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Making Use of Flexi's Template Feature

Monday, April 04 2005 @ 08:40 AM EDT

Contributed by: [BobbyFosson](#)

Views:: 127

The Templates feature within FlexiSign Pro® 7.5v5 can be quite useful when customized to fit your needs.



This article will cover one use of the Template feature, the Customer Approval Form. Keep in mind that the Template feature can do a lot more and may be the focus of future articles. The Customer Approval Form, in my mind, is one that every sign maker can put to good use.

What is a Template?

A template is a predefined layout that allows you to design your sign or graphic and 'Apply' the layout to your design while not affecting your original design with the intended use of printing, faxing or emailing.

What a Template Can Do For You?

Do you offer a proof of your final design for your client to approve, disapprove or comment, or maybe create job estimates based on a design? If so, you can make use of the Template feature and take your paperwork to the professional level to match your design skills. We won't talk about my design skills here.

It All Starts with Your Design

Let's imagine making a sign from one of the generic samples supplied to us by Flexi® in the Samples folder (C:/Program Files/FlexiSIGN-PRO 7.5v5/Samples/Vinyl Signs/Aviation.fs). Re-size the file to 18" wide to match the screenshots provided later in the article. This will be our finished design for the client to review later. First, we need to save the client information with the file. Using the Job Info feature from the EDIT menu, we can save job critical information that will be passed to the final Template.

In my experience, most sign makers do not use the Job Info feature. Most will say it takes too long to type in all of the information and is a pain to do. I say, do it anyway. It is very useful and information is king. The more the better, even if it takes you an additional 2 to 3 minutes per client design.

Job Info

While your file is open, click on the EDIT menu and choose Job Info from the bottom of the dropdown menu. You should now have the ability to enter important information about the design as well as the client. Type in all that may apply and hit the OK button at the bottom. [See Illus. 1]

After hitting the OK button, save the file. The Job Info you took 2 minutes to complete will be saved with the file and ready to access by you or your employees any time you open this file again. Very handy.

The Template

With your file now saved and the job info entered, we are ready to 'Apply a Template'. The default template I use is the Job_Info_2 file. Actually, the template I use is a customized template based off of the Job_Info_2 file. Let's apply each template to the file for you to see the difference and capabilities available.

While your final design file is open, click on the FILE menu and choose Templates. [See Illus. 2] Then choose Job_Info_2 from the list of templates available. [See Illus. 3] As you can see, there are several default templates to choose from and I would recommend trying each of them later.

Click on the Select Button at the bottom of the Select Template window. Flexi® now creates a new file, with your design pasted into the center of the Job_Info_2 Template. [See Illus. 4] Notice that the job information you took the time to type in earlier is automatically applied to the Job Template. Now you have the beginning of a professional job form for the client to review. This page can be printed, faxed or exported as a .JPG file format and emailed.

Create Your Own Template

Obviously, you do not want the ScanvecAmiable logo on your forms. And who is to say you like the rounded corners of the default Job_Info_2 Template, I don't. FlexiSign Pro® gives you the ability to edit and create your own custom templates.

To edit the Job_Info_2 Template, close the template file you currently have open and then click

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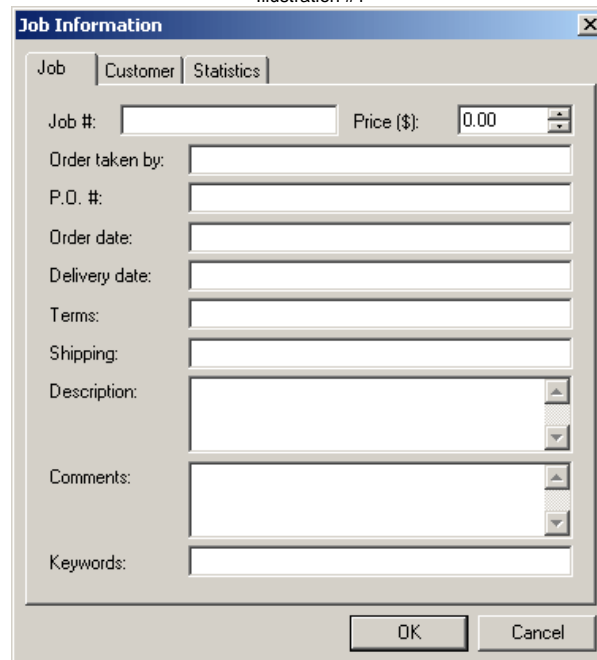
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on the File>Templates>Open Template menu. Choose the Job_Info_2 Template and hit the Select Button. Now you have the shell of the template open and it is ready for you to edit. You can select the ScanvecAmiable logo, delete it, and replace it with your own.

Flexi® also has a Template Toolbar that helps when creating or editing your own template files... Click on the View Menu, then Toolbars, and checkmark Templates at the bottom. This toolbar will allow you to place the Fonts Used and Colors Used box on your template as seen in Illus. 5.

I have created my own template and the results are shown in Illus. 5. This template is based off of the Job_Info_2 Template. If you like this template, you can download it for free from the Downloads Section of the FlexiEzine.com website.
Template Ideas

Illustration #1



The 'Job Information' dialog box is shown with the 'Job' tab selected. It contains the following fields:

- Job #: [text box]
- Price (\$): [text box with value 0.00]
- Order taken by: [text box]
- P.O. #: [text box]
- Order date: [text box]
- Delivery date: [text box]
- Terms: [text box]
- Shipping: [text box]
- Description: [text box with vertical scrollbar]
- Comments: [text box with vertical scrollbar]
- Keywords: [text box]

At the bottom are 'OK' and 'Cancel' buttons.

