

# Using FlexLink 2017 quote template

Last Modified on 06/11/2019 9:22 am CET

The 2017 quotation Word templates are distributed with version 2.1.23 of the Quotation Tool. Make sure that you are running version 2.1.20 or later before continuing reading this article. The version number can be found in the **Help/About** dialog.

In order to be able to use the new word template your administrator has to set up your local database. If you are not an administrator, talk to someone within your organization that is an have him/her follow the instructions below.

## Administrator instructions

The Word template consist of four files, 3 Word templates to be used for different types of quotes and one containing all necessary text elements.

The three Word dotx files (named 2016 to replace existing templates)

```
BudgetQuoteTemplate2016.dotx
```

```
FixedQuoteTemplate2016.dotx
```

```
ComponentQuoteTemplate2016.dotx
```

One text element file

```
BudgetQuoteTemplate2015_TextElements.tex
```

All located in the folder

```
c:\Program Files (x86)\FlexLink Quotation Tool\Documents
```

## Import the .tex file

The .tex file contains the text elements associated with the new Word files. You need to import them to be able to use the Word templates.

Open the Quotation Tool and go to **Basic Data / Program Parameters / Text element types**.

In the dialog click on **File actions / Import**.

Basic Data Text Element Types

New

File Activities

Import

Export

Code	Name	Sort
TASKTOBESOLVED	Task to be solved	70
PROJECTTIMEPLAN	Project time plan	100
PROJECTFATSATCRIT	Project FAT/ SAT criteria	110
WARRANTYLIABILITY	Warranty and Liability	130
EXCLUSIONS	Exclusions	160
DELIVERYTIME	Delivery time	170
EXCHANGERATE	Exchange rate	200
PROJECTPARTICIPANTS	Project participants	220
EXSUMMARY	Executive summary	230
PROP_SOL	Proposed solution	240
APPENDICES	Appendices	250

Select the .tex file.

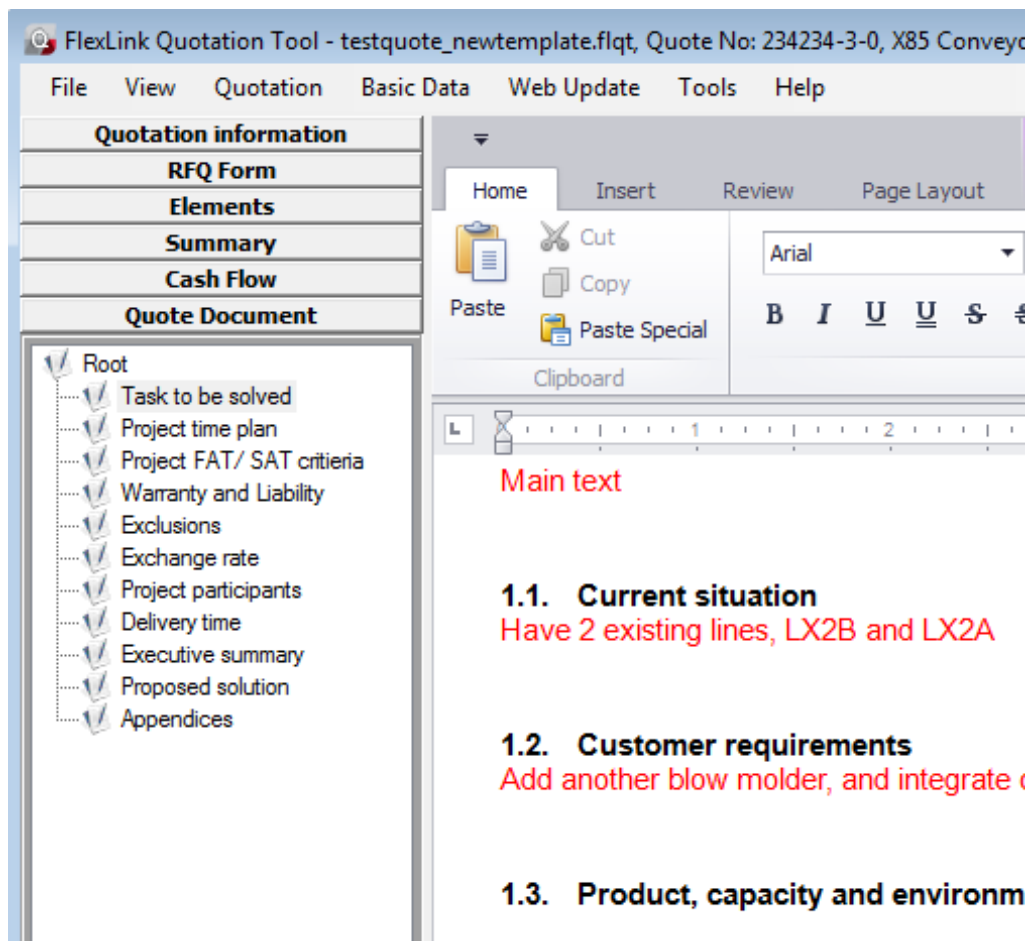
Now you've imported the text elements that corresponds to the fields found in the Word template (.dotx).

