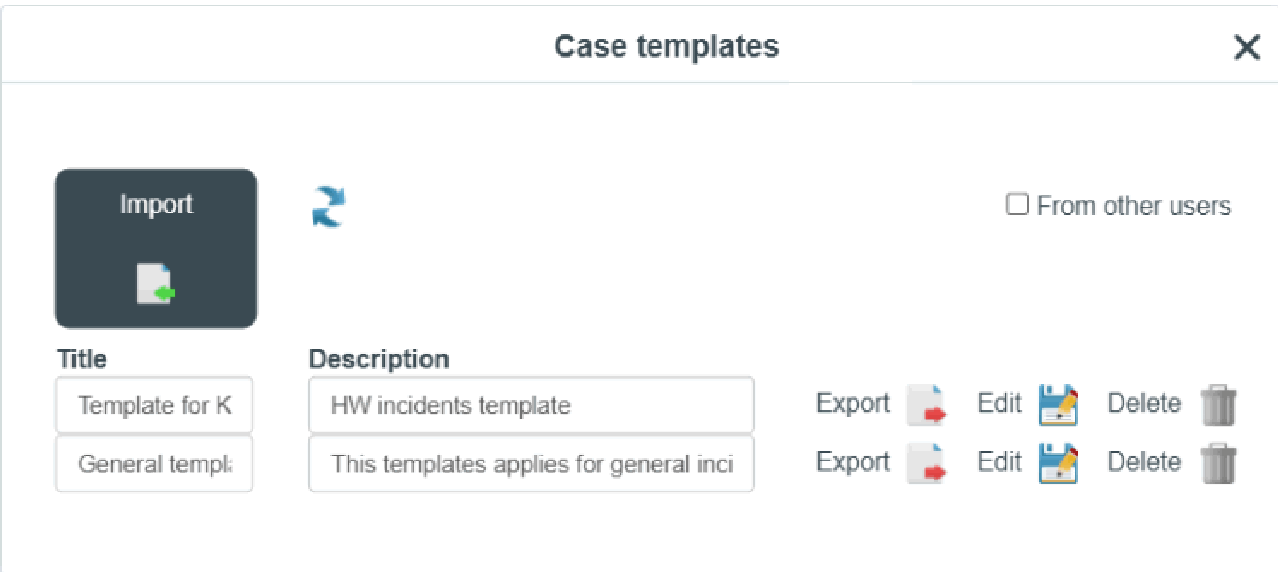
Template tool

Apply a Template

1. When creating the new case, click on the **Template button.**

2. In the *Case Template* window, select the template and click on the **Export button.**
   The fields: *Urgency, Title and Description* in the case creation form will be filled with the information saved in the template.

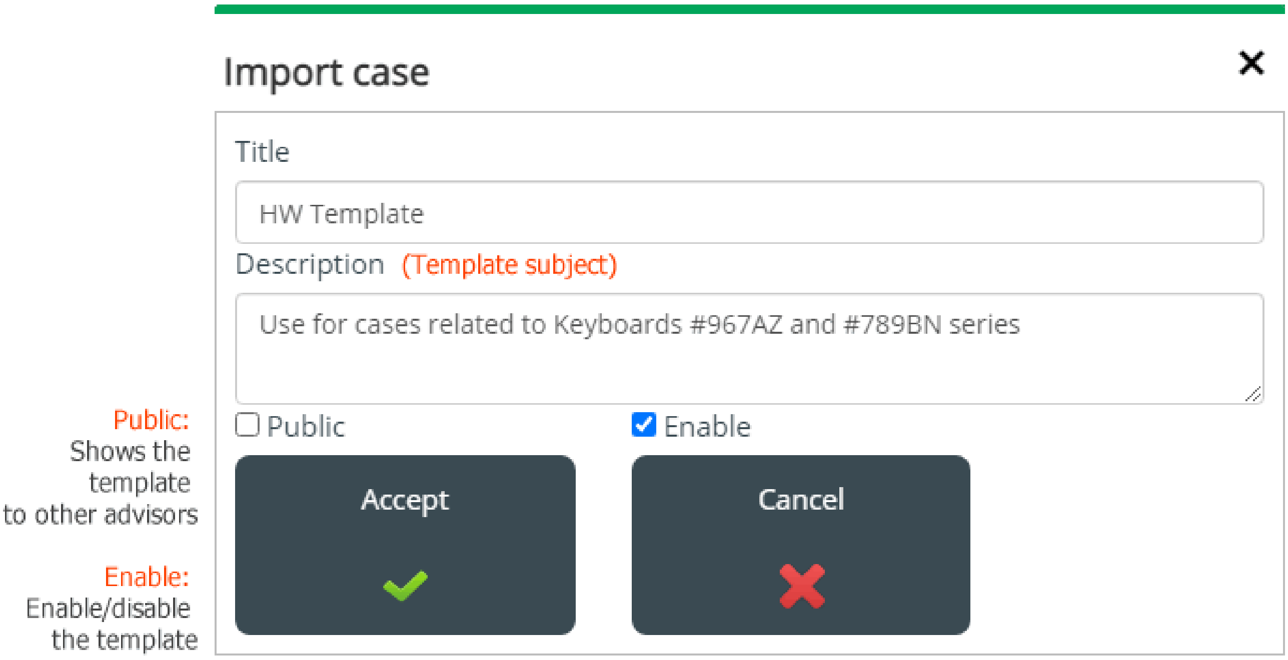
Activate the **Other user** check box to view the templates created by other advisors.
When applying the template the *category* can be completed if it has been saved in the template, but in the new case the category is required to be selected again for SLA/Model recalculation.



Create a Template

1. Create a template during the case creation and Urgency, Title and Description fields are filled.

2. Click on the **Template** button, the template editor window will open.
   In the *Import case* window, click on the **Import** button to save the information previously entered in the case creation form. Complete the following information:



Edit/Delete Template

Only the advisor who created the template can edit/delete the template.

1. *To edit*, select the template and click on the **Edit** button, you can edit: Title, Description and the boxes for activation and publication.

2. *To delete*, select the template and click on the **Delete** button.