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Design Sales Documentation

Wendy D - 2019-01-29 - in ESP Admin

In the Document Design section, administrators can upload a logo for order documentation. Click on the Upload button, browse your computer, select your logo, and click on Open.

A screenshot of the 'Document Design' section in the ESP Admin interface. The section is titled 'Document Design' and contains a 'Company Logo' section with an 'Upload' button. Below this is the 'Document Content' section, which includes a dropdown menu currently set to 'Sales Order'.

In the Document Content section, use the Document Content dropdown to select the document you would like to edit.

A screenshot of the 'Document Content' section in the ESP Admin interface. The dropdown menu is open, showing a list of document types: Sales Order, Purchase Order, Invoice, Acknowledgment, Quote Request, Quote, Packing List, and Sample Request. A blue arrow points to the 'Sales Order' option in the dropdown.

When designing the sales documentation, administrators can choose to display product thumbnails by checking the "Show Product Images" box. Do not check this box if you wish to hide the product images.

Use the header and/or footer boxes to customize this information for company Sales Orders. Enter the information you would like to include within the appropriate section and then use the available toolbar to format it.

Document Content Sales Order

Show Product Images

Document Header

Helvetica 12

ASI
 4800 E Street Rd
Trevose, PA 19053-6658
 US
customerservice@asicentral.com

Document Footer

Helvetica 12

ASI
 4800 E Street Rd
Trevose, PA 19053-6658

Invoice, Acknowledgement, Quote, and Packing List will also contain the option to show the CPN (coded product number) or Product Number. Select the option you would like to use.

Document Content Invoice

Show Product Images Display: CPN Number Product Number

Document Header

Helvetica 14

When you are finished, click on the Save button at the bottom.