

# How to Create Document Templates

## 1) Launch Document Dialog

The screenshot shows the PORTERS HR-Business Cloud interface. At the top, there's a navigation bar with 'Client', 'Recruiter', 'Job', 'Person', 'Resume', 'Sales', 'Process', and 'Activity'. Below that, a 'Job List (3)' section is visible, with a filter icon and buttons for 'Add New Job' and 'Bulk Action'. A search icon is on the left. The main area displays a table of job listings. The first job, 'Sample Job 03', is selected, and its context menu is open, showing options like 'Detail', 'Edit', 'Copy', 'Delete', 'Document', 'Email', 'Sublist', and 'Resume search'. The 'Document' option is highlighted with a blue box. A callout box points to this option with the text: 'As an example, we'll create a Job Description template from Job. Click the title of the job and select the "Document" from the action menu.' Below 'Sample Job 03' is another job listing, 'Sample Job 02', which is not selected. At the bottom right, there are links for 'Terms of Agreement', 'About PORTERS HR-Business Cloud', and a copyright notice: 'copyright © PORTERS Corporation All Rights Reserved.'

- ※ There is a possibility that the screen image might change.
- ※ In this manual, the default menus displayed are the default settings.  
To change the global menu display settings, please refer to the document "How to Customize the Global Menu".

## 2) Launch New Template Dialog

From the Document dialog, click the plus "+" button to create new template.

PORTERS Trial expires in 595 days Catherine Porters Apps ?

Client Recruiter Job Person Resume Sales Process Activity

Job List (3) Filter

Open(3) Close(0)

