Apply an industry template

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Context

After selecting the customer at step 1, use an industry template to prepare the plan structure.

Starting point

Step 1 after selecting the customer; manual import at step 2

Prerequisites

- For an automatic suggestion, assign the customer to a family with templates.

Steps

1. Review the automatic suggestion

If the customer’s family is associated with library plans, a window may suggest matching templates. Check the proposed template and its language. In the card layout, use the action button on the required template card; in the layout with confirmation at the bottom, select the template and confirm. Wait for the plan content to load before continuing.

2. Understand the result

The template’s zones, surfaces and procedures prefill the plan. If you continue without a template using the command available in your version, the template is not applied. Then review step 2 to check and adapt the content.

3. Import a template manually

At step 2, click Import elements, then open Available plans. Select the source plan; above its structure, open Action and choose Add everything to the plan. The details are explained on page 19.

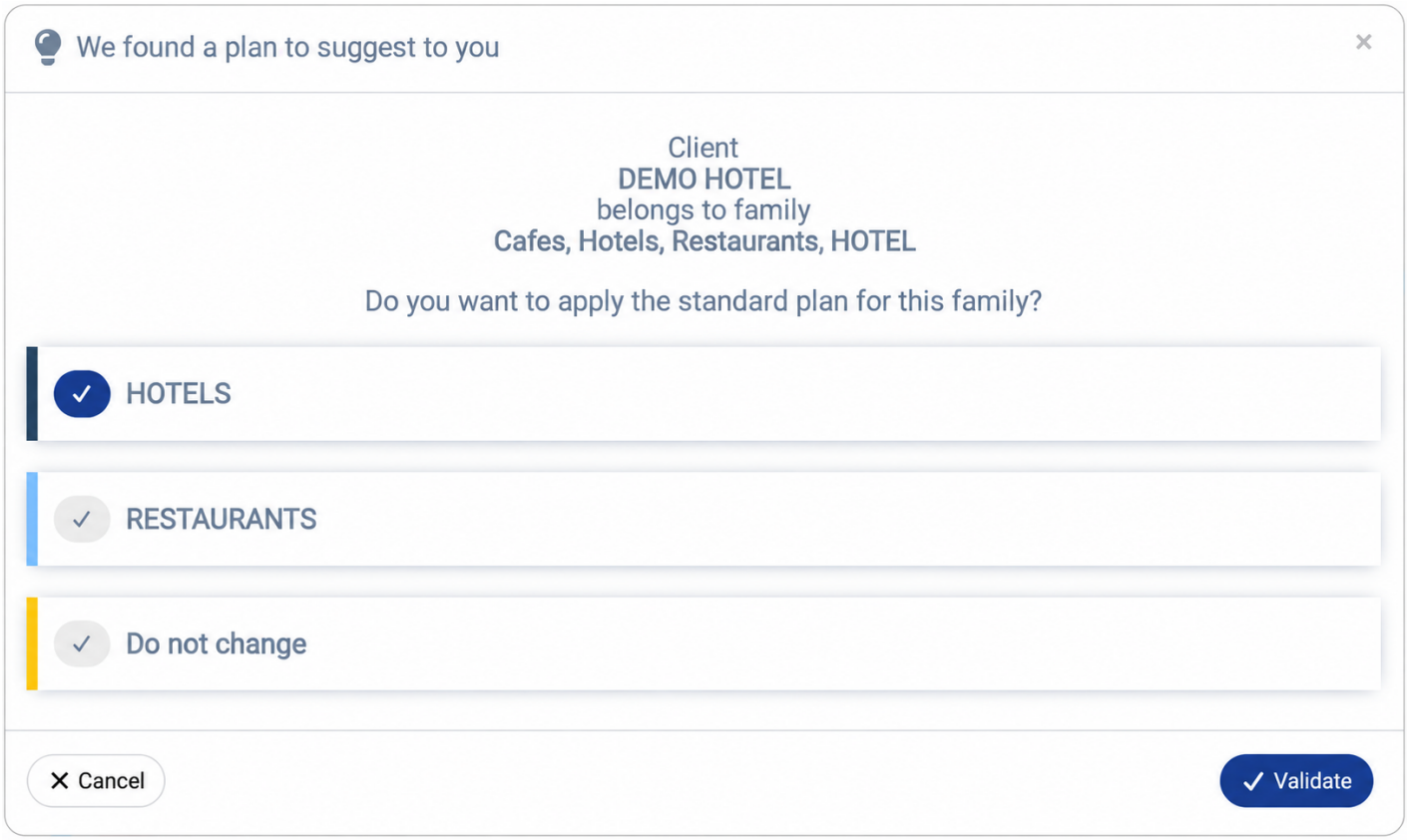
Expected result

The plan is prefilled from the selected template or continued without a template.

Remember

- A template is a starting point: remove elements absent from the site and adapt products to the customer’s actual consumption.

Illustrations



See also

- Import elements or an entire plan
- Create a complete library plan

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