

# QuoteBuilder

## Dynamics 365

**Dynamics 365** | Sales Hub | Sales > Quotes > Business Elements

Quote: Quote Builder Form  
Business Elements

Total Amount: 1,073,78 €

Effective From: --- Effective To: ---

Summary **Quote Builder** Details Related

Save Add Section Add Write-in Product Add Title Edit Comment % Apply Discount Apply Markup Delete Expand All Collapse All Reset

Title	Total Discount	Total Price
<b>First Section</b>	138,72 €	497,08 €
Product Name	Quantity	Price
BenQ EL2870U 27.9" 4K Ultra HD Monitor	1	306,90 €
LG 27UD59-B 27" 4K Ultra HD Gaming Monitor	1	328,90 €
<b>Second Section</b>	0,00 €	576,70 €
Product Name	Quantity	Price
<b>Title 1</b>		
Crucial MX500, 500 GB SSD	1	77,90 €
Samsung 860 EVO, 250 GB SSD	1	59,90 €
<b>Title 2</b>		
Samsung 1 TB, 970 PRO SSD	1	349,00 €
Samsung 250 GB, 970 EVO SSD	1	89,90 €

Hard Disk Drive  
Solid State Disk  
M2  
Monitors

Add Title + Add Product evd

Product ...	Product Name	Price
Samsung 250 GB, 970 EVO SSD	Samsung 250 GB, 970 EVO SSD	89,90 €
Samsung 860 EVO, 250 GB SSD	Samsung 860 EVO, 250 GB SSD	59,90 €

1 - 2 of 2 items

### Interactive Quote Builder By Business Elements

- Drag & Drop products
- Filter & Search products
- In-line editing with HTML comments
- Apply Discounts & markup pricing to multiple items

## User's Guide

- Where to find the QuoteBuilder
- The User-friendly Interface
- Adding Sections & Titles
- Filtering & Searching for Products
- Adding Products – DRAG & DROP (SINGLE)
- Adding Products – ADD BUTTON (MULTIPLE)
- Add Write-in Products
- Removing Products
- Adding/editing Section Comments
- Editing Pricing & Discounts: Apply Discount %
- Editing Pricing & Discounts: Apply Markup
- Other Features

# User's Guide: Where to find the QuoteBuilder?

1. Login as User
2. Go to: Sales -> Quotes (create new or open Quote) -> Open Quote Builder Tab or click on "Quote Builder" button on the command bar for full screen mode
3. Open "Product Catalog" sidebar to show products

1.

The screenshot displays the Dynamics 365 Sales Hub interface. The top navigation bar shows 'Sales > Quotes > Business Elements'. The left sidebar contains various navigation options, with 'Quotes' highlighted under the 'Collateral' section. The main area shows the 'Quote: Quote Builder Form' with a 'Business Elements' tab selected. The 'Quote Builder' button in the command bar is circled with a dashed line and labeled '2.'. The 'Product Catalog' sidebar is also circled with a dashed line and labeled '3.'. The sidebar shows a list of products including Hard Disk Drive, Solid State Disk, M2, and Monitors.

2.

3.

# User's Guide: The User-friendly Interface

1. Command bar (standard)
2. Quote Builder Toolbar
3. Product Family/Hierarchy selection
4. Products Section

The screenshot displays the Business Elements Quote Builder interface. The top command bar (1) includes standard actions like New, Copy, Delete, and Refresh. The Quote Builder toolbar (2) is located below the command bar, featuring options like Save, Add Section, and Add Write-in Product. The main area shows a hierarchy of sections (3) on the left, including 'My First section' and 'Title Uno'. The 'Products' section (4) is a table listing various products with their prices and discounts. The right sidebar shows a product family/hierarchy selection pane.

