Comm**Biz** User Guide

Creating Templates: Payables

About this guide

This guides takes you through the process of creating payment templates. Templates help you reduce the time you spend creating transactions. You can create templates for Transfers, Direct Credit and BPAY 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 payment template in one of two ways:

• Save a payment transaction as a template: follow Steps 1–5 below.

• Create a new template: follow Steps 6–13 below.

Saving a payment transaction as a template

1. Open your internet browser, visit **www.commbiz.com.au** and log in to CommBiz.

2. On the top menu, click **Payables** then choose a payment type, such as Direct Credit.

3. Create your payment as normal, then simply click the **Save as Template** button.

4. The confirm template screen will be displayed. Check that the template details are correct and click the **Confirm** button to save the template.
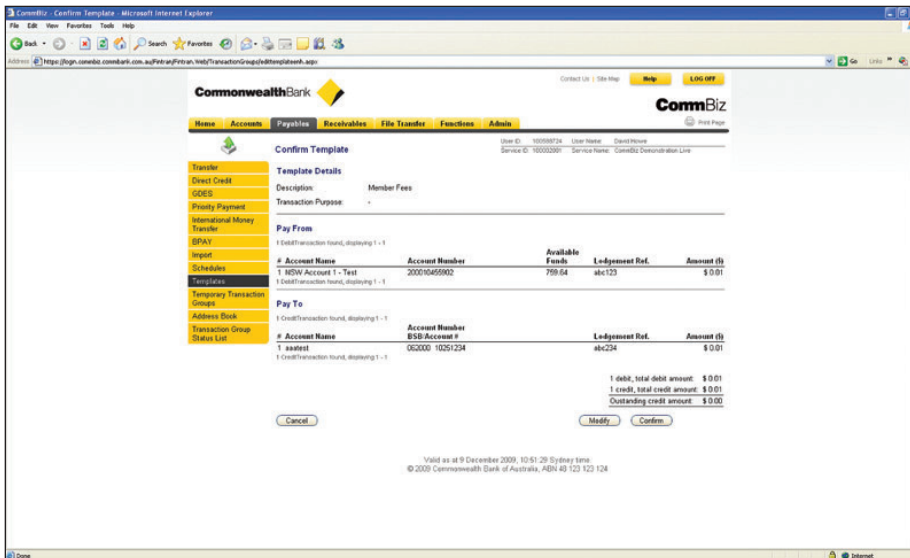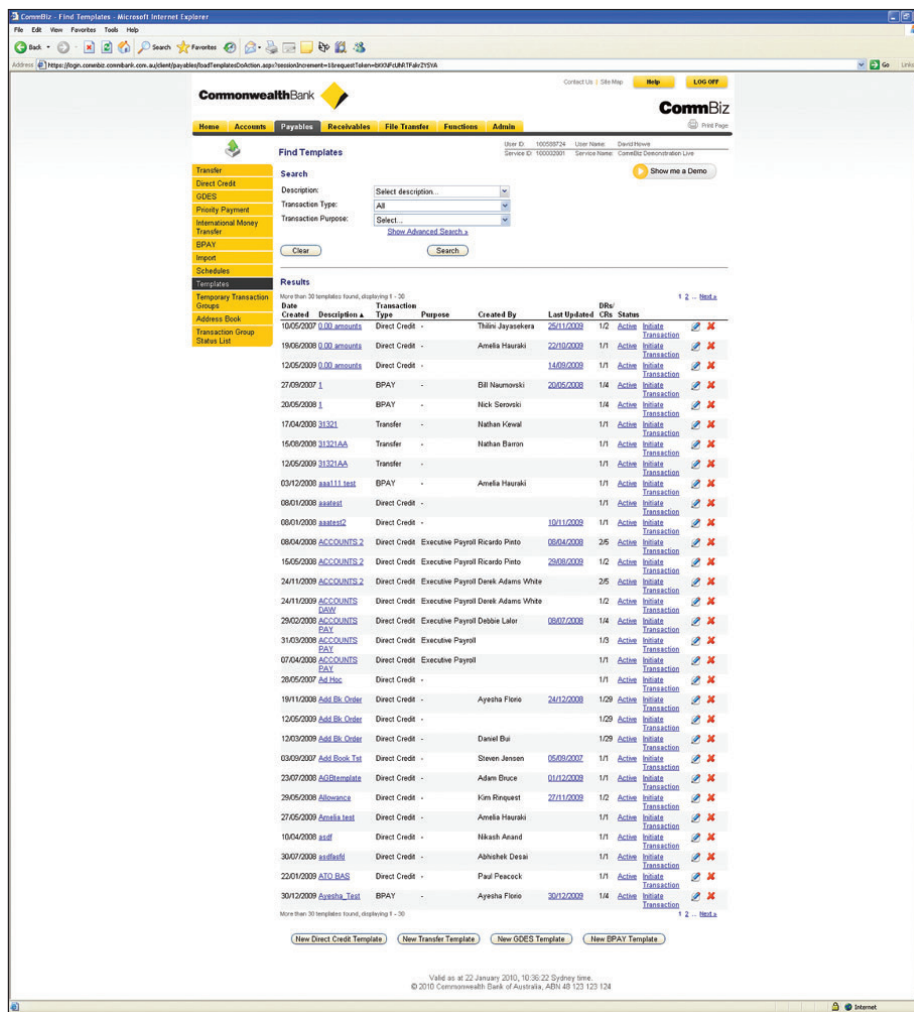

