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Document Templates

A template is a prepared set of data that is copied into a new document when it is created. It is used for documents that recur in the same or a similar form, which avoids entering the same data again and reduces the possibility of error.

The content of a template depends on the document type — the template offers the same fields that are entered in the document itself. A template is not a document in its own right and is not included in any records; it is only a source of data when a new document is created.

List

About filters and finding data in lists

The list shows the templates entered for the company, sorted by document type.

- — Shows and hides the filter.
- ***{Document}***
  List filter. Shows only templates of the selected document type; with no selection all templates are shown.
- The **Search** box above the list filters the displayed rows by the entered text.

List columns:

- **Document** — Document type the template applies to.
- **Type** — Document subtype, entered in the ***{Sub document}*** field of the template. Remains empty for document types without subtypes and for templates in which no subtype is entered.
- **Name** — Name of the template.

Document type

The document type is entered before the other data, as it determines which fields and tabs are shown in the template.

- ***{Document}***
  Document type the template applies to, e.g. *111 - Invoice* or *197 - Quote*.
- ***{Sub document}***
  Document subtype, e.g. *RAOT - Regular* for an invoice. Shown only for document types that have subtypes; for a quote, for example, it is not shown.

Pseudo documents

Besides real documents, the type *999 - Pseudo Document* can also be selected in the ***{Document}*** field. These are printouts generated from existing data that do not exist as a document in Brix.

The pseudo document types are predefined and are selected in the ***{Sub document}*** field. Currently *IOS — ios* is available.

- The same code *999* is also used when defining the document text printed on the company letterhead.
- A pseudo document has no items, so the ***~ ITEMS ~*** tab is not shown.

Buttons

- **SAVE** — Saves the entered template data.
- **DELETE** — Deletes the template. Shown only after the template has been saved.

Creating a document from a template

A template is selected in the ***{Template}*** field when a new document is entered. Selecting a template copies its data into the document, where it can still be changed freely — changing data in the document does not change the template.



{Name} is the name of the template itself and is used only for selecting it; it is not transferred to the document.
{Description} is document data like any other and is copied into the ***{Description}*** of the document created from the template.



For incoming invoices the reverse applies — the template name is generated automatically from the data entered in the ***{Description}*** field of the incoming invoice.

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