Order Template Maintenance

This feature may require some implementation by Commerce Vision.

On this page:

Overview

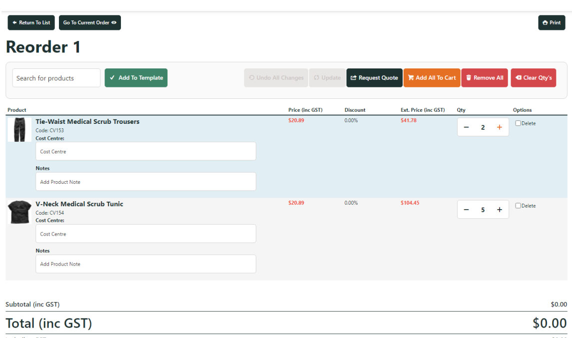
Template Maintenance provides CMS/Website Administrators 'backend' access to all order templates that have been uploaded for or created by your customers. Order templates contain lists of products ('order lines') regularly reordered on a Customer account or by a user. Users can easily edit the products and copy the order lines to their shopping cart. If a template is linked to a Customer account, purchasing users on that account can access the order template. Otherwise, it is available only by the named user (s).

At the backend, order templates are created from prepared csv files uploaded to the website by administrators. You can decide on the basic settings, e.g., should there be fields for cost centre info or notes, for the template. Existing order templates can be viewed, edited and deleted here.

(**NOTE -** Depending on access levels and template settings, and user role, users can edit order lines in individual templates. They can also remove *user templates* they created themselves as well as *company templates* created by other users that are set to allow deletion by all users. See: Order Templates.)

Example

Here is an example of an order template. The template looks similar to a shopping cart. But it contains saved order lines of selected products, each with a set reorder quantity, last checked price, and any system (ERP) discount (if enabled). Depending on how the basic template has been set up for the Customer or User, other fields such as for cost centre information and notes, may also be included.



Set up Order Template Maintenance

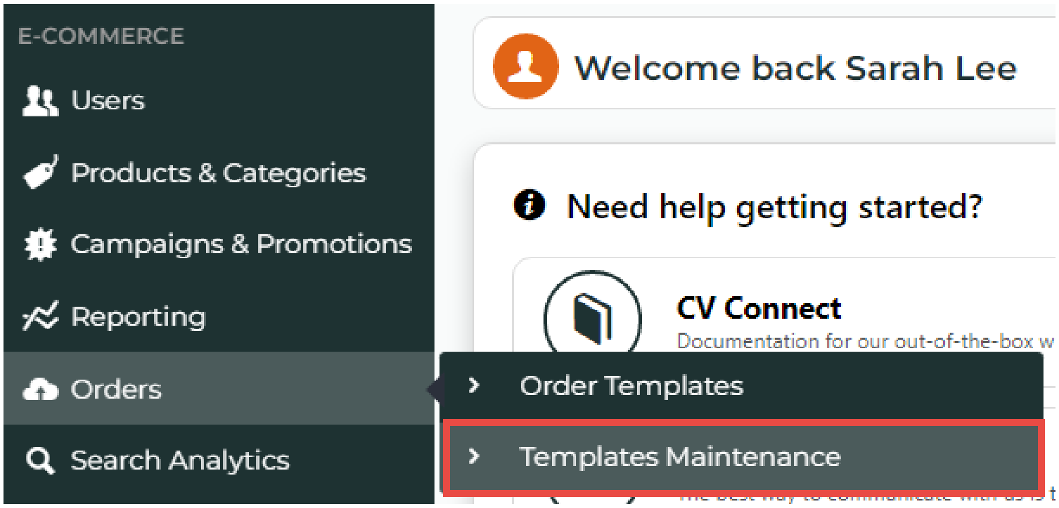
This step may have been implemented by Commerce Vision. If you can see the 'Template Maintenance' and 'Order Templates' menu items, go to Create an Order Template.

Prerequisites

These two pages need to be added as an Administrator's menu item on your website and in the CMS. Add to the website first, then in the CMS. For instructions, see: Add a New Menu Item and Add a page to the CMS menu.

