Working with Templates

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

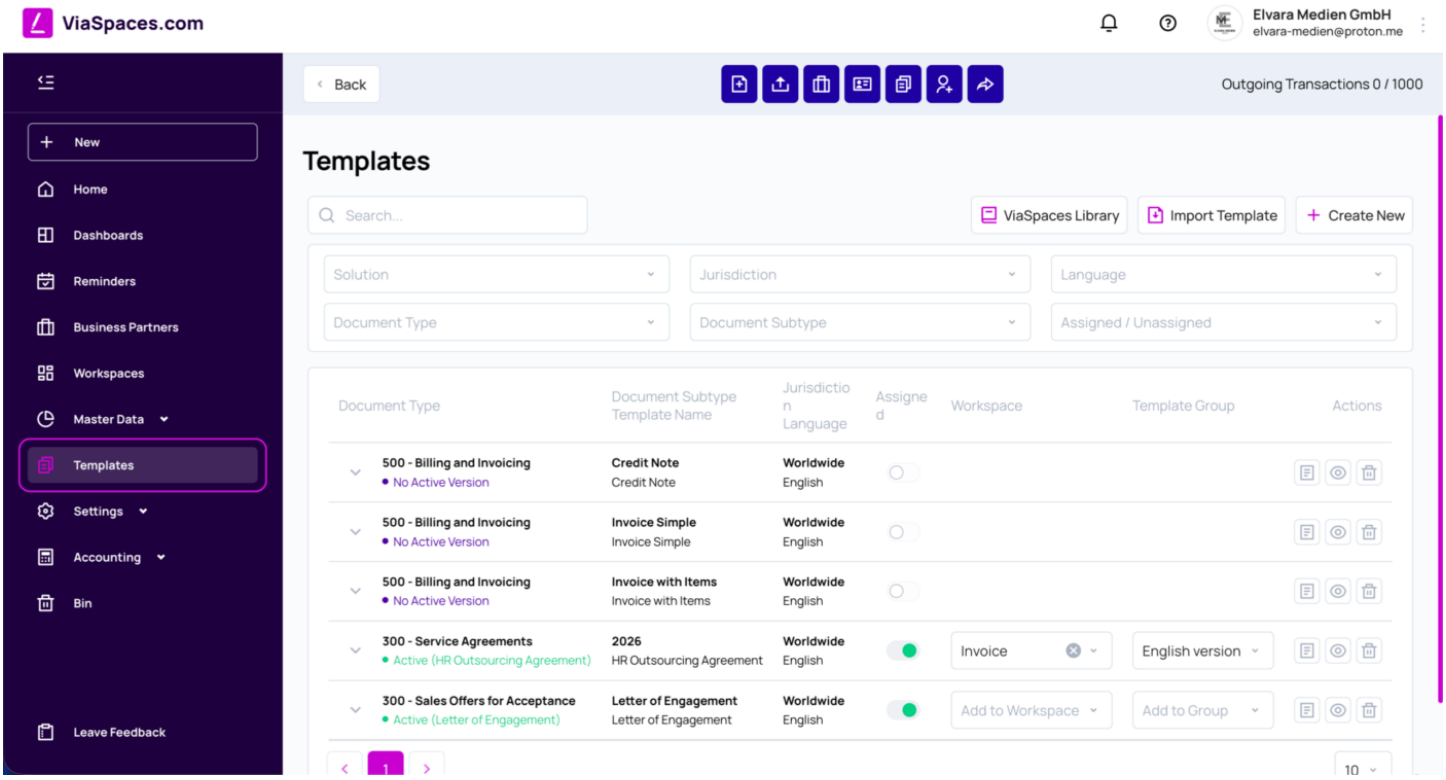
In this help doc: what a template is, how to find one in the Library, how to import, activate, and edit one, and what document type, subtype, and value type mean.

A template is a reusable document layout. It defines the structure and fixed content of a document, and marks where account, partner, and line-item data is filled in automatically. Open **Templates** from the sidebar to work with them.

