

ESP+

Product Support > Quotes, Orders & Invoices > Quotes & Proofs > Edit Decoration for a Quote

Edit Decoration for a Quote

Jennifer M - 2024-09-21 - Quotes & Proofs

When adding or updating the decoration information for items within the quote, click on the quote number to open the details.

Quote #	Products	Customer	Quote Stage	Quote Date
#1006		Example Customer Company	Quote Created	09/21/2024

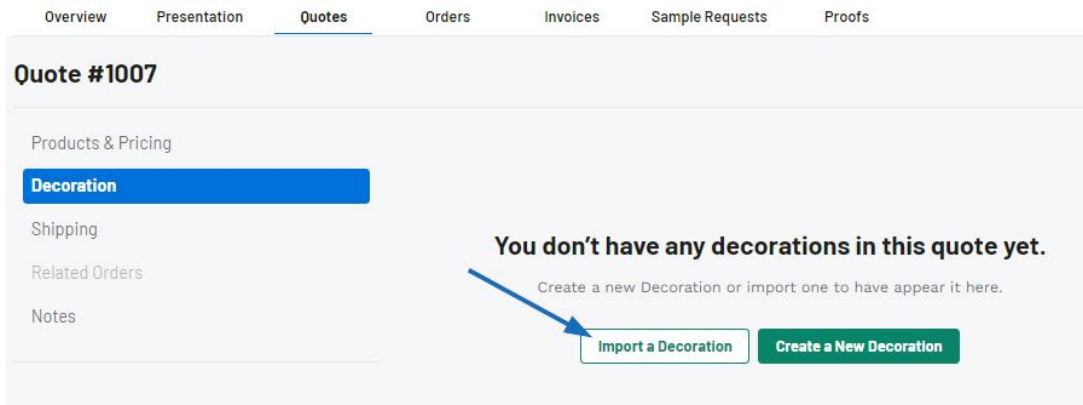
Click on Decoration from the options on the left.

Overview	Presentation	Quotes
<h3>Quote #1007</h3>		
Products & Pricing		
Decoration		
Shipping		
Related Orders		
Notes		

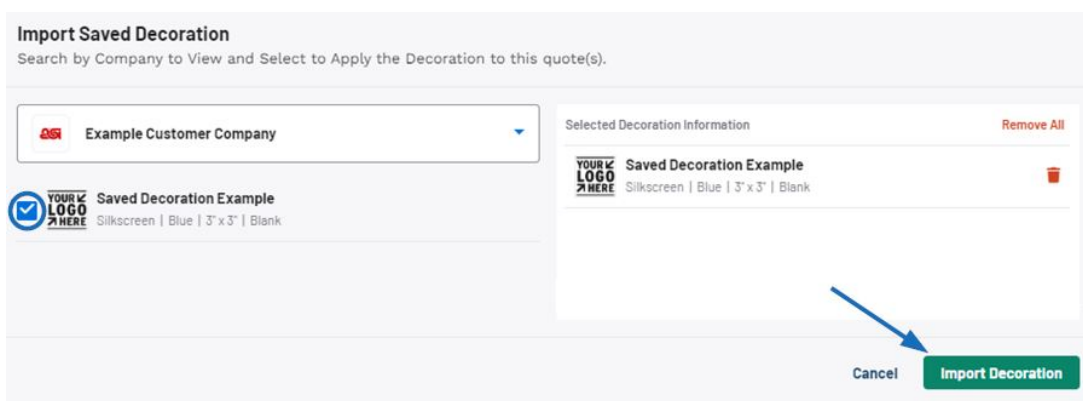
Create or Import Decorations

Import a Decoration

Decorations can be imported from the customer record in CRM. Click on the Import a Decoration button.

