PAMS V2

# Templates

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# Templates

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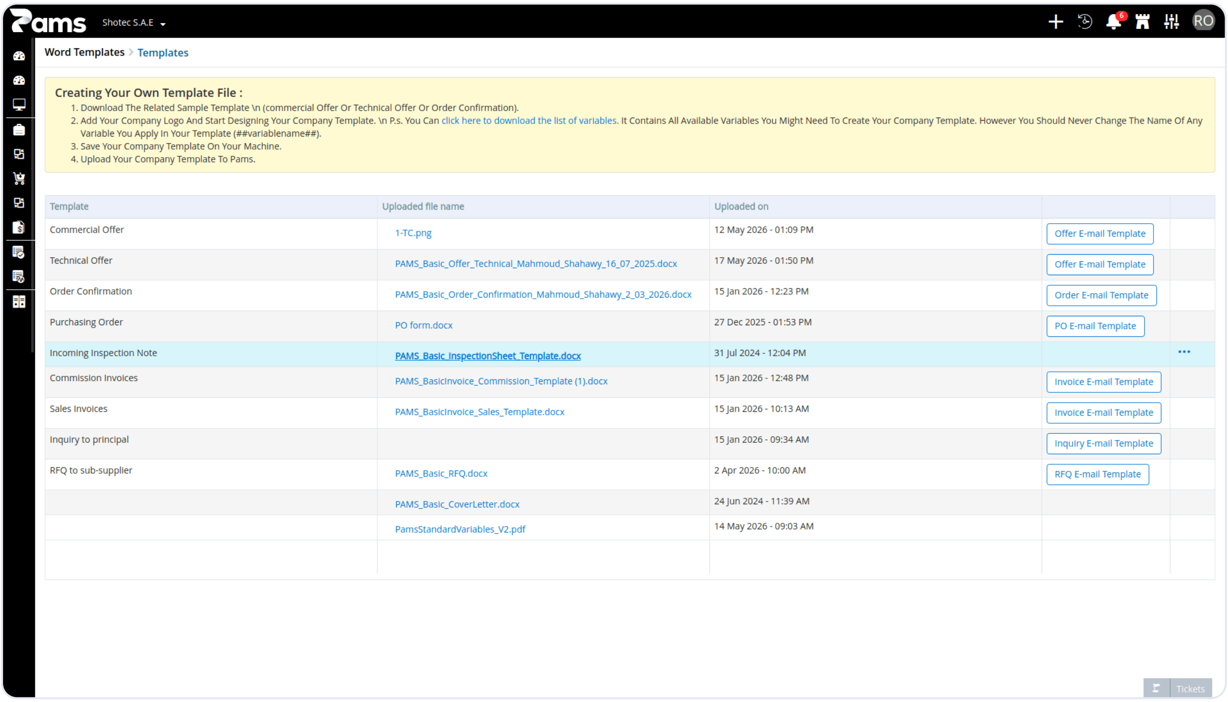


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## Overview

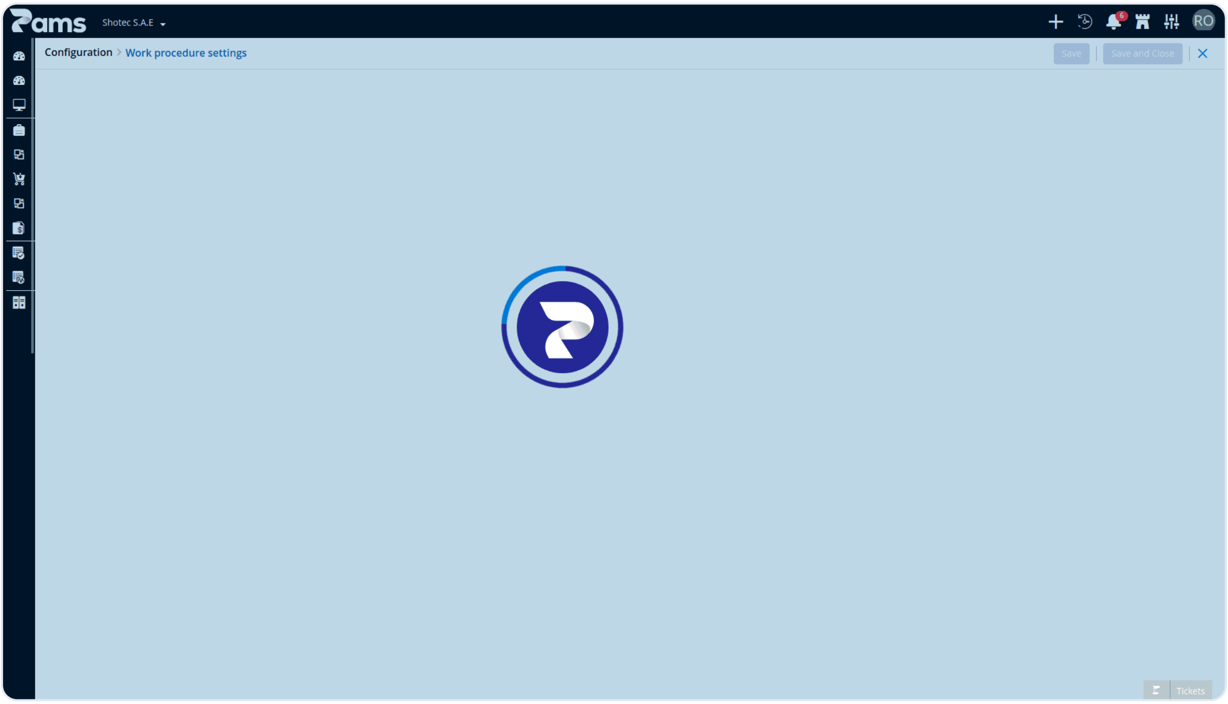
Use Templates to maintain uploaded files that are reused as business templates, including commercial and technical offer templates and email templates. Sales representatives, account managers, project managers, purchasing officers, and finance users can review the available template files before preparing customer, order, or purchasing communications. Use this page when you need to attach a new template file or confirm that an existing template is available.

