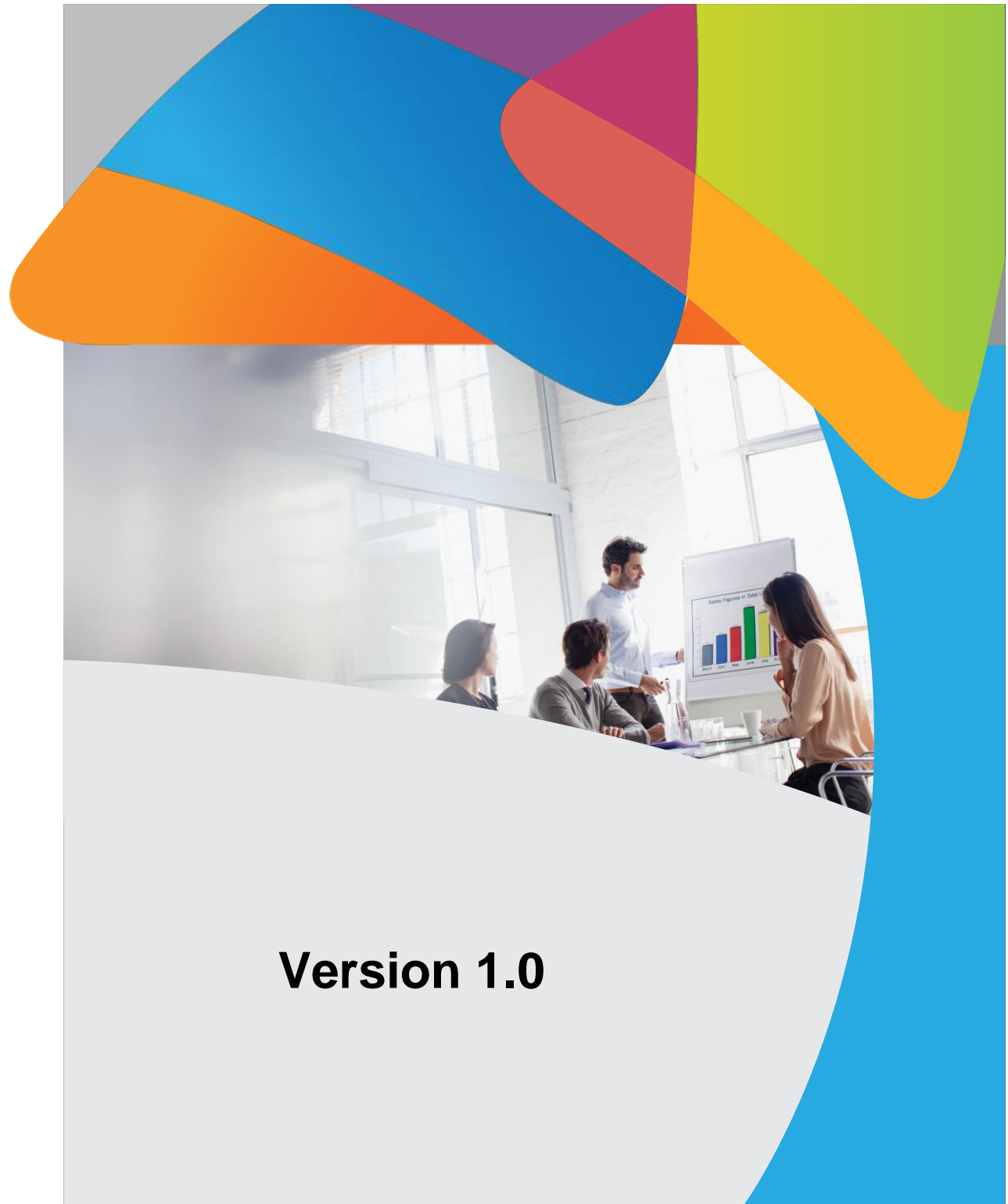




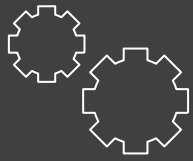
Opportunity Line Item for SuiteCRM



URDHVA TECH



Version 1.0



KEY FEATURES

- ✓ Create Product Line Item
- ✓ Create Service Line Item
- ✓ Sample PDF Template
- ✓ Convert to Quote
- ✓ Create PDF
- ✓ Email PDF

Introduction

Line Items in your Opportunity are used to record the products and/or services that your prospective customer may be interested in buying.

You can add as many more as needed and you can modify the values and quantities as you learn more about the Opportunity.

Line Items can reference products/services in your Opportunity, which will pull through any price/cost/tax information already entered there from product module, although this can be overwritten if required. Alternatively, you can simply free type in a Line Description and all values.

Once opportunity converted to closed won. You can directly convert to quote from the Detail view of Opportunity. You will have button called "Convert quote". It will carry forward all the line items from opportunity and set the default value of other fields in quotes based on opportunity.

How to get the plugin?

- For SuiteCRM, Buy it from the link below.