**1.** Command bar (standard)

**2.** Quote Builder Toolbar

**3.** Product Family/Hierarchy selection

**4.** Products Section

**Sections**

**Products**

**Titles (sub sections)**

Product Name	Quantity	Price	Discount	Discount %	Total Price
Samsung 1 TB, 970 PRO SSD	1	349,00 €	0,00 €	0,0	349,00 €
Samsung 250 GB, 970 EVO SSD	1	89,90 €	0,00 €	0,0	89,90 €
New Write-in Product	1	0,00 €	0,00 €	0,0	0,00 €

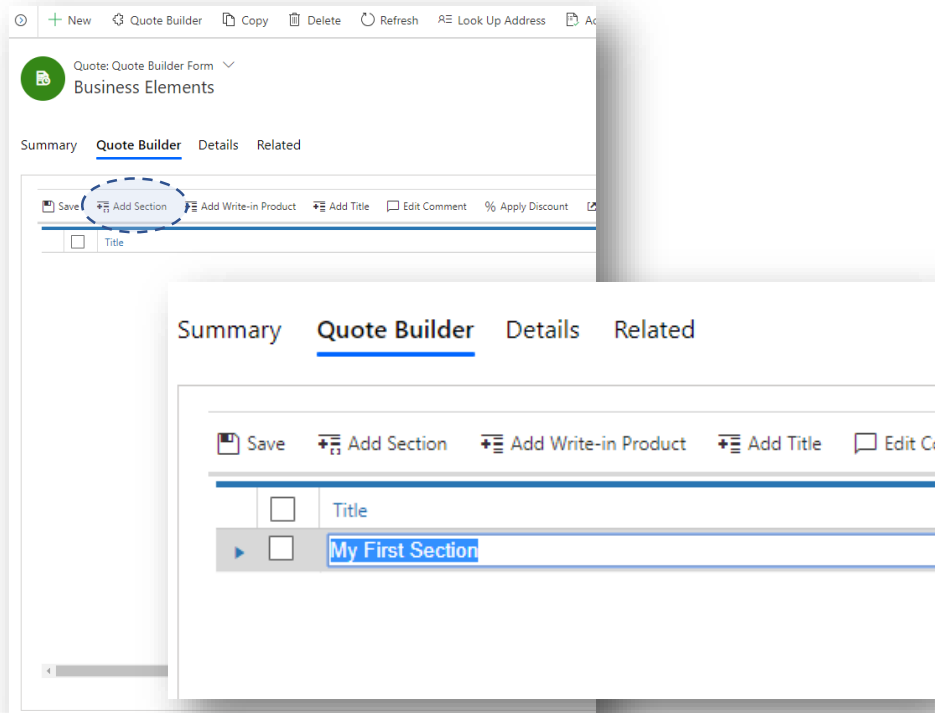
Product Name	Price
Crucial MX500, 500 GB SSD	77,90 €
Hitachi Travelstar Z5K1 1 To (1W10028)	37,10 €
Samsung 1 TB, 970 PRO SSD	349,00 €
Samsung 250 GB, 970 EVO SSD	89,90 €
Samsung 860 EVO, 250 GB SSD	59,90 €

# User's Guide: Adding Sections & Titles

Sections & titles gives you the ability to organize the layout of the quote.

Adding a “section” (mandatory).

