

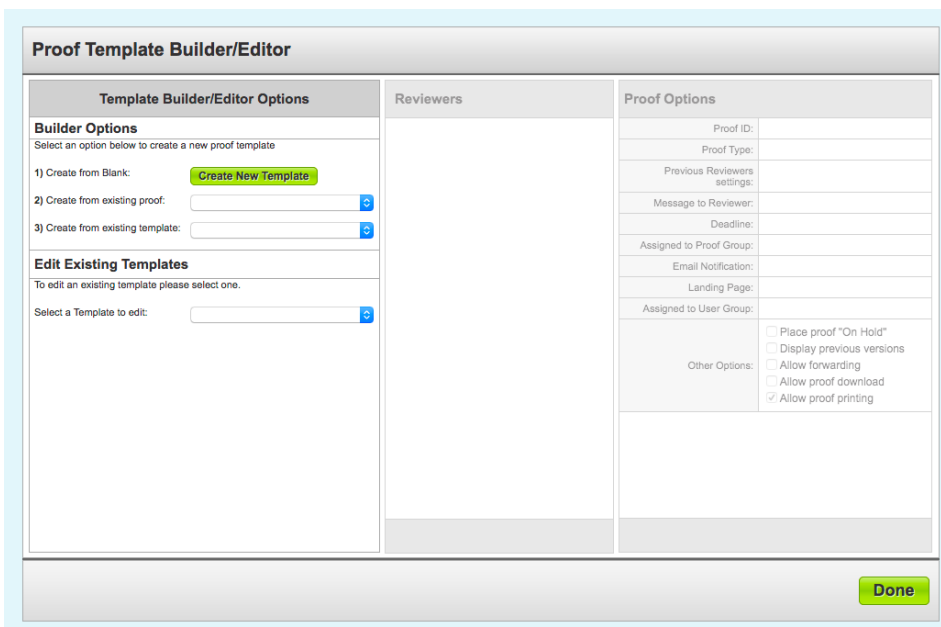
# Proof Templates

Published on 12/30/2014

## Creating a Proof Template with the Builder

Proof Templates are a way to automate the proof upload process. By creating a proof template, the proof uploader can choose that template and automatically apply pre-selected settings such as Reviewers and Proof Release Options.

To create a Proof Template, navigate to **Account > Proof Templates**. You'll be taken to the **Proof Template Builder/Editor**.



The screenshot shows the 'Proof Template Builder/Editor' interface. It is divided into three main sections: 'Template Builder/Editor Options', 'Reviewers', and 'Proof Options'. The 'Template Builder/Editor Options' section is further divided into 'Builder Options' and 'Edit Existing Templates'. Under 'Builder Options', there are three numbered options: '1) Create from Blank' with a 'Create New Template' button, '2) Create from existing proof' with a dropdown menu, and '3) Create from existing template' with a dropdown menu. Under 'Edit Existing Templates', there is a dropdown menu to 'Select a Template to edit:'. The 'Reviewers' section is currently empty. The 'Proof Options' section contains various fields: 'Proof ID:', 'Proof Type:', 'Previous Reviewers settings:', 'Message to Reviewer:', 'Deadline:', 'Assigned to Proof Group:', 'Email Notification:', 'Landing Page:', and 'Assigned to User Group:'. Below these are 'Other Options' with checkboxes for 'Place proof "On Hold"', 'Display previous versions', 'Allow forwarding', 'Allow proof download', and 'Allow proof printing' (which is checked). A 'Done' button is located at the bottom right of the interface.

There are three ways to create a new Proof Template:

1. **Create from Blank** - This option opens a blank template. You'll need to manually setup all reviewers and proof options.
2. **Create from Existing Proof** - If you have already released up a proof and realize you use similar settings frequently, make it a template. You can edit as necessary, give it a unique name, and save.
3. **Create from Existing Template** - This allows you to duplicate an existing proof template, make edits if necessary, give it a name, and save.






## Creating a Proof Template During Upload

On the **Release Summary** page during a proof upload, you can save the reviewers and release options applied as a Proof Template. This is a quick way to create a Proof Template without creating additional work. At the bottom of the **Release Summary** page, enter a name for the template and click save before finalizing your proof.