1. Import Templates (zImportTemplates.aspx)
2. Template Maintenance (zTemplatesMaintenance.aspx)

Once the pages are added, you can access **Template Maintenance** on the CMS navigation menu. You can also access it while logged into the website. **NOTE -** The locations of menu items will depend on where they have been added. In the example, they have been added to the 'E-Commerce' submenu in the CMS.

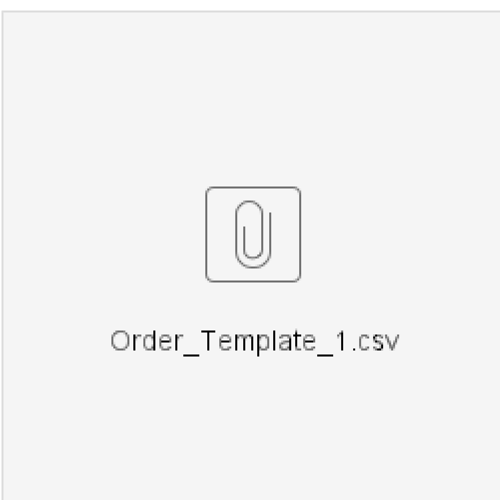


Create an Order Template

This step is for Admin users to create and upload an order template. If a Role for a Customer has been enabled for Order Templates, applicable users can create their own order templates.

At the backend, an order template is created and uploaded through a CSV file. The first row of the CSV file must contain the field names needed for the template. Each additional row contains data, e.g.,product, quantity, user, customer, etc, for the reorder template. Some fields are mandatory. If not present, the upload will display an error.

You can download this example template with all mandatory fields and add data rows as needed. You can also add optional fields to it.



Example

This is an example with all mandatory fields and two rows of data.

	A	B	C	D	E	F	G	H	I	J	K
1	ProntoSalesOrderLine.SolLineT	SoCustCode	SoCustReference	SoUserIdCode	CompanyTemplate	AllowTemplateBillTo	ProntoSalesOrderLine.StockCode	ProntoSalesOrderLine.SolOrderedQty	ProntoSalesOrderLine.SolLineDescription		
2	S	AACAB	Reorder 1	jane.smith.cv123@	N	N	CV153	2	Test Product 1		
3	S	AACAB	Reorder 1	jane.smith.cv123@	N	N	CV154	5	Test Product 2		

Field Information

Mandatory fields

ProntoSalesOrderLine.SolLineType, SoCustCode, SoCustReference, SoUserIdCode, CompanyTemplate, AllowTemplateBillTo, ProntoSalesOrderLine.StockCode, ProntoSalesOrderLine.SolOrderedQty

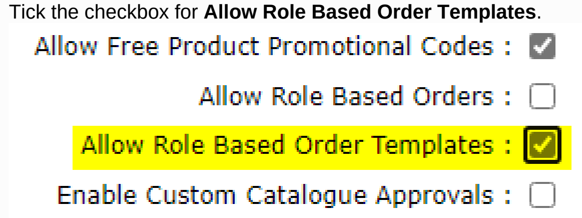
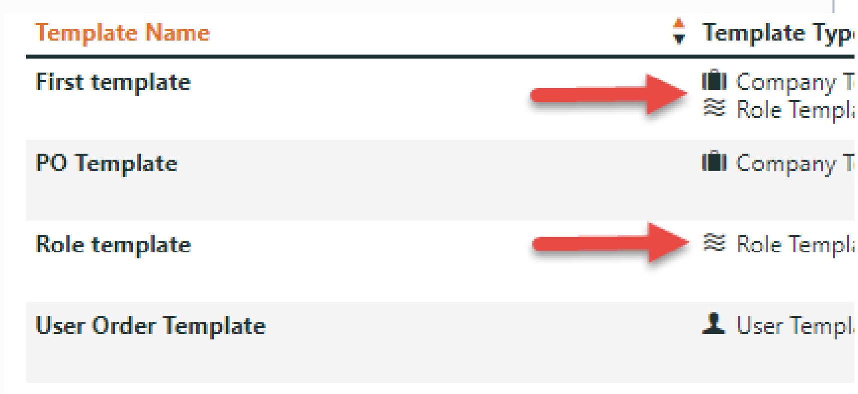
Optional fields