What a Template Is

A template is the starting point for every document. Instead of building a document from scratch each time, a template holds the layout, the wording, and the field placeholders once, and each new document made from it pulls the current data — company details, partner details, line items, totals — into place. This keeps documents consistent and removes repeated typing.

A template can come from the **ViaSpaces Library** (a shared catalog), be **imported** by ID, or be built from scratch in the Template Builder. Building your own template is covered on the Advanced topics page.



The Templates Page

The Templates page lists the templates available to the account. Each row is a template, grouped by its versions, and shows the **Document Type**, **Document Subtype** and **Template Name**, **Jurisdiction** and **Language**, whether it is **Assigned**, its **Workspace**, and its **Template Group**.

Search finds a template by name. The filters narrow the list by **Solution**, **Jurisdiction**, **Language**, **Document Type**, **Document Subtype**, and **Assigned / Unassigned**.

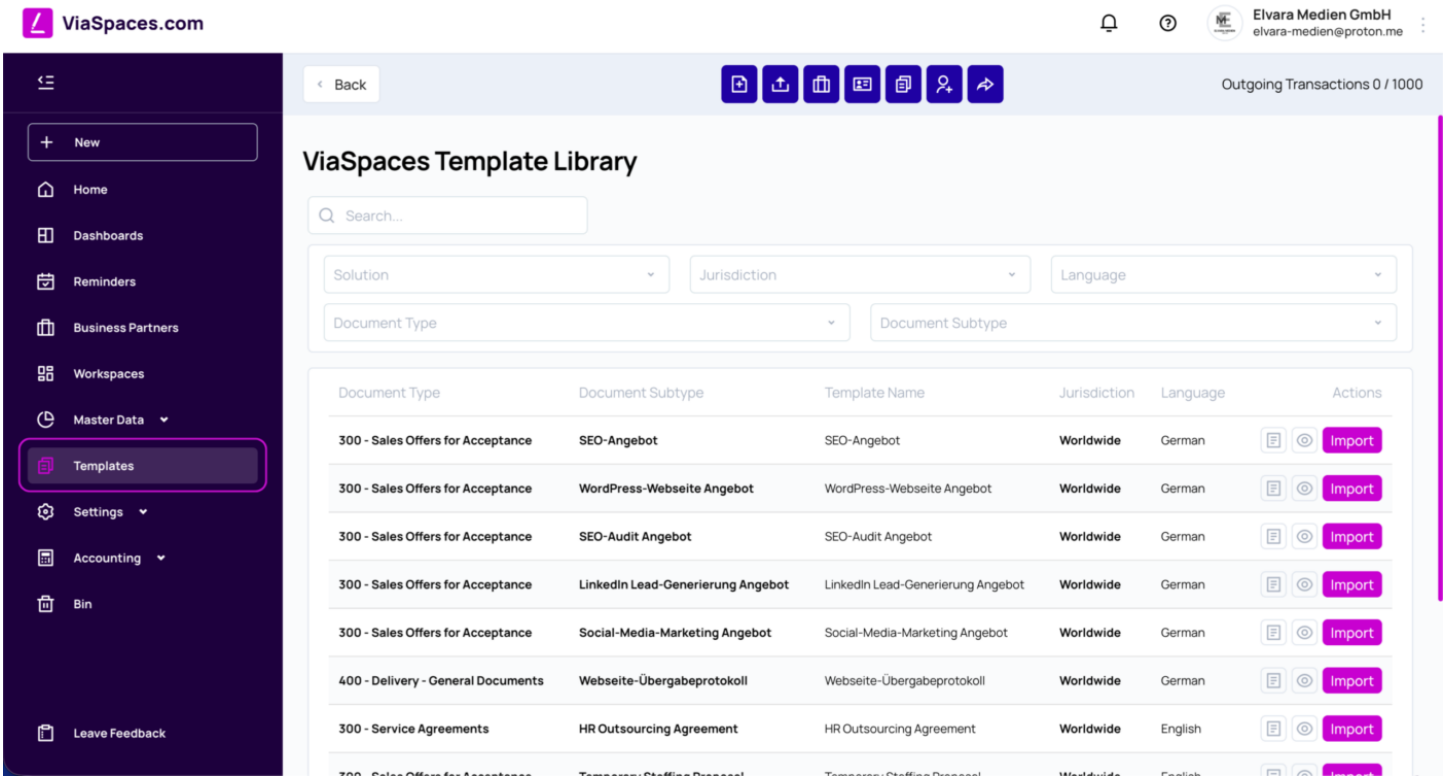
Three buttons add templates:

- **ViaSpaces Library** — opens the shared catalog to import from.
- **Import Template** — imports a template by its ID.
- **Create New** — opens the Template Builder to build a template from scratch. See the Advanced topics page.

The Template Library

The **ViaSpaces Library** is a shared catalog of ready-made templates. It is filtered by the same fields as the Templates page — Solution, Jurisdiction, Language, Document Type, Document Subtype — so a template can be found for a specific purpose and country.

Each row has a **Template Details** view and an **Import** button. Template Details shows the **Template Name**, **Template Author**, **Jurisdiction**, **Document Title**, and the **Template ID**, which can be copied to import the template elsewhere.

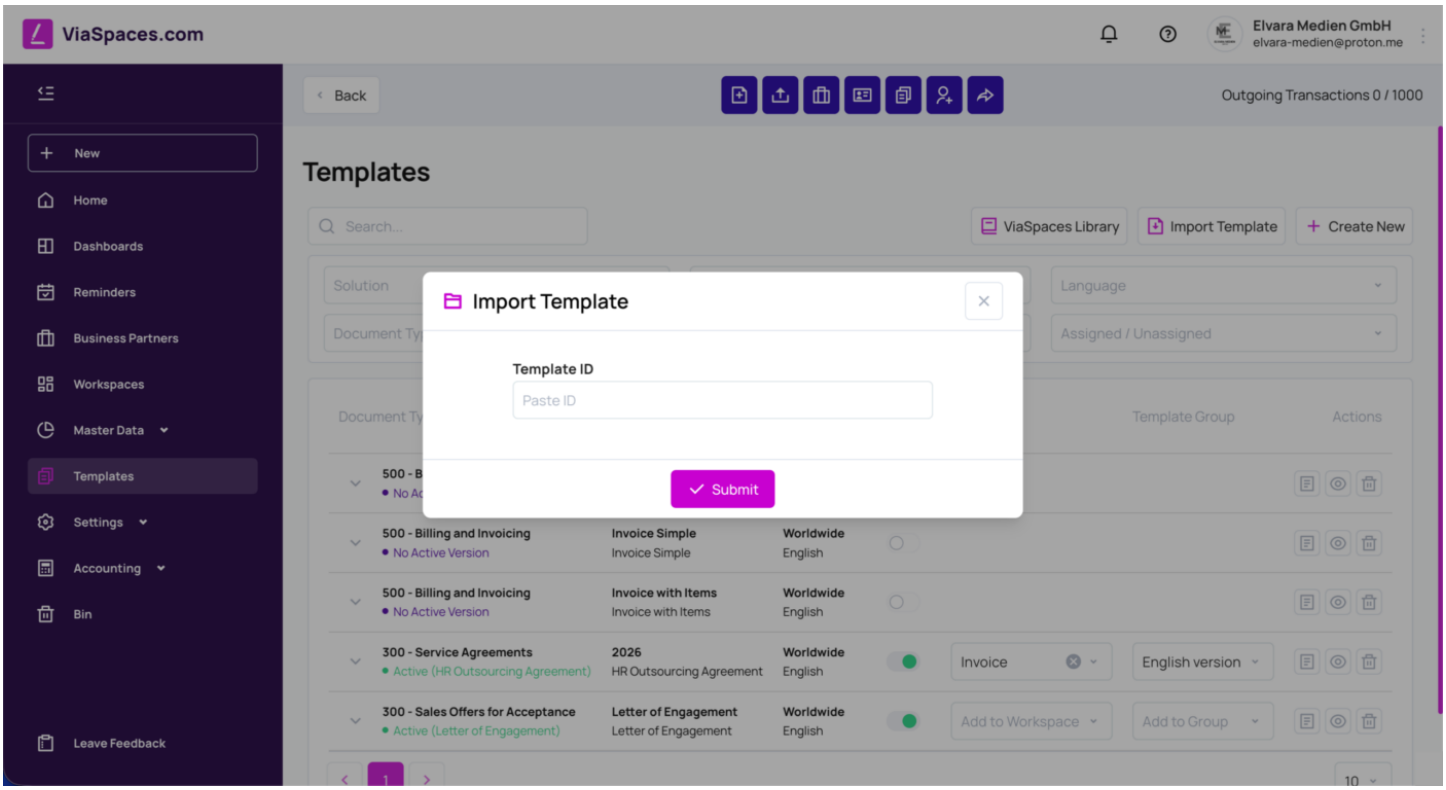


Importing a Template

A template is imported in two ways:

- From the **Library**, click **Import** on a row.
- From the Templates page, click **Import Template**, paste the **Template ID**, and click **Submit**.

The imported template appears in the Templates list, ready to activate.



Template Versions and Activation

A template can hold several **versions**. One version is active at a time, and the active version is the one used when a document is created. A template with no active version is marked **No Active Version** and cannot be used until a version is activated.

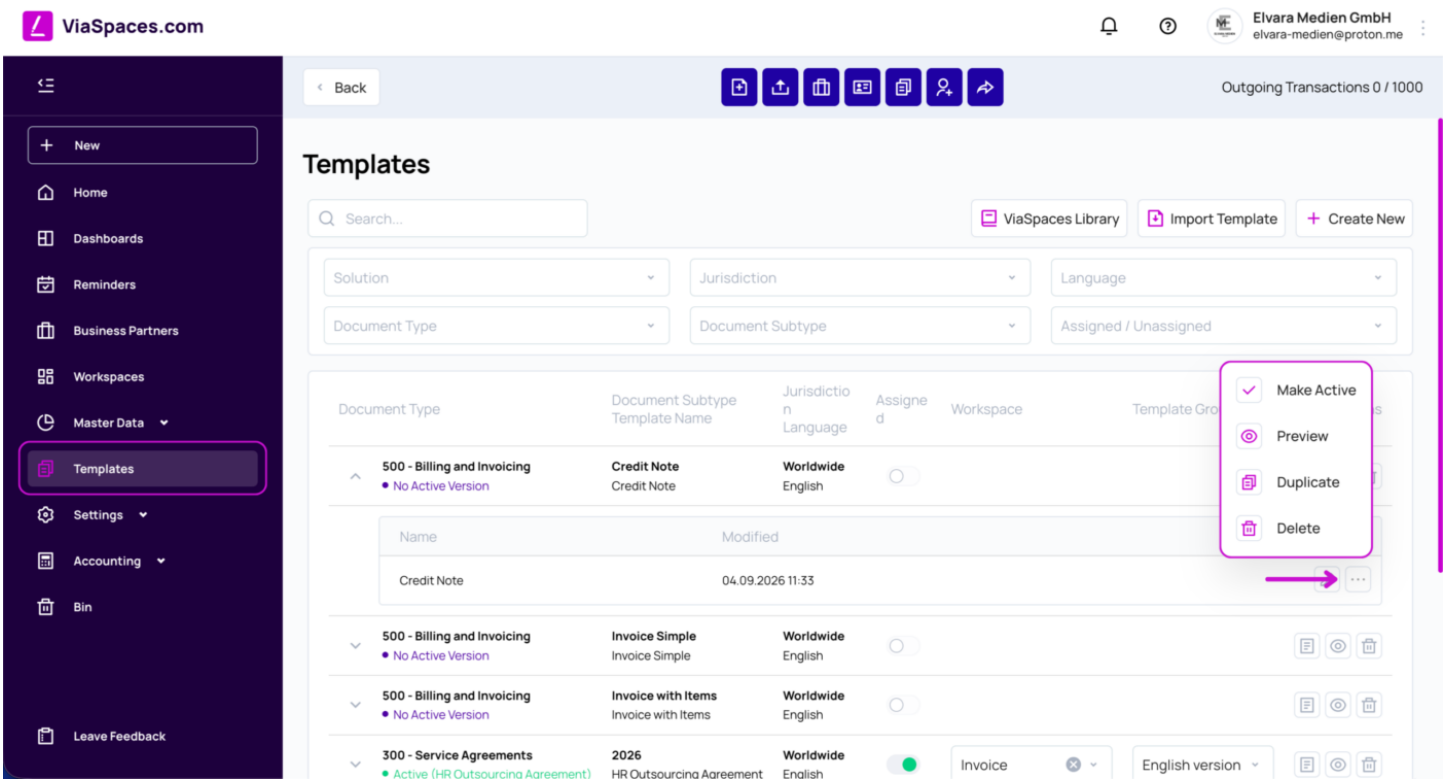
Each version row has actions:

Action	Function
Make Active	Sets the version as the one used for new documents.

Action	Function
Preview	Opens a PDF preview of the template.
Duplicate	Creates a copy of the version to work from.
Delete	Removes the version.

The list also shows the version's **status** — for example, "Active (HR Outsourcing Agreement)" or "No Active Version".

Note: Versions let a template change over time without losing earlier layouts. An older version stays available to activate again.



Assigning a Template to a Workspace

The **Add to Workspace** column assigns a template to a workspace. A workspace is an access boundary inside the account: users and groups assigned to a workspace see the documents and templates assigned to it. Assigning a template to a workspace makes it available to that workspace's members, so each team works with its own set of templates. Full workspace setup is covered on the Workspaces page.

The **Template Group** column groups related templates under a shared name, which keeps versions of the same document organized in the list.

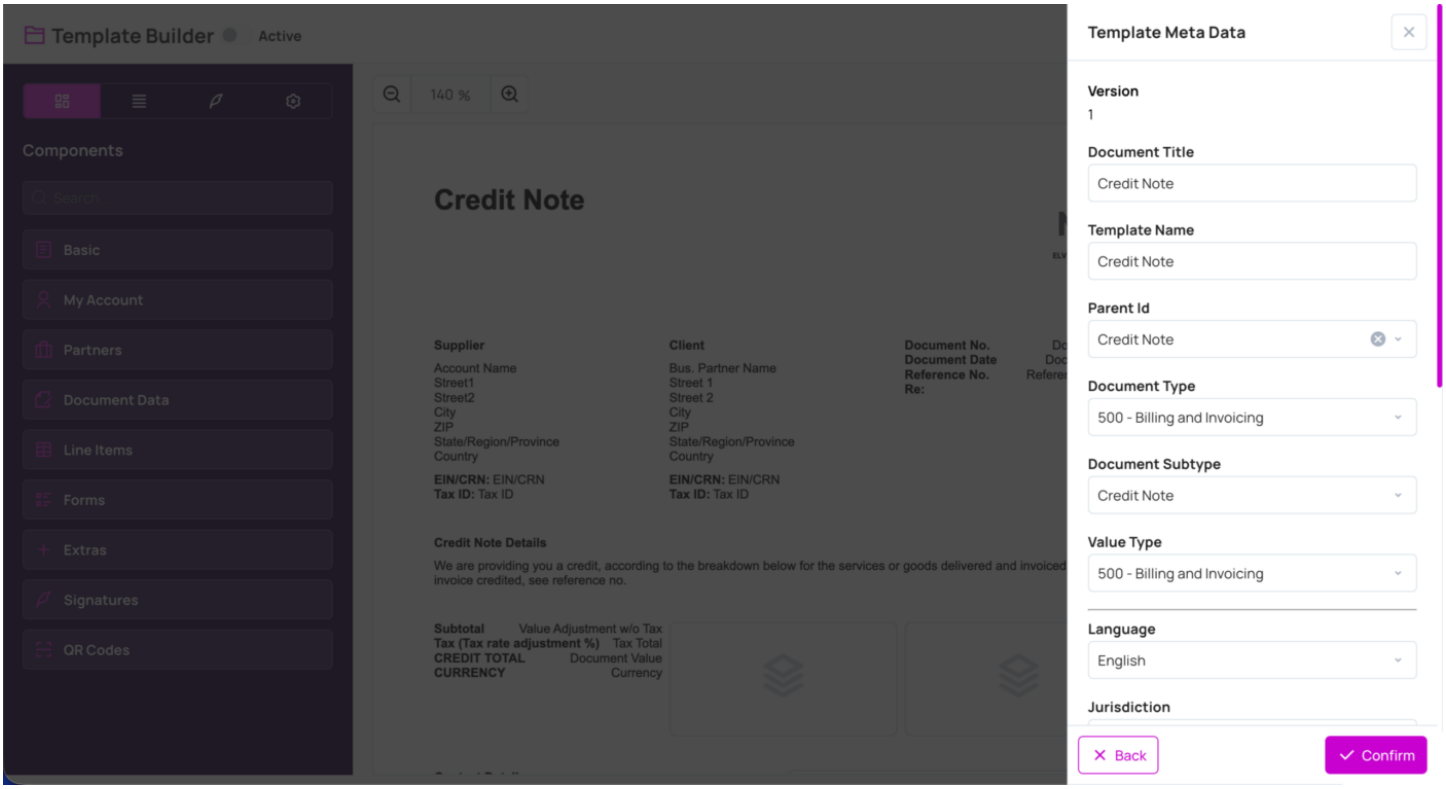
Editing a Template

An existing template opens in the Template Builder for layout changes, and its descriptive data is edited in the **Template Meta Data** window.

The Template Meta Data window holds:

- **Version** — the version number.
- **Document Title** — the title shown on the document.
- **Template Name** — the name in the Templates list.
- **Parent Id** — the template this version derives from.
- **Document Type** and **Document Subtype** — the document's classification.
- **Value Type** — see below.
- **Language** and **Jurisdiction** — the template's language and legal region.
- **URL Link**, **Description**, **Instructions**, **Additional Info** — descriptive fields.
- **Solution** — the solution the template belongs to.

Confirm saves the metadata. Saved values appear in the Templates list and in Template Details.



