CommBiz User Guide

Receivables: Creating Templates

About this guide

This guides takes you through the process of creating receivables templates. You can create templates for Direct Debit transactions, saving time on creating future transactions.

Important information

If you are unable to view or access Templates in CommBiz, please contact your Administrator to enable the permission.

Choosing how you create a template

You can create a receivables template in one of two ways:

- Option A: Save a payment transaction as a template: follow steps 1–6 below.

- Option B: Create a new template: follow steps 7–16 below.

Option A: Saving a receivables transaction as a template

1. Open your internet browser, visit **commbiz.com.au** and log into CommBiz.

2. On the top menu, click **Receivables > Direct Debit**.

3. Create your direct debit transaction as normal, and then simply click the **Save as Template** button. The transaction will be saved as a template and added to your list of available templates.

4. The 'Confirm Template' page is displayed. Check the template details and select **Confirm** to save the template.
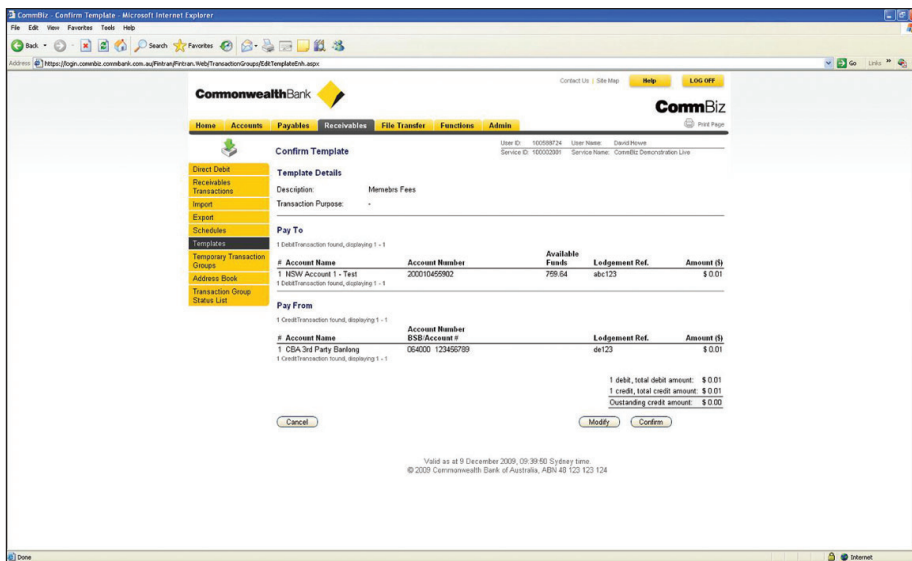

5. If the template details are incorrect, click **Modify** and complete steps 3–4 again.

6. To access that template for future transactions, just select **Templates** from the **Receivables** menu, and the list of available templates will be displayed.
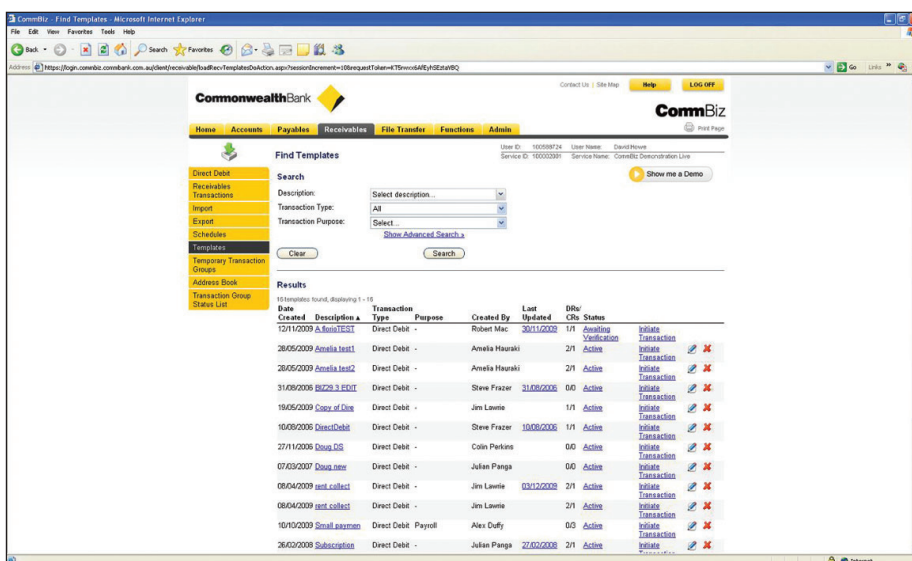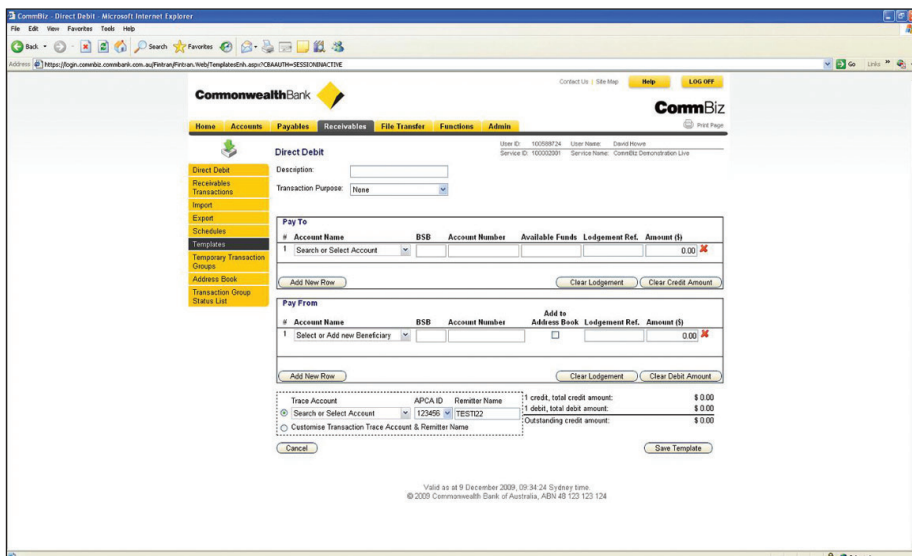
7. Open your internet browser, visit **commbiz.com.au** and log into CommBiz.

