Print Quote

Last Modified on 15/05/2025 9:51 am EDT

First highlight the booking on the booking grid, then access the 'Print' option from the right click menu

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Click on the name of the template you would like to use and wait for the merge to complete



Once the document is merged, both Word and PDF versions of the document are automatically attached to the booking. You will also see a 'Document has downloaded' message.

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Sometimes users like to add some manual formatting to their merged document before sending it on to a client. To do this, check your downloads folder for the merged document and alter as needed.

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To *replace* an attached document with a modified version, keep the filename the same, click NEXT and follow the onscreen instructions (screenshots below). If no modifications are needed, click CLOSE.

You can attach any document to the booking at any time from the 'View Attachments' window. If you attach a file that has the same name as an existing attachment, the file will be replaced.





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