

CALENDAR



OVERVIEW

STEPS

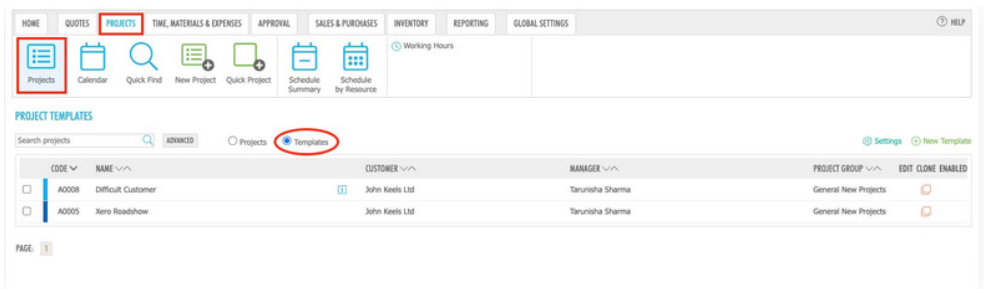
How to create Project Templates

In this guide, learn how to create project templates in your TidyEnterprise account

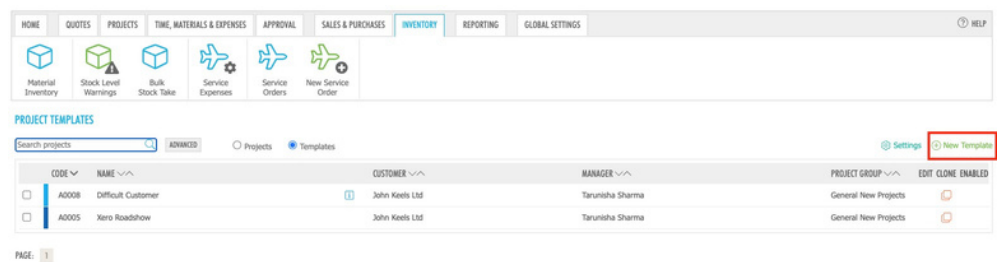
Please note: You can only edit Project Templates that you are assigned as “Manager” to.

To view and create Project Templates, navigate to Projects and select Projects from the menu.

To the right of the search bar, select Templates as shown below.

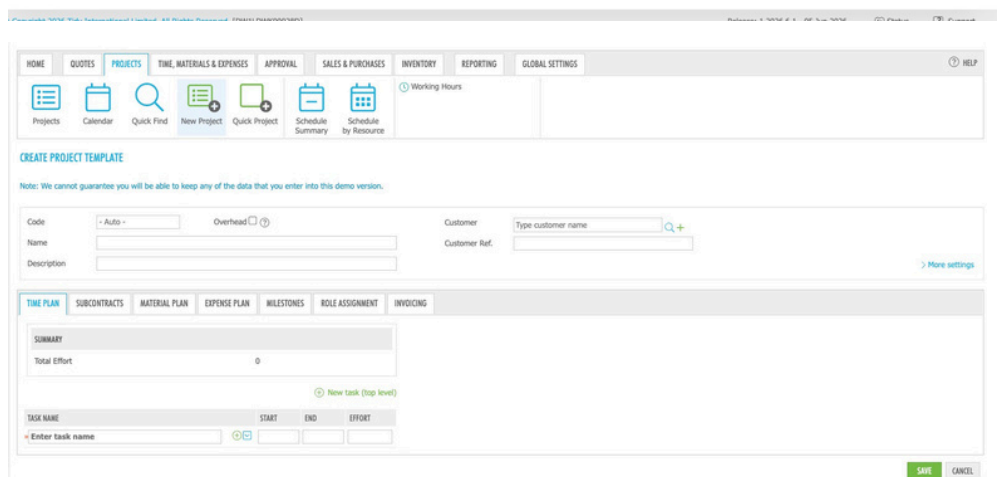


Click “+ New Template” to create a new template.

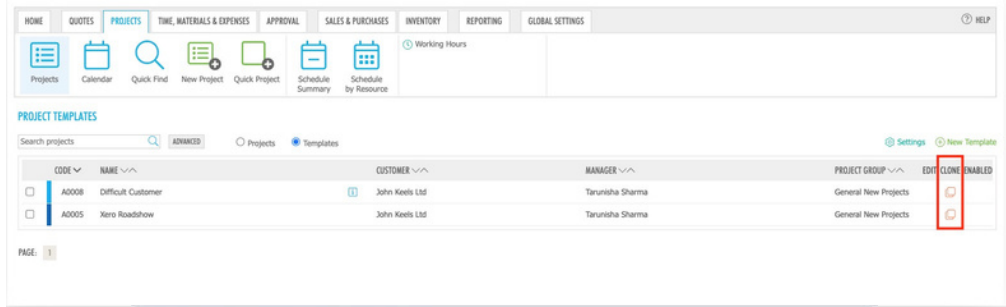


Enter the required information as you would when creating a standard project.

