

Creating Custom Templates from Existing Projects

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The information in this article applies to:



QUESTION




I finished developing a plan or layout file in Chief Architect and would like to use the file as a starting point for future projects. What is the best way to do this?

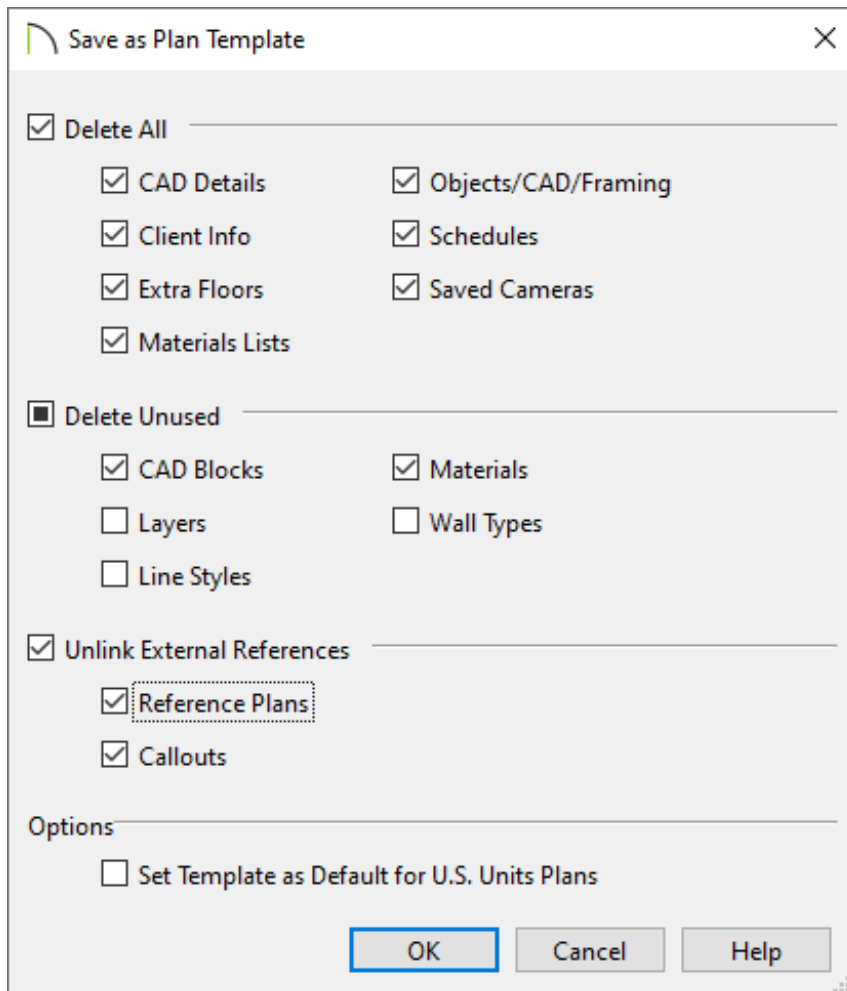
ANSWER

In Chief Architect, a Save As Template tool is available that allows you save a template file from an existing plan or layout file. This tool is useful as it provides the option to keep or delete a variety of items that are in the current file prior to creating the template.

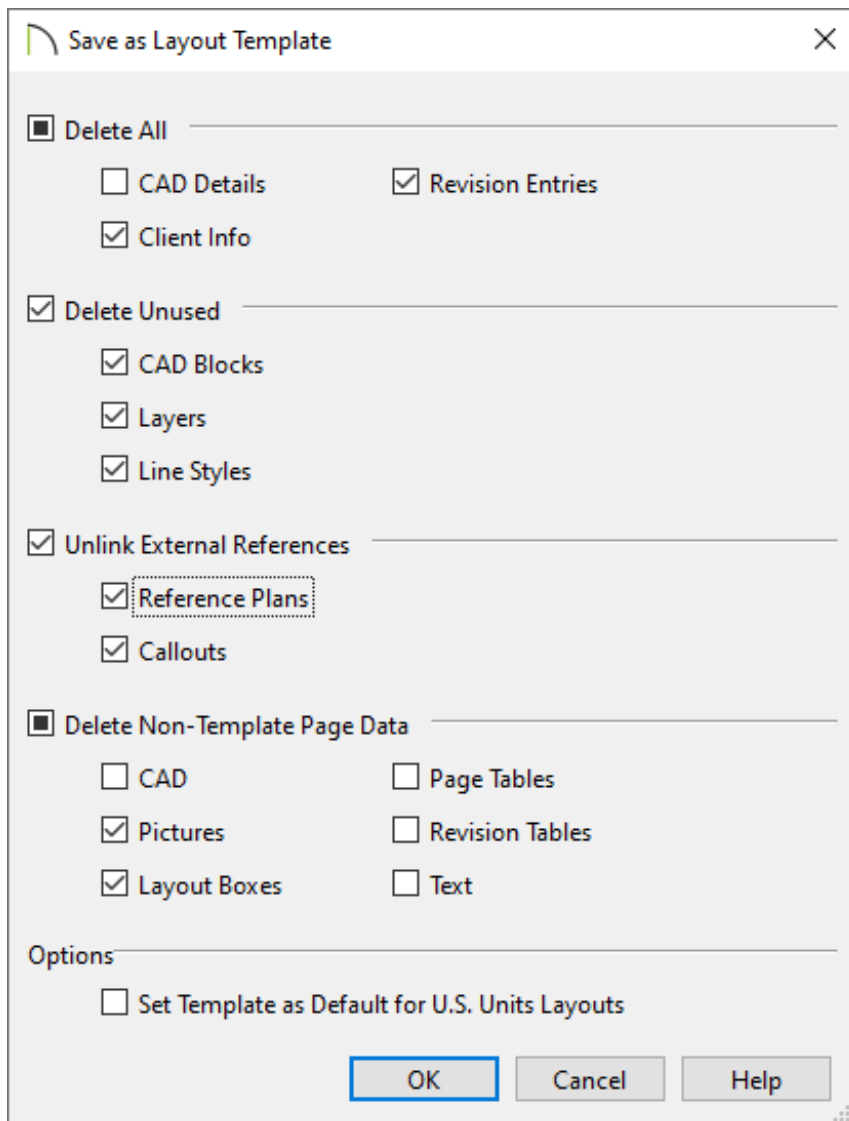
Note: Custom Plan and Layout Templates can also be created and setup to you liking using the default, out of the box, file(s). Please see the [Related Articles](#) section to learn more.

