**Quote Template Naming Conventions Document**

**Purpose**

This document establishes standardized naming conventions for quote templates used across various categories and companies within our organization. The purpose is to ensure consistency, ease of retrieval, and clarity in template management.

**Naming Convention Overview**

Templates are named based on a combination of several elements:

* **Company**
* **Category**
* **Sub-Category**
* **Type**
* **CreatedBy**

These elements help identify the template's applicability, its level of customization, and the creator or editor of the template. Following a structured naming convention facilitates better organization and efficient template usage.

**Detailed Structure**

**Components of the Naming Convention**

1. **Company**:
   * Use the acronym of the company the template is designed for.
   * Examples: MPC, F1, VMS
2. **Category**:
   * Indicates the main revenue type the quote addresses.
   * Options: NRR (Non-Recurring Revenue), MRR (Monthly Recurring Revenue), Hybrid
3. **Sub-Category**:
   * Describes the specific area or focus within the main category.
   * Example for MRR: SaaS, Consulting, Support
4. **Type**:
   * Specifies the template's standardization level.
     + **Standard**: Default templates created for general use.
     + **Diverged**: Templates modified by a CPQ (Configure, Price, Quote) user to meet specific internal needs.
     + **Custom**: Templates modified to suit a specific client's needs.
5. **CreatedBy**:
   * For diverged and custom templates, this field should identify the user who made the modifications.
   * Use the username, initials, or employee ID of the person.

**Format**

* **Standard Templates**: **[Company]-[Category]-[Sub Category]-[Type]**
* **Diverged Templates**: **[Company]-[Category]-[Sub Category]-[Type]-[CreatedBy]**
* **Custom Templates**: **[Company]-[Category]-[Sub Category]-[Type]-[CreatedBy]**

**Examples**

* **Standard Template**: **VMS-MRR-SaaS-Standard**
* **Diverged Template**: **F1-NRR-Hardware-Diverged-JSmith**
* **Custom Template**: **MPC-MRR-Software-Custom-ADoe**

**Usage Guidelines**

1. **Creating New Templates**:
   * Determine the template's intended use and categorize it accordingly.
   * Follow the structured format to name the template before saving.
   * For diverged or custom templates, ensure that the "CreatedBy" field reflects the correct creator or editor.
2. **Modifying Templates**:
   * When editing, choose the appropriate type ("Diverged" or "Custom") and update the "CreatedBy" field.
   * Save the new version separately to maintain the integrity of the original template.
3. **Retrieving Templates**:
   * Use the search functionality of the template management system.
   * Enter specific elements of the naming convention to filter and find the desired templates quickly.
4. **Template Updates**:
   * Regularly review and update templates to ensure they remain relevant and effective.
   * Apply naming conventions consistently whenever templates are updated or newly created.

**Conclusion**

Adhering to these naming conventions will streamline operations, minimize confusion, and enhance productivity. Consistent use of these guidelines will ensure that all team members can easily access and utilize the appropriate quote templates as needed.