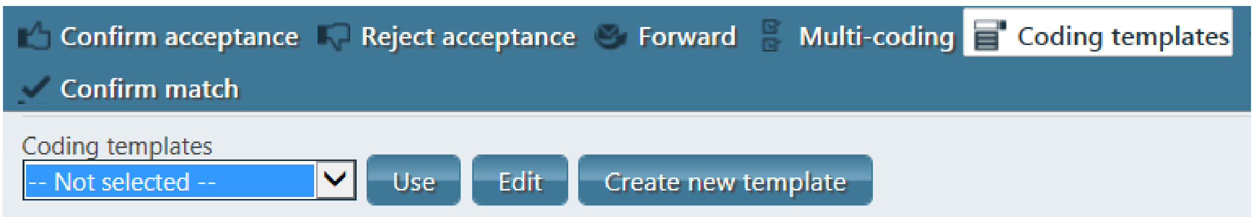
How to use ‘Coding templates’

1. How to use ‘Coding templates’

If the fields in several of your invoices must be filled in with the same information, you can consider creating a template. Note: The template will cover **all the fields** including the fields which have been filled in by the invoice assigner (‘Konto’ (Account), ‘Delregnskab’ (Divisional financial statements) and ‘Moms’ (VAT)).
If you want additional information, assistance or to know more about ‘**Coding templates’**, please contact kreditorhotline@au.dk.
Note: If the invoice is split into more than one line e.g. with VAT and without VAT, you should not use a template, because a template will overwrite the original accounts/field information.

Click ‘**Coding templates**’

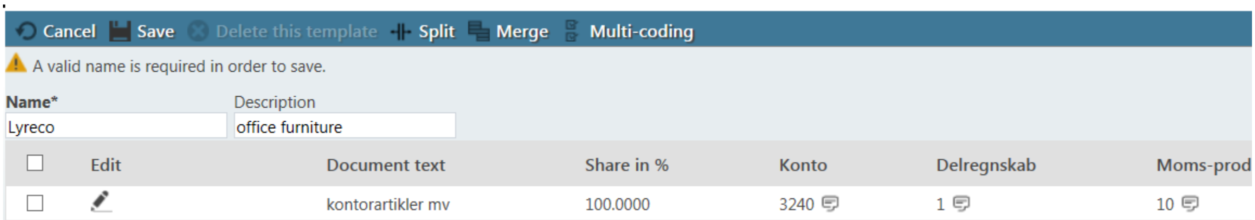


You now have three options:

Click ‘**Use**’. You can now select an existing template from the list in the ‘**Coding templates**’ field.
Click ‘**Edit**’. You can now select an existing template from the list in the ‘**Coding templates**’ field and edit it.
Click ‘**Create new template**’. You can now create a new template, see detailed description below.

1.1 How to create a new template

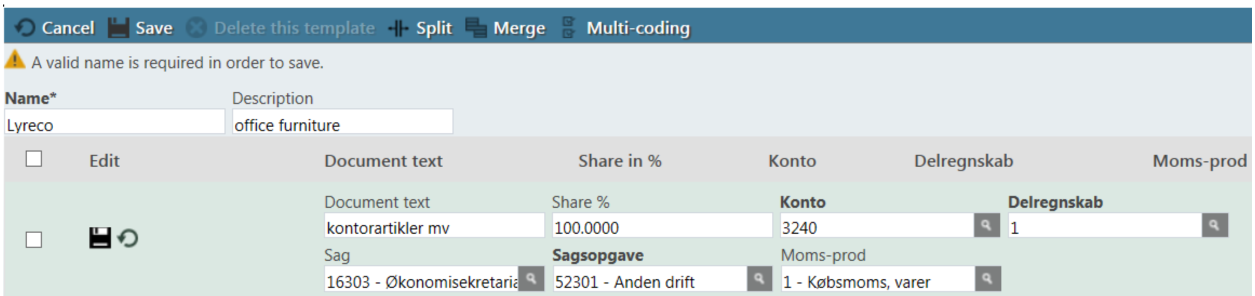
Click '**Create new template**'



In the field '**Name***', you can write a relevant name for your template e.g. the name of the supplier.

