

How to use Templates

Animal Templates can be used when you add a new animal to your account. A template acts as a starting point. You can specify certain values on a template and those values are then automatically filled in for the corresponding fields on the **Add an Animal** page when you select the template. A template makes adding animals quicker and easier. You can, for instance, use a template for "puppies," or "kittens" and have certain values pre-selected.

Where do I find it?

You can find the [Animal Templates](#) page by going to **Animals > Templates**.

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Related pages:

The following actions are available for Animal Templates with the specified service and user roles:

Action	Description	Services	User Roles
View	Able to view animal templates (including shared ones)	Data Management Pet Adoption Portal Web Site	Animal Add Animal Admin
Add	Able to add an animal template	Data Management Pet Adoption Portal Web Site	Animal Add Animal Admin
Edit	Able to edit the animal templates they have created	Data Management Pet Adoption Portal Web Site	Animal Add Animal Admin

Delete	Able to delete the animal templates they have created	Data Management Pet Adoption Portal Web Site	Animal Add Animal Admin
Unshare	Able to unshare any user's template	Data Management Pet Adoption Portal Web Site	Site Admin

Create a template

Templates make your life easier when adding an animal. For instance, you could create templates based on breed, color, age, sex, or temperament. Looking at the fields under **Add a New Animal** in the Animals menu gives you ideas about what templates your organization might need.

1. Create a new template from the [Animal Templates](#) page by clicking **Create a Template**.

2. Enter a template name that will easily identify this template for the values it includes.
3. You'll notice that the template fields are duplicates of those found on the **Add an Animal** page. Go through the fields to find those that are shared in common by the animals for which you intend this template, for instance, puppies, or female puppies. See the table below for some special fields to consider.
4. Once you've completed the template, you can choose to share it with your organization's other volunteers. (Only the creator of a template can delete it, however.) From the list of templates, check the check box for the template you've just created, then from the **Actions** drop-down menu, select share.

The following table lists a few special fields in the animal templates.

Field	Description
Use random name	If you select this option, and also select male or female for sex, a random name will automatically be selected when you load the template.
Received Date, Use current date	If you select this option, the current date will be entered in the received date field when the template is loaded.
Found Date, Use current date	If you select this option, the current date will be entered in the found date field when the template is loaded.

Edit a template

You can edit a template you created by either clicking the **Edit** icon next to the appropriate template from the **Animal Templates** datatable, or by opening a specific template and clicking the Edit button at the bottom of the template.

Delete a template

You can delete a template you created by opening a specific template and clicking the **Delete** button at the bottom of the template.



You can edit or delete only the templates that you have created. If someone in your organization has created and shared a template with you, you may see it in your list of templates, but you **cannot** edit or delete it. If the template is no longer needed and the original creator is not available to delete or unshare the template, open a support ticket and we will unshare the template for you.

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