Upload Templates into DocBoss

09/16/2024 1:38 pm MDT

Before starting, note that templates:

- 1. Must be in excel format
- 2. Any cells where the output data is to be defined by DocBoss, must have applicable variable entered
- 3. You must set your print area (remember to include the last column)

For more information about how to create template, click here to read the complete article.

Let's start!

In order to upload templates in DocBoss: Navigate to Settings > Template Mgmt > Output Templates

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Output Templates		Create Template				×		
PDF/CSV/XLS Templates		Max allowed file size is 20M	b					+
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- 1. Click + button
- 2. Select Template Type

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	plates	
Lownload Cover Page XLS(x) example		
Template Name:*	1	
Template Type:* Docu	iment Cover Page	~
Description:*	3	
Template File Format*	cel 🕜 CSV 🔘 Latex	
File: *		Browse
Output in*	DF 🕑 Excel	
Default Date Format Use i	nstance default	~
Default for Project		

- 1. Fill in the Template Name
- 2. Fill in the Description
- 3. Select the Template File Format (Excel, CSV or Latex)
- 4. Browse and select the template with the variables
- 5. Click Save

Now the templates are ready for use!

For more information on working with Templates please check out our video: Templates

Next steps:

Select Cover Page and Transmittal Templates on Project

Select Transmittal Templates on Project

Add an SDI Report to your project