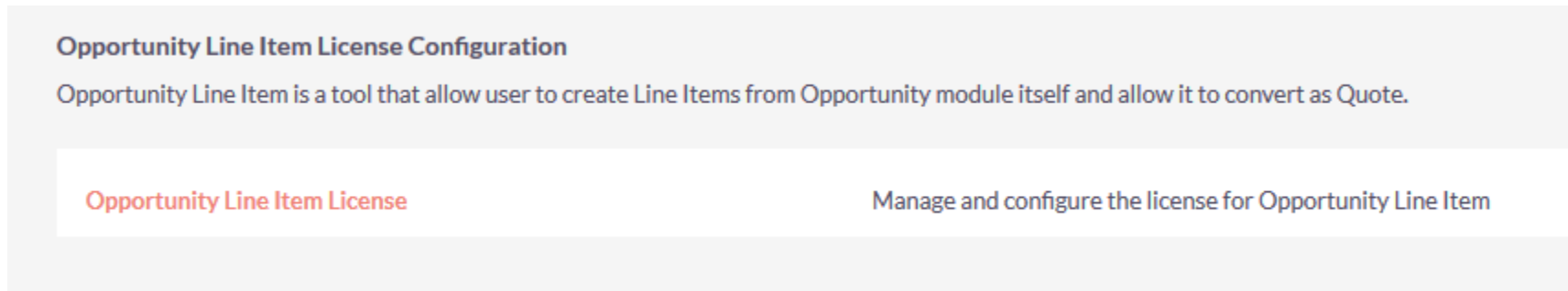
[OpportunityLineItem - SuiteCRM Store](#)

How to install?

- Navigate to **Admin > Module Loader** and select the zip file, that you would have received upon the purchase. Follow the installation process.

Configure License

- Once add-on is installed successfully, you have to provide valid license. Go to **Admin** and access “**Opportunity Line Item License Configuration**” link shown as below.



Validate the license

- Provide the license key that you have received upon purchase and validate it.

OPPORTUNITY LINE ITEM LICENSE CONFIGURATION: OPPORTUN

To Locate Your Key

1. Login to [SuiteCRM Store](#)
2. Go to Account->Purchases
3. Locate the key for the purchase of this add-on
4. Paste into the License Key box below
5. Hit "Validate"

License Key

VALIDATE

Introduction

- **Create Product & Service Line Item from Opportunity module.**
Once you install the add-on. You will have the option to create Line Items from the Opportunity. You can select a Product or Service line as you needed. It will automatically calculate taxes and grand total as default Quotes line Item works.
- **Sample PDF Templates for a line item.**
You will have the option to select Sample PDF for Opportunity Line Item during the creation of PDF template.
- **Generate PDF document from Opportunity's detail view.**
You will have an option in detail view to select the appropriate PDF templates to Generate PDF
- **Email PDF based on the selected email template.**
You will have an option to send an email the PDF, Popup will ask you to choose PDF template and redirect you to compose window of Email with attached generated PDF.
- **Convert Opportunity to Quote right from the detail view of Opportunity.**
You will have a button on Detailview you that is called "Convert to Quote", It will copy all the Line Item from opportunity and redirect you to Edtview of Quotes as a draft status with all the info like, Account, Accounts address, etc.

Create Opportunity with Line Item

- When you create or Edit Opportunity You will have Panel "Line Item" to create or Edit Opportunity Line Item. It will update the opportunity amount after saving the Line Item based on the **Grand total of Opportunity**.

The screenshot displays the 'LINE ITEMS' panel in a CRM system. The panel is titled 'LINE ITEMS' and shows a 'Group Name' of 'Installable packages'. The currency is set to 'US Dollars: \$'. The panel contains a table of line items with the following data:

Quantity	Product	Part Number	List	Discount	Sale Price	Tax Amount	Total
1	Product-1	Pro1	1,500.00	10 Pct	1,350.00	0.00	1,350.00
	Support & Training		150.00	Pct	150.00	0.00	150.00

Below the table, there are buttons for 'ADD PRODUCT LINE' and 'ADD SERVICE LINE'. A summary table on the right shows the following values:

Total:	1,650.00
Discount:	-150.00
Subtotal:	1,500.00
Tax:	0.00
Group Total:	1,500.00

At the bottom of the panel, there is an 'ADD GROUP' button.

➤ Line Item in Detail view with Action button

The screenshot shows a software interface for managing opportunities. The main content area is titled 'MULTI USER LICENSE' and has tabs for 'BASIC', 'OTHER', 'Line Items', and 'ACTIONS'. The 'Line Items' tab is selected, displaying a table with the following data:

	Group Name:	Quantity	List	Discount	Sale Price	Tax	Tax Amount	Total
1	1	1	\$1,500.00	10%	\$1,350.00	0%	\$0.00	\$1,350.00
1	Service	1	\$150.00	-	\$150.00	0%	\$0.00	\$150.00
	Support & Training							
							Total:	\$1,650.00
							Discount:	-\$150.00
							Subtotal:	\$1,500.00
							Shipping:	0.00
							Shipping Tax:	0.00
							Tax:	0.00
							Grand Total:	\$1,500.00

The 'ACTIONS' dropdown menu is open, showing options: Edit, Duplicate, Delete, Find Duplicates, View Change Log, Convert to quote, Print as PDF, and Email PDF.

- ❖ Convert to Quote: This option will copy over all the line item from Opportunity to Quote and create as Draft copy of Quote.
- ❖ Print as PDF: This option will allow you to choose the Email template you would like to generate based on the Opportunity Line Item.
- ❖ Email PDF: This option will parse the PDF template selected and open the Email dialog box with attached generated PDF.

➤ Sample PDF Templates for Opportunity Line Item.

LES MARKETING SUPPORT ACTIVITIES COLLABORATION ALL CREATE ▾

OPPORTUNITY GROUP SAMPLE » EDIT

SAVE CANCEL VIEW CHANGE LOG < PREVIOUS (20

BASIC

Name: * Opportunity Group Sample Assigned to: admin [↩] [✕]

Type: * Opportunities ▾ Load Sample: ▾

Active: ✕

Page Size: A4 ▾ Orientation: ▾

Insert Fields: Opportunities ▾ ▾

INSERT

Body: [HTML Editor]

- Account Sample
- Contact Sample
- Invoice Group Sample
- Invoice Sample
- Lead Sample
- Opportunity Group Sample**
- Opportunity Sample
- Quote Group Sample
- Quote Sample

SUITE CRM



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