Templates

Introduction

If you regularly issue similar documents, for example for weekly shipments where almost all the information of the documents are the same, then it is a good idea to use templates feature.

A template is created once with all the information that is always repeated, for example shipper, consignee, route, etc. and then you create a new document using that template, re result is a new pre filled document.

Templates are available for all types of documents.

Creating a new template

You can create a new template from Database->Templates or while creating a new document by clicking on "Manage templates". In the screen that appears you will have the following options:

- Type: this changes the type of document, select the type of document for which you want to create or see the templates
- New template: to create a new template
- Rename template: renames a template
- Edit templates: to modify an existing template
- Delete template: deletes a template. Documents generated using the deleted template will not be affected in any form.
- New using template: creates a new document using the selected template

To create a new template do the following:

1. Select the desired document type
2. Click on "New template"
3. Enter a name for the template, for example "X Company Monday shipments"
4. Then enter the information in the document that is always repeated
5. When done click on "Save"
6. Close the template

Now the template is ready to be used. If at any time you need to modify the template use the "Edit template" option, modify the template and then click on "Save".

The "<default>" template

In all documents there is always a "<default>" template already created. That template is the template used to create new documents when no other template is selected. This is useful if you have data that is always repeated in all documents. You can edit this template as any other regular template.

Using templates

To use a template, when creating a new document, select the "Template" option and select a template. Then click on "Create" and a new prefilled document will be created.