

# Project Database Co

Developer of  
ExhibitOffice + ManagEvent

## Document Template Linking

Once the document template has been created it needs to be linked to the database to enable it to be used.

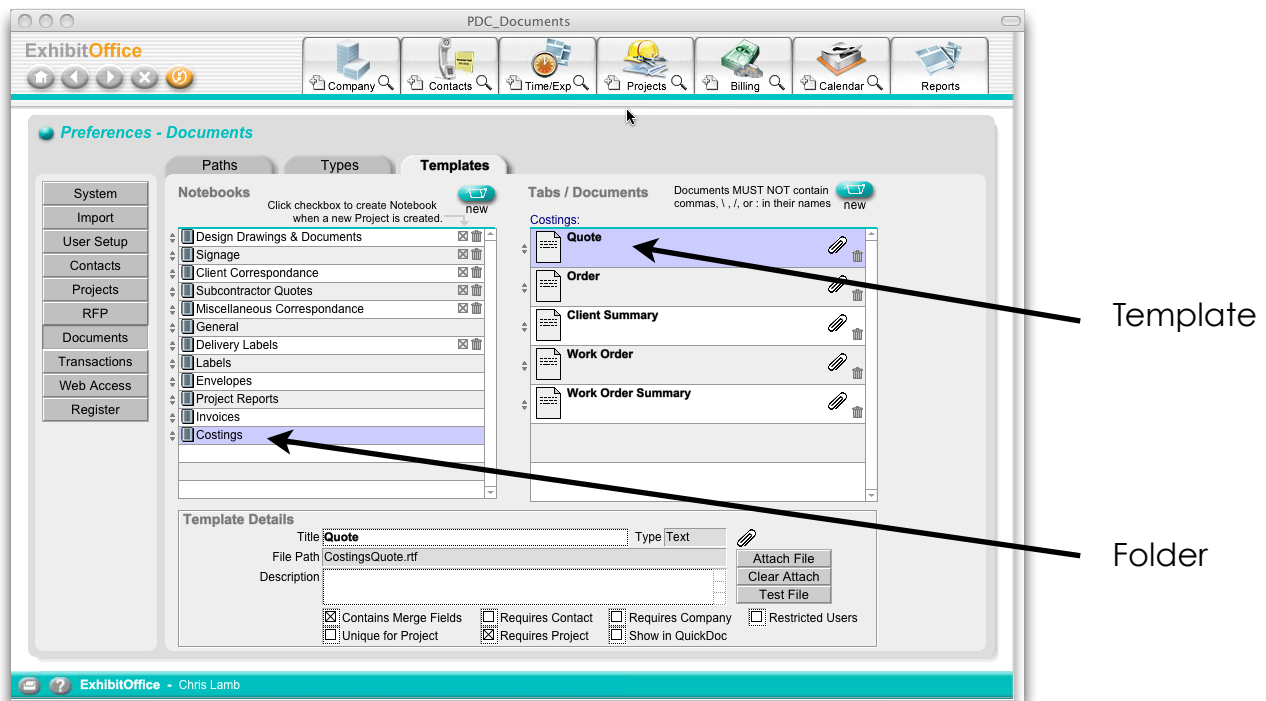
Go to Preferences

Then Documents

Then Templates

Then to the Folder where you want the Template to be stored

In this example we will link a Quote Request to the Costings Folder



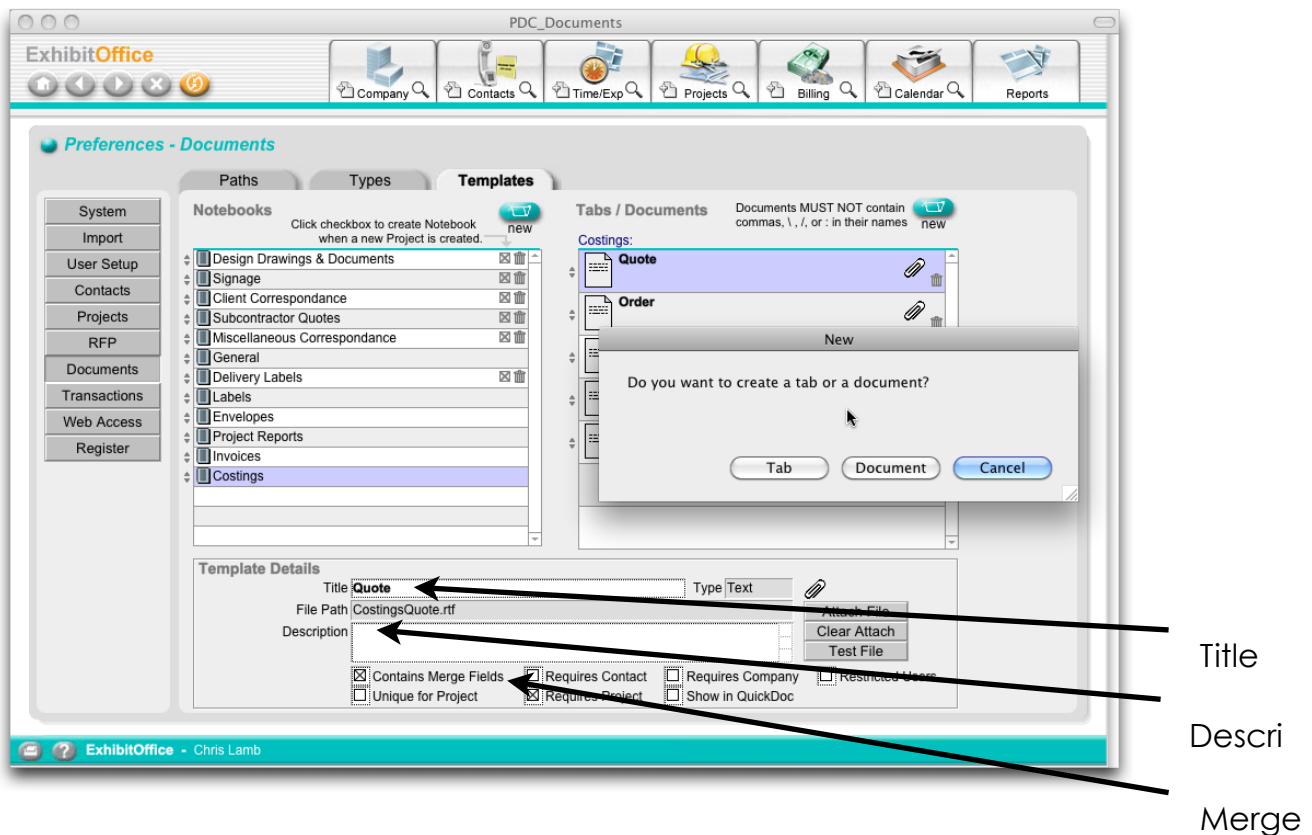
This is what it will look like once complete

Initial Step is to click on "New" - "Do you want to create a tab or a document"  
As we want to link a template we have already created we want to create a document.

If we wanted a folder within a folder we would select create a tab.

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Then enter a "Title".

Enter a description if relevant

Then click on "Attach File" and navigate to where your templates are stored.  
Usually C Drive

ExhibitOffice or ManagEvent Documents  
Templates

Then choose the relevant template

Then once you have done that highlight "Contains Merge Fields"

Then choose which ever other fields are relevant from

- Unique for Project
- Requires Contact
- Requires Project
- Requires Company

This example needs "Requires Project"

This option determines where the template will go looking for data

If you want to create a short cut to this template because you will be using it regularly highlight "Show in Quick Doc"

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Once you have created the template test to make sure it is linking to the correct template properly by clicking on Test File”

You should see the template you have linked it to like this one.

↓	
