

# Description Templates

## Overview

The **Description Templates** feature lets you build templates to automate the creation of descriptions based on item details. These templates are managed on a per category basis. Templates can be created for the following:

- Item Description
- Web Title
- Web Description
- Item Appraisal
- Item Tag

## Creating/Editing a Template

To create or edit an existing template:

1. Click **Inventory > Categories > List** and **Edit** the category.
2. Click on the **Description Template** tab.

The screenshot shows the 'Description Template' configuration window. On the left is a tree view of fields categorized into 'Category Fields', 'Item Fields', 'Item Details Fields (Group 1)', and 'Primary Stone'. In the center, there are radio buttons for selecting the template type: 'Item Description' (selected), 'Web Title', 'Web Description', 'Item Appraisal', and 'Item Tag'. Below the radio buttons is a large text area for editing the template, currently showing 'Currently working on: Item Description'. A 'Preview' section is located below the text area. On the right side, there are buttons for 'Insert', 'Revert', 'Undo', and 'Copy From'. At the bottom left, there are 'Add Stone' and 'Remove Stone' buttons.

3. The radio selections in the middle of the form control which template you are working with. Available options include:

**Item Description** The description that appears on the item record's **General** tab.

**Web Title** The web title that appears on the item record's **Website** tab.

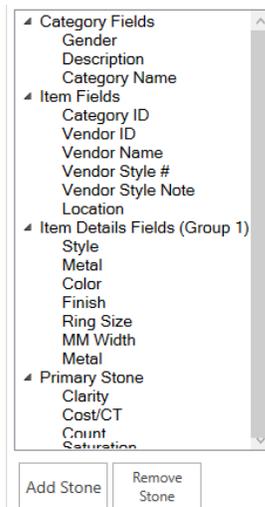
**Web Description** The description that appears on the item record's **Website** tab.

**Item Appraisal** The full description that appears on the item record's **Pre-Appraise** tab.

**Item Tag** The text that appears on the item tag for data type **Tag Template**.

**Meta Tag** The tags that appear in the **Meta Tags** field on the item's **Website** tab.

- Use the selector to choose a template. The list on the left shows all available data points. Note that by default only **Primary Stone** characteristics appear; to use data from additional stones, use the **Add Stone** button at the bottom.



- The **Value Only** checkbox in the center of the form controls whether to include just the data point's raw value or to also include a label. For example, if you had a stone with a TWT of 1.05 it would display as:

**Not Value Only** 1.05 TWT

**Value Only** 1.05

- When working with **Value Only** data points, you have the ability to add additional conditional text. We will explore this more in the example below.
- To begin building your template, select each data point you wish to include from the list in the left and either double click or use the **Insert** button.
- Each inserted data point will appear in the top part of the form and a **Preview** of the template's actual output will appear in the bottom. Additionally, you can type text directly into the template.

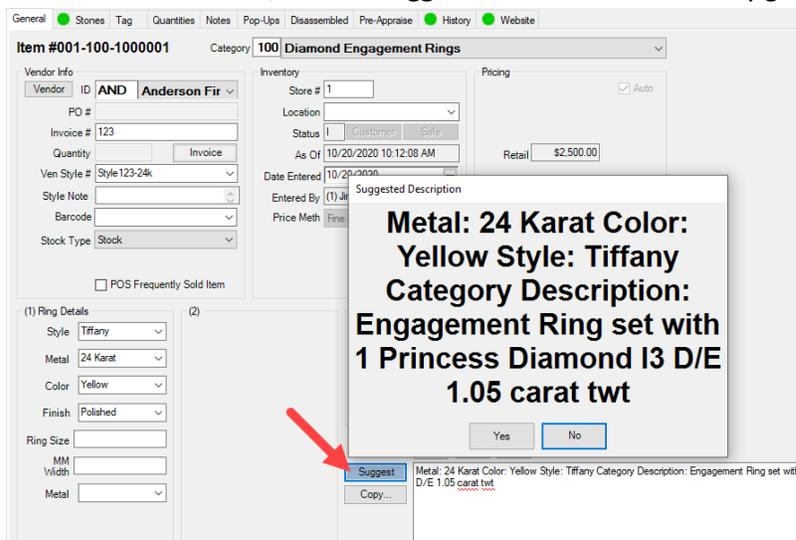
Currently working on: Item Description

```
{Detail Group 1.Metal} {Detail Group 1.Color} {Detail Group 1.Style}
{Category.Description} {set with {Primary Stone.Count}} {{Primary Stone.Shape}}
{{Primary Stone.Type}} {{Primary Stone.Clarity}} {{Primary Stone.Hue/Color}} {{Primary
Stone.TWT} carat twt}
```

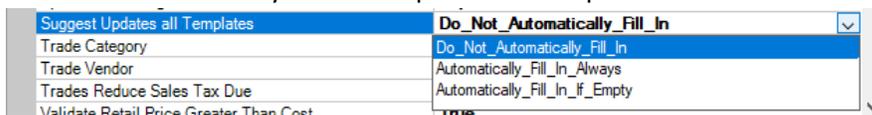
**Preview**

Metal: Platinum Color: Yellow Style: Antique Description: Engagement Ring set with One Emerald Diamond S13 Greenish Yellow 5.00 carat twt

9. Data points that are **Value Only** will appear here inside double brackets while those that include labels will be single bracketed. For those that are **Value Only**, conditional text can be inserted between the brackets.
10. In this example, stone weight was added as value only and originally appeared as **{{Primary Stone.TWT}}** in the template builder. The text “**carat twt**” was then inserted between the ending brackets: **{{Primary Stone.TWT} carat twt}**. In the preview, notice it now shows the weight as **5.00 carat twt**.
11. Text inserted between brackets will only appear if that data point exists. Using the above example, if the item had no primary stone weight, then the text “**carat twt**” would not appear.
12. Text inserted outside of brackets will always appear.
13. Once you have created templates for one category, you can use the **Copy To** button at the bottom to quickly apply this to multiple categories.
14. From the **Item Record**, use the **Suggest** button to automatically generate the text.



15. The system option **Suggest Updates all Templates** controls whether clicking **Suggest** on the item's **General** tab builds only that description or also updates the text on the **Pre-Appraise** and **Website** tabs.



## Notes

- The system option **Inventory Item Description Auto Suggest** can be set to **True** to automatically suggest the description when the item is saved.
- The **Description Generator (Inventory > Utilities > Description Generator)** can be used to retroactively apply templates to existing items. It allows you to select which items to update and which templates to apply.