To create a custom template from an existing project



1. Select **Open Plan**  or **Open Layout** , then open the file you want to create a template from.
2. Select **File> Templates> Save As Template**  from the menu.
3. Determine what items you would like to keep in the template and de-select those boxes.



For layout files, **Non-Template Page Data** can also be deleted.





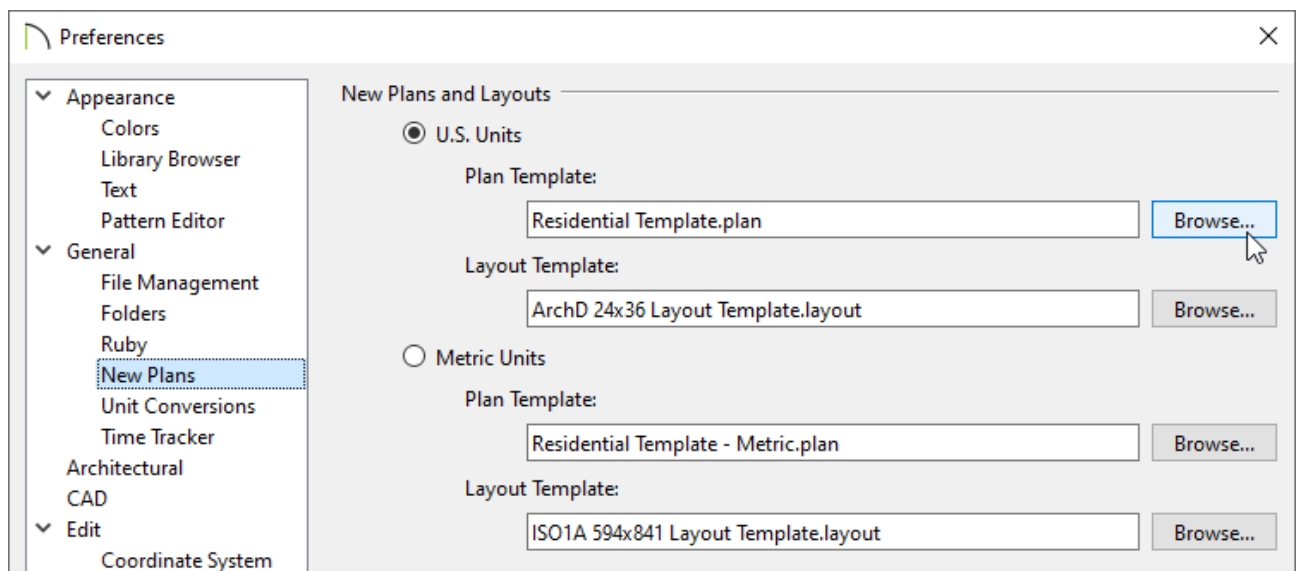
For more information on each of these options, click the Help button at the bottom of the dialog to open your program's Documentation.

4. Check the **Set Template as Default for Imperial/Metric Plans/Layouts** box if you would like this file to be the default template when you create a **New Plan**  / **New Layout** .
5. Click **OK** to get prompted to provide a name and location for the file.
6. When you click **Save**, the original file remains open, and a new file with the specified name and location is created.

If you didn't set this file to be your default template, or overlooked the option to set it as such, you can change this at anytime by accessing the program's Preferences.

To specify the default template(s)

1. Select **Edit> Preferences**  from the menu if you're on a Windows PC or **Chief Architect> Preferences**  if you're on a Mac.
2. On the **NEW PLANS** panel of the **Preferences** dialog, click the **Browse** button to the right of the Plan Template or Layout Template text field for your unit of measurement.



3. In the **Select a Plan/Layout Template File** dialog, browse to the location of your new template file and click **Open** to specify this file as your plan or layout template.
4. Click **OK** to close the dialog and apply your change.

Related Articles

[Creating and Using a Plan Template \(/support/article/KB-00463/creating-and-using-a-plan-template.html\)](/support/article/KB-00463/creating-and-using-a-plan-template.html)


[📄 Creating and Using Layout Templates \(/support/article/KB-00737/creating-and-using-layout-templates.html\)](/support/article/KB-00737/creating-and-using-layout-templates.html)

[📄 Group Selecting Objects \(/support/article/KB-00623/group-selecting-objects.html\)](/support/article/KB-00623/group-selecting-objects.html)

[📄 Troubleshooting Slowness in Chief Architect Plans \(/support/article/KB-00521/troubleshooting-slowness-in-chief-architect-plans.html\)](/support/article/KB-00521/troubleshooting-slowness-in-chief-architect-plans.html)



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