Advanced Topics: Creating Templates & the Field Catalog

Documentation · https://viaspaces.com/Documentation/advanced_topics/

Design a template from scratch, and the master list of fields behind it.

When the Library doesn't have what you need, Template Builder lets you design your own document layout visually, with no code — built from Sections that hold Components, and backed by the Field Catalog.

Building the Layout

1. Open Template Builder from **Templates, Create New**, or **New, Template**.
2. Click **Add New** to build a section, or **Insert from Library** to reuse one from My Sections Library.
3. Add rows and components inside the section.
4. Click **Save Design**.

The Basic category's Layout group holds the structural pieces — rows with one to four columns, a standalone Column, and a Page break. Its Basic group holds content pieces like Simple text, Rich text, and Field Wrapper.



Note: The complete list of components and what each one does is available at this link.

Components & the Field Catalog

The Components panel groups mapped platform fields into categories: Basic, My Account, Partners, Document Data, Line Items, Forms, Extras, Signatures, and QR Codes.

The catalog is a fixed, centrally maintained set of fields available to every account.

Every field you place comes from the Field Catalog — a predefined set of fields, each mapped to real account, partner, or document data:

Group	Covers
Account & Partners	Company and partner identity, addresses, contacts, social media, bank details, tax registrations.
References	Links to related documents, such as a purchase order.
Document data	Subject, document number, dates, reference numbers, banking symbols, calculated totals.
Section items	Line items, a free text area, sender/receiver signature blocks.
Attachments	Supporting files appended to the document.
QR codes	Payment QR codes for Switzerland, Slovakia, Czechia, and the EU (SEPA).



Note: Some fields — like a **Company name, Business Partner Name, or Document Date — are mandatory** wherever they're used. This is set by the Field Catalog itself and can't be changed per template.

Layers, Styles & Settings

The **Layers** tab lists your template as a tree — Body, Rows, Columns, and their components — handy for selecting something hard to click on a crowded canvas. The **Styles** tab configures the selected element's General, Flex, Dimension, and Typography properties. The gear tab holds page-level Template Settings: Margin and **Show Audit Trail**, which adds the document's audit trail to the rendered output.

The ⋮ menu next to "*Save Design*" and "*Make Active*" opens *PDF Preview*, *Meta Data*, and *Delete Draft*.