Graphical user interface, website

Description automatically generated![A picture containing text

Description automatically generated]()![A picture containing text

Description automatically generated]()![A picture containing text

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Description automatically generated]()

**Company Name**

{{ORG\_NAME}}

{{ORG\_STREET \f “  
“}}{{ORG\_CITY \f ", "}}{{ORG\_STATE \f " "}}{{ORG\_POSTALCODE}}

**Company Representative**

{{USER\_NAME}}

{{USER\_TITLE}}

{{USER\_EMAIL}}

**\*Picture switches can dynamically display text/line breaks after text if a merge field is not blank by using the “\f” syntax.**

PROPOSAL

for {{APTTUS\_PROPOSAL\_\_PROPOSAL\_APTTUS\_PROPOSAL\_\_ACCOUNT\_NAME}}

**Prepared Personally For:**

**Proposal Issued**

{{Today \@ MM/dd/yyyy}}

**Proposal Valid To**

{{ADJUST:TODAY:0:0:30:0:0:0 \@ MM/dd/yyyy}}

{{APTTUS\_PROPOSAL\_\_PROPOSAL\_APTTUS\_PROPOSAL\_\_PRIMARY\_CONTACT\_\_R}}

{{TableStart:Acct}}**{{APTTUS\_PROPOSAL\_\_PROPOSAL\_APTTUS\_PROPOSAL\_\_ACCOUNT\_NAME}}**

{{APTTUS\_PROPOSAL\_\_ACCOUNT\_BILLINGSTREET}}

{{APTTUS\_PROPOSAL\_\_ACCOUNT\_BILLINGCITY}}, {{APTTUS\_PROPOSAL\_\_ACCOUNT\_BILLINGSTATE}} {{APTTUS\_PROPOSAL\_\_ACCOUNT\_BILLINGPOSTALCODE}}

{{APTTUS\_PROPOSAL\_\_ACCOUNT\_BILLINGCOUNTRY}}

{{TableEnd:Acct}}

**You can adjust a date merge field by including the ADJUST: prefix**

**STATEMENT OF CONFIDENTIALITY**

The contents of this e-mail message and any attachments are confidential and are intended solely for addressee. The information may also be legally privileged. This transmission is sent in trust, for the sole purpose of delivery to the intended recipient. If you have received this transmission in error, any use, reproduction or dissemination of this transmission is strictly prohibited. If you are not the intended recipient, please immediately notify the sender by reply e-mail or phone and delete this message and its attachments, if any.

[our leader and team]

Our people's combined expertise has created our networks and broad range of service products.

Meet our execs – and know you can count on us.

A group of people sitting around a table with a computer

Description automatically generated with low confidence

A black rectangle with a black background

Description automatically generated with low confidenceA black rectangle with a black background

Description automatically generated with low confidenceA black rectangle with a black background

Description automatically generated with low confidence

*To me, job titles don’t matter. Everyone is in sales.*

*If you are not taking care of your customer, your competitor will.*

*The more you engage with customers the clearer things become and the easier it is to determine what you should be doing.*

*Our reputation, all of us in this room, is not what it should be. Delivering good customer service — not lip service and not just cheap prices, but really differentiated service — is really important.*

Shape

Description automatically generated with low confidenceShape

Description automatically generated with low confidence

Shape

Description automatically generated with low confidence

{{IMAGE:USER\_FULLPHOTOURL:H=140}}

A person wearing glasses

Description automatically generated with medium confidenceA person in a blue shirt

Description automatically generated with medium confidence

**You can merge images into a Word Template by using the IMAGE prefix and a public URL. You can also use this prefix to specify the height or width of the merged image.**

**{{USER\_NAME}}**

***Sales Manager***

**Anna Runner**

***Account Manager***

**Tom Finch**

***Director***

[our client case study]

A picture containing electronics

Description generated with high confidenceEco Gain used {{ORG\_NAME}} to bring  
all processes into the 21st Century with Solar and Wind Power

A picture containing sky, outdoor, solar cell, outdoor object

Description generated with very high confidence

A picture containing indoor, sewing machine

Description generated with high confidence

**Total Budget**

**{{APTTUS\_PROPOSAL\_\_PROPOSAL\_AMOUNT \# Currency0}}**

Implementation hours included in total

**BUSINESS CHALLENGE**

Eco Gain was using outdated energy processes to support the building and manufacturing of their product suite. Moving to Solar and Wind power reduced their Ecological Footprint, annual energy costs and brought awareness to their community. With a distributed work force, the process for each department has improved efficiencies in Salesforce® and transferring by hand between departments. Eco Gain is now at the forefront of Eco Technology.

