Default Templates

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Since any custom template can be marked as default, we added a way to differentiate the default built-in version, which is the base template for each data type (work order, proposal, invoice, credit, statement, purchase order), and a custom template set to default by users. This allows the built-in templates to be updated, without interfering with the functionality of the templates that are set to default.

The built-in templates are referred to as Stock and provide the updated generic default version of each template type. You need to click the **Sync Stock Templates** button to get the most updated version with any corrections for the Stock templates. New Managely releases will only change Stock templates (if there are any template changes), never any of the others. This may mean that you will need to copy the Stock template and customize the copy.

Synchronizing templates can be necessary for various reasons. Details for template changes (if any for a Managely update) are available in the product release notes. Generally, changes to the database schema that affects templates or changes to the templates require synchronizing them. If a template is not printing correctly, and it is a stock template (as opposed to a custom template), click the **Sync Stock Templates** button to attempt to resolve the issue.

Custom template types that do not have a stock version (site, system, customer, contract), no longer have the option to be set as default.