Templates

September 10, 2026

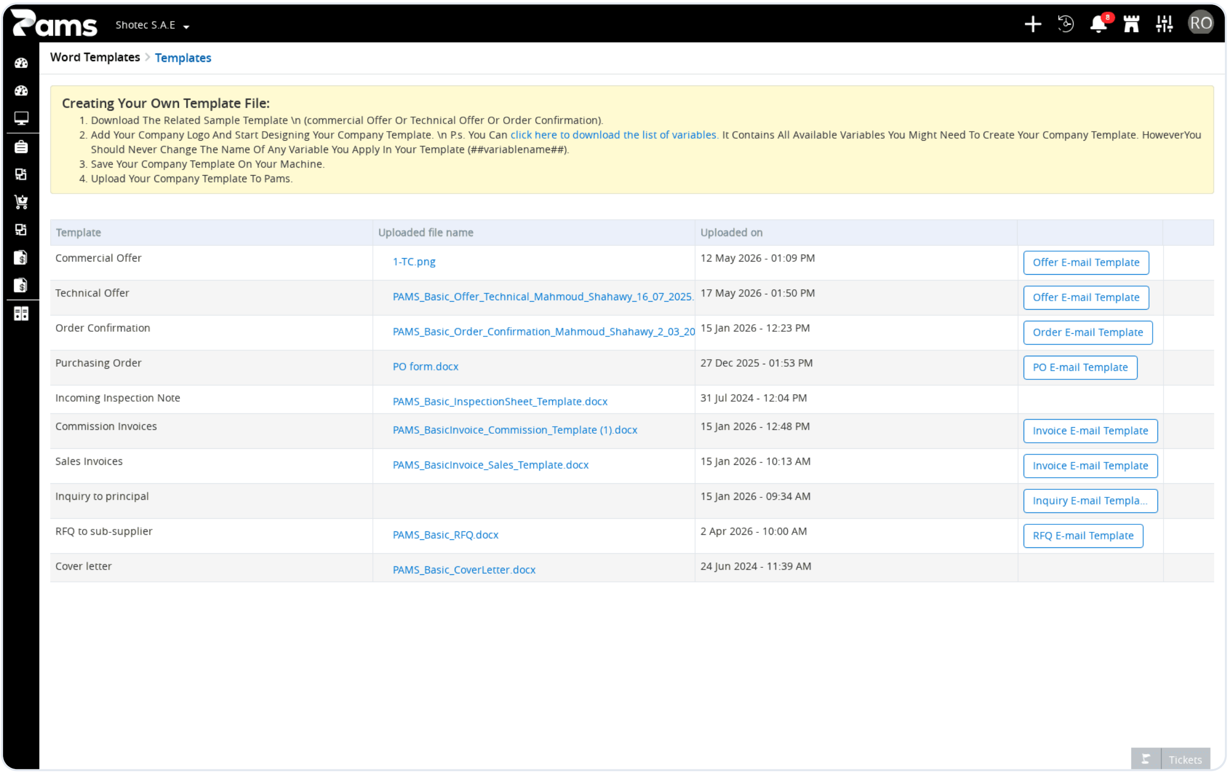
Templates

Templates at a glance

Templates is the configuration area where you prepare document templates for inquiry, offer,
order, RFQ, PO, and invoice work. You can review the template type, uploaded file name, and
upload date, then open the available editor or file actions for a row.

If you need to…	Go to
Check the access and file prerequisites	Before you start
Locate an existing template	Find a template
Learn what each part of the screen does	Understand the Templates screen
Choose the action for a particular template type	Choose the right template action
Download, upload, or edit a template	Maintain and use a template
Diagnose a failed template action	When a template action fails
Continue into document work	Continue with the document workflow
Work with offers	Offers
Work with orders	Orders
Work with purchasing RFQs	Purchase job RFQs
Work with purchasing orders	Purchase job orders
Work with invoices	Create an invoice

The Templates screen is at `/configuration/templates`.



Before you start

Prerequisites

- The Word Templates feature is included in your subscription.
- To upload the list of variables, you have developer access.
- For a company template upload, have a `.doc` or `.docx` file ready.
- For a variable-list upload, have a `.pdf` file ready.

The available action also depends on the template row. Check the row type before choosing an
editor, download, or upload action.