In the field '**Description**', you can write a relevant template description.

Click the '**Edit**' icon to access the invoice line fields.



Fill in the field '**Sag**' (Case) and then the field '**Sagsopgave**' (Case task).

You can change the '**Document text**', if you want the same text when you use the template.

Click the '**Save**' icon to save the line.

Click '**Save**' and you will return to the invoice line and the template window will be closed.

Click '**Cancel**' if you do not want to create a template and want to exit the template window.

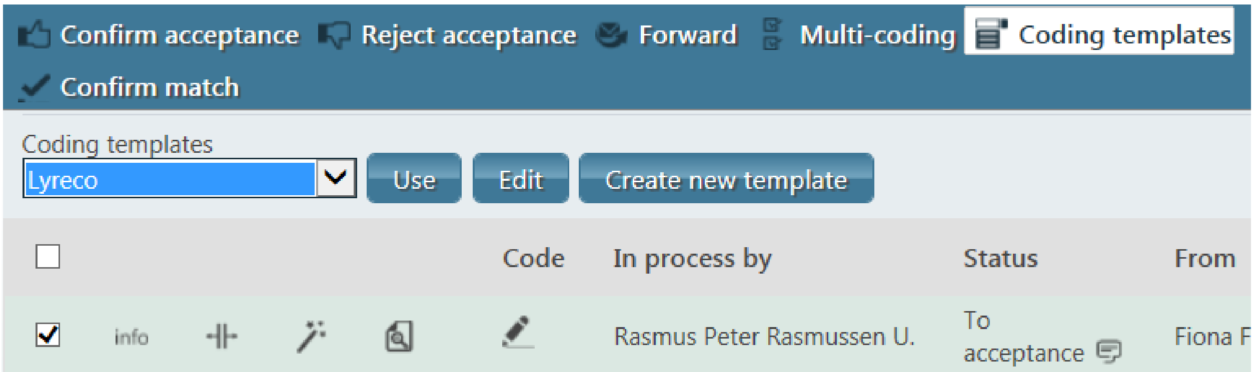
For further information about '**Split**', see the user guide on 'How to split invoice lines'

For further information about '**Merge**', see the user guide on 'How to split invoice lines'

'**Multi-coding**' is not used, because there is no connection between '**Sag**' (Case) and '**Sagsopgave**' (Case task).

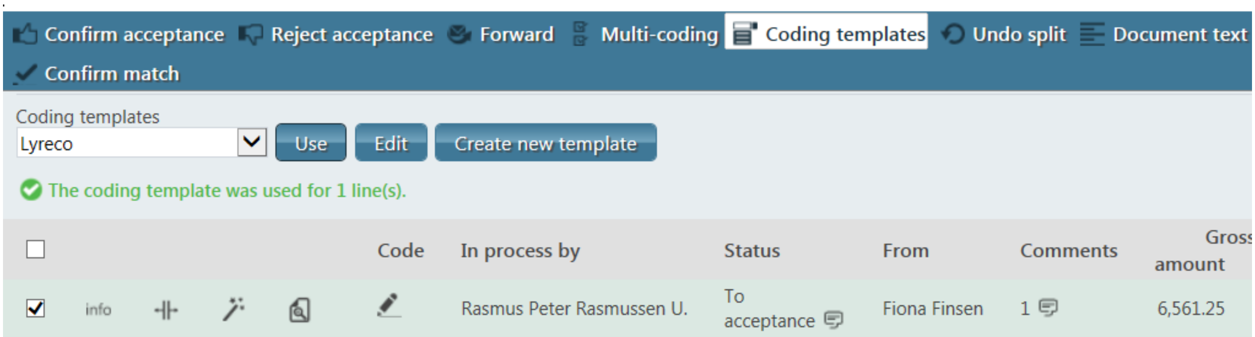
1.2 How to use a template

This is how you use your templates:



In the field ‘**Coding templates**’, you can select the template you want to use and click ‘**Use**’.