Illustration #2

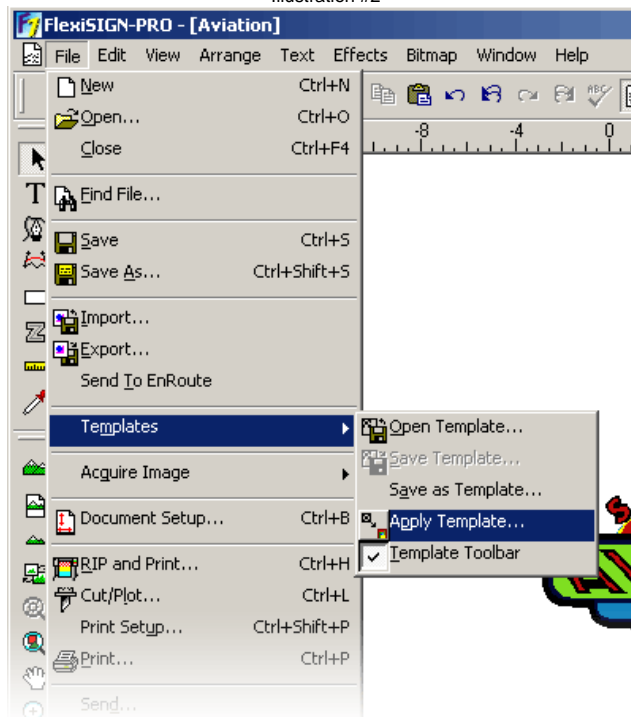


Illustration #3

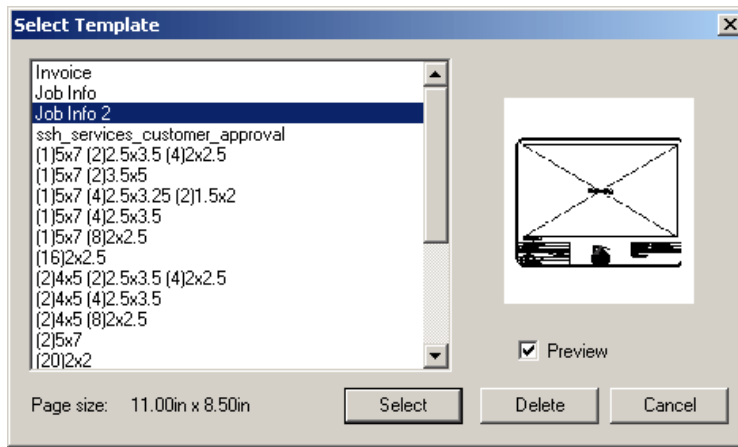


Illustration #4

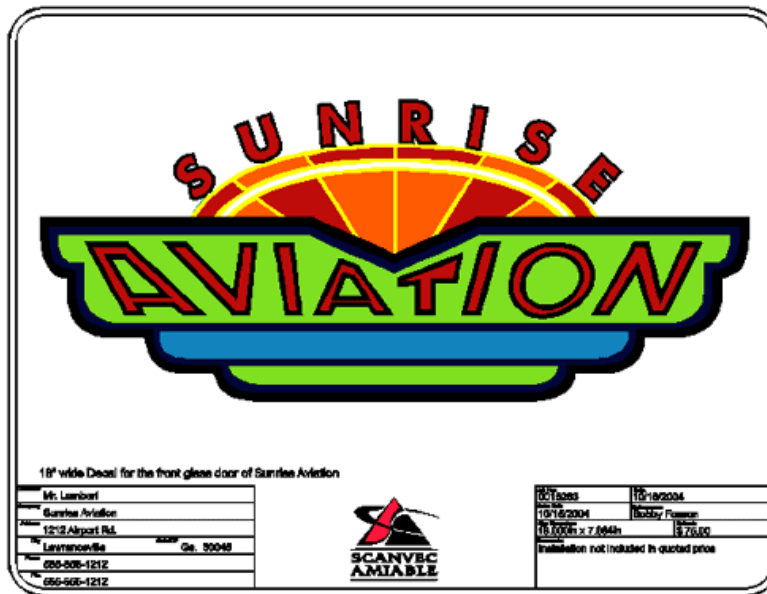
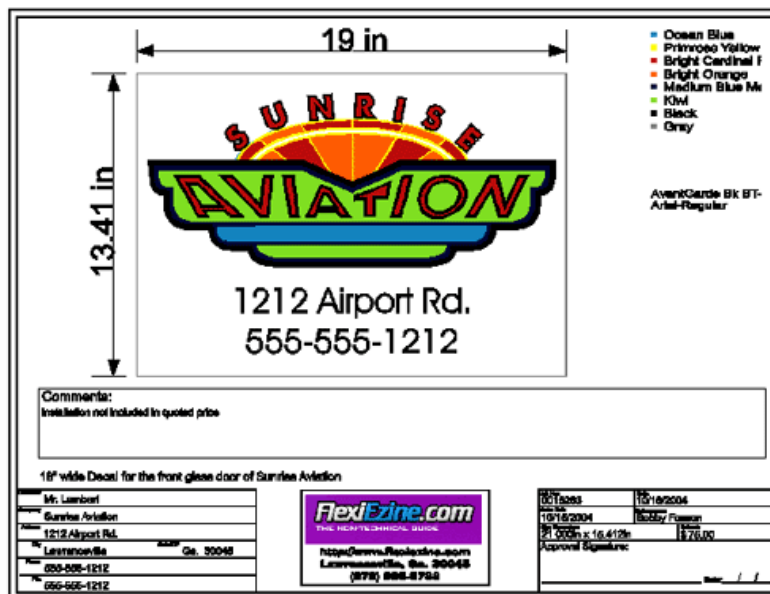


Illustration #5


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