Find a template

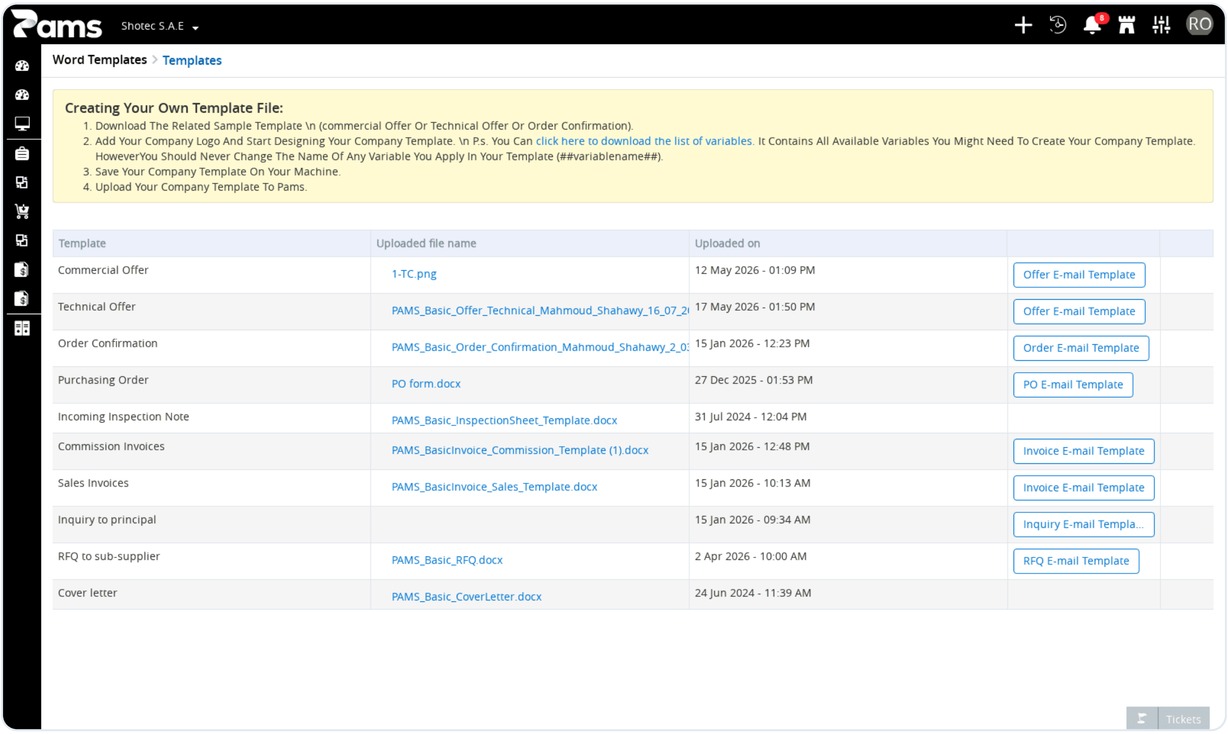
Use the Templates list to identify an existing template before opening an action. The list shows
the template type, the uploaded file name, and the upload date.

Prerequisites

- You have access to the Templates screen.
- You know the document type or file name you want to review.

Steps

1. Open `/configuration/templates`.
2. Read the **Template** column to identify the document type.
3. Read the **Uploaded file name** column to identify the stored file.
4. Read the **Uploaded on** column to identify when the file was uploaded.
5. Note the document type and identify its matching option in **Choose the right template action**.



Result: The template row and its document type are identified. Continue to Choose the right
template action.

Understand the Templates screen

The template list is the starting point for reviewing a row. Each row can also show a document-specific email-template option, such as **Offer E-mail Template** or **Invoice E-mail Template**.

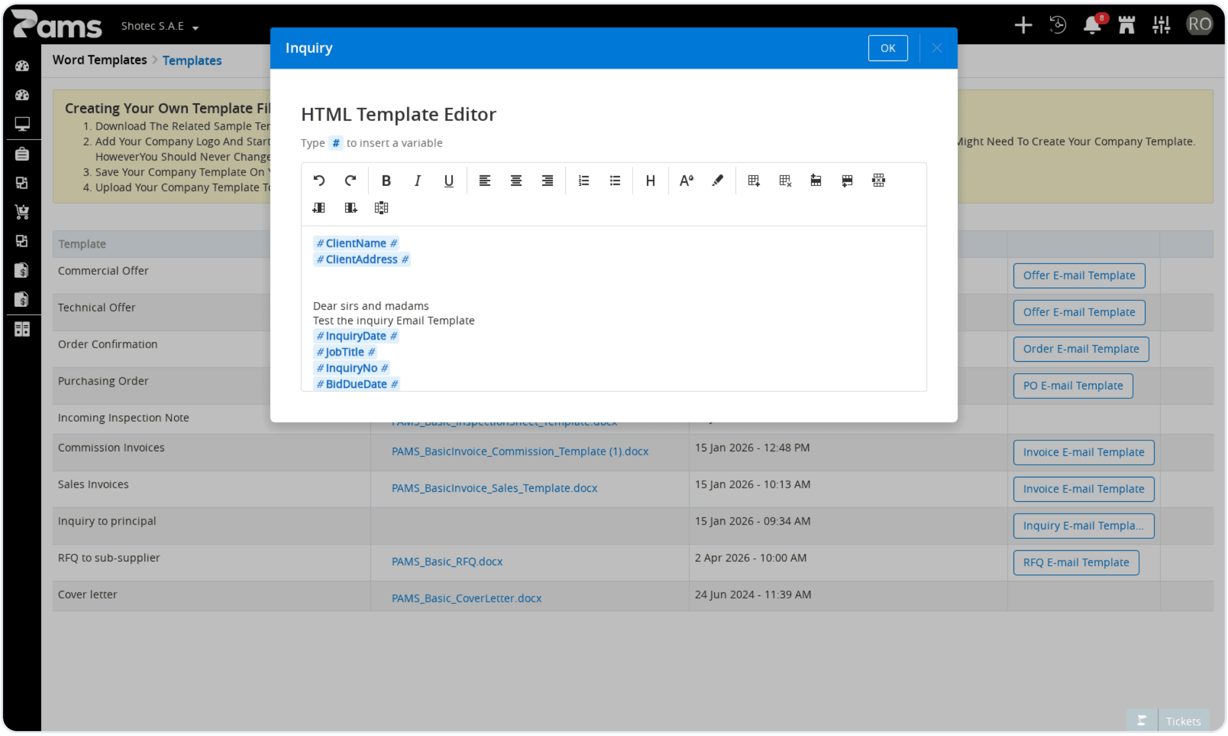
Screen area	What you use it for
Template	Identify the document type.
Uploaded file name	Identify the stored file.