ProntoSalesOrderLine.CostCentreCode, ProntoSalesOrderLine.SolLineDescription, UserRoleWhenOrderTemplate

Field Descriptions:

Field	Value	Comment
ProntoSalesOrderLine.SolLineType	Line type. 'S' = Stock; 'N' = Note	S is used for a product order line.
SoCustCode	Customer Code this template is for	Unique code of customer this template is linked to.
SoCustReference	Template name	Unique name that describes the template. Template of the same name as for existing one can be used to overwrite.
SoUserIdCode	User ID	Unique User ID login.
CompanyTemplate	'Y' or 'N'.	Y if this is a company template. If N, this template will be a user template. See: Configure Company Template options.
AllowTemplateBillTo	Allow bill to? Enter 'Y' or 'N'.	Y only if this feature is enabled for the Customer.
ProntoSalesOrderLine.StockCode	Product code	Unique code that identifies a product.
ProntoSalesOrderLine.SolOrderedQty	Default quantity	Quantity displayed when template is first accessed.

Optional fields:

Field	Value	Comment
ProntoSalesOrderLine. CostCentreCode	Cost centre code	The Cost Centre feature must be enabled and configured for the Customer.
ProntoSalesOrderLine. SolLineDescription	Product note	Add an input field for each order line to allow entry of notes.
UserRoleWhenOrderTemplate	Role name. Enter an existing Role or 'None'. This allows templates to be limited to the Users in a specific Role.	The **Allow Role Based Order Templates** flag for the Role must be enabled. 1. Go to **Users Role Maintenance**. 2. Click the radio button next to the required Role. 3. Click the **Functions** tab. 4. Click **Modify**. 5. Tick the checkbox for **Allow Role Based Order Templates**.  6. Click **OK**. Both company and user templates can be saved for a specific Role. 

Adding Whole Order Note Lines

Contact Commerce Vision to implement this non-standard note input feature. Once implemented, you can add whole order note lines in various places on the page. They can also be used for inserting breaks or as headings in the template.

To create a whole order note line (instead of a product line), override the normal product line processing using the following format.

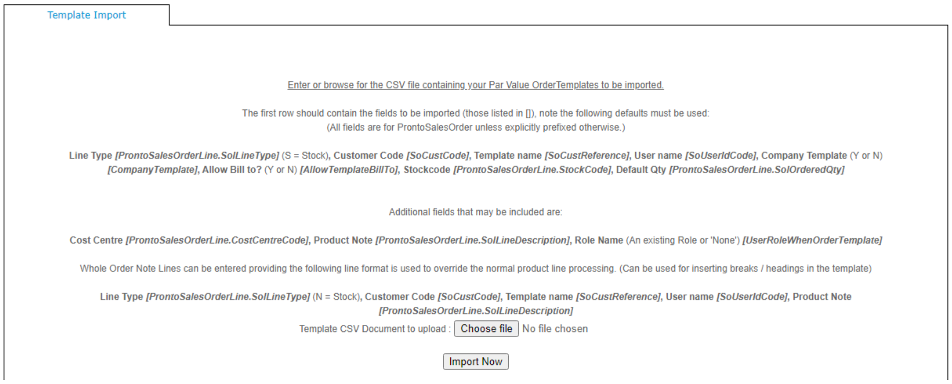
Instead of a product (stock) line, enter the following:

Line Type *[ProntoSalesOrderLine.SolLineType]* (Enter 'N')**, Customer Code *[SoCustCode]*, Template name *[SoCustReference]*, User name *[SoUserIdCode]*, Product Note *[ProntoSalesOrderLine.SolLineDescription]***

Import an Order Template

You must have the order template CSV file ready for upload.