Sample Job 03 Matching Job Sent 2 Recon

Sublist

Sample Job 01 Matching Job Sent 1 Recon

Sublist

Sample Job 02 Matching 1 Job Sent Recon

Sublist

Job - Create PDF

Document Custom Document

PDF

Document Title, Content and Signature

Template +

Logo Image

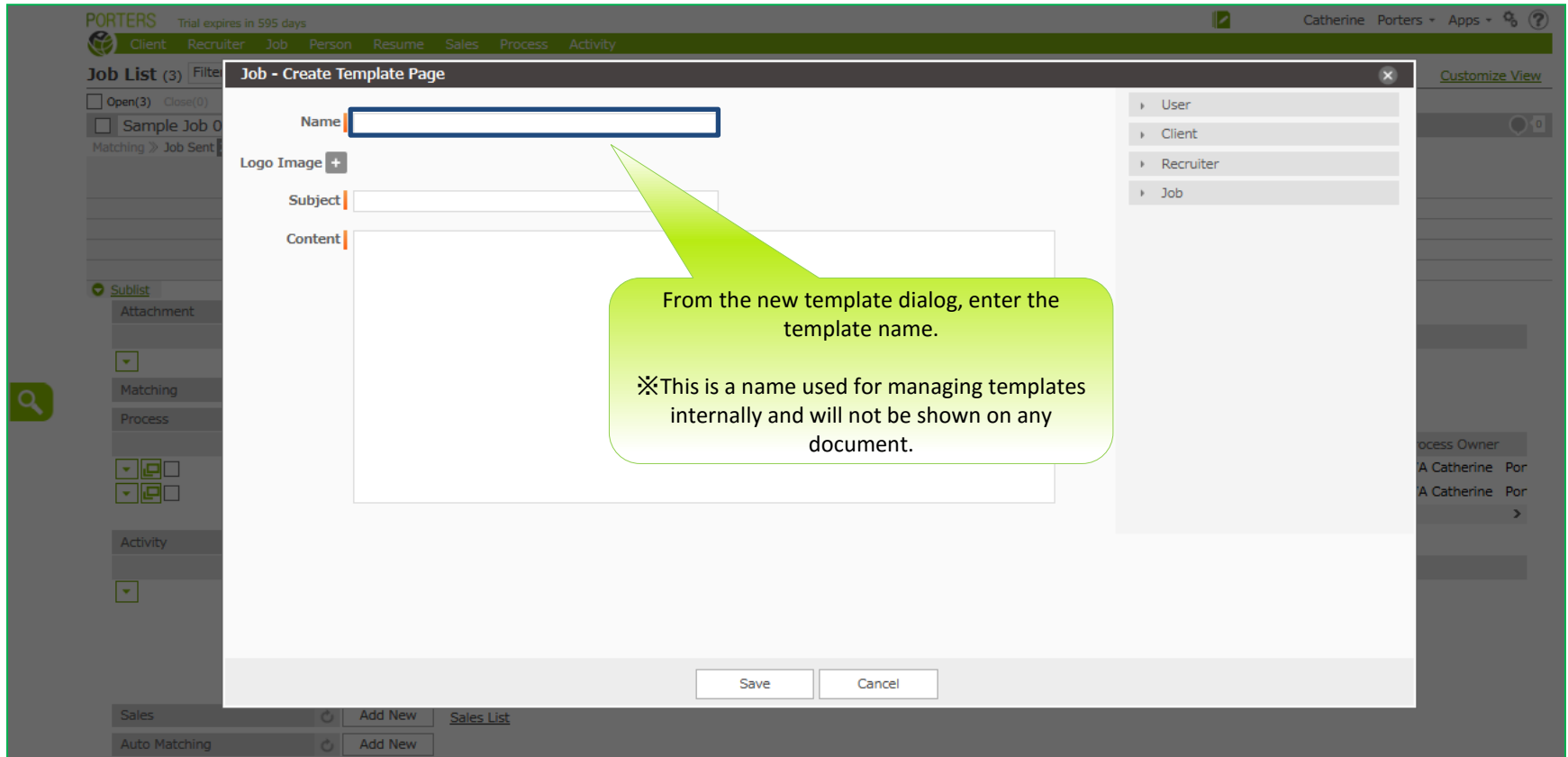
Document Title

Document Content

Preview Save Cancel

[Terms of Agreement](#) [About PORTERS HR-Business Cloud](#) copyright © PORTERS Corporation All Rights Reserved.

## 3) Template Name



PORTERS Trial expires in 595 days Catherine Porters - Apps - ?

Client Recruiter Job Person Resume Sales Process Activity

Job List (3) Filter

Open(3) Close(0)

Sample Job 0

Matching > Job Sent

Sublist

Attachment

Matching

Process

Activity

Sales Add New Sales List

Auto Matching Add New

Job - Create Template Page

Name

Logo Image +

Subject

Content

User

Client

Recruiter

Job

Customize View

Process Owner

A Catherine Por

A Catherine Por

Save Cancel

From the new template dialog, enter the template name.

\*This is a name used for managing templates internally and will not be shown on any document.


## 4) Template Logo

PORTERS Trial expires in 595 days Catherine Porters - Apps - ?

Client Recruiter Job Person Resume Sales Process Activity

### Job - Create Template Page

Name | Job Description

Logo Image 

Subject |

Content |

If you want to include the company logo, you can do that by clicking the Logo Image plus "+" button.

