
How do I add new default templates to the Project Wizard?

Last Modified on 02/21/2018 5:36 pm EST

GoFiler uses default templates based on the form type selected in the **Project Wizard**. GoFiler contains three default templates (for Forms 3, 4 and 5) that can be used as examples when creating your own templates. To add additional templates for other form types, follow the steps below.

1. Locate the Template directory. This is usually C:\Program Files\GoFiler\Templates\Project Wizard
2. Create a folder that is named the form type. For forms that end in "/A", remove the "/" character. For example, 10-Q/A would be 10-QA. Please note that forms N-1A and N-1/A create a conflict using this naming convention. For now default templates cannot be used for those form types.
3. Create a project of that form type in GoFiler.
4. Save the project in the folder created in step 2. The project file must be the same as the folder name.
5. Add any files or data to the project that you want to appear whenever a new project is created using the selected form type.
6. Save and close the project. The template is now complete.

Be mindful that, as with any pickup project, the files will be renamed if they contain the name of the project. This is important to note when creating templates because the name of the project file must be the form type.

This is an example of what will happen if a file name contains the name of the project file:

form10-q.htm becomes form:p:.htm

Note that the keyword code :p: is the Project Name specified in the wizard.