**Release Summary**

Help  
cancel process

Please review the content, reviewers, and release options before selecting the Finalize button below.

Uploaded Content	Reviewers:	Release Options																								
<div style="margin-bottom: 10px;">  <p>Display Caption: truesoap-ad-horizontal-revised</p> <p>Original File Name: truesoap-ad-horizontal-revised ...</p> </div> <div style="margin-bottom: 10px;">  <p>Display Caption: truesoap-ad-revised</p> <p>Original File Name: truesoap-ad-revised.pdf</p> </div> <div style="margin-bottom: 10px;">  <p>Display Caption: truesoap-label</p> <p>Original File Name: truesoap-label.pdf</p> </div> <div style="margin-top: 10px;"> <p>Assigned Project: True Soap Campaign</p> <p style="text-align: right;"><a href="#">Edit</a></p> </div>	<div style="margin-bottom: 10px;">  <p>Christy christy@truesoap.com</p> <p style="text-align: center;">RV CA FM RM JR</p> </div> <div style="margin-bottom: 10px;">  <p>Megan megan@truesoap.com</p> <p style="text-align: center;">RV CA FM RM JR</p> </div> <div style="text-align: right; margin-top: 10px;"> <p><a href="#">Edit</a></p> </div>	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td>Proof ID:</td><td>True Soap Campaign</td></tr> <tr><td>Proof Type:</td><td>Approval</td></tr> <tr><td>Access Code:</td><td>dddd37</td></tr> <tr><td>Previous Reviewers settings:</td><td>Show all reviewers' markups</td></tr> <tr><td>Instructions to Reviewer:</td><td><a href="#">Show</a></td></tr> <tr><td>Deadline:</td><td>None</td></tr> <tr><td>Subscriber List:</td><td>None</td></tr> <tr><td>Email Notification:</td><td>On <a href="#">Preview Email</a></td></tr> <tr><td>Landing Page:</td><td>None</td></tr> <tr><td>Assigned to User Group:</td><td>Print</td></tr> <tr><td>Web Page URL Reference:</td><td>None</td></tr> <tr><td>Other Options:</td><td> <input type="checkbox"/> Place proof "On Hold"  <input checked="" type="checkbox"/> Allow forwarding  <input checked="" type="checkbox"/> Allow Proof Download  <input checked="" type="checkbox"/> Allow Proof Printing  <input type="checkbox"/> Live asset links                 </td></tr> </table> <div style="text-align: right; margin-top: 10px;"> <p><a href="#">Edit</a></p> </div>	Proof ID:	True Soap Campaign	Proof Type:	Approval	Access Code:	dddd37	Previous Reviewers settings:	Show all reviewers' markups	Instructions to Reviewer:	<a href="#">Show</a>	Deadline:	None	Subscriber List:	None	Email Notification:	On <a href="#">Preview Email</a>	Landing Page:	None	Assigned to User Group:	Print	Web Page URL Reference:	None	Other Options:	<input type="checkbox"/> Place proof "On Hold" <input checked="" type="checkbox"/> Allow forwarding <input checked="" type="checkbox"/> Allow Proof Download <input checked="" type="checkbox"/> Allow Proof Printing <input type="checkbox"/> Live asset links
Proof ID:	True Soap Campaign																									
Proof Type:	Approval																									
Access Code:	dddd37																									
Previous Reviewers settings:	Show all reviewers' markups																									
Instructions to Reviewer:	<a href="#">Show</a>																									
Deadline:	None																									
Subscriber List:	None																									
Email Notification:	On <a href="#">Preview Email</a>																									
Landing Page:	None																									
Assigned to User Group:	Print																									
Web Page URL Reference:	None																									
Other Options:	<input type="checkbox"/> Place proof "On Hold" <input checked="" type="checkbox"/> Allow forwarding <input checked="" type="checkbox"/> Allow Proof Download <input checked="" type="checkbox"/> Allow Proof Printing <input type="checkbox"/> Live asset links																									

Want to save this proof as a quick release template in the future? Give the template a name and click the save button.  [Save](#)

[Finalize](#)