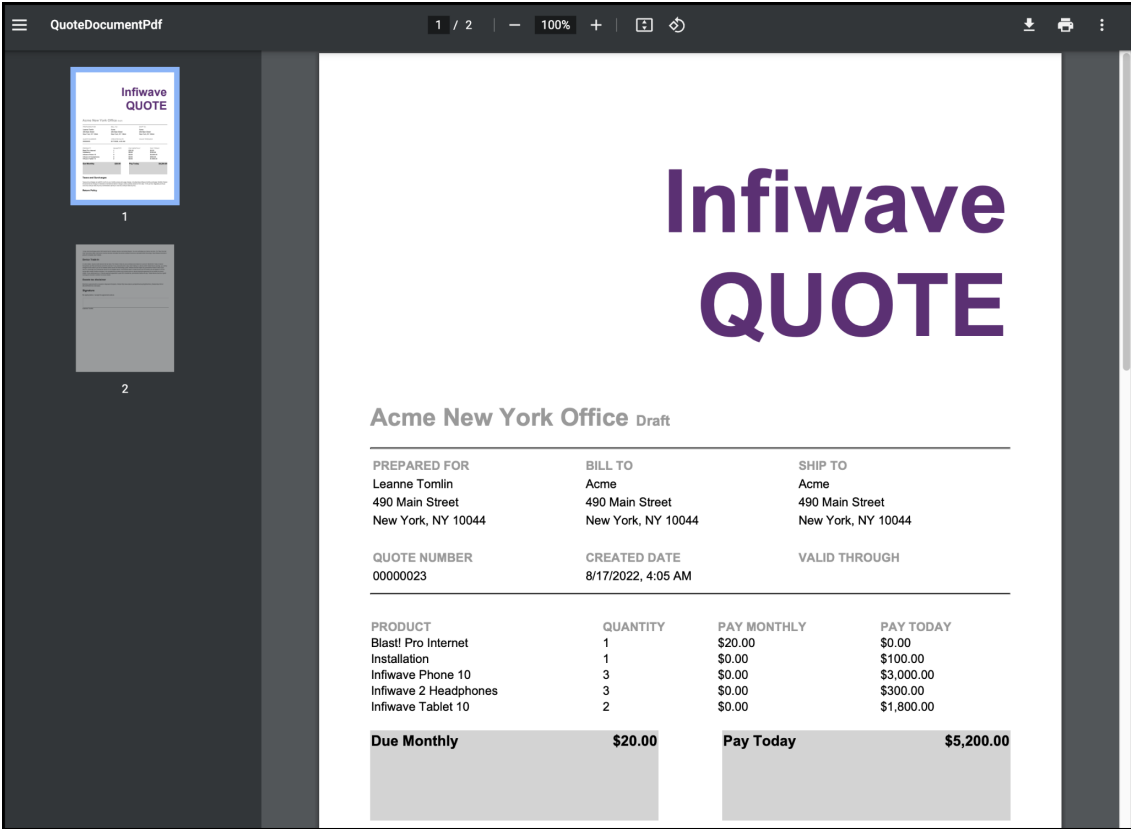
Change from .../apex/**Order**DocumentPdf?id=....

To .../apex/**Quote**DocumentPdf?id=....


This issue is fixed in later releases.