All the text elements shown in the picture above should be present in your list view of text element types. You might have other text element types that belongs to other templates as well, but leave them for now.

Time to test the template.

1. Select a customer
2. Enter a sales responsible
3. Enter a quote number and name, make sure that your quote language is set to **English**.
4. Add some items into the elements
5. Enter a quoted price in the summary/totals section.
6. In the **Quotation Document**, right click on **Root** and select **Add all**
7. Verify that the new text element types are present (if there's more text element types present, don't worry)

Your Quote Document / Text element tree should look like this:



8. Print the quotation (CTRL+SHIFT+P)
9. Make sure you select the new Word template (path described above).
10. Press **Generate** and hopefully you've created a test quote using the new template.

## Update your FLQT templates

If you are using .flqt templates when starting the application (either when starting flqt or when creating a new quote via File/New) you need to update your .flqt template files so that they contain the correct text element types.

These files needs to be distributed to your users separately.

## Translate

If you want to translate the text elements into another language you need to open up the **Basic Data**, **Program Parameters / Text element alternatives** dialog.

Click on the **Edit** button to edit the text element alternative

	Code	Name	Sort	Type	Language
✓	TASKTOBESOLVED_EX	Task to be solved example	10039	Task to be solved	en_US
✓	PROJECTTIMEPLAN	Project time plan example	10069	Project time plan	en_US
✓	PROJECTFATSAT_SMALL	Project FAT/SAT criteria for less than 1000 k\$, k\$	10089	Project FAT/ SAT criteria	en_US
✓	PROJECTFATSAT_LARGE	Project FAT/SAT criteria for more than 1000 k\$, k\$	10099	Project FAT/ SAT criteria	en_US
✓	WARRANTYLIABILITY_EX	Warranty and Liability example	10139	Warranty and Liability	en_US
✓	EXCLUSIONS_NOT_SPEC	Exclusion of anything not specifically listed	10169	Exclusions	en_US
✓	DELIVERYTIME	Delivery time 16 weeks	10179	Delivery time	en_US
✓	EXCHANGERATE_EX	Exchange rate example	10209	Exchange rate	en_US
✓	PROJECTPARTIC_EX	Project participants example	10229	Project participants	en_US
✓	EXESUM_EX	Executive summary example	10239	Executive summary	en_US
✓	PROPSOL_EX	Proposed solution example	10249	Proposed solution	en_US
✓	APPENDICES_EX	Appendices example	10259	Appendices	ay_en_US

Then, when the dialog appears; copy the original text (English) using CTRL+A and CTRL+C.

Click on the **Add language** button.

The screenshot shows the 'Basic Data - Text Element' editor. The top bar displays the text element name and code: 'TASKTOBESOLVED Task to be solved - TASKTOBESOLVED\_EX Task to be solved example'. Below this, a dropdown menu shows 'en\_US' and the 'Add Language' button is highlighted with a red circle. The main editing area contains a document preview with the following content:

**Main text**

**1.1. Current situation**  
Have 2 existing lines, LX2B and LX2C

**1.2. Customer requirements**  
Add another blow molder, and integrate out feed conveyors into existing line structure

**1.3. Product, capacity and environment**

**2.3.1 Product details**

Product	Empty PET Bottles
Size	Approx 70mm OD, various heights

A dialog box titled 'Basic Data - Select Language' is open, showing a dropdown menu with 'Ganda' selected. The dialog has 'Cancel' and 'Select Language' buttons.

Press select language and then paste the original English text into the edit window (CTRL+P).

Translate the text into the language you've selected and press **Done** to save.

Now repeat this procedure with all the text element alternatives that belongs to the new template (see

previous image).

Open up the Word template

( c:\Program Files (x86)\FlexLink Quotation Tool\Documents\BudgetQuoteTemplate2015.dotx )

Translate all the fixed texts in the dotx and save it as a new dotx (select a different name).

It is NOT recommended to store custom templates in program files and neither is saving them on a network drive.

All template files should be stored locally on each users drive.

To test, select the language in the Quotation Information tab and print the quote (make sure that you select the correct/translated dotx).

## **Distribute the new templates**

First thing you need to do is to make sure that all your users gets any new dotx and .flqt template files that you've created.

Then you need to make sure that they copy your database (sdf) either by using the DB Tool or via the auto update mechanism.