

Creating an RTF Template

Last Modified on 02/04/2025 4:25 pm EDT

Open Microsoft Word and design your template as desired OR copy an existing template (see load document below for where to find existing templates)

For any area where you would like information from the booking to print, use the corresponding insert field from the **RenalPoint Add-ins Tab**, **colour insert fields** and regular **insert fields**

The screenshot shows a quotation form template with the following sections:

- Header:** Logo for 'E AV' and 'QUOTATION Printed' with various insert fields like &dateN&, &timeC&, &BY, &BSALESPC&.
- Page Info:** 'Page 1 of 1' and fields for &bookNoC&, &BKSTATEC&, &CoC&, &SHOWNAMC&.
- Contact Info:** Address (1509 Walkerview Lane, Miltonville UK 90210-22), Phone (905-693-9457), Website (ey_products.com.uk), and Facebook (ey_products).
- Job Details Table:**

Prepared For	Dates	Job Site
&CoC& &Cadl1C& &Cadl2C& &Cadl3C& &STATEC&	Deliver: &ACTDELDN:8& at &mtimeC& Set-Up By: &SETUPDN:8& at &mtimeC& Show Start: &SHWSDN:8& at &SHWSTIMC&	Venue: &delToC& Room: &VroomC& Address: &dadr1C& &dadr2C&
&CustposC& &CNTRYC&	Show End: &SHWENDDN:8& at Pick-Up: &PICRETN:8& at &mtimeC&	&dadr3C& &VNSTATEC& &VNPOCDEC&
Contact: &bcontC& Telephone: &CphoneC&	Fax: &CfaxC&	Contact: &VcontC& Telephone: &dphoneC&
- Color Fields:** &COMCOL&, &HEDCOL&, &SUNCOL&, &COMPCOL&, &GROCOL&
- Table:**

