66 MasterQ™

Quote Management System

Quote Template Substitutions

When quotes are created, MasterQ will search through your quote template document and substitute values for the keywords listed below.

This keyword in your quote template	Will be replaced by this value
$Contact	Name of person the quote is addressed to
$QuoteDate	Date the quote was issued
$ShippingDate	The lead time shown on the quote
$ShipVia	The ship via instructions
$FOB	The FOB point shown on the quote
$Terms	The payment terms specified
$Salesperson	The name of the salesman
$QuoteNumber	A unique number identifying this quote
$CustomerNumber	Your unique number used to identify this customer
$CustomerName	The customer's company name
$TaxExcemption	The customer's tax ID number
$EffectiveDate	The date the quoted pricing takes effect
$FaxAreaCode	The customer's* fax number area code
$FaxNumber	The customer's* fax number
$AreaCode	The customer's* phone area code
$PhoneNumber	The customer's* phone number
$DeliveryDay	The day of the week you deliver to the customer
$CompanyName	The name of *your* company

* these are the numbers associated with the *person* the quote was addressed to, and are not necessarily the same as the phone number of the *company*.

Quote Template Tips

If keywords occur more than once in your document, *all* occurrences will be replaced with the new value.

Case does not matter. $QuoteDate and $quotedate will both be replaced by the date the quote was issued.

The replacement values will use the *style* of the keyword. If your quote template has the word **$Contact** (formatted as shown) the replacement value might be **Bob Jones**. If the keyword *$CustomerNumber* is formatted as shown, the replaced value might be *A1001*.

You are not required to use any or all of the keywords in your quote. They are available to use if you wish.

Keywords may be placed anywhere in the document, including the header and footer.