

How Template affects the Quote Report Format

The **Organization** and **Titles** options on [Quote Template](#) screen have a direct impact on the format of the Quote Report.

Organization

Use this to define how the item will be grouped on Quote Report. Options are Item Category, Product Type, and Item Name.

1. **Item Category** - the item on report will be grouped by its Category. Items without category will be under 'No Item Category' group.

The screenshot shows a 'Report' window with a header bar containing 'Archive' and 'Close' buttons. Below the header is a toolbar with icons for print, save, and navigation, along with a page indicator 'Page 2 of 4' and a 'Pdf' dropdown. The main content area displays a quote report. At the top, there is a table with customer and order details. Below this is a table with item details, grouped by category. The first group is 'No Item Category' with one item, 'sample misc item'. The second group is 'GAS - Gasoline' with one item, '87G 87 Unleaded Gasoline'. Each group has a subtotal row. The bottom of the window shows a status bar with a question mark, a globe icon, and the text 'Ready'.

Customer:	ABC Reseller	Salesperson:	Jared Smith	PO Number:		Date:	06/30/2016
Location:	0001 - Fort Wayne	Ship Via:	UPS	Terms:	5% 5, Net 30	Due Date:	07/30/2016
Currency:	USD	Ordered By:	IRELY ADMIN	Split:		Expiration Date:	
BOL No:		Order Status:	Pending	Template:	Sample Template		
Ship To:	ABC Reseller Somewhere St. Indianapolis, IN, 46204, United States			Quote Order Header Comment:	sample Standard Quote		

Item #	Description	UOM	Ordered	Discount	Tax	Price	Total
No Item Category							
	sample misc item		1.000	0.00%	0.00	10.50	10.50
Subtotal No Item Category:							10.50
GAS - Gasoline							
87G	87 Unleaded Gasoline	Gallon	1.000	10.00%	0.23	1.85	1.66
Subtotal GAS - Gasoline:							1.66

2. **Product Type** - the item on report will be grouped based on existing [Product Types](#). Items categories that are not included in any Product Type setup will be under 'No Product Type' group.

The screenshot shows a 'Report' window with a header bar containing 'Archive' and 'Close' buttons. Below the header is a toolbar with icons for print, save, and navigation, along with a page indicator 'Page 2 of 4' and a 'Pdf' dropdown. The main content area displays a quote report. At the top, there is a table with customer and order details. Below this is a table with item details, grouped by product type. The first group is 'No Product Type' with one item, 'sample misc item'. The second group is 'gas & others - gas & others' with one item, '87G 87 Unleaded Gasoline'. Each group has a subtotal row. The bottom of the window shows a status bar with a question mark, a globe icon, and the text 'Ready'.

Location:	0001 - Fort Wayne	Ship Via:	UPS	Terms:	5% 5, Net 30	Due Date:	07/30/2016
Currency:	USD	Ordered By:	IRELY ADMIN	Split:		Expiration Date:	
BOL No:		Order Status:	Pending	Template:	Sample Template		
Ship To:	ABC Reseller Somewhere St. Indianapolis, IN, 46204, United States			Quote Order Header Comment:	sample Standard Quote		

Item #	Description	UOM	Ordered	Discount	Tax	Price	Total
No Product Type							
No Item Category							
	sample misc item		1.000	0.00%	0.00	10.50	10.50
Subtotal No Item Category:							10.50
gas & others - gas & others							
87G	87 Unleaded Gasoline	Gallon	1.000	10.00%	0.23	1.85	1.66
Subtotal GAS - Gasoline:							1.66
Subtotal gas & others - gas & others:							1.66

Total Records: 2

3. **Item Name** - the item on report will follow the arrangement of items on Quote screen.

Titles

If selected, titles of categories or product types will be displayed on the Quote Report. Note that this will have impact on report format if Organization is set to either Item Category or Product Type.

Title option is not checked

Report

Archive Close

Page 2 of 4

PDF

Customer:	ABC Reseller	Salesperson:	Jared Smith	PO Number:		Date:	06/30/2016
Location:	0001 - Fort Wayne	Ship Via:	UPS	Terms:	5% 5, Net 30	Due Date:	07/30/2016
Currency:	USD	Ordered By:	IRELY ADMIN	Split:		Expiration Date:	
BOL No:		Order Status:	Pending	Template:	Sample Template		
Ship To:	ABC Reseller Somewhere St Indianapolis, IN, 46204, United States			Quote Order Header Comment:	sample Standard Quote		

Item #	Description	UOM	Ordered	Discount	Tax	Price	Total
	sample misc item		1.000	0.00%	0.00	10.50	10.50
Subtotal No Item Category:							10.50
87G	87 Unleaded Gasoline	Gallon	1.000	10.00%	0.23	1.85	1.66
Subtotal GAS - Gasoline:							1.66

Title option is checked

Report

Archive Close

Page 2 of 4

PDF

Customer:	ABC Reseller	Salesperson:	Jared Smith	PO Number:		Date:	06/30/2016
Location:	0001 - Fort Wayne	Ship Via:	UPS	Terms:	5% 5, Net 30	Due Date:	07/30/2016
Currency:	USD	Ordered By:	IRELY ADMIN	Split:		Expiration Date:	
BOL No:		Order Status:	Pending	Template:	Sample Template		
Ship To:	ABC Reseller Somewhere St Indianapolis, IN, 46204, United States			Quote Order Header Comment:	sample Standard Quote		

Item #	Description	UOM	Ordered	Discount	Tax	Price	Total
No Item Category							
	sample misc item		1.000	0.00%	0.00	10.50	10.50
Subtotal No Item Category:							10.50
GAS - Gasoline							
87G	87 Unleaded Gasoline	Gallon	1.000	10.00%	0.23	1.85	1.66
Subtotal GAS - Gasoline:							1.66

Related Topics

- [How to Print Quote Report](#)
- [How Template affects Printing of Quote](#)