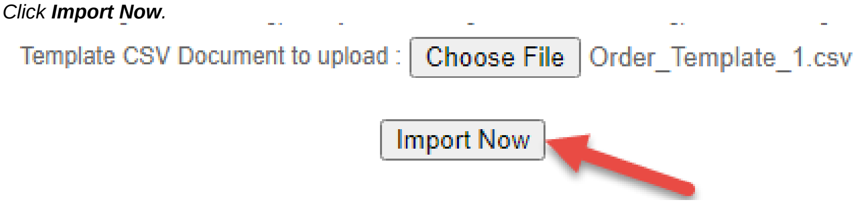
1. *In the CMS, navigate to **Orders Order Templates**. (**NOTE -** 'Order Templates' may have been named something else, e.g., 'Import Templates'.)*



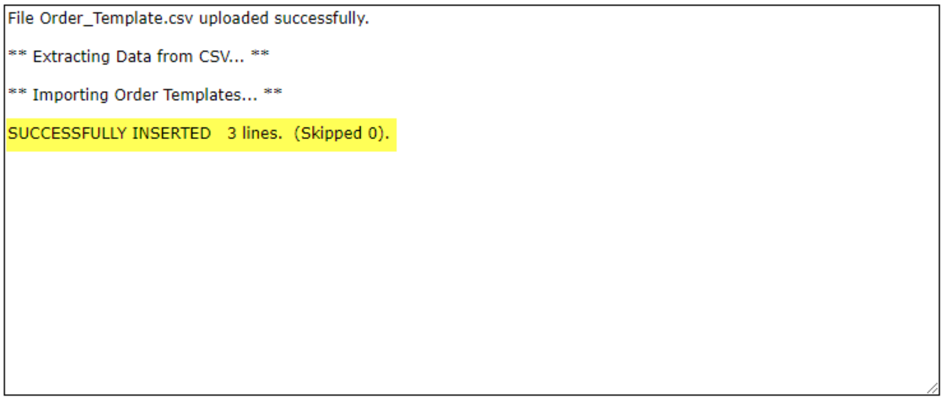
2. *To upload the order template csv file, click **Choose File**.*

3. *At the bottom of the page, select either **New/Replace existing template** (default) or **Append to existing template**. 'New/replace' will overwrite a template with the same name. 'Append' will add any new rows to the existing file.*

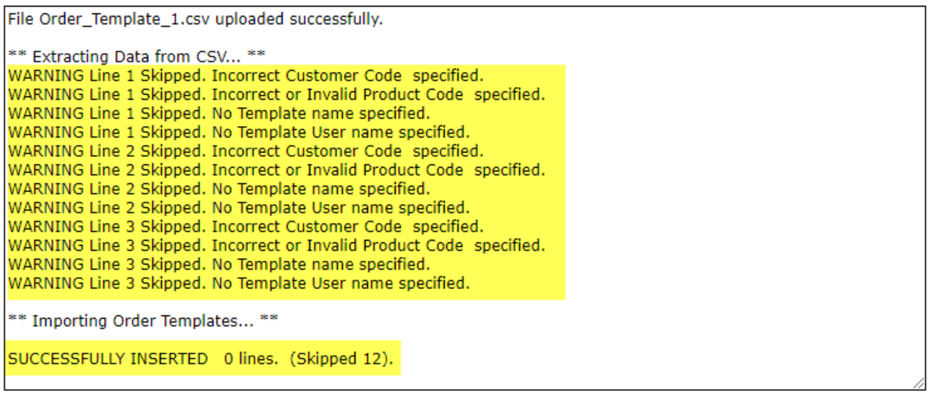
4. *Click **Import Now**.*



*Success and/or error messages will be displayed in the box on completion of the import. **NOTE -** Upload can also be partially successful. Just check 'Successfully Inserted' for the number of lines added and skipped.*
Successful