▶ User  
▶ Client  
▶ Recruiter  
▶ Job

Save Cancel

Sales Add New Sales List  
Auto Matching Add New

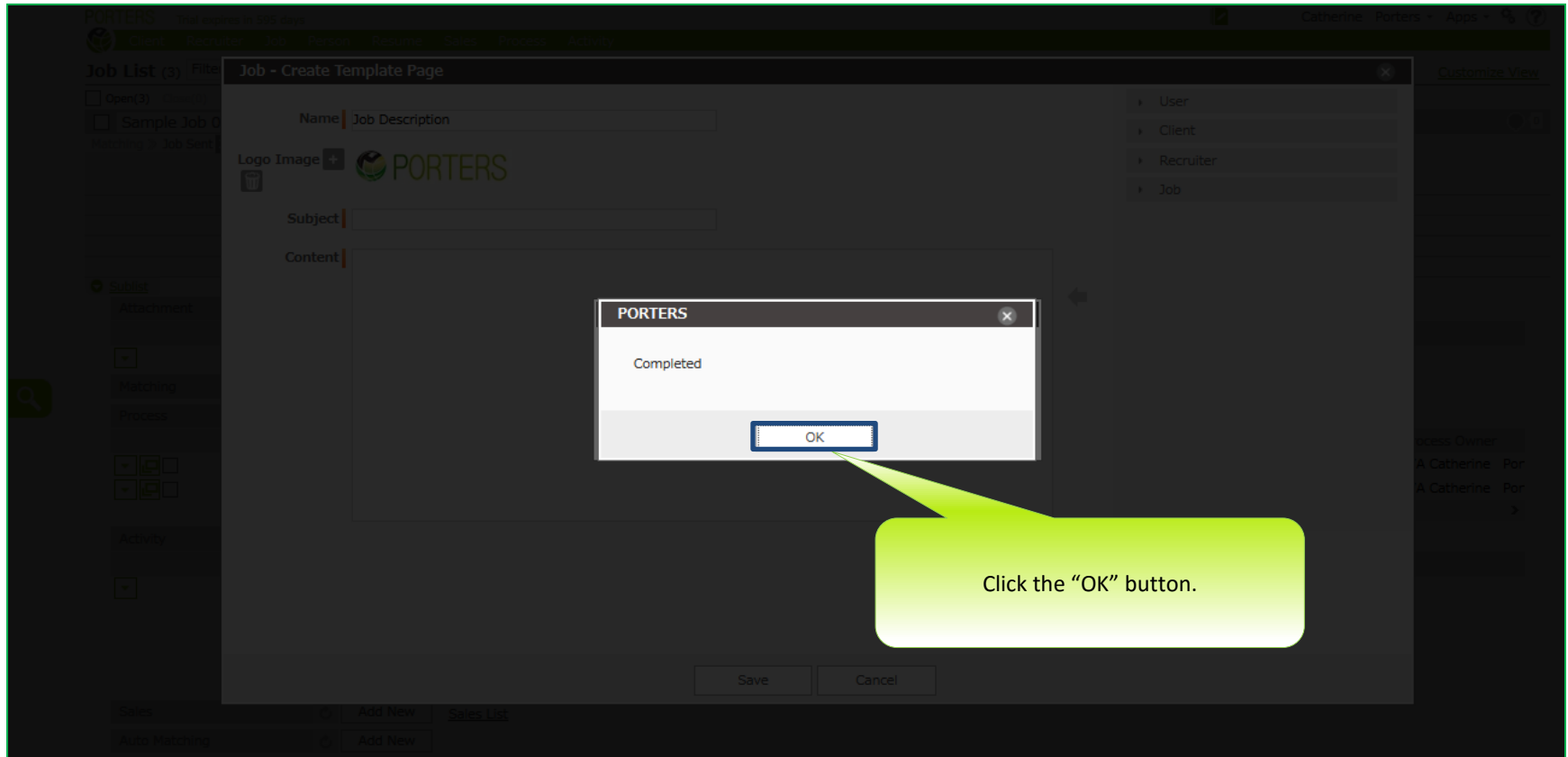
## 5) Browse Logo

The screenshot displays the PORTERS HR-Business Cloud interface. The main window is titled "Job - Create Template Page" and contains fields for "Name" (Job Description), "Logo Image" (with a plus icon), "Subject", and "Content". A yellow callout bubble with the text "Click the 'Browse' button and select the logo file." points to the "参照..." (Browse) button in the "Add Attachment" dialog box. The "Add Attachment" dialog shows a text input field with the Japanese text "ファイルが選択されていません。" (File not selected) and a "参照..." (Browse) button. The background interface includes a "Job List" sidebar, a top navigation bar with "Client", "Recruiter", "Job", "Person", "Resume", "Sales", "Process", and "Activity", and a right sidebar with "User", "Client", "Recruiter", and "Job" options.

## 6) Save Logo

The screenshot displays the PORTERS HR-Business Cloud interface. The main window is titled "Job - Create Template Page" and contains fields for "Name" (Job Description), "Logo Image" (with a plus icon), "Subject", and "Content". An "Add Attachment" dialog box is open, showing a file selection field with "ロゴ.jpg" selected. A green callout bubble points to the "Save" button in the dialog, with the text: "Once the logo file is selected, click the Save button." The background shows a sidebar with "Job List" and "Sublist" sections, and a top navigation bar with "Client", "Recruiter", "Job", "Person", "Resume", "Sales", "Process", and "Activity" tabs.

