Managing Document Templates

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Understand Templates and Variables

In Pams, a document template is the approved layout used when preparing business documents such as Commercial Offer documents, Order Confirmation documents, Purchasing Order documents, RFQ documents, Technical Offer documents, and invoices. The template provides the parts that should look the same every time: your logo, headings, font choices, page layout, footer wording, and standard company information.

A template file also contains variable placeholders. A variable is a marked location in the template where Pams inserts information from the document you are creating. For example, a generated document may need to show the recipient's name, document number, Offer Date, Order Date, Delivery Date, Currency, Total Price, or other transaction details. Instead of typing these values into the template manually for every document, you place a variable placeholder in the correct position.

When you generate a document, Pams combines three parts:

- The uploaded template file supplies the branded design and fixed wording.
- The variable placeholders identify the locations where changing information belongs.
- The generated business document fills those locations with values from the selected record.

This approach keeps recurring documents consistent while allowing each Commercial Offer, Orders, Purchase Order, or Invoice to contain its own client, principal, product, price, date, and reference information.

For example, your logo and footer text remain fixed in every document. A document number or Client name changes for each document generated from the same template. The template controls where both appear on the page.

[SCREENSHOT: An example branded business document showing fixed elements such as a logo and footer, alongside variable locations for a document number, recipient details, and date.]

Use the template currently approved by your organization. Dashboard display choices are configured separately; see Configuring Dashboard Settings if you need to adjust Dashboard settings rather than document layouts.

Prepare a Branded Template for Upload

Prepare the source document before opening Pams. Start with the organization's approved branded layout so the uploaded file already includes the logo, headings, footer content, standard wording, and page formatting your team expects to use. Review both the first page and any continuation pages, especially where headers, footers, signatures, totals, and legal wording appear.

Separate fixed content from information that changes from one document to another. Keep fixed content as normal text. Add a variable placeholder wherever Pams must insert a document-specific value during generation. Typical changing content includes:

- Recipient details, such as the Client, Principal, Contact Name, Address, or Delivery Destination.
- Document identifiers, such as Offer Number, Order Number, Invoice Number, Purchase Order Number, or RFQ Number.
- Dates, such as Offer Date, Order Date, Delivery Date, Due Date, or Validity Period.
- Commercial details, such as Currency, Quantity, Unit Price, Discount (%), Tax (%), Total Price, Delivery Term, or Payment Method.
- Transaction-specific notes, descriptions, and item information.

Place each placeholder exactly where the generated value should appear. A placeholder for a document identifier belongs near the document title or reference area. Recipient placeholders belong in the recipient address block. Price, Quantity, and Total Price placeholders belong in the commercial or item section.

Keep every placeholder visually separate from the fixed text around it. Do not merge a placeholder into a long sentence, a logo, or a heading where it may be difficult to review later. Use clear, distinct names that make the intended value obvious when you configure variables in Pams.

Before upload, read through the entire document as if it were a completed Commercial Offer or Order Confirmation. Confirm that fixed branding is correct, placeholders are in the intended locations, and no temporary notes or outdated wording remain.

[SCREENSHOT: A source template file with highlighted placeholder locations in the recipient block, document reference area, and totals section.]

Upload a Document Template

Use the **Templates** area in Pams to add the prepared file. Templates are managed as shared document layouts, so use a name that allows other administrators to identify the document type and its intended purpose.

1. Open **Configuration** and go to **Templates**. Select **Word Templates** to view the available document templates.
2. Start a new template record. In the template details, enter a clear **Name**. Include the business document purpose in the name, such as whether it is for a Commercial Offer, Technical Offer, Order Confirmation, Purchasing Order, or RFQ. Avoid vague names that do not show which layout a colleague should select.
3. Choose the option for uploading your own template file. Use the file upload control to select the prepared template from your local storage. Confirm that you selected the final approved version rather than an earlier draft.
4. Check that the uploaded file appears on the template record. If Pams shows the file name or attachment after upload, compare it with the source file you intended to use.
5. Click **Save**. If you are finished working with the template record, select **Save and Close**.
6. Return to the **Word Templates** list and confirm that the new template appears with the name you entered. Open the saved template and verify that the file remains attached to the template record.