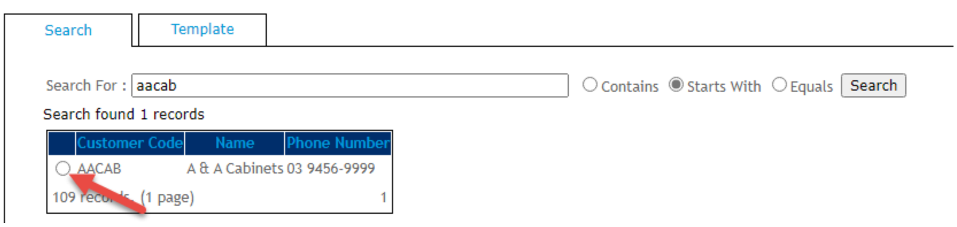
Unsuccessful



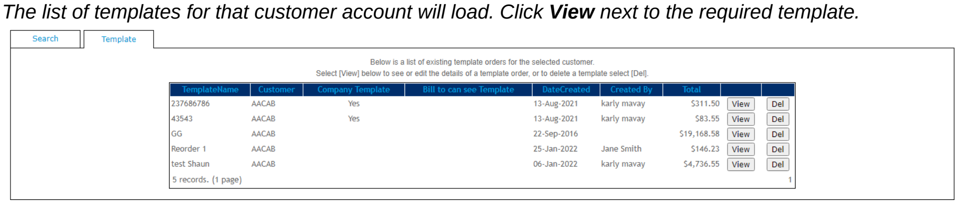
Edit Contents of an Order Template

An order template can be edited in the CMS or on your website. **NOTE -** Depending on settings, users with access to a template can also edit it through their Dashboard menu.

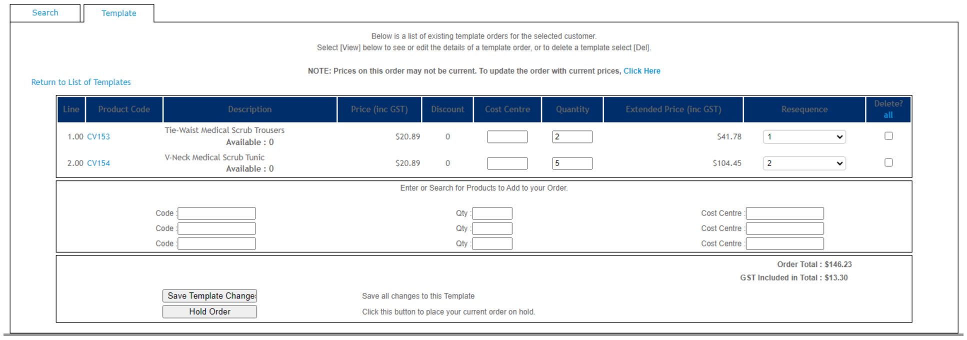
1. *In the CMS. go to **Orders Template Maintenance**.*
2. *Enter the **Customer Code** linked to the template for, then click **Search**. **TIP -** To display all templates on your website, just click **Search** without entering anything.*
3. *To select a customer, click its radio button.*



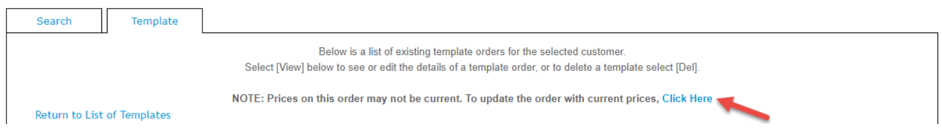
4. *The list of templates for that customer account will load. Click **View** next to the required template.*



5. ***Edit** the template as needed. You can edit quantities, resequence product order lines, delete products and add other products.*



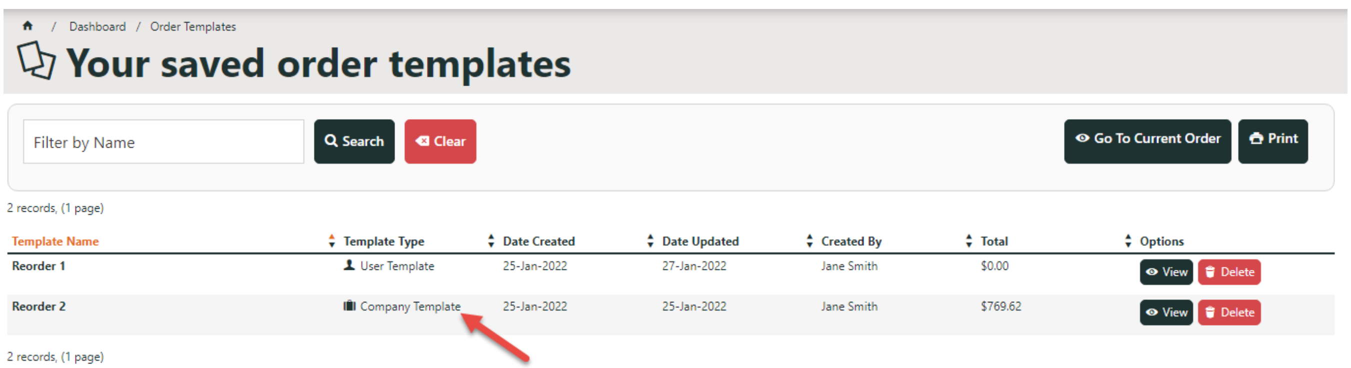
6. *You can also update the template to display the latest prices for listed products. To update prices, click '**Click Here**'.*



