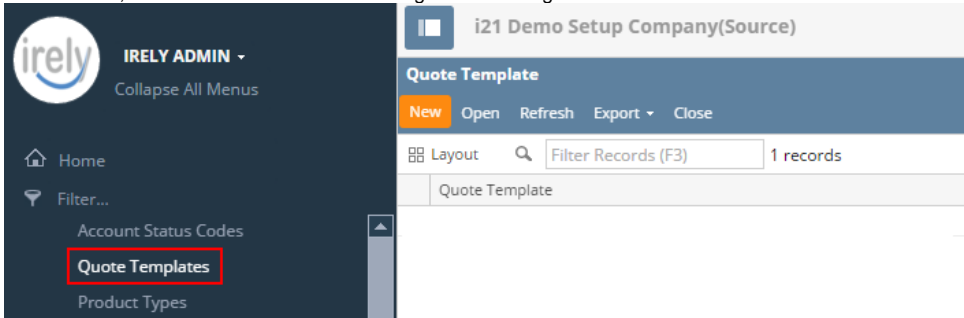
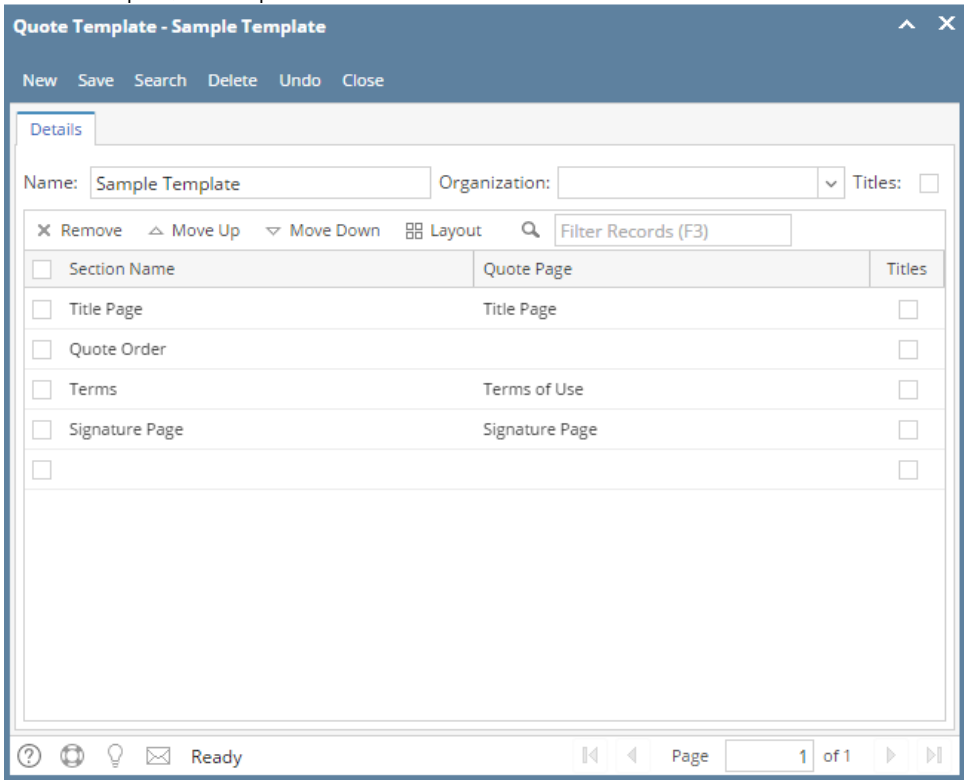


# How to Add Quote Template

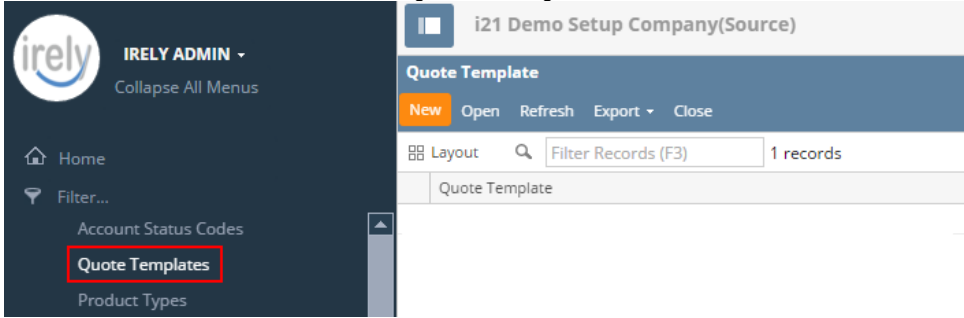
1. Open new Quote Template screen from **Sales | Quote Templates** menu. If there is no existing record, this will open a new Quote Template screen. If not, click the **Add button** on the integrated search grid.



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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  3. **Save** the record once done.
- 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)

<input type="checkbox"/>	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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