

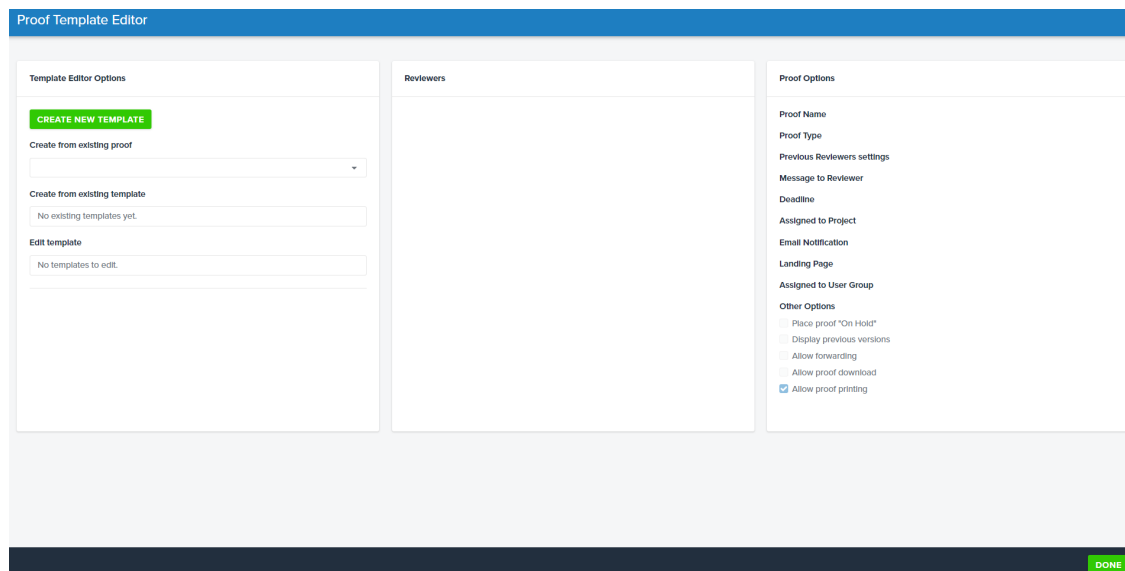
# Proof Templates

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## 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 Editor' interface. It has a blue header bar with the title 'Proof Template Editor'. Below the header, there are three main sections: 'Template Editor Options', 'Reviewers', and 'Proof Options'. The 'Template Editor Options' section on the left contains a green 'CREATE NEW TEMPLATE' button, a 'Create from existing proof' dropdown menu, a 'Create from existing template' section with a text input field (showing 'No existing templates yet.'), and an 'Edit template' section with a text input field (showing 'No templates to edit.'). The 'Reviewers' section in the middle is currently empty. The 'Proof Options' section on the right lists various settings: 'Proof Name', 'Proof Type', 'Previous Reviewers settings', 'Message to Reviewer', 'Deadline', 'Assigned to Project', '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 green '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

CANCEL

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

Uploaded Content

EDIT



Asset Name:


Part 1

truesoap-label.pdf

Assigned Project: Spring Campaign - Sunflower 7oz Label

Reviewers List


EDIT



Christy Drucker

Creative Director

christy@truesoap.com



Paul Morad

Project Manager

paul@truesoap.com

Release Options

EDIT

Proof Name: Product Label - Sunflower

Proof Type: Approval

Access Code: 99c261

Instructions to Reviewer: [Show](#)

Deadline:

Subscriber List:

Email Notification: On [Preview Email](#)

Landing Page: None

Assigned to User Group: Print

Web Page URL Reference: None

Other Options:

☐ Place proof "On Hold"
 ☐ Allow forwarding
 ☒ Allow Proof Download
 ☒ Allow Proof Printing

Want to save this proof as a quick release template in the future? Give the template a name and click the save button.

Product Label

SAVE

FINALIZE