7. *Click **Save Template Changes** at the bottom of the grid.*

Configure Company Template Options

An order template can be saved as a user or company template. A user template can only be accessed, edited and used by the template creator (or if created by the Admin, the user named). A company template can be accessed by all users on the same Customer Code (if they have a Role that allows Order Template access). In the Saved Order Templates list, the Template Type is specified.



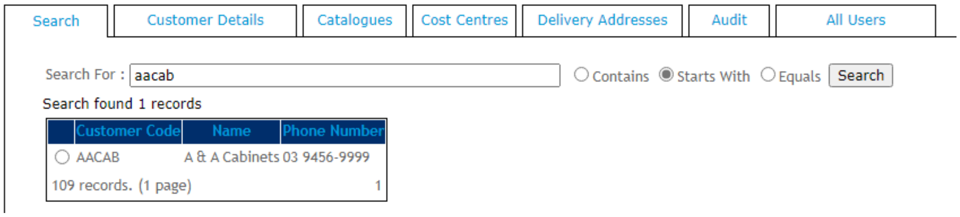
One of two usage options for Company Templates must be configured for each Customer user. Option 2 allows more permissions for non-creator users.

OPTION 1	OPTION 2
User can create, view and use company templates. User can delete a company template only if they created it. User cannot save changes to company templates.	User can create, view, use and save changes to company templates. User can delete any company template.

To allow an order template to be saveable as a Company Template, at a minimum, the "Allow Creation of Company Order Templates" must be enabled on a Customer and User Customer records.

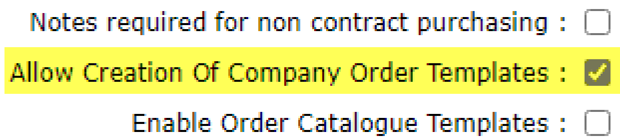
For both options:

1. In the CMS, go to **Users** **Customer Maintenance**.
2. Use the **Search** tool to find the Customer, and click the radio button next to it.

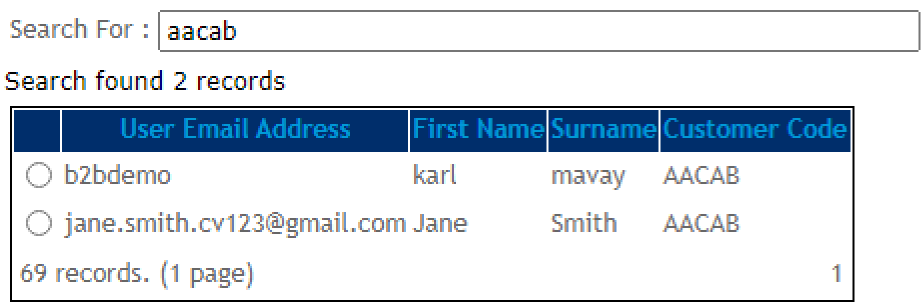


3. Click the **Customer Details** tab.
4. Click **Modify**.

5. Scroll down to ***Allow Creation of Company Order Templates*** and tick the checkbox.

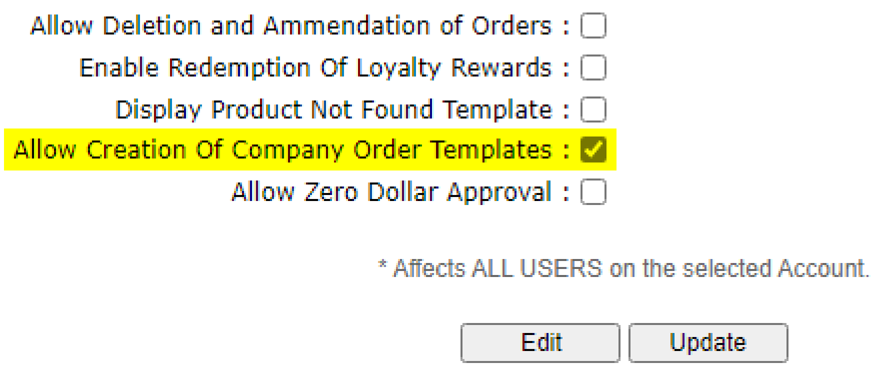


6. To save, click **OK**.
7. Go to **Users** **Advanced User Maintenance**.
8. User the **Search** tool to find the **Customer Code**. All users on this account are listed.



