



## Creating Job Templates

Job templates are easy to use and take the manual work out of creating jobs on Synergist.

If creating a document in Word or Excel you may often start by using an existing document as this already has the format that you require for your new document. The same applies when creating jobs in Synergist. Create your new job by using a template or use an existing job and copy the elements that you require.

Templates can be used to create a job, phase, & 2 tier stage Structure  
Key for maintaining consistency  
Can act as a checklist for less experienced users

### How to create a Job Template

1. Create a new job and select your internal client as the client for this new job. (This will keep it generic so as not to confuse it with a standard job).
2. Add phases to your template Job as required.
3. If you re using 2-tier estimating remember to tick the box at the bottom left of the screen '**this job has a 2 tier phase structure**'. Add stages to each phase as required.

This job has a 2-tier phase structure  
 Template


4. Optional adding of estimates for time, purchases or materials. Estimates can be useful within a template, however, users need to be mindful of updating the estimate **based on the actual job** rather than keep an estimated budget based on the generic template.
5. Tick 'template' in the bottom left hand corner of the job. A template job will allow you to skip fields that need to be filled out on every job e.g. Job Type or Handler.

This job has a 2-tier phase structure  
 Template

## Template Settings

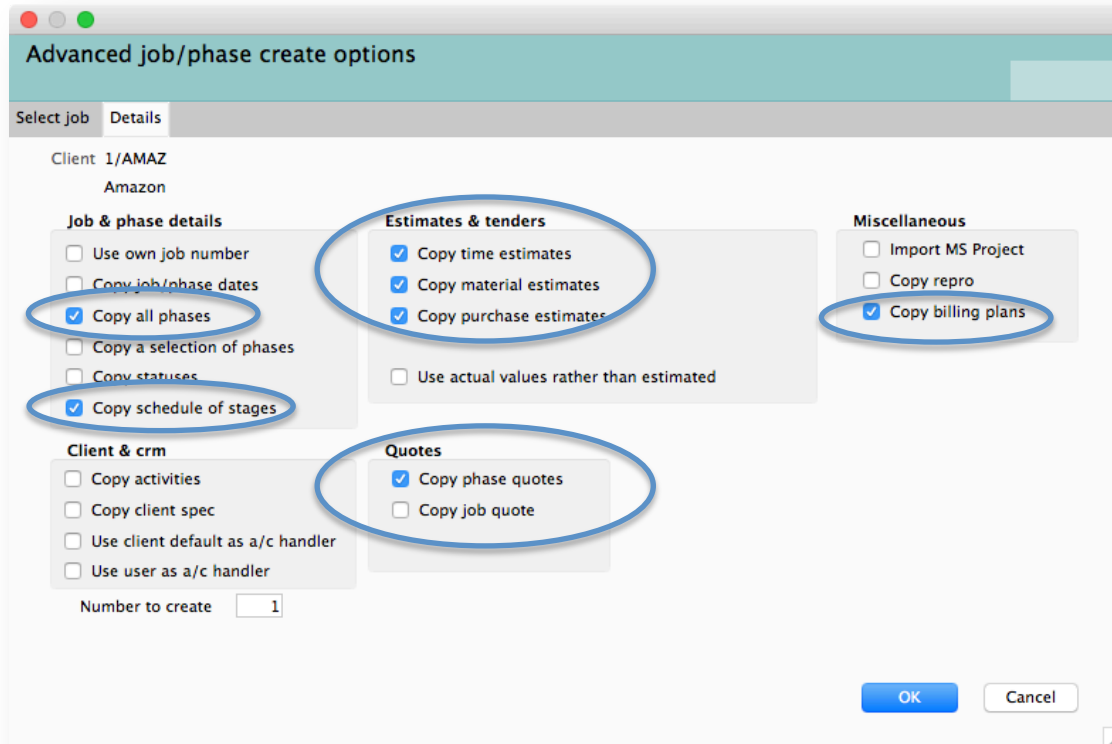
- The template job must be opened using an Internal Client (this will be your company which will be marked as an “internal client”)
- The ‘Template’ box must be ticked to distinguish this job as a template only
- Any ‘forced’ data fields that you would normally be required to complete when opening a new job e.g. due date or AH can be left blank when creating the template.

## Creating a new job based on a template

1. Go to the Opportunity or Job list & click on the  to ‘add new job’.
2. You now have the option to choose your template from the templates listed under “new job using template, simply click on the required template from the list, you will be prompted to select the Client for new job/opportunity

Job num	Description	Date due	%	Status
5353	Advertising campaign	01/04/2015	50%	Live
5775	New fuel launch	11/03/2015	41%	Live
5828	Web Redesign	02/03/2015	40%	Live
5502	2015 Spring campaign	12/03/2015	33%	Live

The next screen will be the “**advanced job/phase create options**” screen. The default options already pre-selected here will suit most templates so you will not need to tick anything on this screen just click **OK** at the bottom right of the screen.



**Advanced job/phase create options**

Select job Details

Client 1/AMAZ  
Amazon

**Job & phase details**

- Use own job number
- Copy job/phase dates
- Copy all phases
- Copy a selection of phases
- Copy statuses
- Copy schedule of stages

**Estimates & tenders**

- Copy time estimates
- Copy material estimates
- Copy purchase estimates
- Use actual values rather than estimated

**Client & crm**

- Copy activities
- Copy client spec
- Use client default as a/c handler
- Use user as a/c handler

Number to create

**Quotes**

- Copy phase quotes
- Copy job quote

**Miscellaneous**

- Import MS Project
- Copy repro
- Copy billing plans

OK Cancel

Once the Job/Opportunity has been created based on the template, it operates like a standard job/Opportunity. Phases/estimates etc. can be amended as required. It is important check all the estimates within a templated job and to delete the items that are not required for the new job.

Please contact The Agency Works at [clientservices@taw.co.uk](mailto:clientservices@taw.co.uk) or **01455 553246** if you wish to further discuss

Templates within Synergist