3. Review the PDF file that has been generated from your quote.

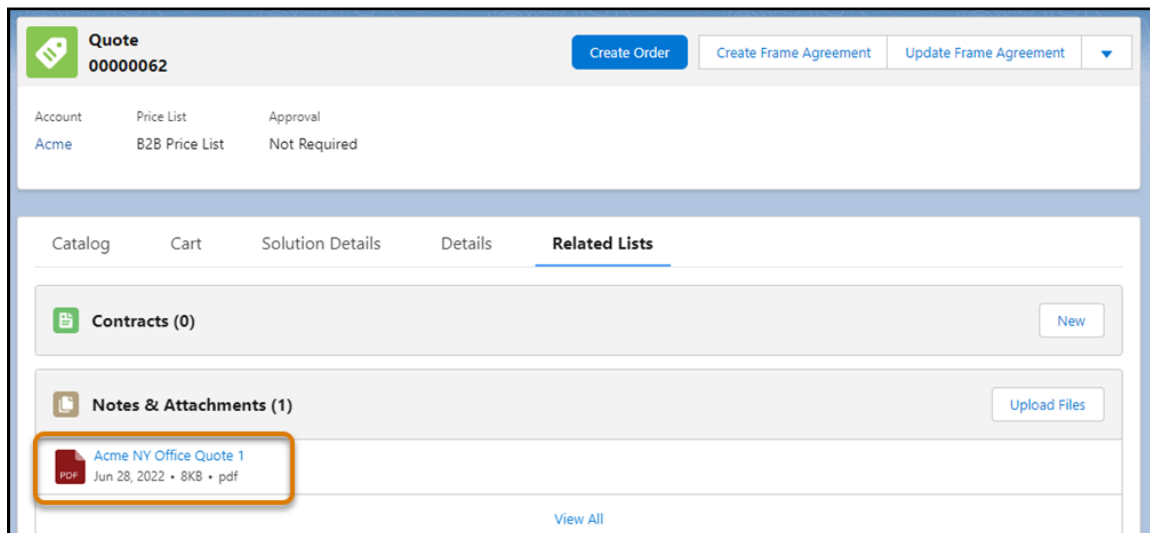


Note there are two pages, including terms and conditions. In your organization, the proposal template will be updated to reflect your business requirements.

4. Download the pdf by clicking download  at the top of the proposal. Save the downloaded document as Acme NY Office Quote 1. If this was a real customer, you'd now email, or print and post, the proposal to your customer.

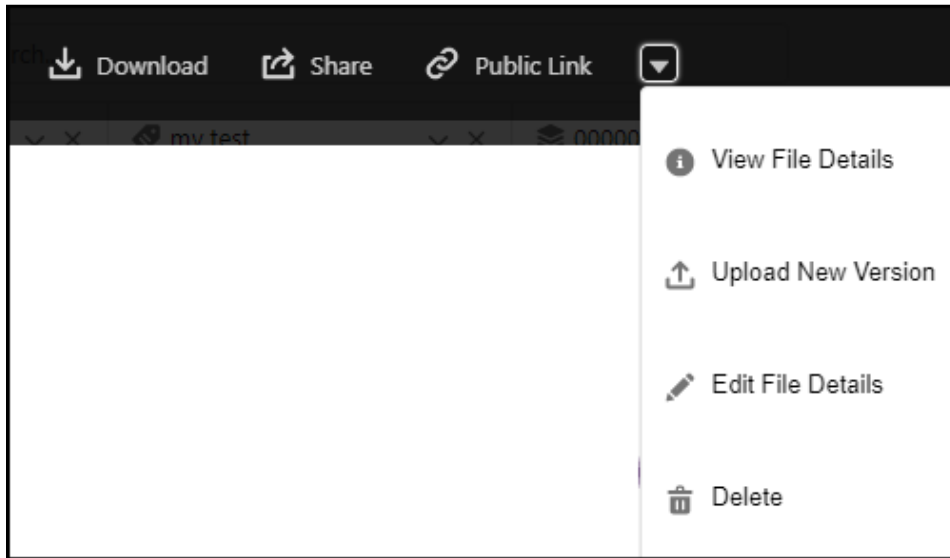
Task 2: Upload the proposal onto the quote

1. Use the back button on your browser to return to the Acme New York Office quote.
2. Click the **Related Lists** tab in the quote.
3. In the **Notes & Attachments** section, click **Upload Files**.
4. Select the **Acme NY Office Quote 1** pdf you saved in the previous task and click **Open** to add the proposal pdf to the quote record. You receive notification that the file has been uploaded. Click **Done** to continue. The quote pdf now appears in the Notes & Attachments.



5. Click the **Acme NY Office Quote 1** attachment to open and view it.

- The toolbar at the top of the window gives you options to download, share, update, or delete the document if required. For example, if you were to create an updated proposal based on the quote, you'd upload the new version using the **Upload New Version** feature.



- Click **View File Details** to see details of interactions with the proposal in Industries CPQ. This includes how many people have viewed the document, and who has access to it.
- Close the tab to return to the quote.

NOTE:

For your quote pdfs to work, you must have an activated quote template and an associated action to run the template. We've set this up in the training playground for you. Your implementation team will set up the templates and actions in your org to suit your business needs.



If you are getting errors in the training playground when generating quotes, check:

1. That you are generating the quote from within a quote (and not an order); and
2. That the correct Apex command is being called. Check the URL - it should read `.../apex/QuoteDocumentPdf?id=[QuoteId]`. If it is calling the `OrderDocumentPdf`, just change the word `Order` to `Quote` in the URL and press Enter.



Yay! All done!