

ASSIGN TEMPLATE TO A DOCUMENT TYPE

When a template is assigned to a Doc Type, that means all files added as the Doc Type will automatically have the assigned template processed.

1. Begin by clicking Admin in the user menu on the left, then click the Doc Types button below the admin menu or on the Admin Dashboard.
2. Click the name of the Doc Type you want to open under the Doc Type column.
3. Select the template you want to assign to the Doc Type using the Template field.

The screenshot shows the 'Doc Type' configuration page for 'Customer Form'. The 'Template' dropdown is highlighted with a blue box, and a blue arrow points to it. The 'Template' is set to 'Customer Form Template'. The interface includes various settings like Workflow, Retention, and OCR Handling, and a table of fields.

| * Field Name | Required | Visible | Size | Unique | Field Type | Mask | Tool Tip | Delete |
|-----------------------|--------------------------|-------------------------------------|------|--------------------------|------------|------|----------|--------|
| Customer Name | <input type="checkbox"/> | <input checked="" type="checkbox"/> | 50 | <input type="checkbox"/> | Text | | | |
| Customer Phone Number | <input type="checkbox"/> | <input checked="" type="checkbox"/> | 50 | <input type="checkbox"/> | Text | | | |

4. When you are finished, click Save.