## 7) Confirmation





## 8) Subject

The screenshot displays the 'Job - Create Template Page' dialog box within the PORTERS HR-Business Cloud application. The dialog features the following elements:

- Name:** Job Description
- Logo Image:** A field containing the PORTERS logo, highlighted by a callout that says "The logo is added."
- Subject:** A text input field containing the placeholder text "[ JOB DESCRIPTION ]", highlighted by a callout that says "Please enter the 'Subject'. This will be displayed in the document as the title."
- Content:** A large empty text area for entering the main content of the job description.
- Buttons:** 'Save' and 'Cancel' buttons at the bottom of the dialog.

The background interface includes a sidebar with 'Job List (3)' and a top navigation bar with 'Client', 'Recruiter', 'Job', 'Person', 'Resume', 'Sales', 'Process', and 'Activity'. The user's name 'Catherine Porters' is visible in the top right corner.

## 9) Content

The fields or data shown in the job description can be adjusted. You can directly enter the Field name and the unique identifier directly. (example: "<Client:3-1001>")

※Please change the design based on your preference.

On the right side of the screen are the fields that can be used in creating the document template. Click the necessary fields that you want to include in the document.

The field tag will be reflected in the template content. But when creating the actual Job Description document, the actual data will be displayed.

## 10) Save Template

The screenshot displays the 'Job - Edit Template Page' in the PORTERS HR-Business Cloud application. The interface includes a top navigation bar with 'Client', 'Recruiter', 'Job', 'Person', 'Resume', 'Sales', 'Process', and 'Activity' tabs. A left sidebar shows a 'Job List' with 'Sample Job 0' and various filters. The main content area is titled 'Job - Edit Template Page' and contains the following fields:

- Name:** Job Description 1
- Logo Image:** PORTERS logo
- Subject:** [ JOB DESCRIPTION ]
- Content:**
  - Number of Employees : Sample Number of Employees
  - Position Information
  - Position : Sample Job 03
  - Job Category : Systems Analyst/Consultant,Project Manager,Application Development Engineer(Open Source),Application Development Engineer(Web/Mobile),Application Development Engineer(Design),Database Architect/Design

A callout bubble with a green background and white text points to the 'Save' button at the bottom of the form, stating: "Once the contents are set, click the 'Save' button." The 'Save' button is highlighted with a blue border.

## 11) Select Template

The Create Document dialog is displayed after creating the template.

If you want to use the newly created template, click the Template dropdown and select it from the list.

PORTERS Trial expires in 595 days Catherine Porters Apps ?

Client Recruiter Job Person Resume Sales Process Activity

Job List (3) Filter

Open(3) Close(0)

Sample Job 03 Matching Job Sent 2 Recon

Sublist

Sample Job 01 Matching Job Sent 1 Recon

Sublist

Sample Job 02 Matching 1 Job Sent Recon

Sublist

Job - Create PDF

Document Custom Document

PDF

Document Title, Content and Signature

Template + --

Logo Image

Document Title

Document Content

Preview Save Cancel

[Terms of Agreement](#) [About PORTERS HR-Business Cloud](#) copyright © PORTERS Corporation All Rights Reserved.

## 12) Template List

The screenshot displays the PORTERS HR-Business Cloud interface. A modal window titled "Job - Create PDF" is open, showing the "PDF" configuration section. The "Template" dropdown menu is expanded, and a new template named "Job Description 1" is highlighted in blue. A green callout box with a white border and a green arrow points to the new template, containing the text: "The newly created template is now available and can now be used." The background shows a "Job List" table with columns for ID, Matching, Process, and Activity. The table contains several rows of data, including "Sample Job 03" and "Job Description 1".

ID	Matching	Process	Activity
3			
10006			
10004			
10004			

## 13) Apply Template

Click the “Apply” button to use the template.

To edit the template, click the Pencil icon. And to delete the template, click the trashcan icon.  
✘ Deleted template can't be recovered.

The change is reflected in the content after clicking “Apply”.

**Job - Create PDF**

Document Title: [ JOB DESCRIPTION ]

Document Content:

- ++ Company Profile ++
- Client : Sample Client 01
- Business : Software/Information Processing,IT/Telecommunications
- Number of Employees : Sample Number of Employees
- ++ Position Information ++
- Position : Sample Job 03

Preview Save Cancel