9. Click the radio button next to the user.
10. Click **Modify**.
11. Select the **Accounts** tab.
12. If the user is on more than one Customer account, make sure the same customer is selected.
13. Click **Modify**.
14. On the **Limits** tab, click **Edit**.

15. *Tick **Allow Creation of Company Order Templates .***



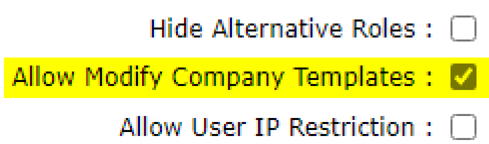
16. *Click **Update**.*

This completes configuration for OPTION 1.

> ⚠ For Option 2, the "Allow Modify Company Templates" must be enabled on the User record.

For Option 2, there is one more setting.

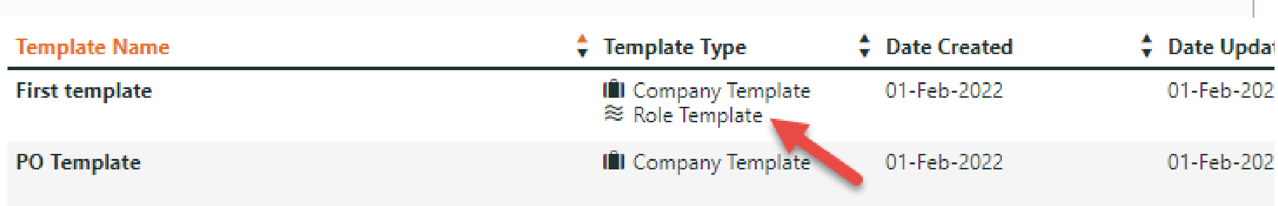
1. *Go to **Users User Maintenance**.*
2. *Use the **Search** tool to find the user.*
3. *Select the radio button next to the user.*
4. *Click **Modify**.*
5. *Scroll down to **Allow Modify Company Templates** and tick the checkbox.*



6. *Click **OK**.*

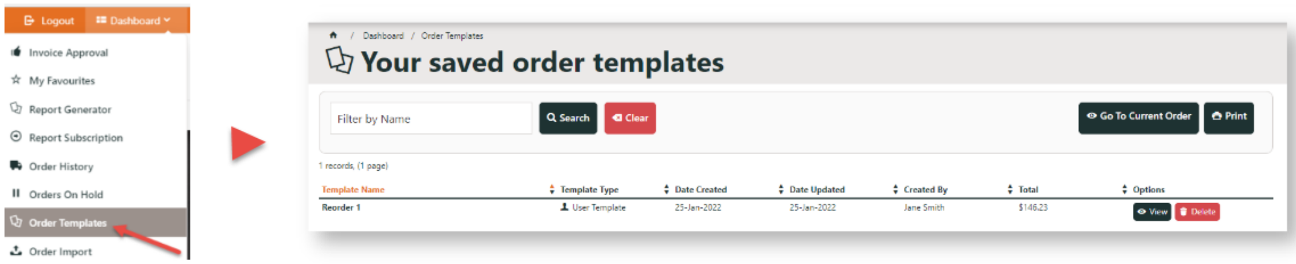
This completes configuration for OPTION 2.

> **Limit to Role**
>
> To limit a company order template to specific Roles, add the optional field **UserRoleWhenOrderTemplate** and enter the Role code in each data row. A company template restricted to a Role will display both 'Company Template' and 'Role Template' in Template Type in the user's order template list.



Allow user access to order templates

To allow the end user access to Order Templates, the page '**OrderTemplates.aspx**' must be added to their Role's Dashboard menu. See: Add a menu item. **NOTE -** Users with access to this functionality can also create and manage order templates themselves. For user assistance on order templates, see: Order Templates.



