

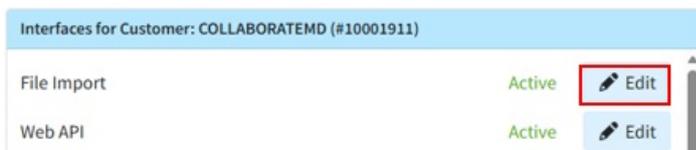
Manage Your Universal Import Templates

† Modified on 03/26/2026 1:35 pm EDT

Your saved Universal Import Templates can be viewed and managed from your interface settings. Follow these steps to view, delete, or copy a template to another customer.

Viewing Universal Import Templates

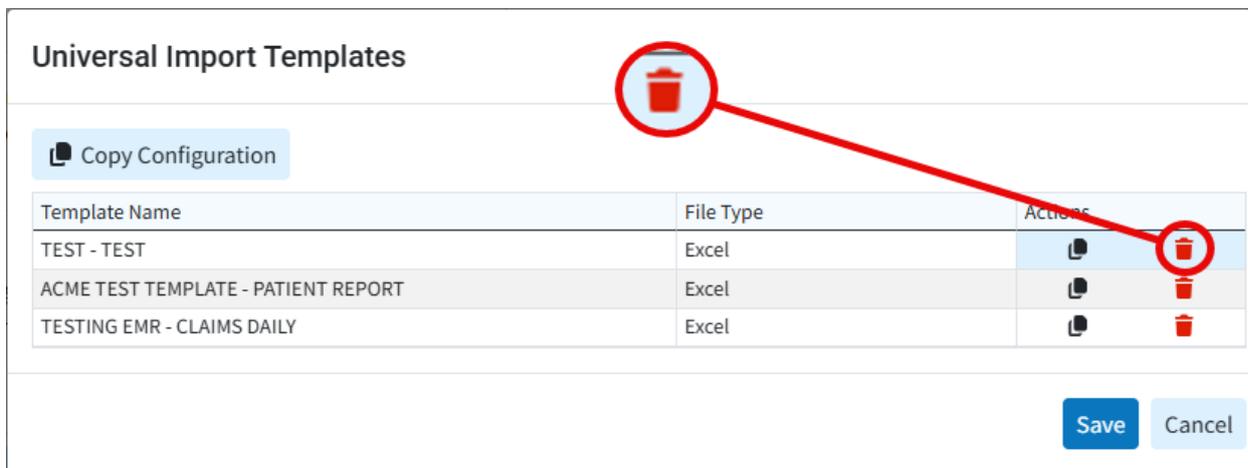
1. Select **Interface > Settings**.
2. Find the **File Import** interface and click **Edit**.



3. Click the **View Universal Import Templates** button.

Deleting a Universal Import Template

1. Find the template you want to delete from your list.
2. Click the **red trash can icon** to the right of the template name (under the **"Actions"** column).



3. Click **Save**.

Copy Your Universal Import Template Configuration

1. Find the template you want to copy from your list.
2. Click the black **copy** icon to the right of the template name (under the **"Actions"** column).

Universal Import Templates



Template Name	File Type	Actions
TEST - TEST	Excel	 
ACME TEST TEMPLATE - PATIENT REPORT	Excel	 
TESTING EMR - CLAIMS DAILY	Excel	 

Save **Cancel**

3. Select the customer(s) you wish to copy the configuration to by checking the box(es).

Select the customer you wish to copy configurations to.

Find in table ↑ ↓

<input type="checkbox"/>	Customer #	Customer
<input checked="" type="checkbox"/>	10000003	DEMO
<input type="checkbox"/>	10002359	COLLABORATEMD SUPPORT
<input type="checkbox"/>	10003112	CMD TRAINING

4. Click **Copy**.

5. Click **Save**.

 Need to copy all your templates? You can copy all your Universal Import Templates simultaneously instead of individually by selecting the "Copy Configuration" button and choosing the customer(s) to copy the configurations to.

Universal Import Templates



Template Name	File Type	Actions
TEST - TEST	Excel	 
ACME TEST TEMPLATE - PATIENT REPORT	Excel	 
TESTING EMR - CLAIMS DAILY	Excel	 

Save **Cancel**