Screen area	What you use it for
Uploaded on	Compare upload dates.
Available email-template control	Open the editor for the document type shown in the row.
Upload popup	Select a file for a company template or variable list.
HTML Template Editor	Edit template content and insert variables.

The upload surfaces use one file field. The company-template surface accepts `.doc` and `.docx`;
the variable-list surface accepts `.pdf`. The editor uses rich text and shows **Type # to insert a variable**.

When the editor opens, its dialog is titled **HTML Template Editor**. Its visible controls include
the following toolbar actions:

Editing need	Controls
Change text formatting	**Bold**, **Italic**, **Underline**, **Font Color**, **Background Color**
Change alignment and lists	**Align Left**, **Align Center**, **Align Right**, **Ordered List**, **Bullet List**, **Header**
Work with tables	**Insert Table**, **Delete Table**, **Insert Row Above**, **Insert Row Below**, **Delete Row**, **Insert Column Left**, **Insert Column Right**, **Delete Column**
Reverse or repeat an edit	**Undo**, **Redo**
Save the editor	**OK**



Choose the right template action

Use the email-template option that matches the document type in the table below.

If the row is…	Choose…
Inquiry	**Inquiry E-mail Template**
Technical or commercial offer	**Offer E-mail Template**
Order confirmation	**Order E-mail Template**
Purchase inquiry	**RFQ E-mail Template**
Purchase order	**PO E-mail Template**
Commission or sales invoice	**Invoice E-mail Template**
Inspection sheet	No document-specific editor action is available in this screen.

For rows other than Inquiry, open the row menu to use **Sample template**, **Company template**,
Upload company template, or **List of variables**. **Company template** is available for download only when the row has a company template; when the row is a basic template, that action
is disabled.

Maintain and use a template

Choose one procedure after you have selected the document type and its matching option.

Download a template or the variable list

Prerequisites

- You have identified the template row.
- The row is not an Inquiry when using the row menu actions.

Steps

1. Open the row menu.
2. Choose one action from the table.

If you need to…	Choose…
Download the standard file	**Sample template**
Download the company file	**Company template**
Download the variable list	**List of variables**
Download the variable list from the instructions	**click here to download the list of variables.**

Result: The selected download action starts from the template screen.

Upload a company template

Prerequisites

- You have a `.doc` or `.docx` file ready.
- You have identified a non-Inquiry template row.

Steps

1. Open the row menu.
2. Select **Upload company template**.
3. Select **Browse**.
4. Choose the company template file.
5. Select **Upload**.

Result: The upload popup closes after the upload path completes.

Edit a document template

Prerequisites

- You have identified the row's document type.
- You have selected its document-specific editor action.

Steps

1. Select the document-specific email-template action for the row.
2. Edit the content in **HTML Template Editor**.
3. Type `#` to insert a variable.
4. Select **OK** to save the editor content.

Result: The editor closes after the save path completes.

Upload the list of variables

Prerequisites

- You have developer access.
- You have a `.pdf` file ready.

Steps

1. Select **Upload list of variables**.
2. Select **Browse**.
3. Choose the PDF file.
4. Select **Upload**.

Result: The variables upload popup closes after the upload path completes.

If an action fails, use When a template action fails.

When a template action fails

Use this table when a template action does not complete as expected.

What you see	What it means	What to do
`An error occurred while processing your request` while the list loads	Loading the template list failed.	Return to the Templates screen and retry the load.
`An error occurred while processing your request` after a download action	The requested file download failed.	Retry the same download action.

What you see	What it means	What to do
`An error occurred while processing your request` after an upload action	The upload request failed.	Check the file type and retry the upload.
`An error occurred while processing your request` after saving the editor	Saving the template content failed.	Reopen the editor and retry the save.
The expected document action is not clickable	The action is not available from the current row or screen state.	Recheck the row type and use the matching action in Choose the right template action.

Continue with the document workflow

After you maintain the relevant template, continue with the document workflow that uses it. The template
screen provides actions for inquiry, offer, order, RFQ, PO, and invoice documents. Continue with
the workflow that matches the document you are preparing.

If you are continuing with…	Go to
Offers	Offers
Orders	Orders
Purchasing RFQs	Purchase job RFQs
Purchasing orders	Purchase job orders
Invoices	Create an invoice

Result: You have a maintained template and a workflow page for the document type you need.