The Exhibit Company	
Quotation Request	
To: <<SupplierName>> Date: <<CurrentDateLong>> Attention: <<SupplierContactName>> Phone No: <<SupplierContactPhone>> Fax No: <<SupplierContactFax>>	
Details:	Client Name: <<CustomerCompany>> Project Name: <<ProjectName>> Exhibition: <<ExhibitionName>> Stand No: <<StandNo>> Venue: <<ExhibitionVenueName>> Address: <<ExhibitionVenueAddress1>> <<ExhibitionVenueCity>> <<ExhibitionVenueState>> <<ExhibitionVenueZip>> Show Opening: <<ExhibitionShowOpensDate>> Show Close: <<ExhibitionShowClosesDate>> Move In Date & Time: <<ExhibitionMoveInDate>> <<ExhibitionMoveInTime>> Move Out Date & Time: <<ExhibitionMoveOutDate>> <<ExhibitionMoveOutTime>>
Descripti on:	Hi <<SupplierContactFirstName>> <<QuoteDescription>> If you have any queries please call Regards <<UserName>>

The next step is to open a project and test the template

The document will be saved in the position that it was put when initially created so no more remembering to save to the right position

It is possible to put templates in that do not have links to fields in the database, if this is the case do not highlight “Contains Merge Fields”

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## **Trouble Shooting**

If a field does not populate and the area is blank it is usually because there is no data in the relevant field in the database.

If the field has the merge field data in it this is usually because something has gone wrong with the template creation.

Go to Templates

    Delete the Merge Field Data

        Save the Document

            Then reenter the correct field data and save again

The merge field data must be entered exactly as it is in the original document including the Upper & Lower Case Mix.