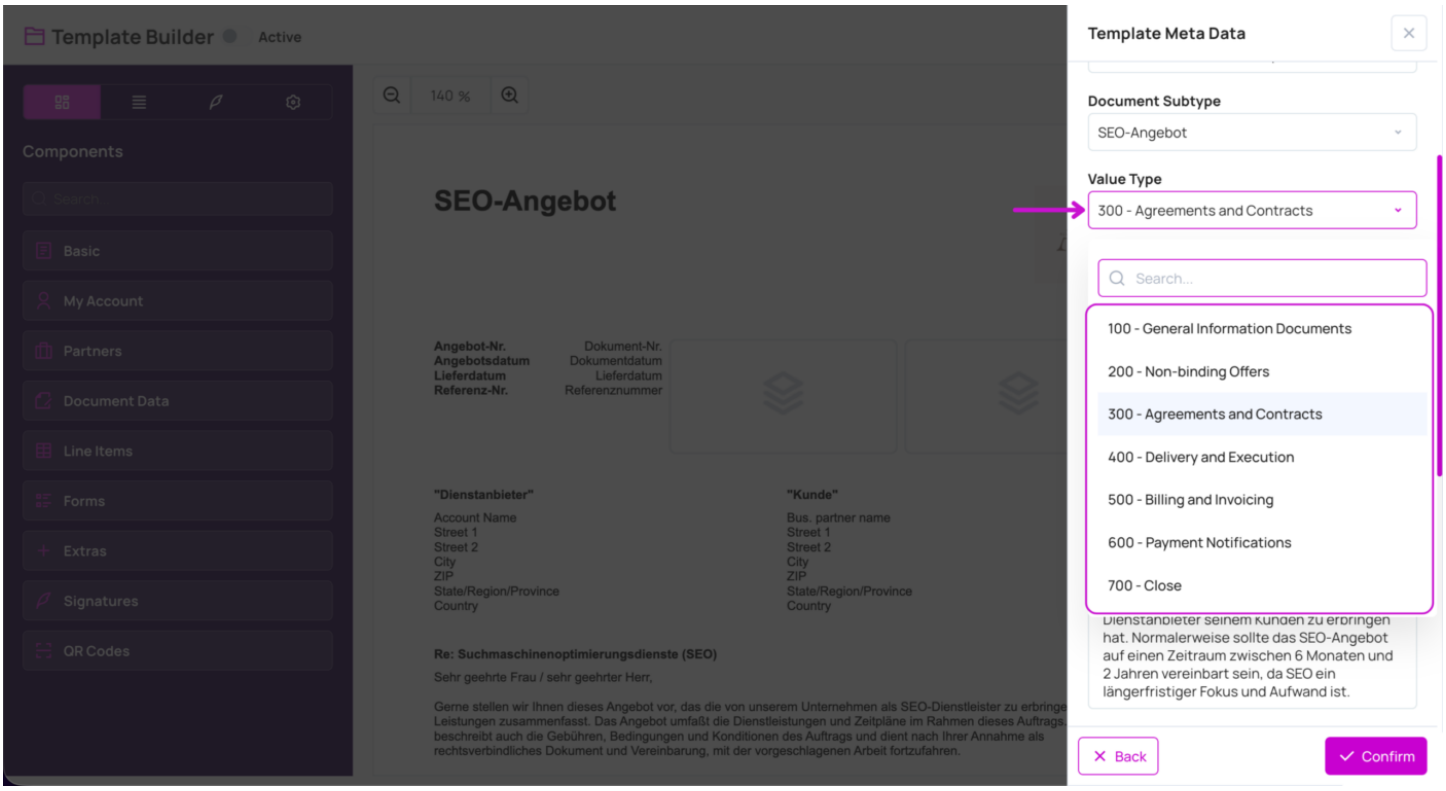
Document Type, Subtype and Value Type

Every template is classified so documents made from it are grouped, filtered, numbered, and valued correctly.

Document Type is the top-level category of the document — for example, "500 - Billing and Invoicing" or "300 - Agreements and Contracts".

Document Subtype refines it further — for example, "Faktúra" or "Invoice with Items". Type and subtype drive the Templates and Library filters and the numbering set in **Settings, Document Controls**.

Value Type is a field in Template Meta Data. It determines the category under which the document's amount is recorded, so every amount is reported at the stage of the business case it actually belongs to. It is chosen from a searchable list of seven categories, the same seven used for Document Type.



Value Type	Typical documents	What the amount represents
100 - General Information Documents	Cover letters, notices, statements, certificates	No commercial amount
200 - Non-binding Offers	Quotations, offers, price lists	Indicative value — the counterparty has not committed to it
300 - Agreements and Contracts	Contracts, framework agreements, confirmed orders	Committed value — agreed, not yet delivered or billed
400 - Delivery and Execution	Delivery notes, handover protocols, work reports	Delivered value — performed, not yet billed
500 - Billing and Invoicing	Invoices, credit notes, debit notes	Real value — a receivable, counted as actual income
600 - Payment Notifications	Payment advice, payment confirmations, payment reminders	An amount already billed under 500, tracked as a payment movement
700 - Close	Closing and settlement documents that end a case	The closing value of the case

The categories follow the order of a business case, and the value hardens along the way. An amount in 100 to 400 is a planning figure: an offer can expire unaccepted, a contract can be delivered in parts, and a delivery note is not yet a claim for payment. The amount becomes real income at 500 - Billing and Invoicing, where the document creates a receivable. Documents in 600 - Payment Notifications carry an amount that was already billed, so they move the payment status of the invoice instead of adding new value.

Set the Value Type on the template to match the role of the document. A quotation template set to 200 keeps a large quotation in the pipeline figures without inflating invoiced revenue. An invoice template set to 500 makes the document total count as income and follow the Paid, Unpaid, and Partially Paid payment widgets on the Dashboard.



Note: Value Type is a template setting, so every document created from that template inherits it. Changing it on a template applies to documents created afterwards.