Once all necessary fields have been completed, click Save.



STEPS



To create a new Project using an existing Project Template, click the Clone icon on the right-hand side of the desired template:

You will be presented with a list of fields and information that can be included in the new project. Select the required options and click Create.

The dialog box 'CREATE PROJECT FROM TEMPLATE - PROJECT TEMPLATE' contains the following fields and options:

- Note: We cannot guarantee you will be able to keep any of the data that you enter into this demo version.
- Code: - Auto -
- Project Manager: Melissa Ward
- Name: Project Template
- Description: (empty field)
- Status: Not Started
- Est. Start Date: 12/06/26
- Include section:
 - Tasks (Specify which tasks to clone)
 - Task Assignments
 - Subcontracts
 - Planned Expenses
 - Planned Materials
 - Update Unit Cost
- Buttons: CREATE, CANCEL

You will then be taken to the Edit Project screen, where you can make any additional changes required for the new project. Once you have finished making changes, click Save.

The 'EDIT PROJECT' screen for project 'ADD42 - PROJECT TEMPLATE' shows the following details:

- Note: We cannot guarantee you will be able to keep any of the data that you enter into this demo version.
- Code: ADD42, Overhead: , Status: NOT STARTED
- Name: Project Template
- Description: (empty field)
- ETA Date: (empty field), EXW Date: (empty field)
- Delivered Date: (empty field)
- Customer: Type customer name, Contact: - Select -, Customer Ref: (empty field)
- More settings: > More settings
- Summary:
 - Total Assigned Days: 0 days
 - Total Estimated Charge (time only at today's rate): NZD \$0.00
 - Total Team Size: 0
 - Departments: 0
- TIME PLAN tab:
 - Table with columns: AM, CITY, MANAG
 - Task: Meeting, Start: 12/06/26, End: 13/06/26, Effort: 4h, Bal: 4h, Charge: \$75.00
- Buttons: SAVE, CANCEL

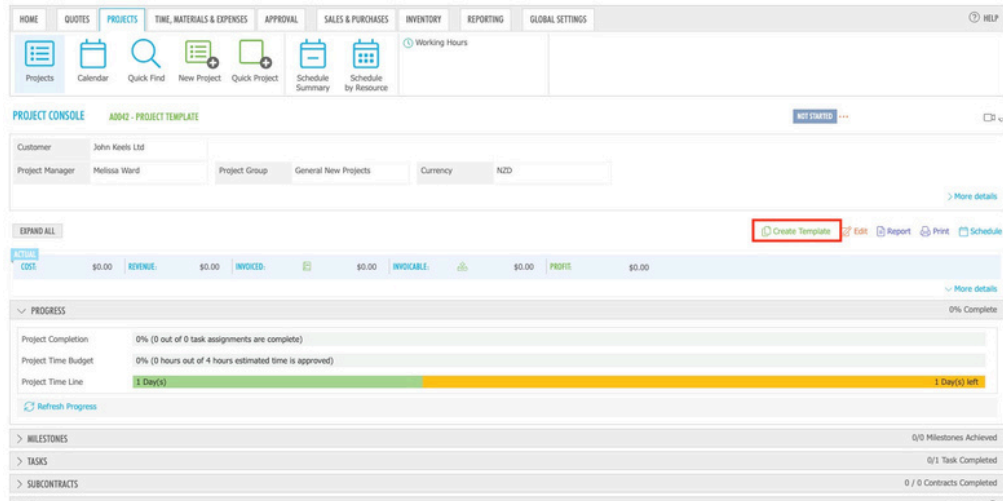
STEPS

You can also create a Project Template from an existing project.

Open the desired project and navigate to the Project Console. From here, click Create Template on the right-hand side of the screen.

The project will be converted into a Project Template and will become available within the Templates list.

You can then use the template creation process outlined above to create new projects from the template.



The screenshot displays the Project Console interface. At the top, there is a navigation bar with tabs for HOME, QUOTES, PROJECTS, TIME, MATERIALS & EXPENSES, APPROVAL, SALES & PURCHASES, INVENTORY, REPORTING, and GLOBAL SETTINGS. Below this is a toolbar with icons for Projects, Calendar, Quick Find, New Project, Quick Project, Schedule Summary, and Schedule by Resource. The main content area is titled 'PROJECT CONSOLE' and shows details for a project named 'ADD0 - PROJECT TEMPLATE'. The project manager is Melissa Ward, and the project group is 'General New Projects'. A 'Create Template' button is highlighted with a red box. Below the project details, there is a table with columns for ACTUAL, COST, REVENUE, INVOICED, and INVOICABLE. The 'PROGRESS' section shows that the project is 0% complete, with a project time line of 1 Day(s) left. The 'MILESTONES', 'TASKS', and 'SUBCONTRACTS' sections are also visible, all showing 0% completion.