

Upload Templates into DocBoss

02/02/2026 3:18 pm MST

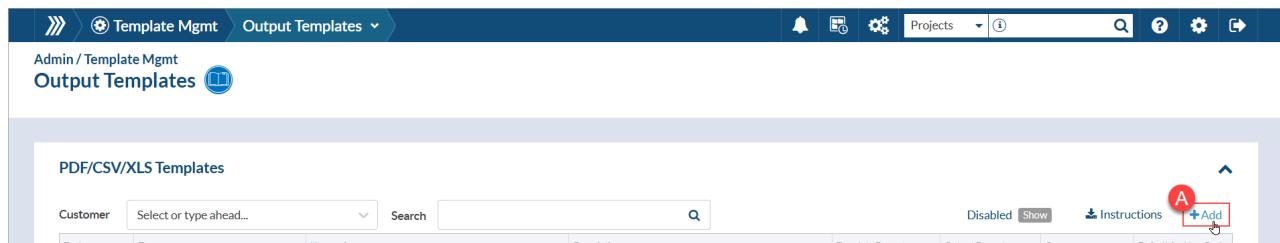
Before starting, note that templates:

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.

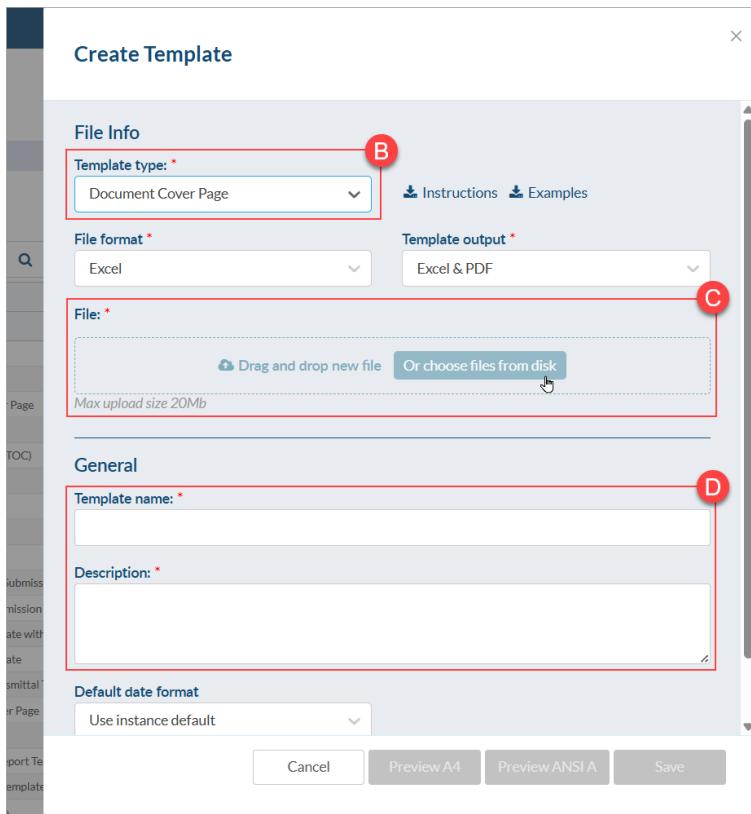
Let's start!

In order to upload templates in DocBoss, navigate to **System Menu > Template Mgmt > Output Templates** and click the "+ Add" button (A).



Once the "Create Template" slide in form appears:

- Choose the template type (B)
- Upload the template file (C)
 - Most commonly an Excel file, but may also be a CSV or LaTeX file.
- Enter a template name and description (D)



Once the above information is configured, click "Save" and the template will be 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](#)