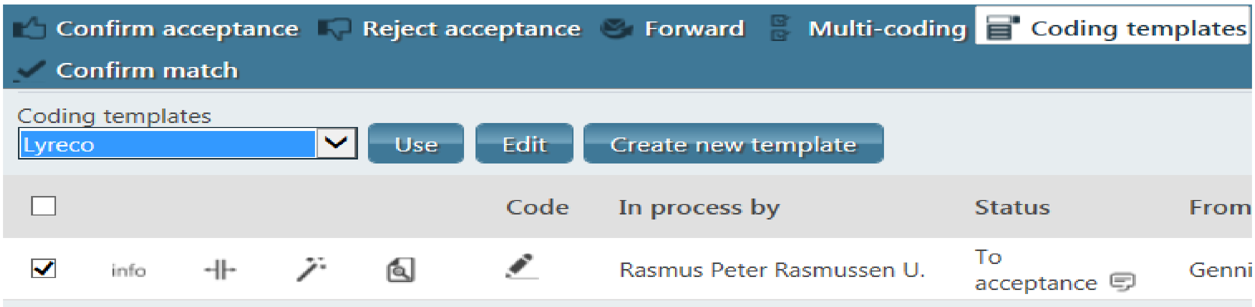
If you want to use the same template for several lines, remember to check the boxes of the relevant lines.



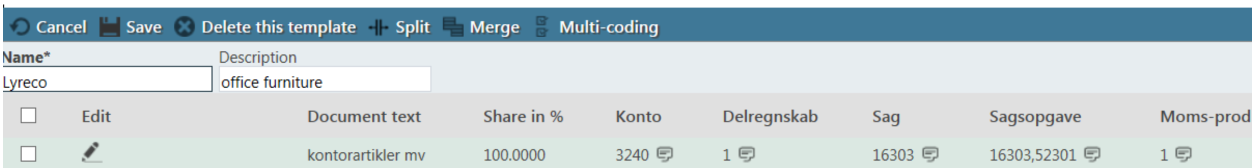
The invoice line now contains the template information.

1.3 How to edit a template

This is how you delete or edit a template:

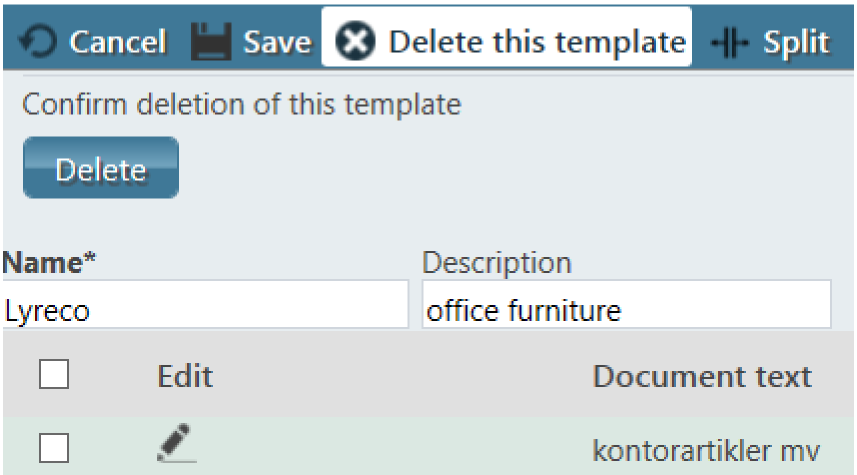


In the field ‘**Coding templates**’, you can select the template you want to edit, then click ‘**Edit**’.



Click the ‘**Edit**’ icon, if you want to edit field information. For further information, see the section ‘**How to create a new template**’.

If you want to delete the template, check the box of the relevant template and click ‘**Delete this template**’.



Then click ‘**Delete**’ to confirm that you want to delete the template.

Click ‘**Cancel**’ if you do not want to edit the template and want to exit the template window.

For further information about ‘**Split**’, see the user guide on ‘How to split invoice lines’

For further information about ‘**Merge**’, see the user guide on ‘How to split invoice lines’

‘**Multi-coding**’ is not used, because there is no connection between ‘**Sag**’ (Case) and ‘**Sagsopgave**’ (Case task).