Creating Custom Templates from Existing Projects

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QUESTION

I finished developing a plan or layout file in Chief Architect or Home Designer 2026 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 and Home Designer 2026, 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 your liking using the default, out of the box, file(s). Please see the Related Articles section to learn more.
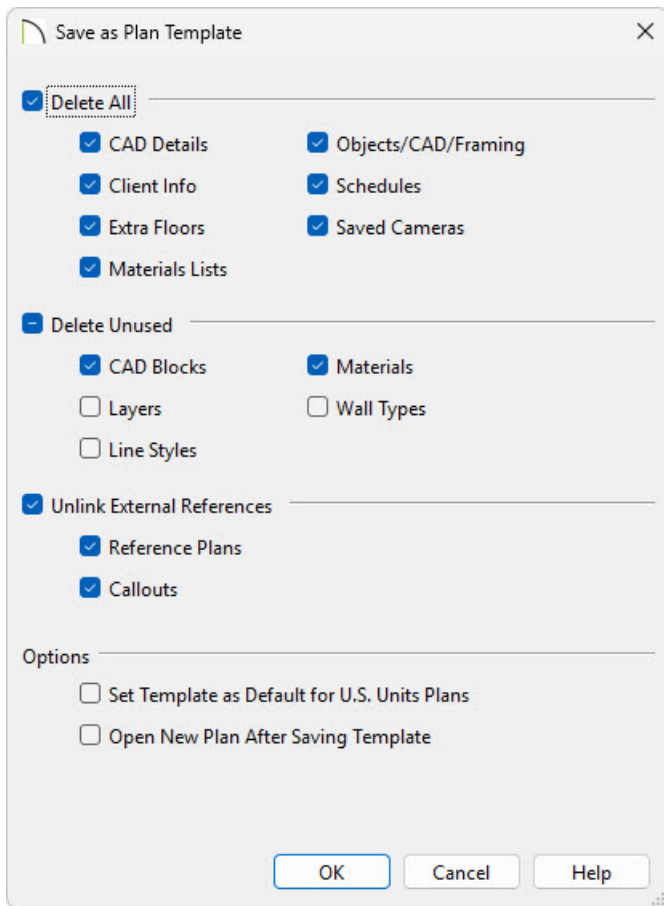
To create a custom template from an existing project

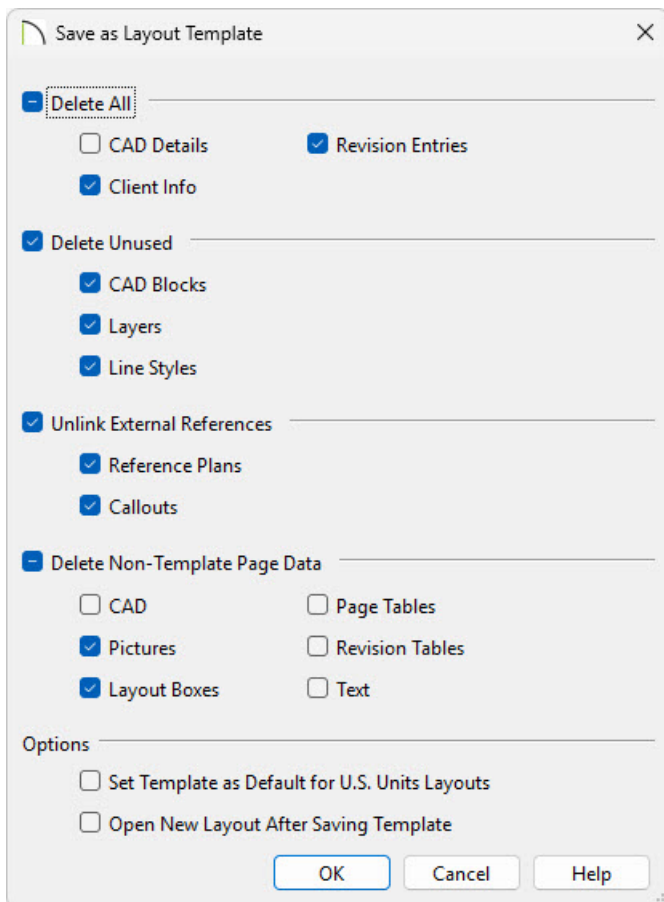1. With the file you'd like to create a template from, select **File> Save As Template** 🔳 from the menu.

