In Document Capture, the template card has a central role in recognizing the documents, and how the later registration and approval process is handled. Document Capture has three template types: Identification, Master and Source template. Source templates are linked to a specific record of a source table - for example a vendor. Document Capture uses a source template to recognize, validate, and register documents. In this session, you are introduced to the structure and the overall content of a source template for a specific vendor in the Document Category Purchase.
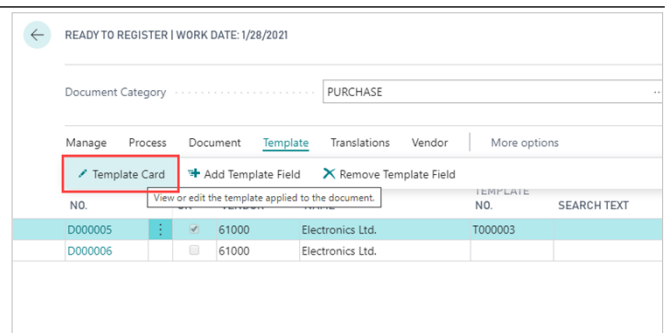
Let's look at the template number three, which is assigned to the vendor **Electronics Ltd**.
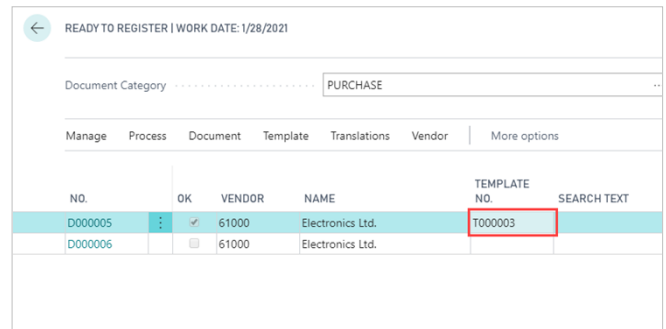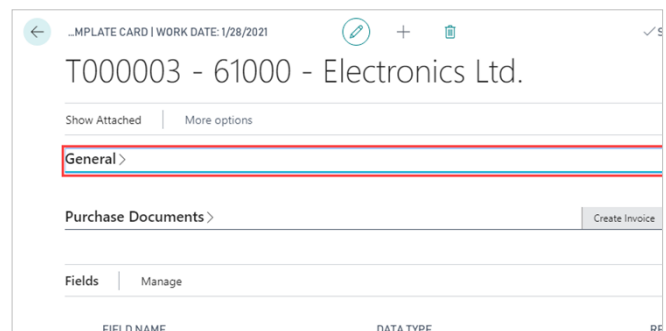
Select the action "**Template**" in the ribbon.
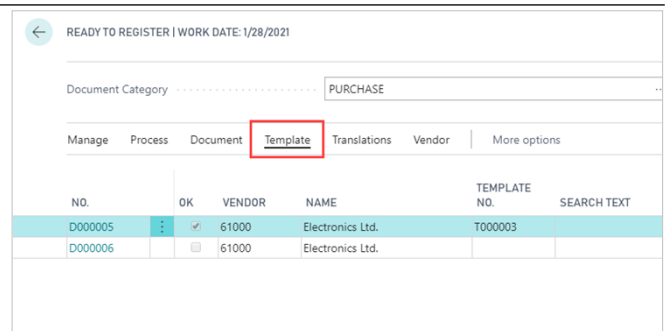
Select "**Template Card**".

In the template card, we have four fast tabs: General, Purchase Documents Fields, and Codeunits.

Let's start with the first fast tab on the page. Select "**General**" to expand the fast tab.

The "**Category Code**" is the name of the Document Category, which the template belongs to. This means that this source-specific template was created from a master template in the "**PURCHASE**" category.

In the field "**Data Type**", you can see which file type these templates are for.

Select "**General**" to collapse the fast tab.

Select "**Purchase Documents**" to expand the fast tab.
The "Purchase Documents" fast tab is divided into multiple sub-sections.

The section "**Registration**" concerns how the document is handled and checked when the activation of the Register Document action in the Document Journal.

In the next section, "**Approval**", you can apply the setting that takes effect in the approval process.

If "**Line Recognition**" in the General section is enabled, or you have already recognized the line in the document, this section is visible. Here the settings are related to the process of recognizing lines in the document.

When it comes to matching orders, the section "**Matching**" is where the key settings are found.

Just below the Matching section is the "**Line Matching**" parameters. These settings are only available if any line in the document is recognized or the Recognize Lines option in the General section is enabled.

Select "**Purchase Documents**" to collapse the fast tab.

The key part for recognizing document values is the fast tab "**Fields**". Here we have all the fields that are configured to find, or calculate values in the recognized documents.

The Fields section is split into two sub-sections. The top one contains the "**Header Fields**".

Below the Header Fields, we have the "**Line Fields**", which only are available if any lines in the document are recognized, or if the "Recognize Lines" option in the General section is enabled.

Select "**Codeunits**" to expand the fast tab.
The Codeunit fast tab enables you to apply your codeunits at specific events. The events found here allows the users to change the behavior on-demand by exchanging standard functionality with a custom made codeunit.

In cases where you like to modify the "**Line Capture**" functionality, just simply type the object number, or look up the codeunit by selecting the look-up button in the field. This is especially useful when you deal with a complex invoice layout.

In some situations, you want to activate a function, like notifying someone or process data, after the document is registered. This is easily handled by adding the new codeunit created to the specific purpose in the field "**After Step 1**".
Utilizing the codeunit fields, you can change how Document Capture functions from template to template. This enables you to start specific processes when certain data are recognized.

Select "**Back**" to return to the Document Journal.