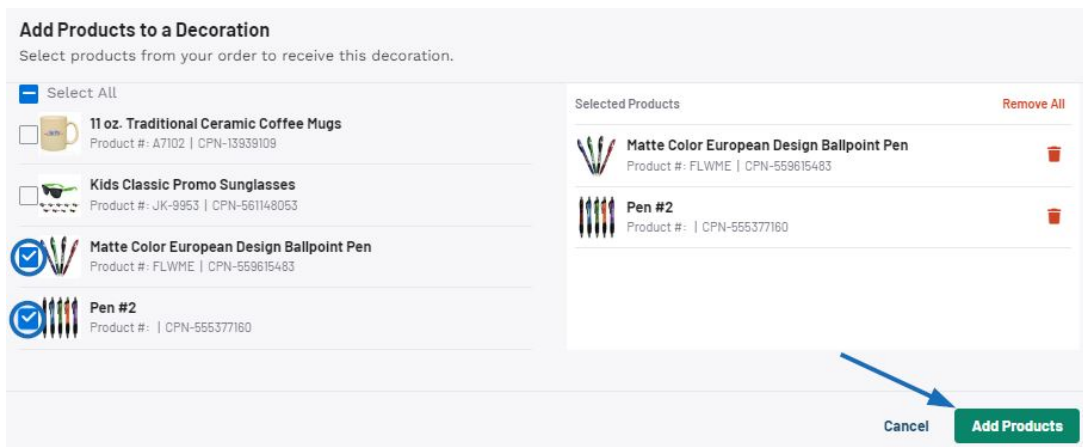


The Import Saved Decoration window will open. Use the Search Company with Decoration drop-down to select the customer. All saved decorations will be displayed. Check the box for the template(s) you would to use. Then, click on Import Decoration.



You will now be able to configure the decoration details. When you are finished, click on the Save Decoration button at the bottom. You will then be prompted to add at least one product to save a Decoration Template. Click on Continue.

The Add Products to a Decoration window will open and display all the products within the quote. Check the box for the product(s) you would to use. Then, click on Add Products button.



The decoration information will now be applied to the selected products.

Create a New Decoration

When creating a new decoration, there are three sections where custom information can be added:

- **Decoration Details**

Enter information regarding general imprinting such as method and location.

- **Setup Details**

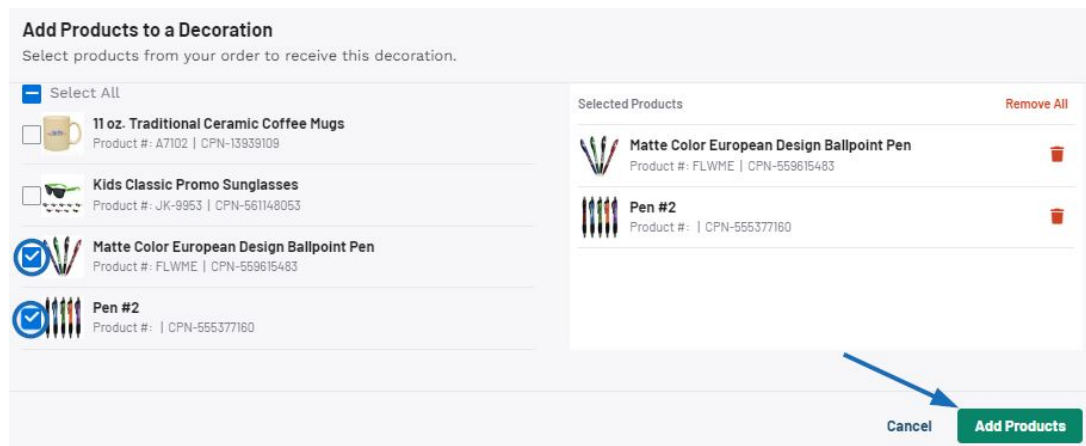
Enter specific information about the imprinting, such as the imprint color, size, and instructions for the decorator.

- **Artwork & Proofs**

Upload any applicable artwork files for this product. Artwork can be uploaded from your computer, imported from the customer's CRM record, and/or imported from a previous order. This section also enables you to select a proof type and indicate if client approval is required.

When you are finished, click on the Save Decoration button at the bottom. You will then be prompted to add at least one product to save a Decoration Template. Click on Continue.

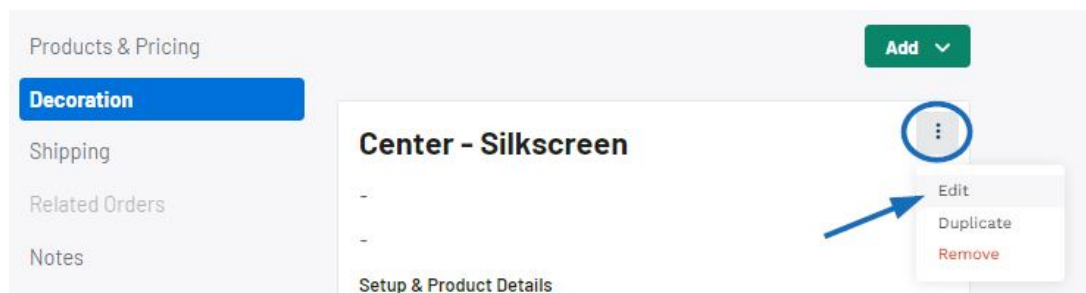
The Add Products to a Decoration window will open and display all the products within the quote. Check the box for the product(s) you would to use. Then, click on Add Products button.