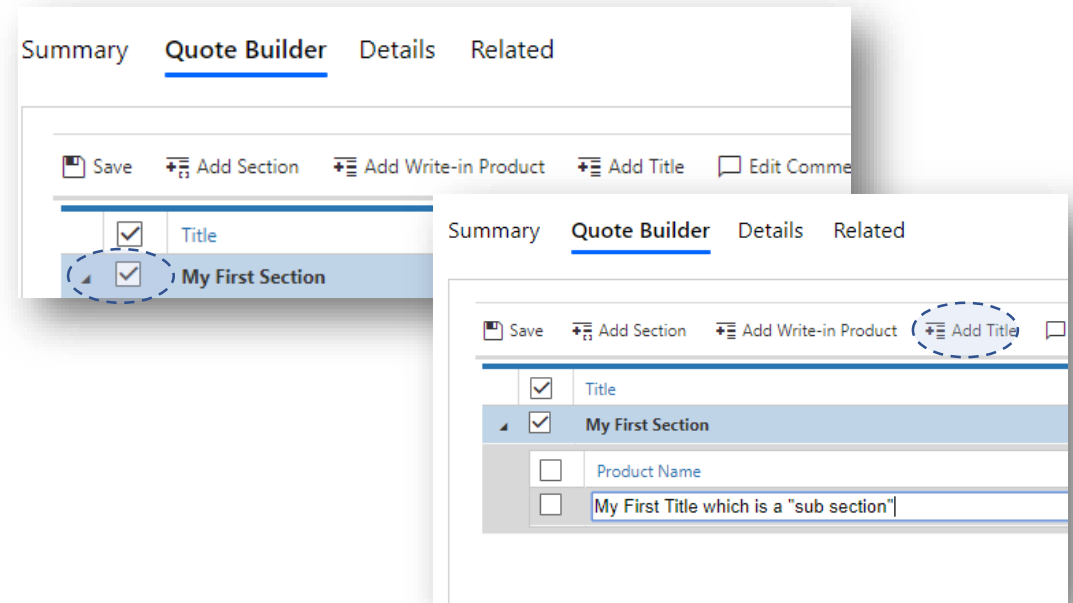
- Click “Add Section”
- Select newly created section
- Enter section name



The screenshot shows the 'Quote Builder Form' with tabs for Summary, Quote Builder, Details, and Related. The 'Quote Builder' tab is active. A toolbar contains buttons for Save, Add Section, Add Write-in Product, Add Title, Edit Comment, and Apply Discount. The 'Add Section' button is circled in red. Below the toolbar, a table lists sections with checkboxes and input fields. The first row has a checkbox and the text 'Title'. The second row has a checked checkbox and the text 'My First Section'.

Adding a “title” (~subsection – is optional)

- Select related section
- Click “Add Title”
- Select newly created title
- Enter title name



The screenshot shows the 'Quote Builder' tab with the 'Add Title' button circled in red. Below the toolbar, a table lists sections with checkboxes and input fields. The first row has a checked checkbox and the text 'Title'. The second row has a checked checkbox and the text 'My First Section'. Below this, a table lists titles with checkboxes and input fields. The first row has a checked checkbox and the text 'Product Name'. The second row has a checked checkbox and the text 'My First Title which is a "sub section"'.

# User's Guide: Filtering & Searching for Products

1. In the Product Catalog, all active/published products & families are displayed with hierarchical structure
2. Filter required products by selecting the corresponding product family
3. **Search** within the filtered results or **show all products**

The screenshot displays the Business Elements Quote Builder interface. At the top, the 'Quote: Quote Builder Form' is shown with 'Business Elements' as the title and a 'Total Amount' of '0,00 €'. The 'Quote Builder' tab is active, showing a 'Summary' section with a table of sections. The 'My First Section' is expanded, showing a table with columns for 'Product Name', 'Quantity', 'Price', 'Discount', 'Discount %', and 'Total Price'.

On the right, a 'Product Catalog' panel is visible, showing a hierarchical structure of product families. The 'Solid State Disk' family is selected, and the 'Monitors' family is also visible. A blue dashed box highlights the 'Solid State Disk' family, with a blue arrow pointing to it from a blue box labeled '1.'.

Below the 'Product Catalog' panel, a search bar is shown with the text 'evo' entered. A blue dashed box highlights the search bar, with a blue arrow pointing to it from a blue box labeled '3.'.

Below the search bar, a table of products is displayed, showing the results of the search. The table has columns for 'Product ...', 'Product Name', and 'Price'. The products listed are 'Samsung 250 GB, 970 EVO SSD' and 'Samsung 860 EVO, 250 GB SSD'.

At the bottom right, a blue box labeled '2.' points to the 'Solid State Disk' family in the product catalog.