5. To access that template for future transactions, just select Templates from the Payables menu, and the list of available templates will be displayed.
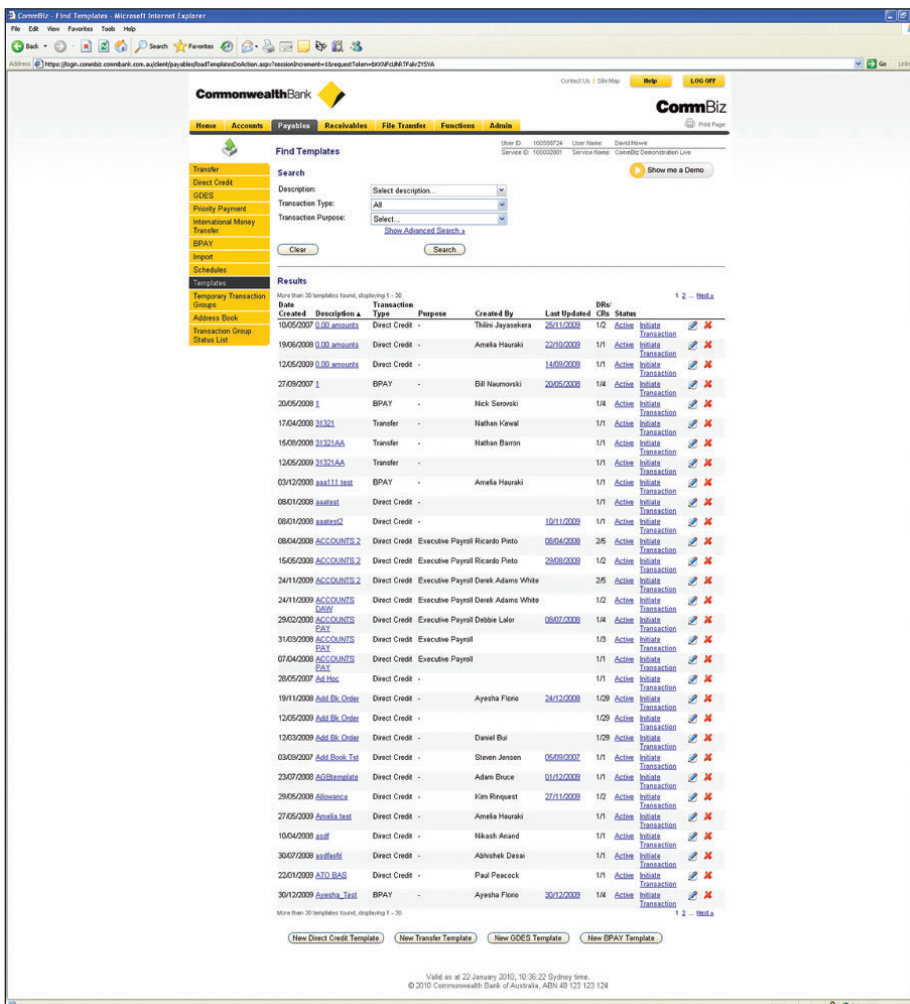
6. Open your internet browser, visit **www.commbiz.com.au** and log in to CommBiz.

7. On the top menu, click **Payables > Templates.**

   Note: All available templates previously created will be displayed.

8. Scroll to the bottom of the page, choose the type of template you wish to create and click the relevant button. You can choose from.

• New Direct Credit Template

• New Transfer Template

• New GDES Template

• New BPAY Template

• New Fast Payment

   Note: The process is almost identical for the four possible payment templates. Screen shots displayed below are for creating a Direct Credit Template.

9. Enter the information required in all the fields, and then click the **Save Template** button. For more information about creating payments, please refer to the CommBiz User Guides that cover each payment method in detail.

10. The Confirm Template screen will be displayed. Check the template details and click **Confirm** to save the template.

11. If the template details are incorrect, select **Modify** and complete Steps 9–10 again.

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

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

   Notes: 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.