How to Use User Field as Currency in the Quoting Software Tools

In some business environments and industry frontiers, the practice usage of QwikQuote the Quoting Software and Invoicing Software with out-of-box quotation templates may need to use User Field as Currency instead of normal String text. To address this business requirement, QwikQuote has added the feature for you to Use User Field as Currency in the Quoting Software Tools.

To use this feature in our quoting software system, you need first to enable this feature by check the Handle User Field Values as Currency in Quote on the QwikQuote 6 Options dialog / Catalog tab as the screenshot shown below:

Then on the Catalog view of the QwikQuote 6 main quotation software application / User Fields tab you can enter the Currency values in those User Field instead of normal String text, such as the screenshot shown below:

In the Price List view of the quotation software, you can pick those items with the Currency in User Fields into the current sales quotes in the quotation software and invoicing software you are running, such as the screenshot in Windows 7 Enterprise edition 64 bit OS below:
To show those User Fields with Currency in them in the Quote View of the quotation templates, you need to select those fields to be displayed in the quote view of the quoting software first on the QwikQuote 6 Options dialog / Quote/Order tab such as the screenshot below:

With the Quote View column settings as the screenshot above, the User Field values are handled as Currency during the process of picking from Price List view into the current quote in the Quoting Software when it is detected that the field values in those fields can be understood as Currency Type. If not, it will continue to be handled in the Sales Quotes as String text. The following screenshot shows the user fields are treated as Currency in the Quote View of the quoting software and invoicing software:

If you want to show those users field values in the Subtotal columns in the quote view of the current sales quotes or in the templates for making new quotes by re-using their formats, you need first to enable this function in QwikQuote the quoting software and Invoicing Software on the QwikQuote 6 Options dialog / Catalog tab by checking the Subtotal User Field Currency Values in Quote in the quoting software as screenshot below:
With the above feature enabled, then you need to choose what subtotal column you want to be calculated in the quoting software and invoicing software setup by pressing the Pick Subtotal Fields button on the QwikQuote 6 Options dialog / Quote/Order tab to bring up the window Pick Subtotal Field and you select the fields as you want by checking the corresponding checkboxes on it.

The following screenshot shows we choose as in this example:

With the above feature enabled, the subtotal line in the Quote View will show the values of the user field values multiplied by the quantity of that item in the corresponding cells of the Subtotal line in the Sales Quotes view, such as the screenshot below:

If you encounter problem or difficulty regarding to the feature and functionality in this document, please feel free to contact us at support@qwikquote.com with the corresponding screenshots to demonstrating your problems and idea.

Enjoy your QwikQuote the quoting software and invoicing software with out-of-box quotation templates ready to speed up your business.