The decoration information will now be applied to the selected products.

Update Existing Decoration

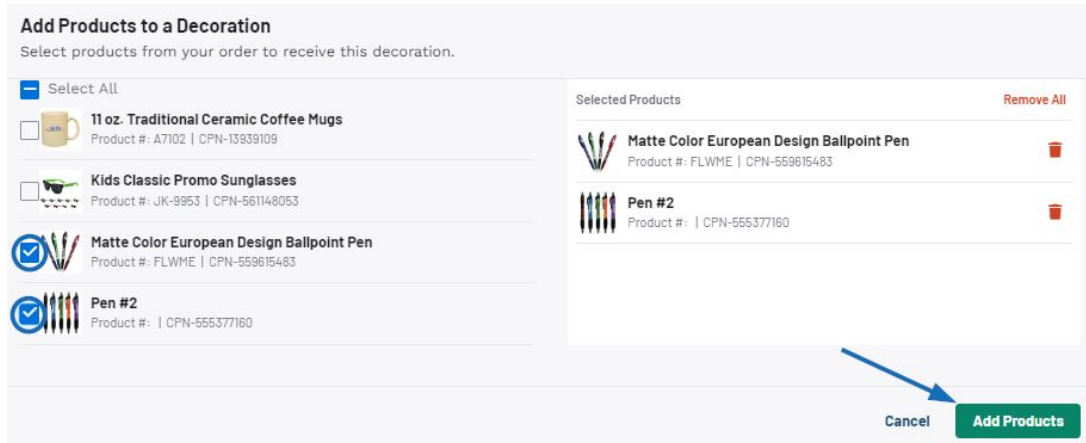
If decoration information is available in this section, it can be updated at any time by clicking on the three dot icon and selecting Edit from the options.



The decoration information will open and you can update the information in any of the available fields.

When you are finished updating information, click on the Save Decoration button at the bottom. You will then be prompted to add at least one product to save a Decoration Template. Click on Continue.

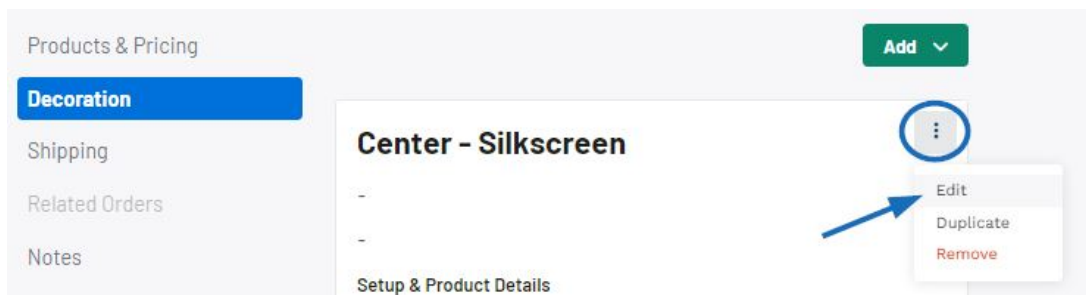
The Add Products to a Decoration window will open and display all the products within the quote. Check the box for the product(s) you would to use. Then, click on Add Products button.



The decoration information will now be applied to the selected products.

Save a Decoration Template

To save a decoration configuration for this customer, edit the decoration.



In the Save Decoration Name box, name the decoration and then click on the Save Decoration button.

Decoration Details ^

Decoration Name

Saved Decoration Example

Save decoration to this customers CRM record

Imprint Method **Imprint Location**

Silkscreen Center

Setup Details v

Artwork & Proofs v

Save Decoration

Detailed Decoration Field Information

Imprint Location

Where on the item the imprint will be located. For example, "Left Chest" on a shirt would be an imprint location.

Imprint Method

The process by which the artwork is applied to the item. Examples of imprint methods are silkscreen, embroidery, hot stamp, laser engrave, etc.

Imprint Color

The color(s) included within the imprint. This can be a single or multiple colors, as well as specific colors from the Pantone Matching Systems, commonly referred to as PMS colors and follow the format of Pantone##-####. For example the Pantone color of the year for 2024 was "Peach Fuzz" and it would be indicated by entering Pantone13-1023 in the Imprint Color field.

Imprint Size

How big the artwork will be imprinted.

Instructions

Use the Instructions field to communicate any specific messages regarding decoration to the supplier or decorator. Checking the Visible box will also display the instructions on customer facing documents, such as quotes and invoices.

Proofs

If the customer requested a Proof, use the dropdown to select the type and use the checkbox if client approval is needed.

Related Content

- [Send the Quote to the Customer](#)