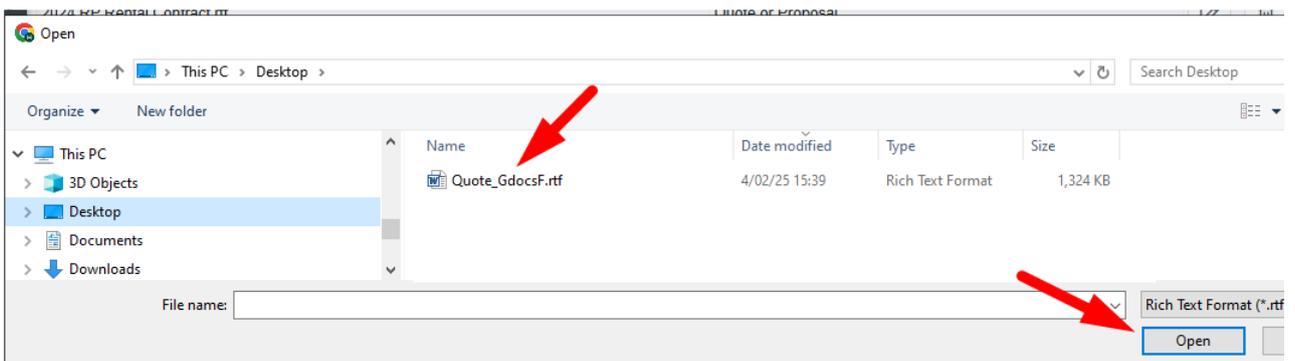
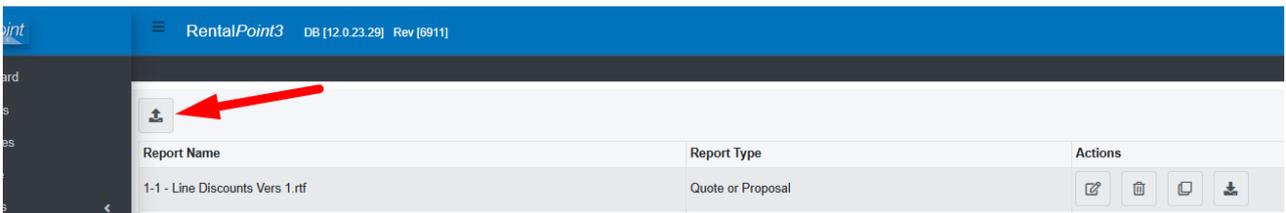
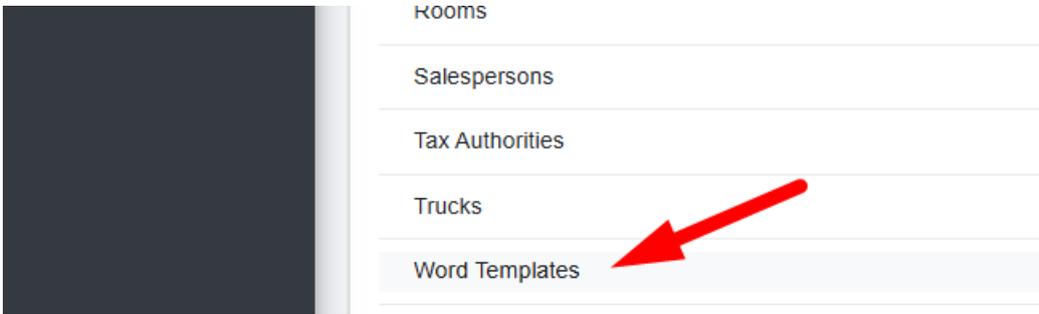
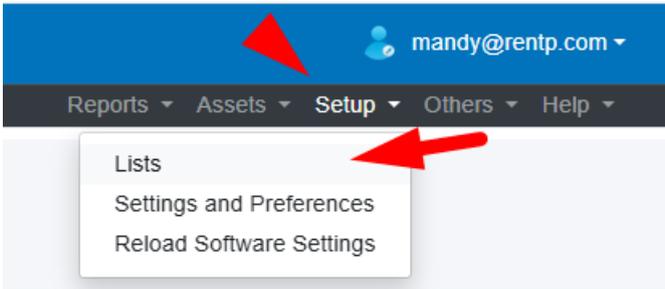
Qty	Description	Days Charged	Unit	Discount %	Extended
&QTYN:3&	&DESCC:48& &DAYSCHDN&	&UNITN:8:2&	&LIDISCN:4:2&	&LINEPRIN:10:2&	
Installation Instructions					
&instru1C& &instru2C& &instru3C& &instru4C& The renter acknowledges that the equipment is NOT covered by insurance and that additional rental charges will be made if the equipment is returned late. All blown globes must be returned, speaker cone damage must be paid for on return, any theft must be reported to the police.				Rental	&equipTN:14:2&
Renter or duly authorized agent of Renter				Rental Discount	&discamtN:14:2&
Date				Sales	&saletotN:14:2&
Please Print Name				Sales Discount	&SDISCAMN:14:2&
				Sundries	&sundtotN:14:2&
				Delivery Pickup	&TOTDELN:14:2&
				Tech Labor	&labourN:14:2&
				&TAXTIT1C&	&saletaxN:14:2&
				Total	&TotalN:14:2&

Save your document as an RTF type

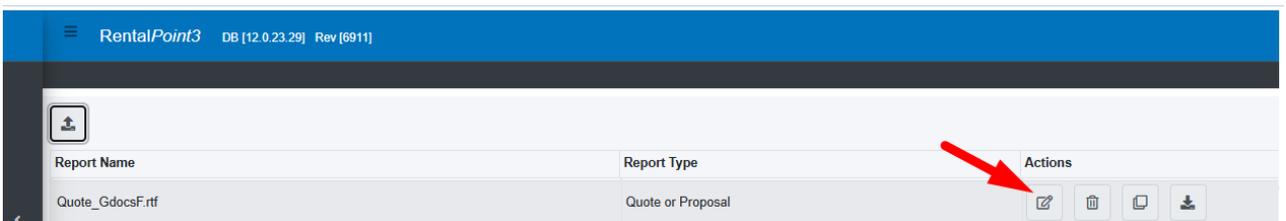
The screenshot shows a 'Save As' dialog box with the following details:

- File name:** Quote_GdocsF.rtf
- Save as type:** Rich Text Format (*.rtf)
- Authors:** Tim Grafton
- Tags:** Add a tag
- Title:** Invoice Date / Tax point
- Buttons:** Save, Cancel

Load your document for use in the software



Edit the settings to set whether the template should be available from the Print->Quote or Print->Invoice option



Report Type

- Quotation / Proposal
- Invoice