   In X16 and prior, choose **File> Templates> Save As Template** 🔳 from the menu instead.

   > If you're using Project Management in X17, Home Designer 2026, or newer, you can also right-click on a plan/layout file within the Project Browser and choose "Save as Template".

2. 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.

3. 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** .

4. Check **Open New Plan/Layout After Saving Template** if you'd like to create a new plan/layout right away.*

   Applies to X17 and newer. The "Open New Layout After Saving Template" option is not available in Home Designer.

5. Click **OK**, give the new template a short, descriptive name, then click **OK**.

   In X16 and prior, or when using Traditional File Management in X17 or Home Designer 2026, give the new template a short, descriptive name, then click **Save**.

   > When using Project Management in X17 or Home Designer 2026, the template will be located in your Plan and Layout Templates folder within the Project Browser.
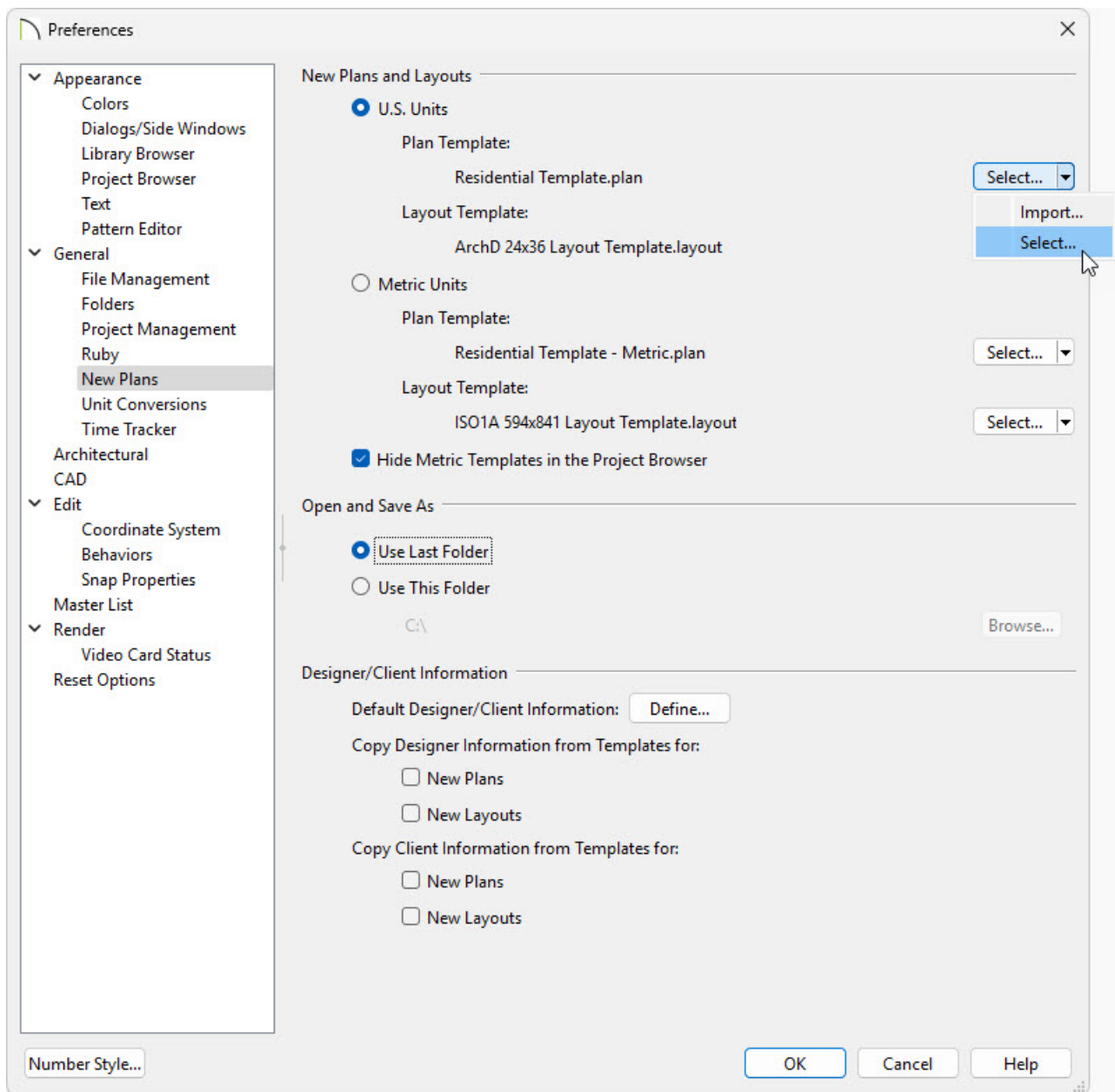   >
   > In X16 and prior, or when using Traditional File Management in X17 or Home Designer 2026, the program will automatically save the template to the program's Templates directory on your computer.