# User's Guide: Adding Products (to sections) – DRAG & DROP (SINGLE)

1. Open related section
2. Filter/Search required products by selecting the corresponding product family
3. Drag & drop the product from the product selection onto the section header

1. Open related section

2a. Filter/Search required products by selecting the corresponding product family

3. Drag & drop the product from the product selection onto the section header

Do Not Forget To Save Your Work before:

- \* Exiting the Quote Builder
- \* Removing quote lines

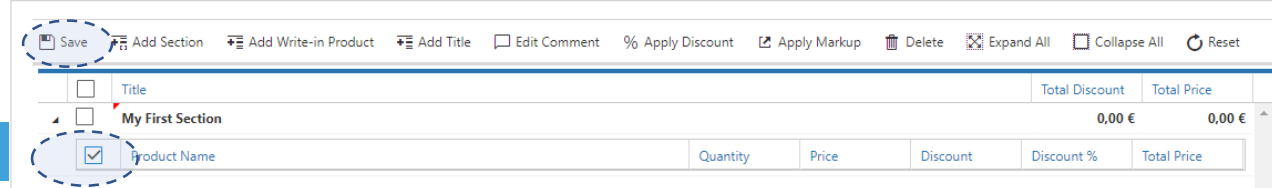
# User's Guide: Adding Products (to sections) – ADD BUTTON (MULTIPLE)

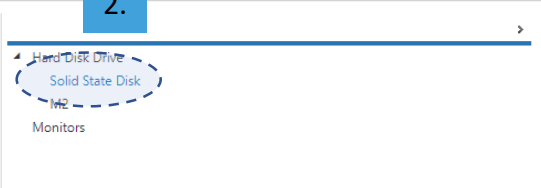
1. Select related section
2. Filter/Search required products by selecting the corresponding product family
3. Mark one or more products and click “Add Product”

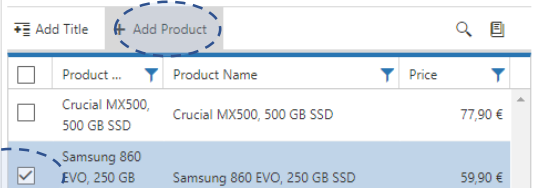
Quote: Quote Builder Form  
Business Elements

Total Amount  
0,00 €

Summary **Quote Builder** Details Related

1. 

2. 

3. 

Do Not Forget To Save Your Work before:

- \* Exiting the Quote Builder
- \* Removing quote lines

# User's Guide: Add Write-in Products

1. Mark the target selection
2. Click "Add Write-in Product"
3. Add details to the newly added write-in product

Quote: Quote Builder Form Business Elements Total Amount 0,00 €

Summary **Quote Builder** Details Related

1. 2.

<input checked="" type="checkbox"/>	Title	Total Discount	Total Price			
<input checked="" type="checkbox"/>	My First section	0,00 €	0,00 €			
<input type="checkbox"/>	Product Name	Quantity	Price	Discount	Discount %	Total Price
<input type="checkbox"/>	Samsung 1 TB, 970 PRO SSD	1	349,00 €	0,00 €	0,0	349,00 €
<input type="checkbox"/>	Samsung 250 GB, 970 EVO SSD	1	89,90 €	0,00 €	0,0	89,90 €
<input type="checkbox"/>	New Write-in Product	1	0,00 €	0,00 €	0,0	0,00 €

3.

Do Not Forget To Save Your Work before:  
\* Exiting the Quote Builder  
\* Removing quote lines

# User's Guide: Removing Products

1. Mark one or multiple products from the section
2. Click "Delete"
3. Confirm or cancel the dialog box.

The screenshot illustrates the process of removing products from a quote. The interface is titled 'Quote: Quote Builder Form' and 'Business Elements'. The 'Quote Builder' tab is active, showing a table of products under the section 'My First Section'. The table has columns for Product Name, Quantity, Price, Discount, Discount %, and Total Price. Two products are listed: 'Crucial MX500, 500 GB SSD' and 'Samsung 860 EVO, 250 GB SSD'. The 'Delete' button in the top toolbar is highlighted with a blue box and the number '2.'. The 'My First Section' header is highlighted with a blue box and the number '1.'. A dialog box is open in the foreground, asking 'Do you really want to delete the selected row(s) ?' with 'OK' and 'Cancel' buttons. The dialog box is highlighted with a blue box and the number '3.'. On the right side, there is a sidebar with a tree view showing 'Hard Disk Drive', 'Solid State Disk', 'M2', and 'Monitors'. Below this, there is a table with columns for Product Name and Price, showing the same two products.

