Template Page Category

Categorizing Template Pages:

Categorizing template pages gives you the ability to label all the pages that are related to a specific function. This allows you to limit the number of template pages you see on the screen.

To categorize template pages, complete the following steps:

1. Access the Digital Invoice Templates page by clicking Setup > Digital Capture Invoice Templates from the menu bar.
2. Highlight the Master Template.
3. Click "Edit".
4. The Digital Invoice Capture Template will display:
5. Click the "Set Category" icon:
6. Enter the Category label of your choosing in the "Category To Set" field.
7. Check the box beside the template pages you wish to set under the category.
8. Click "Set Category on All Checked rows"
9. You can continue labeling and setting up different categories by following the above steps.
10. Once you are finished click "Exit Set Category Mode"
11. Click "Save"