ASK THE EXPERTS

REQUEST TEMPLATES
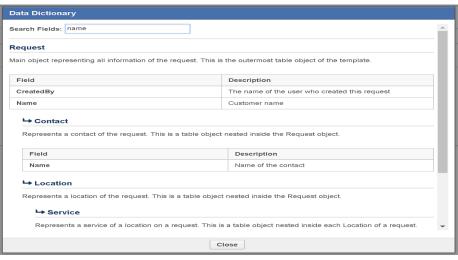
BECCA TABLADA, SR. CLIENT SUCCESS – TEAM LEAD

AUGUST 2022

REQUEST TEMPLATES

Request Templates are the templates you can customize and create for the Requests created within your instance.

- Use mustache placeholders (for example, {{field}}) to dynamically populate request data to generate proposal PDFs.

- Can use Mail Merge fields for more advanced functionality
  - Mail merge lets you create a batch of documents that are personalized for each recipient

- Access a list of fields and general hierarchy of fields by clicking "View Fields" located under the Test Template tab
  - You can also view fields of the request in the auto-generated last page of the request template. This page is automatically added when downloading the template & automatically removed when importing & previewing the template.

Data Dictionary

Search Fields: name

Request

Main object representing all information of the request. This is the outermost table object of the template.

Field	Description
CreatedBy	The name of the user who created this request
Name	Customer name

↳ **Contact**

Represents a contact of the request. This is a table object nested inside the Request object.

Field	Description
Name	Name of the contact

↳ **Location**

Represents a location of the request. This is a table object nested inside the Request object.

↳ **Service**

Represents a service of a location on a request. This is a table object nested inside each Location of a request.

Close

REQUEST TEMPLATES
ADDING AND EDITING FIELDS

- Each field is part of a parent Request "Object" that contains all fields and additional objects related to it. For example, the Contact object has three fields: Email, Name, & Phone.
  - In general, all fields can be used by using two curly opening curly braces ({{) followed by the name of the field and ending in two ending curly braces (}}).
    - For example: Contact Name: {{Name}}

- Each table object is started & ended using two special marker fields:
  - {{#foreach Request}} - The start of the table object for the **"Request"** object
  - {{/foreach Request}} - The end of the table object for the **"Request"** object
  - In this example, we see the outermost table of every request with the two special fields used to show where the table starts and ends.
  - Between the two special marker fields of the table object above, fields of the table object itself may be populated, for example:
    - {{#foreach Services}} {{Label}} {{#foreach Items}} {{ProductID}} {{Description}} {{Code1}} {{Code2}} {{Quantity}} {{Rate}} {{Subtotal}} {{/foreach Items}} {{/foreach Services}}
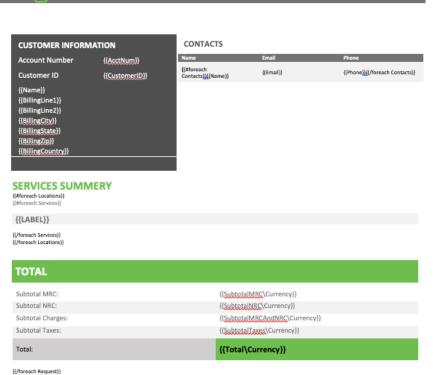
REQUEST TEMPLATES

DEMO/CREATE YOUR OWN

We're now going to have an opportunity to create our own!

Remember – because Request Templates were designed to allow for the highest flexibility in configuring your proposals, so there will be a lot of trial by fire.