**SUCCESS STRATEGY**

By implementing {{ORG\_NAME}}’s solutions, Eco Gain was able to jump to the forefront of Eco Technology, lead by example in their community and save money on their energy bills. Eco Gain now runs an Ecological Footprint website and is a local leader in their Community. The Ecological Footprint is the only metric that measures how much nature we have and how much nature we use.

**Project Specifications**

|  |  |
| --- | --- |
| * **Order and Install of Equipment** | **On time & on budget** |
| * **Install and Test Energy Applications** | **Early & on budget** |
| * **Conduct Training** | **On time & under budget** |

[product description]

{{ORG\_NAME}}: retailer of high tech consumer goods, specializing in Technology, Security and Support accessories for your technology needs.

A picture containing square

Description automatically generated

**\*This is the most basic option for displaying Proposal Line Items. There is no grouping or consideration for Options.**

| Proposal Products: | | | | |
| --- | --- | --- | --- | --- |
| Product | Description | Quantity | Discount | Net Price |
| {{TABLESTART:LINEITEMS}}**{{APTTUS\_PROPOSAL\_\_PRODUCT\_NAME}}**  Product Code: {{APTTUS\_PROPOSAL\_\_PRODUCT\_PRODUCTCODE}} | {{APTTUS\_PROPOSAL\_\_PROPOSAL\_LINE\_ITEM\_DESCRIPTION}} | {{APTTUS\_PROPOSAL\_\_PROPOSAL\_LINE\_ITEM\_QUANTITY2 \# Number0}} | {{APTTUS\_PROPOSAL\_\_PROPOSAL\_LINE\_ITEM\_SALES\_DISCOUNT \# “##%”}} | {{APTTUS\_PROPOSAL\_\_PROPOSAL\_LINE\_ITEM\_NETPRICE \# CURRENCY2}}{{TABLEEND:LINEITEMS}} |
| **Total** | | | | **{{=SUM(ABOVE)}}** |

**\*This is option groups by the Product Family and displays the Product Family in the Header row.**

| {{TableGroup:LineItems:APTTUS\_PROPOSAL\_\_PRODUCT\_FAMILY:Show}} | | | | |
| --- | --- | --- | --- | --- |
| Product | Description | Quantity | Discount | Net Price |
| {{TABLESTART:LINEITEMS}}**{{APTTUS\_PROPOSAL\_\_PRODUCT\_NAME}}**  Product Code: {{APTTUS\_PROPOSAL\_\_PRODUCT\_PRODUCTCODE}} | {{APTTUS\_PROPOSAL\_\_PROPOSAL\_LINE\_ITEM\_DESCRIPTION}} | {{APTTUS\_PROPOSAL\_\_PROPOSAL\_LINE\_ITEM\_QUANTITY2 \# Number0}} | {{APTTUS\_PROPOSAL\_\_PROPOSAL\_LINE\_ITEM\_SALES\_DISCOUNT \# “##%”}} | {{APTTUS\_PROPOSAL\_\_PROPOSAL\_LINE\_ITEM\_NETPRICE \# CURRENCY2}}{{TABLEEND:LINEITEMS}} |
| **Total** | | | | **{{=SUM(ABOVE)}}** |

**\*The option below uses a query and an IF statement to dynamically display a table with/without a discount column based on whether or not any products have a discount associated.**

|  | | | |
| --- | --- | --- | --- |
|  |  |  |  |
|  |  |  |  |
|  | | |  |

|  | | | | |
| --- | --- | --- | --- | --- |
|  |  |  |  |  |
|  |  |  |  |  |
|  | | | |  |

«**DYNAMIC DISCOUNT TABLE**»

