

Products Quoted Table

The Products Quoted table holds the specific products associated with a Quote.

Use Case

The following sections contain information about how to create and process Product Quote records.

Creating Product Quote Records

Product Quotes are created from the Quote table. As a Quote is created, either independently or from the Opportunities table, each added item or product creates a Products Quoted record.

Processing Records

Admins and members of the Sales and Marketing group can create, view and edit Products Quoted. Only Admins and Sales are allowed to edit quoted products created by other Sales or Marketing members. No other groups have access to the table by default.











When a product is added to a Quote record and saved, the Total Price is updated by a calculation based on the Unit Price, Number of Units and Discount Percentage. When the quantity of an item in a quote is changed, the Total Price of the quoted product is updated.

Ownership

Records in this table are owned by the person who created the associated Quote. Specifically, a record is owned by the user whose Full Name matches the Quote Prepared By field.

Reports

The Products Quoted table contains five default Charts/Reports:

<input type="checkbox"/> Edit View	Title ↑	Filter	Published	Date Updated	Output Format	Type of Report
<input type="checkbox"/>  	Forecast of Parts Needed in next 6 months for accepted quotes	Quote Accepted 6 months window	Yes	Nov 26 2018 16:50	Graphical chart, HTML	Standard
<input type="checkbox"/>  	Forecast of Potential Parts Needed in next 3 months		Yes	Nov 26 2018 16:50	Graphical chart, HTML	Standard
<input type="checkbox"/>  	Pie Chart showing Total Revenues per Product	Open quotes within 3 months of closing	Yes	Nov 26 2018 16:51	Graphical chart, HTML	Standard
<input type="checkbox"/>  	Value of Completed Orders per month for past 12 months	Products purchased in last 12 months	Yes	Nov 26 2018 16:51	Graphical chart, HTML	Standard
<input type="checkbox"/>  	Value of Completed Orders per Product for past 6 months	Open quotes within 3 months of closing	Yes	Nov 26 2018 16:51	Graphical chart, HTML	Standard