

Knowledge Base



View and Edit Templates

Last updated on May 11th, 2023

Viewing Templates

To see your list of templates, you can either find the list under Inventory and Assets from the Navigation Dashboard, or by navigating to **Resources > Templates**.

Resources > Templates

HelpFeedback

Templates

ActiveTerminated

Search Products

AddRefreshActions

Name	UoM	Unit Price (AUD)	Margin %
4 Pack Downlights	Each	45.00	200.8%
Full Team Installation	Each	6,943.97	34.91%

Records to display on page: 20

Template Actions

EditCloneTerminate

All your templates will be shown in the list, showing their Unit of Measure (UoM), Price and Markup (Margin %). On the right is the dropdown for Template Actions, which will allow you to edit the template, clone its items into a new one, and manage which templates are active. You will have the option to terminate

Note: Terminating a template or archiving an inventory item will also automatically terminate any parent templates that use it as a child item. If this happens and you want to re-activate that parent template, you will need to reinstate the child template/inventory item before you can restore it to an active state.

At the top of the page are options to search, switch the view between active templates and terminated templates, add new templates into the system, and perform a number of actions.

To add a template onto a job, refer to the [Create a Job](#) section.

Editing Templates

To edit a template, or to terminate it, click on the row in the table above. This will bring up the template edit page, where any changes can be made and saved. Refer to the [Add a New Template](#) section for more details on the editable fields.

Resources > Templates > Edit Template - Template 4HelpFeedback

Making changes to this template will affect other template items including: Prebuilt A

Edit Template 4
(Unsaved changes)

Name

Template 4

Unit of Measure

Each

Template Cost (AUD)

92.0000

Template Price (AUD)

198.9600

Markup %

116.2609

☐ Set Price by Markup on Cost

Template Actions

Undo Edits

Clone Template

Terminate

All

Add Bill of Material...

Refresh

When editing a template, you will now have access to another Template Actions menu – this will allow you to access similar actions to those available from the template list. You can discard current changes, clone the template’s saved items to a new template, and terminate or re-activate a template.

At the top of the page, you will also be able to see which templates (if any) will be affected by changes to this template. Changes saved to a template will also propagate to parent templates and the BOM of any jobs that do not have an approved quote yet – as their BOM is not yet frozen.

Importing and Exporting Templates

From the Actions menu at the the top of the page, new templates can be imported from CSV and existing templates can be exported to CSV. It is not possible to update templates this way – it is a one-way process similar to the job import.

	A	B	C	D	E	F	G	H
	template	item code	item name	item type	cost per unit	price per unit	quantity	unit
1	4 Pack Downlights			main-template	14.96	45		each
2	4 Pack Downlights	IS002	Arlec 9W Tri Colour Dimmable LED Downlights	stock	3.74	11.25	4	each
3	Aircon install 2 workers			main-template	1697	1962.2		each
4	Aircon install 2 workers	IS003	Reverse Cycle Split System Air Conditioner	stock	1536	1575	1	each
5	Aircon install 2 workers		Work Van	asset	25	200	1	hour
6	Aircon install 2 workers		Air Cond. Technician	profession	56	67.2	1	hour
7	Aircon install 2 workers		Electrician	profession	80	120	1	hour
8								
9	Aircon install 2 apprentices			main-template	1833	2149.4		each
10	Aircon install 2 apprentices	IS003	Reverse Cycle Split System Air Conditioner	stock	1536	1575	1	each
11	Aircon install 2 apprentices		Work Van	asset	25	200	1	hour
12	Aircon install 2 apprentices		Air Cond. Technician	profession	56	67.2	2	hour
13	Aircon install 2 apprentices		Electrician	profession	80	120	2	hour
14								
15	Solar panel unit			main-template	20	30		each
16	Solar panel unit		Electrician	profession	80	120	0.25	hour
17	Solar panel unit		Panel	single-use	0	0	1	each
18	Solar panel unit		Rail	single-use	0	0	0.5	length
19								
20	Section 1			main-template	298.96	362		each
21	Section 1	IS001	Ceiling Fan	stock	108	108	1	each
22	Section 1	IS004	Call Out Fee	stock	80	80	1	each
23	Section 1		4 Pack Downlights	template	14.96	45	1	each
24	Section 1	IS014	Cordless Drill	stock	96	129	1	each
25								
26								

Importing and exporting is performed in a similar fashion to the inventory and job import. Like the job import, multiple templates can be imported at once. Each template is defined by a “main-template” line, and subsequent lines will allow for import of stock items, assets, professions, other templates, and new single-use items. Any issues that occur during the import will appear in the modal and allow you to fix them or ignore them before import.

Templates

ActiveTerminated

Search Products

Add

Refresh

Actions

Name	UoM	Unit Price (AUD)	
4 Pack Downlights	Each	45.00	
Aircon install 2 apprentices	Each	2,149.40	17.26%
Aircon install 2 workers	Each	1,962.20	15.63%
Section 1	Each	362.00	21.09%
Solar panel unit	Each	30.00	50%

Import Templates

Export Templates to CSV

Once an import goes through, all newly added templates will appear in your Templates list.

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