

Product Type

This screen sets up the various types that various categories might be assigned to. The product type have direct impact on [Quote Template](#) | Organization. Open this screen from **Sales | Product Types** menu.

The screenshot shows a software window titled "Product Type -" with a close button (X) and a maximize button (^). Below the title bar is a menu bar with "Save", "Delete", "Undo", and "Close". The main content area has a tab labeled "Details". Under this tab, there are two text input fields: "Type Name:" and "Description:". Below these is a section titled "Categories" which contains a table. The table has a header row with "Category Code" and "Description". Below the header, there is a single row with a checkbox in the "Category Code" column. Above the table, there are icons for "Remove" (X), "Layout" (grid), and a search icon (magnifying glass) next to a search box labeled "Filter Records (F3)". At the bottom of the window is a status bar with icons for help, refresh, lightbulb, and email, followed by the text "Ready", and then navigation controls including "Page 1 of 1".

Field Description

Header Details

Type Name - Enter a unique name for the product type. This is a required detail.

Description - Give a more detailed description for the name.

Grid Details

Category Code - Select the category codes associated with this type. If the category code you are looking for is not in the list, you will have to add it to [Category](#) screen.

Description - This is a read-only field that shows the description of the selected Category Code.

Pages

- [How to Add a Product Type](#)

Related Topic

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

Product Type -

Save Delete Undo Close

Type Name:

Description:

Categories

Remove Layout Filter Records (F3)

Category Code	Description

Ready Page 1 of 1

Field Description

Same with above