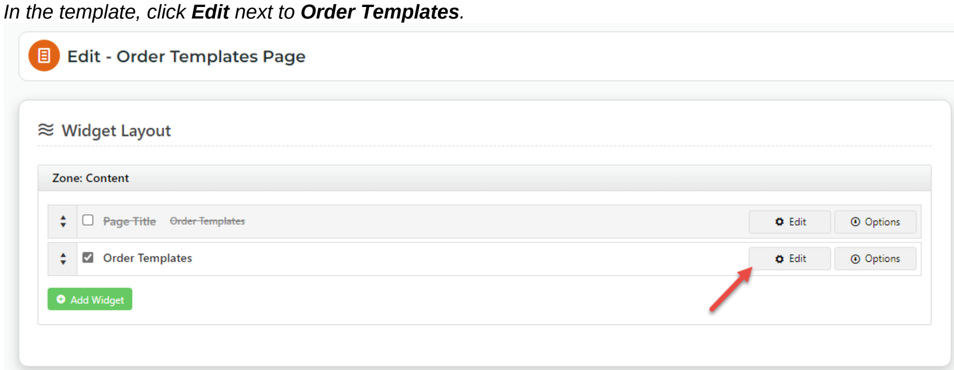
Edit Template Options & Text Displayed to User

The Order Template page template displays order templates to users on your website. You can edit the widgets that control display and text/label options on this template.

Order Template page

General template options are rendered by the Order Templates Widget.

1. *In the CMS, go to:* ***Content Content Pages & Templates Orders Order Templates Page****.*
2. *Click* ***Edit*** *for Order Templates Page.*
3. *In the template, click* ***Edit*** *next to* ***Order Templates****.*



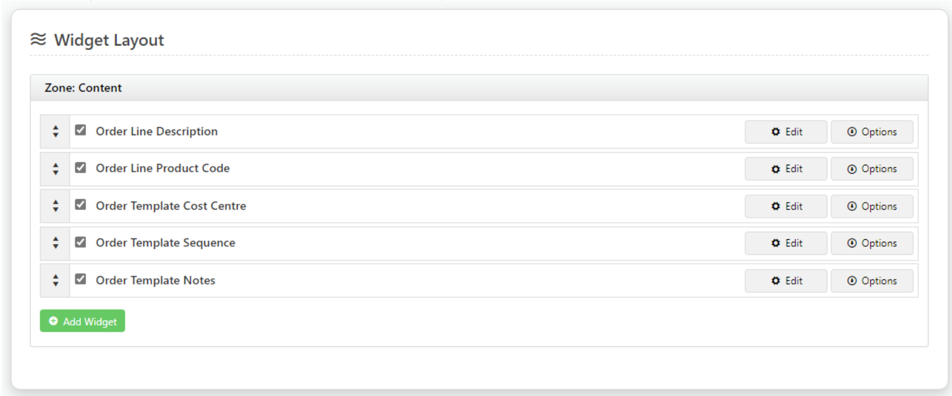
For a guide to display options, see: Order Templates Widget.

Order Line section

Order Line level options and styling, e.g., cost centre and notes input fields, are rendered in the Order Templates Line Info template.

1. *In the CMS, go to:* ***Content Content Pages & Templates Orders Order Template Lines Info****.*
2. *Click* ***Edit*** *next to* ***Order Template Lines Info****.*

3. *In the template, click **Edit** next to the relevant widget.*



Which widget?

- *Edit labels and text - Order Line Description*
- *Edit Product Code display options, e.g., make code a hyperlink, show APN instead of Product Code, display Code as prefix - Order Line Product Code*
- *Add/remove Cost Centre field - Order Template Cost Centre*
- *Allow resequencing of product lines - Order Template Sequence*
- *Provide/remove the Notes field - Order Template Notes*

Related help

- Par Value VMI Templates
- Order Templates
- Order Line Notes
- Add To Order Template from Product Pages

Related widgets

- Order Template Notes Widget
- Order Template Sequence Widget
- Order Template Cost Centre Widget
- Add Product To Order Template Widget
- Order Templates Widget