Quote: Quote Builder Form  
Business Elements

Total Amount  
0,00 €

Summary **Quote Builder** Details Related

Save Add Section Add Write-in Product Add Title Edit Comment % Apply Discount Apply Markup **Delete** Expand All Collapse All Reset

**1.** My First Section

Product Name	Quantity	Price	Discount	Discount %	Total Price
Crucial MX500, 500 GB SSD	1	77,90 €	0,00 €	0,0	77,90 €
Samsung 860 EVO, 250 GB SSD	1	59,90 €	0,00 €	0,0	59,90 €

**2.**

Do you really want to delete the selected row(s) ?

**3.**

OK Cancel

Hard Disk Drive  
Solid State Disk  
M2  
Monitors

Add Title Add Product

Product ...	Product Name	Price
Crucial MX500, 500 GB SSD	Crucial MX500, 500 GB SSD	77,90 €
Samsung 860 EVO, 250 GB SSD	Samsung 860 EVO, 250 GB SSD	59,90 €

# User's Guide: Adding/editing Section Comments

1. Select a Section, Title or Product
2. Click "Edit Comment"
3. Save & Close (a "comment" icon will be added to the line)

The screenshot displays the Business Elements Quote Builder interface. At the top, the header shows 'Quote: Quote Builder Form' and 'Business Elements'. The 'Total Amount' is 770,20 €, and the 'Effective' date is ---. The 'Quote Builder' tab is selected, showing a list of sections and products. A blue box labeled '1.' highlights the 'Title1' row under 'Section2'. A blue box labeled '2.' highlights the 'Edit Comment' button in the toolbar. A blue box labeled '3.' highlights the 'Title1' row again. A 'SAVE AND CLOSE' dialog box is open, showing a text area with the comment 'Any comment with any font or HTML formatting' and a rich text editor toolbar. A blue box labeled '1.' highlights the 'Title1' row in the list, and a blue box labeled '3.' highlights the 'Title1' row in the list.

Quote: Quote Builder Form  
Business Elements

Total Amount  
770,20 €

Effective  
---

Summary **Quote Builder** Details Related

Save Add Section Add Write-in Product Add Title Edit Comment % Apply Discount Apply Markup Delete Expand All Collapse All Reset

1. Title

2. Section1

3. Product Name Quantity

BenQ EL2870U 27.9" 4K Ultra HD Monitor

LG 27UD59-B 27" 4K Ultra HD Gaming Monitor

Section2

Product Name Quantity

Samsung 1 TB, 970 PRO SSD

Samsung 250 GB, 970 EVO SSD

1. Title1

Crucial MX500, 500 GB SSD

Samsung 860 EVO, 250 GB SSD

SAVE AND CLOSE

(inherited font) (inherited size) A B I U abc

Any comment with any font or HTML formatting

To view the comments, select the line where a comment icon is set, and "Edit Comment"

All comments with its formatting will be added to the actual output of the quote.

# User's Guide: Editing Pricing & Discounts: Apply Discount %

1. Select quote lines to which you want to apply a discount %
2. Click "% Apply Discount"
3. Set "Discount Percentage", click "SAVE AND CLOSE"

Quote: Quote Builder Form Business Elements Total Amount 770,20 € Effective ---

Summary **Quote Builder** Details Related

2.

Save Add Section Add Write-in Product Add Title Edit Comment **% Apply Discount** Apply Markup Delete Expand All Collapse All Reset

<input type="checkbox"/>	Title	Total Discount	Total Price
<input checked="" type="checkbox"/>	Section1	256,70 €	321,30 €
<input type="checkbox"/>	Product Name	Quantity	Price
<input type="checkbox"/>	BenQ EL2870U 27.9" 4K Ultra HD Monitor	1	279,00 €
<input type="checkbox"/>	LG 27UD59-B 27" 4K Ultra HD Gaming Monitor	1	299,00 €
<input checked="" type="checkbox"/>	Section2		
<input type="checkbox"/>	Product Name	Quantity	Price
<input type="checkbox"/>	Samsung 1 TB, 970 PRO SSD	1	349,00 €
<input type="checkbox"/>	Samsung 250 GB, 970 EVO SSD	1	89,90 €
<input type="checkbox"/>	Title1		
<input checked="" type="checkbox"/>	Crucial MX500, 500 GB SSD	1	77,90 €
<input checked="" type="checkbox"/>	Samsung 860 EVO, 250 GB SSD	1	59,90 €

1.

