

Creating Print Templates

Print Templates are managed from the action bar of each table. Hover over the printer icon from the table view of records, then select **New HTML Template** or **New Word/PDF Template** to create a print format which may contain text with specific fields inserted wherever you like.

If you want to create a PDF output, you'll still use a Word file to create the template, although the PDF output generally alters the formatting. When creating a PDF print template, be sure to test the output thoroughly.

HTML Template Wizard

Finish

Cancel

The name of this format

*Name

Select the type of printing.

- Print whole
- Start ea
page
- Put line
between rec
- Print labels
- Across 2 ▾

Enter the size of the labels you will be printing or select a standard paper size and let the system calculate the label size.

- US Paper Siz
- ISO A0 ▾
- Label size:
Width 2
Height 1
- Add borders

Adjust vertical and horizontal margins

Vertical Margin 25
Horizontal Margin 45

Add variable fields, such as Address, to the label.

Add Variables

Add variable fields. displayed as barcode. to the

Add Barcode

Format Considerations

Each format has benefits and drawbacks. Here are some common considerations for each format:

	Word	PDF	HTML
Pros	<ul style="list-style-type: none">■ Output is fully editable and easy for power users to revise■ Can include images■ Can include headers and footers■ Can include mathematical formulas based on field values in the record	<ul style="list-style-type: none">■ Output is not editable and therefore more secure■ Can include headers and footers	<ul style="list-style-type: none">■ Highly configurable■ Can include images■ Can create barcodes■ Can include mathematical formulas based on field values in the record
Cons	<p>Editable output is less secure, but you can use a locked template to automatically track any changes to the final document</p>	<ul style="list-style-type: none">■ Non-editable output is difficult to revise■ Formatting is more difficult, and some formatting is impossible■ Must use Word tables with invisible borders to align text, rather than using Tab	<ul style="list-style-type: none">■ Requires knowledge of HTML to set up the template well■ Not a standard format for contracts and other common documents

Building a Template

You can include information from the selected record in the print template output. This ranges from ordinary fields to complex embedded related tables. If you're building a Word or PDF template, you can click **Show Field Variables** or **Download Template** to see all the available fields in the appropriate syntax.

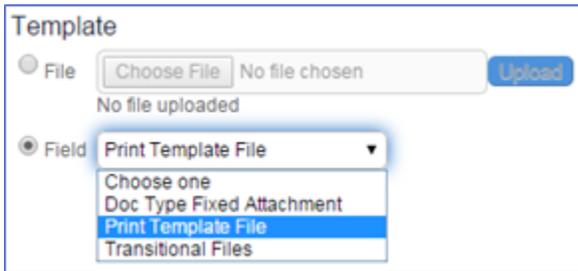
For details about syntax, refer to [Print Template Syntax Reference](#). For details about embedding related tables, refer to [Embedding Tables and Fields from Tables](#).

Selectable Templates

If different records will use different print formats, you can create a print template that pulls its formatting from a field instead of hard-coded file. With this setup, you can use a single print template configuration while accommodating different print formats.

For example, in a typical contract management scenario, the Contract Types table has an attached file field called Print Template File that holds or links to the available print templates. In each contract type, the relevant print template is selected in this field. When users select a contract type for a new contract, you can automatically pull in the selected print format as part of the linked set.

1. Set up an attached file field in the table, either as a local field or a link to another table that stores all available print templates.
2. When you create the print template, load the template from a **Field** instead of a **File**, and select the attached file field. In this example, the attached file field is named Print Template File.



Locked Word Templates

If a PDF doesn't suit your needs, but you don't want a Word template to be freely edited, you can lock the template so that all changes are tracked. When the document is ready to be finalized, the person with access to the password can review all changes and accept or reject them as needed.

To lock your Word template for editing, configure your template as desired and then:

1. Go to the **Review** tab and click **Restrict Editing**.

2. Configure the options as desired:
 - Formatting restrictions. You can use this to limit formatting changes to selecting an allowed saved style.
 - Editing restrictions. Select one of these options to limit or track editing. To follow the example above and track all changes for later review, select Tracked Changes.
3. Click **Yes, Start Enforcing Protection**.
4. Set a password to unlock the restrictions. This is the password you'll need to distribute to people responsible for reviewing the changes and producing a final version of the document. You might also store the password in a field if you use a table to store all the print templates; in the default Print Templates table, you can use the Password for Locked Word Document field.