**\*The option below displays child products in a bundle as indented and in a lighter font.**

| Proposal Products: | | | | |
| --- | --- | --- | --- | --- |
| Product | Description | Quantity | Discount | Net Price |
| {{TABLESTART:LINEITEMS}}«Product or Option Name» | {{APTTUS\_PROPOSAL\_\_PROPOSAL\_LINE\_ITEM\_DESCRIPTION}} | {{APTTUS\_PROPOSAL\_\_PROPOSAL\_LINE\_ITEM\_QUANTITY2 \# Number0}} | {{APTTUS\_PROPOSAL\_\_PROPOSAL\_LINE\_ITEM\_SALES\_DISCOUNT \# “##%”}} | {{APTTUS\_PROPOSAL\_\_PROPOSAL\_LINE\_ITEM\_NETPRICE \# CURRENCY2}}{{TABLEEND:LINEITEMS}} |
| **Total** | | | | **{{=SUM(ABOVE)}}** |

**Queries Used**

|  |  |
| --- | --- |
| Alias | Purpose |
| Acct | Gets fields from the associated Account (such as Name and Billing Address) for display on Page 1 in the *Prepared For* section.  **Sample Query:**  *SELECT Apttus\_Proposal\_\_Account\_\_r.name,*  *Apttus\_Proposal\_\_Account\_\_r.BillingStreet,*  *Apttus\_Proposal\_\_Account\_\_r.BillingCity,*  *Apttus\_Proposal\_\_Account\_\_r.BillingState,*  *Apttus\_Proposal\_\_Account\_\_r.BillingPostalCode,*  *Apttus\_Proposal\_\_Account\_\_r.BillingCountry*  *FROM Apttus\_Proposal\_\_Proposal\_\_c*  *WHERE id = '{pv0}'* |
| LineItems | Gets fields from the Proposal Line Items associated to the Proposal for display in the Product tables. This query is sorted in ascending order of the Apttus\_QPConfig\_\_PrimaryLineNumber\_\_c field.  **Sample Query:**  *SELECT Apttus\_Proposal\_\_Product\_\_r.name,*  *Apttus\_Proposal\_\_Product\_\_r.ProductCode,*  *Apttus\_QPConfig\_\_OptionId\_\_r.ProductCode,*  *APTSMD\_Product\_or\_Option\_Name\_\_c,*  *Apttus\_Proposal\_\_Sales\_Discount\_\_c,*  *Apttus\_QPConfig\_\_LineNumber\_\_c,*  *Apttus\_QPConfig\_\_PrimaryLineNumber\_\_c,*  *Apttus\_Proposal\_\_Product\_\_r.Family,*  *Apttus\_Proposal\_\_Description\_\_c,*  *Apttus\_QPConfig\_\_Quantity2\_\_c,*  *Apttus\_QPConfig\_\_NetPrice\_\_c*  *FROM Apttus\_Proposal\_\_Proposal\_Line\_Item\_\_c*  *WHERE Apttus\_Proposal\_\_Proposal\_\_c = '{pv0}'*  *ORDER BY Apttus\_QPConfig\_\_PrimaryLineNumber\_\_c* |
| Discount | This is a *helper* query to determine if there are any Proposal Line Items with a discount. It includes a filter for discount > 0, is sorted by Apttus\_Proposal\_\_Sales\_Discount\_\_c desc and returns only 1 record. This query is utilized in the Dynamic Discount Table option to display a table with a discount column *only* *if* the query returns any results, otherwise a table without a discount column is merged.  **Sample Query:**  *SELECT Apttus\_Proposal\_\_Sales\_Discount\_\_c*  *FROM Apttus\_Proposal\_\_Proposal\_Line\_Item\_\_c*  *WHERE Apttus\_Proposal\_\_Proposal\_\_c = '{pv0}' AND Apttus\_Proposal\_\_Sales\_Discount\_\_c >0*  *ORDER BY Apttus\_Proposal\_\_Sales\_Discount\_\_c desc*  *LIMIT 1* |

**Picture Switches Used in Product Tables**

|  |  |
| --- | --- |
| Picture Switch | Purpose |
| Number0 | Formats the value according to the Salesforce Locale, including a digit grouping symbol, but excluding two decimal places and a currency symbol. |
| ##% | Includes the specified character in the result. |
| Currency2 | Formats the value according to the Salesforce Locale, including a currency symbol, digit grouping symbol, and 2 decimal places |