3.

SAVE AND CLOSE

Discount Percentage 15

You can also set the discount per line-item by simply editing the items in-line.  
Discount = Absolute discount  
Discount % = Relative discount

When you combine both types of discounts: the relative discount is calculated AFTER the absolute discount.

# User's Guide: Editing Pricing & Discounts: Apply Markup

1. Select Quote Lines
2. Click "Apply Markup"
3. Set "Markup Percentage" or Reset\* values. Click "SAVE AND CLOSE"

The screenshot shows the 'Quote Builder Form' interface. At the top, it displays 'Business Elements', 'Total Amount: 738,00 €', and 'Effective P: ---'. Below this are tabs for 'Summary', 'Quote Builder' (selected), 'Details', and 'Related'. A toolbar contains icons for 'Save', 'Add Section', 'Add Write-in Product', 'Add Title', 'Edit Comment', '% Apply Discount', 'Apply Markup' (highlighted with a blue box and labeled '2.'), 'Delete', 'Expand All', 'Collapse All', and 'Reset'. The main table lists quote lines under 'Section1' and 'Section2'. In 'Section2', two lines are selected (highlighted with a blue box and labeled '1.'): 'Crucial MX500, 500 GB SSD' and 'Samsung 860 EVO, 250 GB SSD'. A 'SAVE AND CLOSE' dialog box is open in the foreground, labeled '3.', with a 'Markup Percentage' input field and two checkboxes: 'Reset catalog prices' and 'Reset manual prices'.

Section1		Total Discount	Total Price		
		256,70 €	321,30 €		
Product Name	Quantity	Price	Discount	Discount %	Total Price
BenQ EL2870U 27.9" 4K Ultra HD Monitor	1	279,00 €	200,00 €	15,0	67,15 €
LG 27UD59-B 27" 4K Ultra HD Gaming Monitor	1	299,00 €	0,00 €	15,0	254,15 €

Section2		Total Discount	Total Price		
		160,00 €	416,70 €		
Product Name	Quantity	Price	Discount	Discount %	Total Price
Samsung 1 TB, 970 PRO SSD					
Samsung 250 GB, 970 EVO SSD					
Title1					
Crucial MX500, 500 GB SSD					
Samsung 860 EVO, 250 GB SSD					

## \*Reset values

Reset catalog prices:

-> if you added a markup to the price of the quote line, you can apply this option to reset the selected lines to the pricelist/catalog values.

Reset manual prices:

-> if you changed the price of the quote line manually, you can use this option to reset the selected lines back to pricelist/catalog values.

# User's Guide: Other features

1. Open in full screen: "Quote Builder" in command bar
2. Expand all
3. Collapse all
4. Reset

Resetting will remove any changes since your last save.

2. 3. 4.

Expand All Collapse All Reset

Section1					
Product Name	Quantity	Price	Discount	Discount %	Total Price
BenQ EL2870U 27.9" 4K Ultra HD Monitor	1	279,00 €	200,00 €	15,0	67,15 €
LG 27UD59-B 27" 4K Ultra HD Gaming Monitor	1	299,00 €	0,00 €	15,0	254,15 €

Section2					
Product Name	Quantity	Price	Discount	Discount %	Total Price
Samsung 1 TB, 970 PRO SSD	1	349,00 €	100,00 €	0,0	349,00 €
Samsung 250 GB, 970 EVO SSD	1	89,90 €	60,00 €	0,0	29,90 €
Crucial MX500, 500 GB SSD		77,90 €			30,00 €
Samsung 860 EVO, 250 GB SSD		59,90 €			40,00 €