

Template Page Category

Last Modified on 01/07/2025 3:54 pm EST

Template Page Category

Settings > Accounts Payable > Digital Capture Invoice Templates

Categorizing Template Pages

Categorizing template pages gives you the ability to label all the pages that are related to a specific function. This allows you to limit the number of template pages you see on the screen.

To categorize template pages, complete the following steps:

- Access the Digital Invoice Templates page by clicking *Settings > Accounts Payable > Digital Capture Invoice Templates* from the menu bar.
 - Highlight the Master Template.
 - Click **Edit**.
 - The Digital Invoice Capture Template will display:
 - Click the **Set Category** icon:
 - Enter the Category label of your choosing in the **Category To Set** field.
 - Check the box beside the template pages you wish to set under the category.
 - Click **Set Category on All Checked rows**.
 - You can continue labeling and setting up different categories by following the above steps.
 - Once you are finished, click **Exit Set Category Mode**.
 - Click **Save**.
-