

QUOTEWERKS: Layout Customization

QuoteWerks has many pre-defined Quote, Order, Purchase Order, Sales Order, and Invoice print templates to be used when printing. These print templates can be customized using the visual layout designer. Additionally, the printing engine creates a PDF file that is previewed, printed, emailed, etc. within QuoteWerks and numbers the pages individually.

To print a document, open the document, and then select the **File -> Print/E-mail/Deliver** menu, or click on the Deliver icon on the icon toolbar to display the Print, Share, Publish, Deliver Document window.

ADDING LOGO TO EVERY PAGE

- 1.) Click on the Deliver button within QuoteWerks
- 2.) Select the Layout you wish to edit
- 3.) Click on the [Edit] button
- 4.) Resize the 'Page Header' to accommodate the logo.
- 5.) Right click on the logo within the 'Report Header' and select 'Copy'
- 6.) Right click within the 'Page Header' and select 'Paste'
- 7.) Right click on the 'Page Header' line and select 'Filter'
- 8.) A window will open called 'Selection Section Criteria'
- 9.) Type `.if.sys->page<>1` and click [OK]
- 10.) Expand the last Report Header section to include the column header label values.
- 11.) Select the column labels (if any) in your Page Header section, and copy them, then paste them into the bottom of the last Report Header section.
- 12.) Click 'Save' to save the layout.

The next time you use the layout the layout will appear with the logo at the top of every page without having all of the Page Header information appear on every page.

ADDING A PAGE BREAK

- 1.) Insert a new Detail Section in your layout (Section>New)
- 2.) Right click on Detail Section 1 and select Filter.
- 3a.) Insert the following condition:
`.if.upper(documentitems->customtext01)<>"PG"`
- 3b.) If you already have a condition in the filter append this condition to have the same result. You may also have more detail sections other than the one you added in Step 1.
- 4.) Right click on the new Detail Section you had added in Step 1, and select Filter.
- 5.) Insert the following Condition:
`.if.upper(documentitems->customtext01)="PG"`
- 6.) Double click for the detail section properties and select Advance page before printing this section.

To use the new formula, add **pg** to the CustomText01 field in a line in the quote. As long as that is the only text in CustomText01, the page will be advanced in the output at that point.

Video - <http://www.quotewerks.com/video.asp?play=R7SdDYGmqms>

*Note: the video uses the Description field; it is "cleaner" to use the CustomText01 as it is more compatible with QuoteVale

LINE TYPE AND LINE ATTRIBUTE VALUES

Line Type Values:

ProductService = 1

Comment = 2

SubTotal = 4

GroupHeader = 8

RunningSubTotal = 16

SectionHeader = 32

PercentDiscount = 64

PercentCharge = 128

Heading = 256

Summary = 512

Details:

Stores the line type. These values do NOT compound, they are mutually exclusive.

Line Attribute Values:

ExcludeLine = 1

HidePrice = 2

DontPrint = 4

SubItem = 8

Option = 16

AlternatePriceOverride = 32

PrintPicture = 64

IsRecurring = 128

SelectedOption = 256

HideQuantity = 512

QuoteValet Quantity Change = 1024

Details:

Stores the attributes for each line item. The attributes can be combined together. For example, if a line item had the Exclude and HidePrice attributes set, the value would be 3. To test the value to see which of the attributes is set you will need to perform a comparison, for example:

If (Attributes AND 2) = 2 then Hide Price attribute is set.