

Quote Template

This screen is used to create the building block for a quote which gives a level of organization when putting together a certain quote. When Quote Template is assigned to a Quote, that quote will have to be built based on the specifics and attachments defined on the template.

Open the screen from **Sales folder | Quote Templates menu**. If there is no existing record yet, it will open a new Quote Template screen.

The screenshot shows the 'Quote Template' application window. At the top is a header bar with the title 'Quote Template -' and window controls. Below the header is a menu bar with 'New', 'Save', 'Search', 'Delete', 'Undo', and 'Close'. The main content area has a 'Details' tab selected. It contains three input fields: 'Name:', 'Organization:', and 'Titles:'. Below these is a toolbar with 'Remove', 'Move Up', 'Move Down', 'Layout', and a search box labeled 'Filter Records (F3)'. The main area is a table with three columns: 'Section Name', 'Quote Page', and 'Titles'. The table has three rows, each with a checkbox in the 'Section Name' column and a checkbox in the 'Titles' column. The first row is 'Quote Order'. The second row is empty. The third row is empty. At the bottom is a status bar with icons for help, settings, light, and email, followed by the text 'Ready'. On the right side of the status bar are navigation buttons and a page indicator showing 'Page 1 of 1'.

Field Description

Header Details:

Name - Give the template a unique name for easy recognition.

Organization - Use this to define how the item will be arranged on Quote Report. Options are Item Category, Product Type, and Item Name. See also [How Template affects the Quote Report Format](#)

Titles - If selected, titles of categories or product types will be displayed on the Quote Report. See also [How Template affects the Quote Report Format](#)

Grid Details:

Section Name - Give each section a unique name for easy recognition.

Quote Page - Select the Quote Page corresponding to this section. If the page you need is not on the list, you will have to add it on [Quote Page](#) screen.

Pages

- [How to Add Quote Template](#)
- [How to Attach File to Quote Template](#)

Related Topics

- [How Template affects Printing of Quote](#)
- [How Template affects the Quote Report Format](#)

This screen is used to create the building block for a quote which gives a level of organization when putting together a certain quote. When Quote Template is assigned to a Quote, that quote will have to be built based on the specifics and attachments defined on the template.

Open the screen from **Sales folder | Quote Templates menu**. If there is no existing record yet, it will open a new Quote Template screen.

Quote Template -

New Save Search Delete Undo Close

Details

Name: Organization: Titles: ☐

✕ Remove ⬇ Download File 🗑 Layout 🔍 Filter Records (F3)

<input type="checkbox"/> Section Name	Attachment	Titles
<input type="checkbox"/>		<input type="checkbox"/>

? 🔄 💡 ✉ Ready Page 1 of 1

Field Description

Header Details:

Name - Give the template a unique name for easy recognition.

Organization - Use this to define how the item will be organized. Options are Item Category, Product Type, and Item Name.

Titles - If selected, titles of categories or product types will be displayed for the items

Grid Details:

Section Name - Give each section a unique name for easy recognition.

Attachment - Use this field to attach a file relevant to the Section Name.

Titles - If selected, titles of categories or product types will be displayed for the items
Open the screen from **Sales folder | Quote Templates menu**. If there is no existing record yet, it will open a new Quote Template screen.