[SCREENSHOT: The Word Templates list in Pams, with a newly saved template selected and its uploaded file visible on the template record.]

Do not rely on the file name alone to identify a template. The **Name** shown in Pams is what administrators use when choosing among available layouts. Make it specific enough to distinguish similar document types and approved variations.

Add and Maintain Template Variables

After uploading a file, open the saved template and review its variable configuration. The variable list connects the placeholders in the document layout with the values

Pams inserts when you generate a business document. Every placeholder used in the template needs a matching variable entry so Pams can recognize what belongs in that location.

1. Open the template from **Configuration > Templates > Word Templates**.
2. Go to the area where the template variables are listed or maintained. Review the available entries against the placeholders in your uploaded file.
3. Add a variable for each placeholder required by the template. Use a clear variable name that describes the value to be inserted. Match the name carefully to the placeholder in the template file.
4. Check the location and business meaning of each variable. For example, a variable used in the recipient block should represent recipient information, while a variable used beside the document title should represent a document date, Offer Number, Order Number, or Invoice Number.
5. Save the variable changes with **Save**. Reopen the template if needed and confirm that all required variables appear in its list.

Use names that help administrators understand the intended content without opening the source file. The following examples show the type of content a variable may represent:

Template location	Variable content to configure
Recipient block	Client, Principal, Contact Name, Address, Delivery Destination
Document reference area	Offer Number, Order Number, Invoice Number, Purchase Order Number, RFQ Number
Date and terms area	Offer Date, Order Date, Due Date, Delivery Date, Validity Period
Commercial section	Currency, Quantity, Unit Price, Discount (%), Tax (%), Total Price

When you edit the template file, review the variable list immediately afterward. Remove variables that no longer have a placeholder in the revised file, and add entries for every new placeholder. A variable list that does not match the uploaded document can lead to blank values or visible placeholders in generated documents.

[SCREENSHOT: A template record showing a list of configured variables beside the uploaded template file.]

Keep Template Versions Aligned with Branding Changes

Update the template whenever approved branding or standard document content changes. Common reasons include a revised logo, a changed footer, new legal wording, updated bank details, a different document title, or a redesigned Commercial Offer or Order Confirmation layout. Uploading the revised template ensures that future generated documents use the current approved presentation.

Before replacing or adding a revised template, compare the new file with the existing one. Check the first page, headers, footers, page breaks, signature areas, and commercial sections. Confirm that the new layout still has space for changing values such as Client details, document numbers, dates, item information, and Total Price.

Pay particular attention to variable placeholders. A small change to a placeholder name can stop the expected value from appearing in the generated document. If you renamed, removed, or added placeholders in the source file, open the related template in **Word Templates** and update its variables before using the revision.

Use meaningful names that distinguish current layouts from older layouts. For example, include the document purpose and an approved version reference in the template's **Name** when your organization keeps more than one layout. This helps administrators avoid selecting an outdated layout when generating a document.

Maintain the following habits when managing multiple templates:

- Keep the currently approved template easy to identify in the **Word Templates** list.
- Use separate names for Commercial Offer, Technical Offer, Order Confirmation, Purchasing Order, and RFQ layouts.
- Review templates after changes to standard wording, commercial terms, or company presentation.
- Check the template's variables whenever the uploaded file changes.
- Confirm the selected template before generating a document, especially when more than one layout is available.

[SCREENSHOT: A Word Templates list showing distinct template names for Commercial Offer, Technical Offer, Order Confirmation, Purchasing Order, and RFQ documents.]

When an older layout is no longer intended for use, ensure administrators can clearly distinguish it from the approved template. This reduces the risk of producing documents with superseded wording or branding.

Test Generated Documents Before Using a Template

Test every new or revised template using a business document before your team uses it for active client, principal, or sub-supplier communication. A test confirms that the branding, page layout, static content, and variable values work together as intended.

1. Open a suitable business record that can generate the document type you are testing. For example, use a Commercial Offer for an offer layout, a Orders for an Order Confirmation layout, a Purchase Order for a Purchasing Order layout, or an RFQ for an RFQ layout.