8. On the top menu, click **Receivables > Templates**. The 'Find Template' page is displayed:
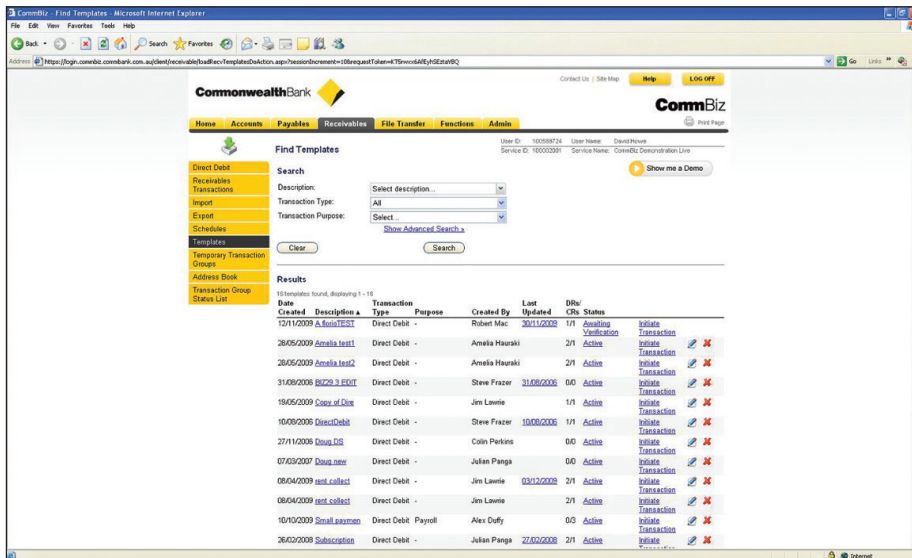

Note: All available templates previously created will be displayed.

9. Click the **New Direct Debit Template** button located at the bottom of the page. The 'Direct Debit Template' page is displayed.

10. Enter the information required in all the fields, then click **Save Template**. For more information about creating Direct Debit transactions, please refer to the CommBiz User Guide 'Receivables: Direct Debits'.

11. The 'Confirm Template' page will be displayed. Check the template details and select **Confirm** to save the template.
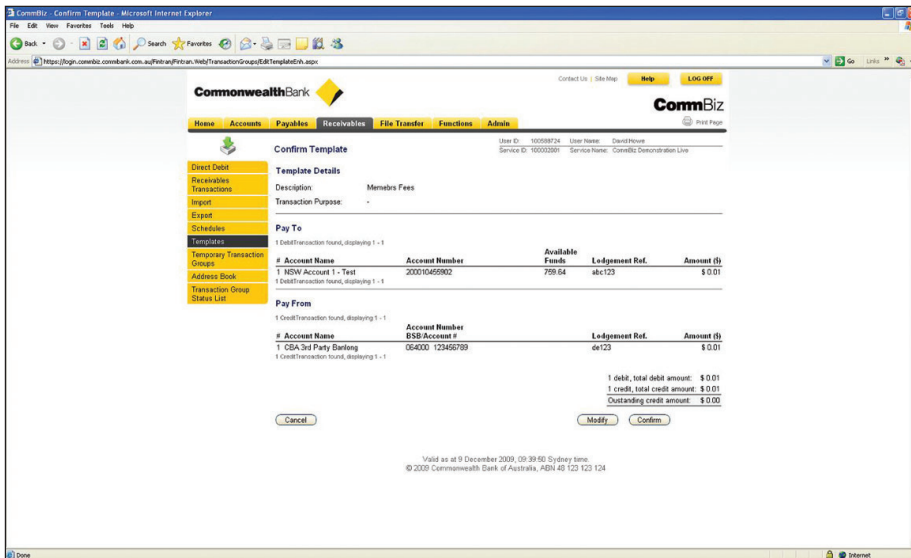
12. If the template details are incorrect, click **Modify** and complete steps 12–13 again.

13. Once confirmed, the template is added to your list of available templates.

14. To access the template for future transactions, just select **Templates** from the **Receivables** menu and the list of templates will be displayed.

Note: From the list of templates displayed, you have the option to copy or edit a template, or you can initiate a transaction using the template.