# **Knowledge Base**

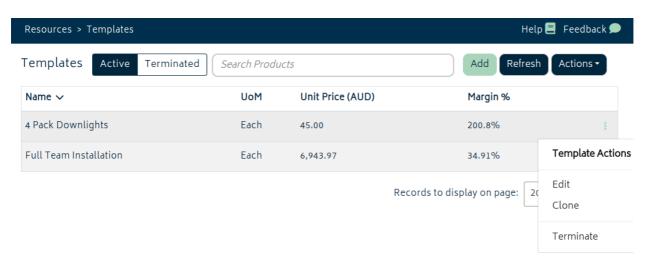


# **View and Edit Templates**

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**.



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

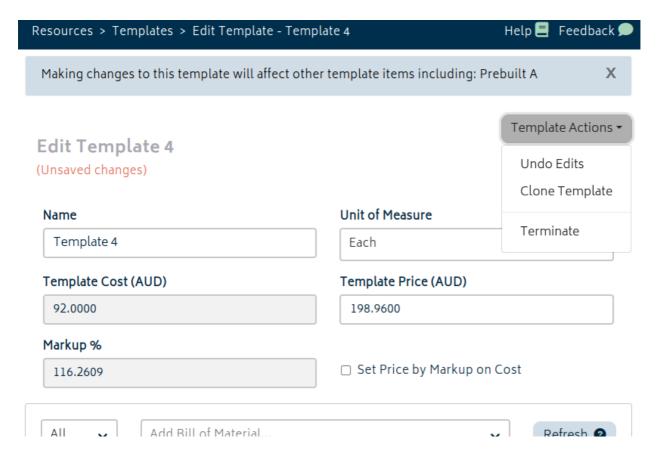
Note: Terminating a template or archiving an inventory item will also automatically terminate any parent templates that use it as a child item. If this happens and you want to re-activate that parent template, you will need to reinstate the child template/inventory item before you can restore it to an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



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 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	В	С	D	E	F	G	Н
template	item code	item name	item type	cost per unit	price per unit	quantity	unit
4 Pack Downlights			main-template	14.96	45		each
4 Pack Downlights	IS002	Arlec 9W Tri Colour Dimmable LED Downlights	stock	3.74	11.25	4	each
Aircon install 2 workers			main-template	1697	1962.2		each
Aircon install 2 workers	IS003	Reverse Cycle Split System Air Conditioner	stock	1536	1575	1	each
Aircon install 2 workers		Work Van	asset	25	200	1	hour
Aircon install 2 workers		Air Cond. Technician	profession	56	67.2	1	hour
Aircon install 2 workers		Electrician	profession	80	120	1	hour
Aircon install 2 apprentices			main-template	1833	2149.4		each
Aircon install 2 apprentices	IS003	Reverse Cycle Split System Air Conditioner	stock	1536	1575	1	each
Aircon install 2 apprentices		Work Van	asset	25	200	1	hour
Aircon install 2 apprentices		Air Cond. Technician	profession	56	67.2	2	hour
Aircon install 2 apprentices		Electrician	profession	80	120	2	hour
Solar panel unit			main-template	20	30		each
Solar panel unit		Electrician	profession	80	120	0.25	hour
Solar panel unit		Panel	single-use	0	0	1	each
Solar panel unit		Rail	single-use	0	0	0.5	length
Section 1			main-template	298.96	362		each
Section 1	IS001	Ceiling Fan	stock	108	108	1	each
Section 1	IS004	Call Out Fee	stock	80	80	1	each
Section 1		4 Pack Downlights	template	14.96	45	1	each
Section 1	IS014	Cordless Drill	stock	96	129	1	each

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 Active Terminated	Search F	Products	Refresh Actions		
Name ✓	UoM	Unit Price (AUD)	Import Templates		
4 Pack Downlights	Each	45.00	Export Templates to CSV		
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%	:	

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

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