6. Once saved, 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/Home Designer> Preferences** if you're on a Mac.

2. On the NEW PLANS panel of the **Preferences** dialog:

When using Project Management in X17 or Home Designer 2026, follow the steps below:

○ Click the **Select** button to the right of the Plan/Layout Template option to open the **Select a Replacement Template** dialog.

  If you don't see the **Select** button, click on the drop-down arrow next to **Import** and then choose **Select**.

○ In the **Select a Replacement Template** dialog find the template you'd like to use, select it, and click **OK** to set it as your default template. If the plan/layout template you'd like to use isn't listed it's likely that it hasn't been imported into Project Management.

○ To import into Project Management, click on **Import**

  If you don't see the **Import** button, click on the drop-down arrow next to **Select** and then choose **Import**.

Additionally, you can use the Project Browser to import templates by right-clicking on the "Plan and Layout Templates" section in the Project Browser and choosing "Import Template(s)".

> You can also set a template as a default by right-clicking on it within the Project Browser and choosing "Use as Default Plan/Layout Template."

- In the **Select a Plan/Layout Template File** dialog, locate the plan/layout file you'd like to import, select it, and choose **Open**.

- Once it has been imported, repeat the initial steps above.

- Click **OK** to close the dialog. The Project Browser will display an icon beside the default template(s), as well as display a tooltip when hovering over the file(s).

In X16 and prior, or when using Traditional File Management in X17, follow the steps below:

- Click the **Browse** button to the right of the Plan/Layout Template text field for the unit of measurement you're using.

  If you don't see the **Browse** button, click on the drop-down arrow next to **Edit Path** and then choose **Browse**.

- In the dialog that opens next, browse to the location of your new plan/layout template file, select it, and then click **Open** to specify this file as your default plan/layout template.

- Click **OK** to close the dialog.

Now, when a new plan/layout or project is created, the file(s) specified in Preferences will be the default option.

Related Articles

Creating and Using Layout Templates (/support/article/KB-00737/creating-and-using-layout-templates.html)
Creating and Using Plan Templates (/support/article/KB-00463/creating-and-using-plan-templates.html)
Group Selecting Objects (/support/article/KB-00623/group-selecting-objects.html)
Troubleshooting Slowness in Chief Architect Projects (https://www.chiefarchitect.com/support/article/KB-00521/troubleshooting-slowness-in-chief-architect-projects.html)