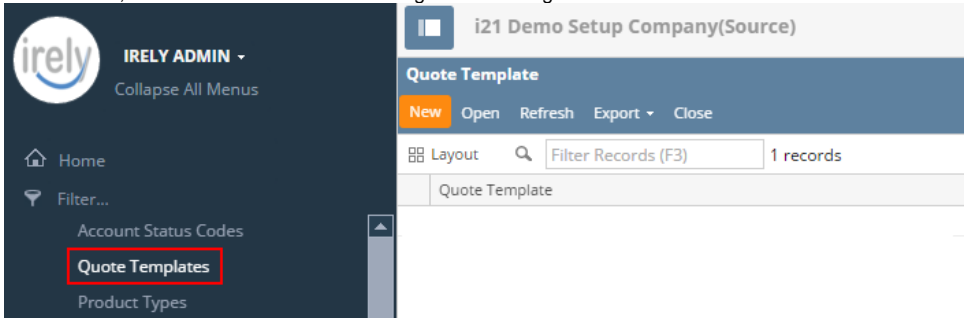
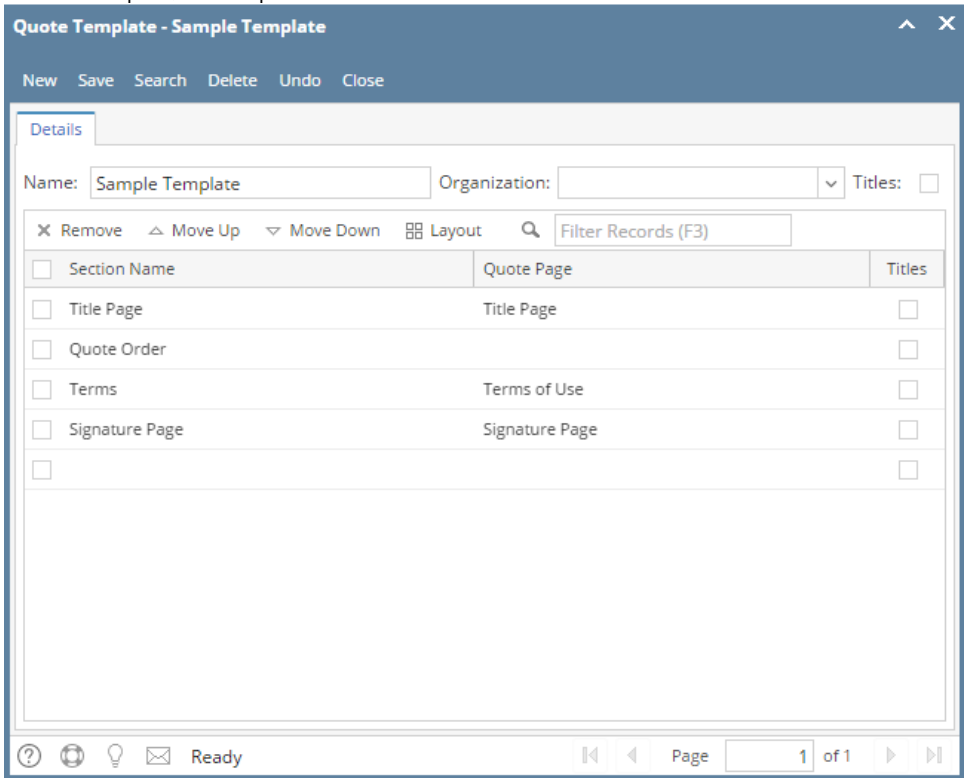


How to Add Quote Template

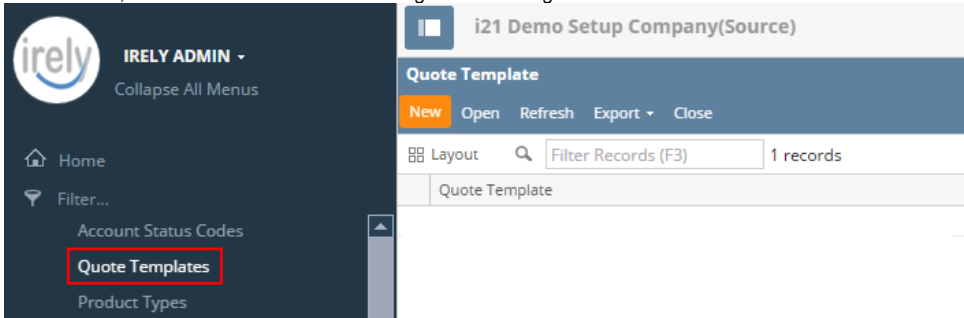
1. Open new Quote Template screen from **Sales | Quote Templates** menu. If there is no existing record, this will open a new Quote Template screen. If not, click the **Add button** on the integrated search grid.



2. Fill out the Quote Template fields. Refer to **Quote Template | Field Description** to help you in filling out the fields.
 3. Use the **Move Up** and **Move Down** buttons to rearrange the sections.
 4. **Save** the record once done.
- Here is a sample Quote Template record.



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- Here is a sample Quote Template record.

Quote Template - Sample Template

New Save Search Delete Undo Close

Details

Name: Sample Template Organization: Item Category Titles:

Remove Download File Layout Filter Records (F3)

| Section Name | Attachment | Titles |
|---|----------------------------------|--------------------------|
| <input type="checkbox"/> Cover Page | Sample Cover Page.docx | <input type="checkbox"/> |
| <input type="checkbox"/> Signature Page | Sample Signature Page.docx | <input type="checkbox"/> |
| <input type="checkbox"/> Terms and Conditions | Sample Terms and Conditions.docx | <input type="checkbox"/> |
| <input type="checkbox"/> | | <input type="checkbox"/> |

Ready

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