## Settings

Before adding or reviewing template files, open **Configurations** > **Templates**. The Templates screen provides the **files[]** area for template files and a dedicated work procedure settings tab.

> **Note:** The available screen does not show individual configuration fields for template categories, file rules, or access permissions. Only configure the information exposed on the Templates screen.

## Work Procedure Settings

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The **work procedure settings** tab is the dedicated area for template-related work procedure settings. Use this tab to review the settings available for the template record before attaching or confirming files.

The supplied screen information does not show a control that moves records into or out of this tab. It therefore serves as a settings view rather than a documented approval or status stage.

## Workflow

1. Open **Configurations** > **Templates** to review the available template records.

Review the template list before adding a file. The list identifies templates and shows the uploaded file name and upload date. Available records can include templates used for commercial offers, technical offers, and offer email messages.

2. Decide whether the required template already exists.
    - If the required template is listed, review its uploaded file name and upload date to confirm that it is the correct file.
    - If the required template is not available, prepare the file that you need to attach.

> **Tip:** Check both the template name and the uploaded file name. Similar templates may be intended for different commercial documents, such as an offer email or a purchase order email.

3. When you need to add a file, select **Attach**.

   Use **Attach** to associate a file with the template through the **files[]** field. Attach the file that should be available for the relevant template purpose.

4. Decide whether the attached file is ready to confirm.
    - If the selected file is correct, select **Ok** to confirm the action on screen.
    - If you need to verify the file or its intended use first, do not confirm until you have reviewed it against the required template.

   The documented screen does not provide a separate draft, approval, or published status. **Ok** is the available confirmation action.

5. If you need to work with a template-related ticket, select **Tickets**.

   Use **Tickets** only when the relevant ticket action is required in your process. The available screen information does not define a ticket lifecycle or show how a ticket changes the template record.

> **Warning:** Do not assume that attaching a file creates an email, commercial offer, purchase order, or direct order. The Templates screen documents template files; document generation actions are not shown here.

## Examples

A sales representative needs to ensure that the current technical offer file is available as a template for an upcoming customer proposal.

1. The representative opens **Configurations** > **Templates** and reviews the existing templates by their template name, uploaded file name, and upload date.
2. The representative determines that the required technical offer file is not available in the list and selects **Attach**.
3. In the **files[]** area, the representative attaches the approved technical offer file prepared for the proposal.
4. Before confirming, the representative checks that the selected file is the intended technical offer version rather than a commercial offer or email template.
5. The representative selects **Ok** to confirm the attachment.
6. If the representative needs to reference a related issue or request, they select **Tickets** and follow the ticket process available in their environment. No ticket transition is shown on the Templates screen.

The result is a confirmed file attachment on the Templates screen, available for the applicable template use.

## Tips

> **Tip:** Use clear file names that identify the template's purpose, such as commercial offer, technical offer, offer email, order email, or purchase order email.

> **Note:** Review the upload date when more than one file appears relevant. This helps you distinguish recently uploaded material from older files.

> **Warning:** Confirm the file selection before choosing **Ok**. The screen provides **Ok** as the confirmation action, but no separate status history is shown.

## Troubleshooting

| Symptom | Likely Cause | Fix |
| --- | --- | --- |
| The required template cannot be found. | The file has not been attached, or it is listed under a different template name. | Review the template list and its uploaded file names. If the file is not available, select **Attach** and add the required file. |
| A file is attached but the action is not completed. | The attachment has not been confirmed. | Review the selected file in **files[]**, then select **Ok** when it is correct. |
| You cannot determine whether a listed template is the current version. | Multiple files or similar template names may exist. | Compare the uploaded file name and uploaded date before using the template. |
| You need to manage a related request or issue. | Template file management and ticket work are separate actions on the screen. | Select **Tickets** when your process requires ticket handling. |

## Related pages

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- Dynamic Validation
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- Manage Demo Data
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