Select Form Templates

Administrators can create rules to determine which form template is used for the output of a business document. A default assignment of form templates to documents is provided. If you create new templates, you must create a form template rule to define when the templates are used.

You can either define a form template rule that applies to all instances of the selected business document, or you can use the parameters provided to create more complex rules. If you have created more than one rule for a document, you also need to define the sequence of the rules. The system processes the rules in the order in which they appear in the table until a rule is found for which the conditions are met. Therefore, enter more specific rules at the top of the list and generic rules at the bottom. If you create a rule and leave a parameter blank, then this is handled as a wildcard, and any value is considered as having fulfilled the condition.

Note

In some cases, a business document represents a group of related document types. For example, the business document Customer Invoice includes invoices, credit memos, correction invoices, and down payments.

Create a Form Template Rule

1. Go to your user profile and select **Settings All Settings Output Management Select Form Template**.
2. Select the **Entity** and **Type**.
3. Click **Add**.
4. From the **Form Template** drop-down list, select a form template.
5. Under **Parameter Settings**, enter the parameters for which you want this rule to apply.
6. Use the **Rearrange** icon to adjust the sequence in which the form template rules are applied in order to ensure that the required rule is applied by the system.
7. Save your changes.