

Add To Order Template from Product Pages

Overview

[Order Templates](#) are used (primarily) by B2B users to save frequently ordered products. For example, a monthly stationery order can be saved as a template for easy re-ordering. Order Templates can even be shared across companies, so that all users attached to the Customer Code have access.

You can a user to create and add a product to a template on the Product Detail page instead of in the cart. This way, they can add a product to a template and keep browsing. It saves on page loads and they don't have to go to the cart before they're ready.

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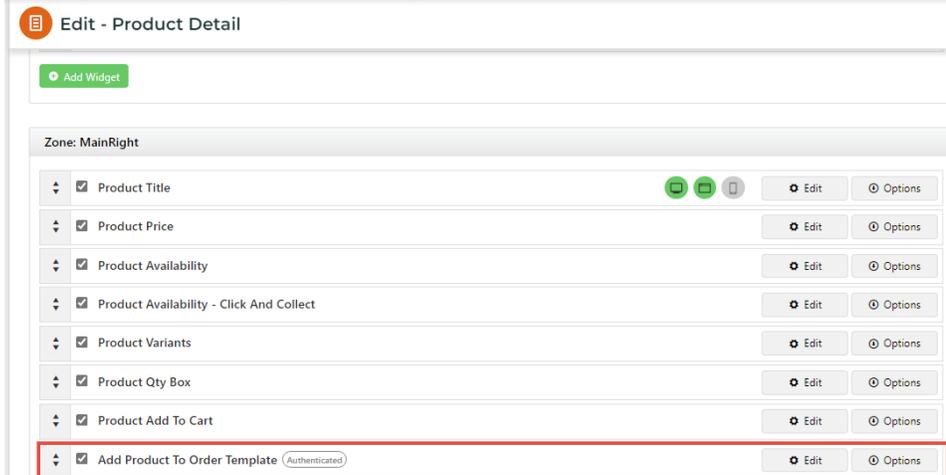


Step-by-step guide

Add Order Template button

To add the feature to the Product Detail Page, add the **Add Product to Order Template Widget** to the **Product Detail** page.

1. In the CMS, navigate to **Content Pages & Templates Products**.
2. Select the **Product Detail** template.
3. In the zone you want to add the widget, click **Add a Widget** at the bottom of the zone.
4. Type in **Add Product To Order Template** widget, then click **Add a Widget**.
5. The Widget will be added and opens for editing.



6. Set the Layer to the appropriate audience (to keep it from appearing to public users):
 - **Authenticated** - ensures the widget only displays for logged in users.
 - **B2B** - ensures the widget only displays to users in the B2B role (by default, they will be logged in)
7. Edit other widget options if required. See: [Add Product to Order Template Widget](#).
8. Click **Save**. The 'Add to Order Template' button will now display on the product detail page for the appropriate users.

Add product to order template (for the user)

When a user clicks the 'Add to Order Template' button, a modal window launches. Product quantity can be changed from the default number. The user can choose to create a new order template or append the product to an existing template (if there is one).

Add To Template

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 Create a new template  Append to existing template

Template Name *

 Company Template
 Role Template

⊖ Cancel ✓ Save Template ✓ Save Template and Close

Append to an existing template

To append to an existing template:

1. Select the **Append to existing template** radio button.
2. In the **Template Name** dropdown, select the template.
3. Click **Save Template** or **Save Template and Close**.

Create a new template

To create a new template:

1. Select the **Create a new template** radio button.
2. In **Template Name**, enter a name for the template.
3. If this template can be used by other users associated with this Customer Code, tick **Company Template**.
4. If this template can be used only by users with this Role, tick **Role Template**.
5. Click **Save Template** or **Save Template and Close**.



If the 'Remember My Template' option is enabled in the widget, the user's most recently selected template will be remembered as they browse.

This means that when they next click the 'Add to Order Template' button, the template name will be pre-filled and the action will default to 'Append'.

+ Create a new template Append to existing template

Template Name *

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Additional Information

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Minimum Version Requirements	03.88.00
Prerequisites	--
Self Configurable	Yes
Business Function	Orders
BPD Only?	Yes
B2B/B2C/Both	B2B
Third Party Costs	n/a

Related help

- [Order Templates](#)
- [Order Line Notes](#)
- [Order Template Maintenance](#)
- [Par Value VMI Templates](#)