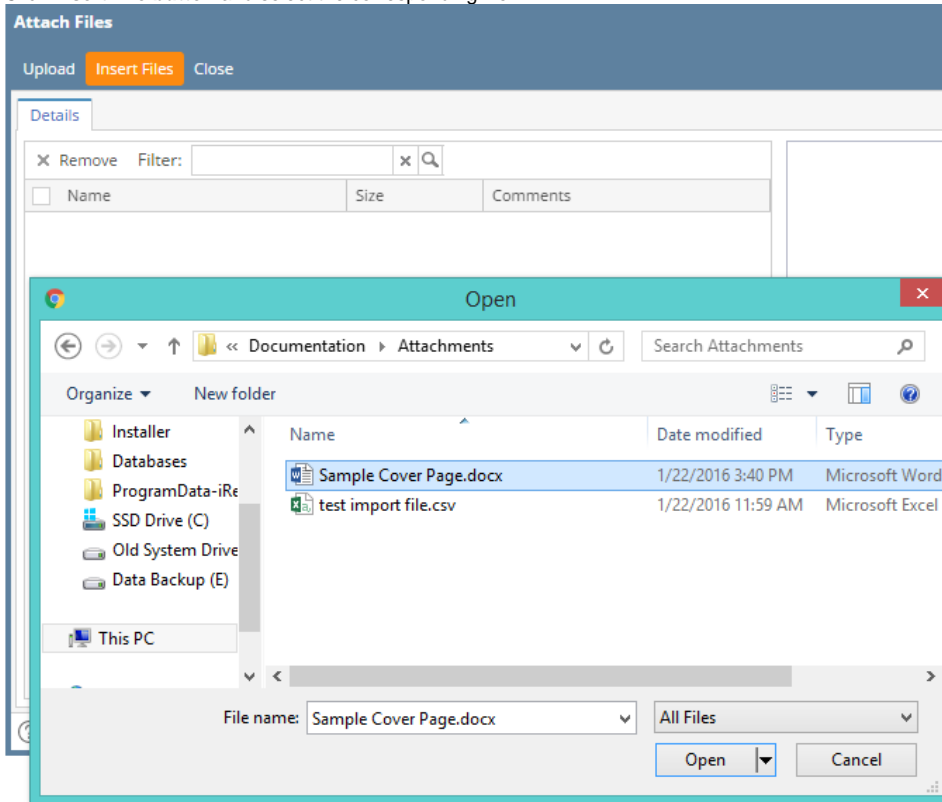


How to Attach File to Quote Template

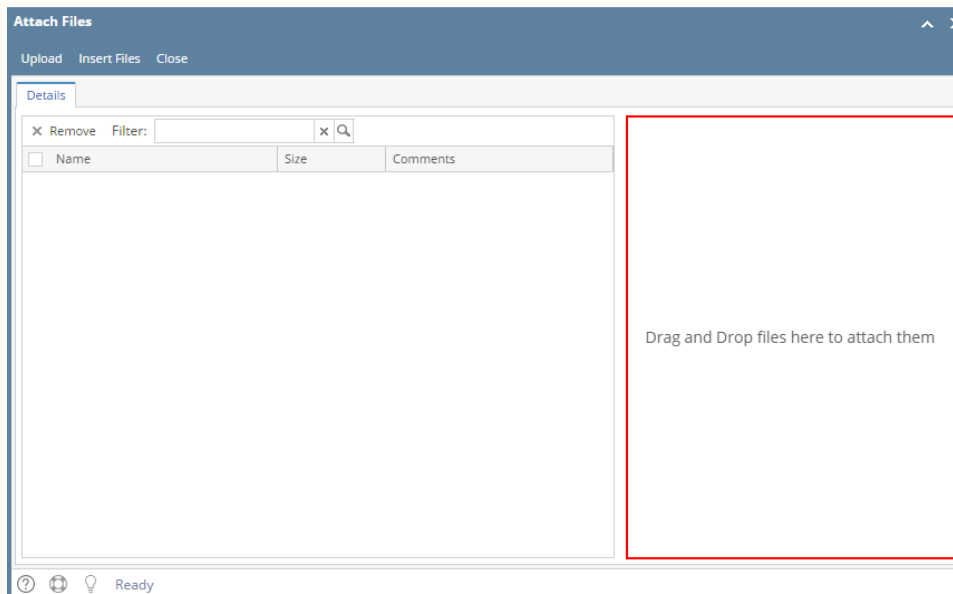


This process has been obsolete since version 16.1.

1. If you are already working on the Quote Template screen, proceed with the succeeding steps. Else, open the record first.
2. Add a **Section Name**.
3. Click the **Attachment field** next to the added Section Name. This will open the **Attach Files screen**.
4. Click **Insert File button** and select the corresponding file.



You can also drag and drop the file to the Drag and Drop panel of the Attach Files screen.



5. Click the **Upload button**. Note that you can upload 1 file only per section.

The 'Attach Files' dialog box has a dark blue header with the title 'Attach Files' and buttons for 'Upload' (highlighted in orange), 'Insert Files', and 'Close'. Below the header is a 'Details' tab. Under the 'Details' tab, there is a search bar with a 'Filter:' label, a clear button (x), and a search icon (Q). Below this is a table with columns: 'Name', 'Size', and 'Comments'. The table contains one row: 'Sample Cover Page.docx' with a size of '11.02 Kb'. There is a checkbox to the left of the 'Name' column header.

Here is how the it will look on Quote Template.

The 'Quote Template - Sample Template' window has a dark blue header with the title 'Quote Template - Sample Template' and window controls (minimize, maximize, close). Below the header is a menu bar with 'New', 'Save', 'Search', 'Delete', 'Undo', and 'Close'. Below the menu bar is a 'Details' tab. Under the 'Details' tab, there are input fields for 'Name: Sample Template', 'Organization: Item Category' (with a dropdown arrow), and 'Titles: [checkbox]'. Below these fields is a toolbar with buttons: 'Remove' (x), 'Download File' (download icon), 'Layout' (grid icon), and a search bar labeled 'Filter Records (F3)'. Below the toolbar is a table with columns: 'Section Name', 'Attachment', and 'Titles'. The table contains two rows: 'Cover Page' with 'Sample Cover Page.docx' and an empty 'Titles' cell, and another empty row. There is a checkbox to the left of the 'Section Name' column header, and the 'Cover Page' row is selected.

6. **Save** the changes.

 To view the attachment, select the row and then click **Download File button**. The system will download it to your default Download folder.

This screenshot is identical to the previous one, but the 'Download File' button in the toolbar is highlighted with a red rectangle. The 'Cover Page' row in the table is also selected.