2. Select the intended template when generating or printing the document. Confirm the document type and template name before creating the output.

3. Open the generated document and review the first page carefully. Check the logo, headings, document title, recipient details, document number, date, and footer content.

4. Review the commercial and item sections. Verify that values such as Currency, Quantity, Unit Price, Discount (%), Tax (%), and Total Price appear where the template expects them.

5. Continue through all pages. Check page breaks, repeated headers or footers, signature sections, and any tables used for items or descriptions.

6. If a placeholder appears as text in the output, return to **Word Templates** and verify that a matching variable exists for that placeholder. Also confirm that the source record contains a value that Pams can insert.

7. If a value is blank or appears in the wrong place, compare the source template's placeholder with the configured variable name and its position in the document. Correct the template file or variable configuration, upload the revision if required, and test again.

[SCREENSHOT: A generated Commercial Offer with callouts showing the logo, recipient details, Offer Number, Offer Date, item section, Total Price, and footer.]

Do not treat a template as ready based only on its appearance in the uploaded file. The generated document is the final check because it shows how Pams fills the variable locations with actual business values.

Overview

Document Templates in Pams support consistent, branded business documents across sales, purchasing, principal, and financial workflows. Instead of preparing each Commercial Offer, Order Confirmation, Purchasing Order, RFQ, or Invoice from scratch, administrators maintain approved layouts in **Templates** and use **Word Templates** to keep those layouts available for document generation.

A complete template has three connected elements:

- An uploaded source file that contains your organization's branding, standard headings, footer content, and document structure.
- Variable placeholders placed in the source file wherever a value must change between documents.
- A variable list in Pams that matches those placeholders and allows the correct record values to be inserted.

The template file is responsible for appearance. This includes the logo, typography, headings, sections for recipient details, item information, totals, and standard commercial wording. Variables are responsible for changing values. They allow each generated document to show the applicable Client, Principal, Contact Name, document number, date, Currency, Quantity, Unit Price, Total Price, and other record-specific information.

Use templates to make documents consistent across the full sales and purchasing cycle. A client receiving a Commercial Offer should see the same approved branding and layout as a client receiving an Order Confirmation. A sub-supplier receiving an RFQ or Purchasing Order should receive a document that uses the appropriate approved layout and business wording.

Templates are a shared administrative resource. For that reason, make changes only when you have the approved source file and have reviewed the impact on variables. A template that looks correct but has missing or mismatched variables can produce incomplete output.

[SCREENSHOT: A simple flow showing an uploaded branded template file, configured variables, and a completed generated business document.]

Prerequisites

Before you create or revise a template in **Word Templates**, gather the approved content and confirm what the generated document must display. Preparation prevents repeated uploads and reduces the chance of publishing a document with outdated branding, incorrect wording, or unfilled variable placeholders.

Have the following ready:

- An approved source document containing the correct logo, headings, footer content, and standard wording.
- The final document layout for the intended purpose, such as a Commercial Offer, Technical Offer, Order Confirmation, Purchasing Order, or RFQ.
- A list of the document-specific values that must be inserted during generation, including recipient details, document identifiers, dates, and commercial values.
- Clear placeholder names for all changing values in the source file.
- Access to **Configuration**, **Templates**, and **Word Templates** in Pams.
- A suitable existing business record for testing the completed template, such as a Commercial Offer, Orders, Purchase Order, RFQ, or Invoice.

Before uploading, confirm that the source document contains only approved fixed content. Check the logo, legal wording, footer details, document title, and standard terms. Remove temporary notes, internal comments, sample client names, and unfinished text that should not appear in generated documents.

Also review where each variable belongs. Recipient values should be located in the recipient section. Offer Number, Order Number, Invoice Number, Purchase Order Number, or RFQ Number should be in the document reference area. Commercial values such as Quantity, Unit Price, Tax (%), and Total Price should be positioned in the relevant item or totals section.

If multiple layouts exist for one document type, agree on a naming approach before creating records in **Word Templates**. A clear **Name** helps administrators select the correct approved layout when generating documents and makes it easier to identify which template requires an update when branding changes.