

Order Templates

Overview

Order templates allow product templates to be saved for future orders. An order template can be stored against a specific user, role or customer account. Product order lines on an order template can be partially or completely copied to the user's cart.

Use cases: Your business customers wants some of their users based on role to have easy access to regularly-ordered products prepared with quantities, prices and ordering notes for future orders. Your staff can create order templates for users in their accounts.

Example of an order template

Reorder 1

Search for products

✓ Add To Template

✗ Undo All Changes

✗ Undo

✗ Reorder Counts

✗ Add All To Cart

✗ Remove All

✗ Clear Qty's

Product	Price (ex GST)	Discount	Est. Price (ex GST)	Qty	Options
<div><div>Industrial Work Socks - 3-Pack</div><div>Code: CV35</div><div>Notes</div><div>Add Product Note</div></div>	\$9.99	0.00%	\$99.90	5	⌵ ⌴ ⌵
<div><div>V-Neck Medical Scrub Tunic</div><div>Code: CV34</div><div>Notes</div><div>Add Product Note</div></div>	\$16.99	0.00%	\$264.85	15	⌵ ⌴ ⌵
<div><div>Tie-Waist Medical Scrub Trousers</div><div>Code: CV33</div><div>Notes</div><div>Add Product Note</div></div>	\$16.99	0.00%	\$264.85	15	⌵ ⌴ ⌵
Subtotal (ex GST)					\$679.60
Plus GST					\$61.98
Total (inc GST)					\$681.63

Good to Know

- Stock security is applied to order templates as per the stock security configuration in your ERP system.
- Product discounts are applied to order templates as per custom or special pricing configurations in your ERP system.
- All other product-based rules are obeyed when the the template is copied to the current order.

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Step-by-step

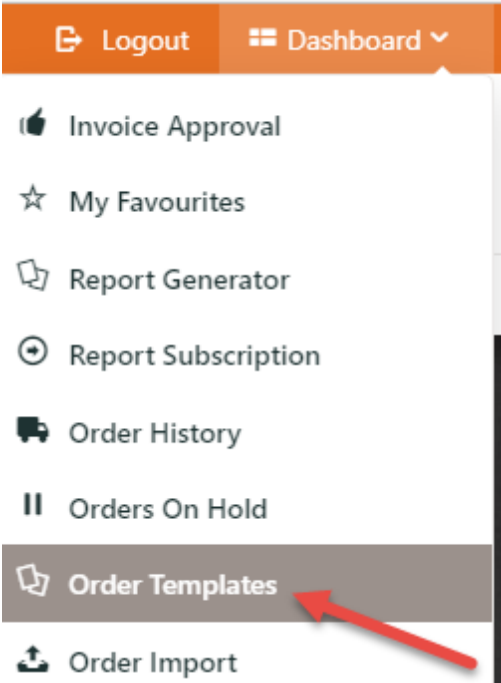
These guides are intended for your customers or sales rep users. For Administrator level maintenance access, see: [Order Template Maintenance](#).

View an Order Template

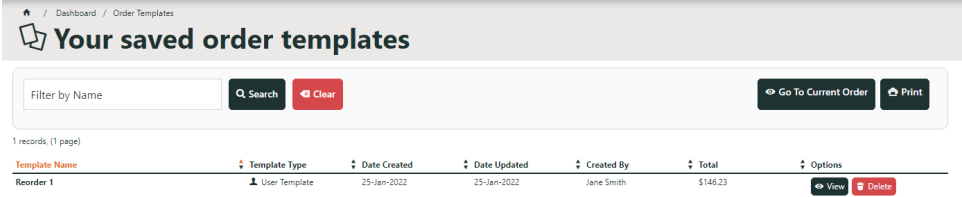
To view an existing order template:



1. While logged in as a user, go to the **Dashboard** menu and select **Order Templates**.

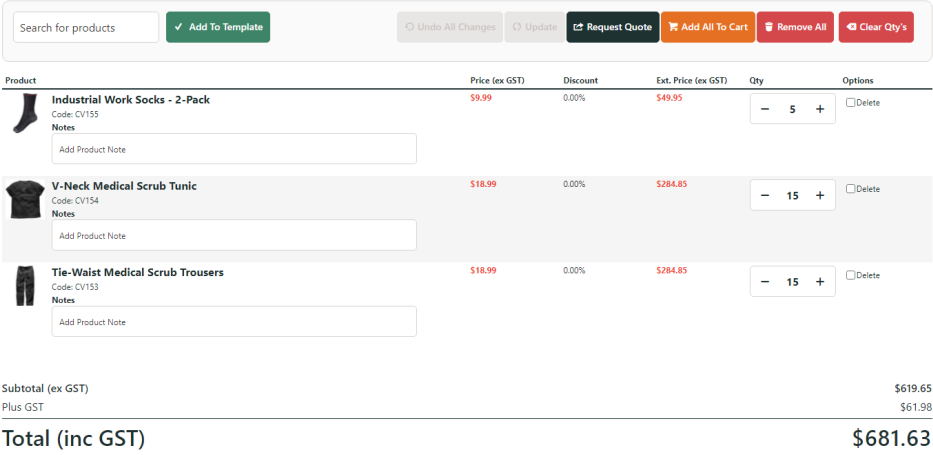


2. The list of saved templates is displayed. Click **View** next to the required template. **TIP** - If there are too many order templates, use the **Search** tool to quickly find the one you want.



3. The order template selected is displayed.

Reorder 1



Delete an Order Template

To delete an Order Template:

1. On your Saved Order Templates list, click **Delete** next to the template. **TIP** - If there are too many order templates, use the **Search** tool to quickly find the one you want.

Dashboard / Order Templates

Your saved order templates

Filter by Name

1 records (1 page)

Template Name	Template Type	Date Created	Date Updated	Created By	Total	Options
Reorder 1	User Template	25-Jan-2022	25-Jan-2022	Jane Smith	\$146.23	<input type="button" value="View"/> <input type="button" value="Delete"/>

2. In the **Confirmation** popup, click **Confirm**.

Confirmation

Are you sure you want to delete the 'Reorder 1' template?

3. The Order Templates list will reload.

Reorder from an Order Template

1. View the existing order template.
2. Click **Add All to Cart**.

Reorder 1

Search for products

3. A confirmation message displays to advise that the template's items have been added to cart.

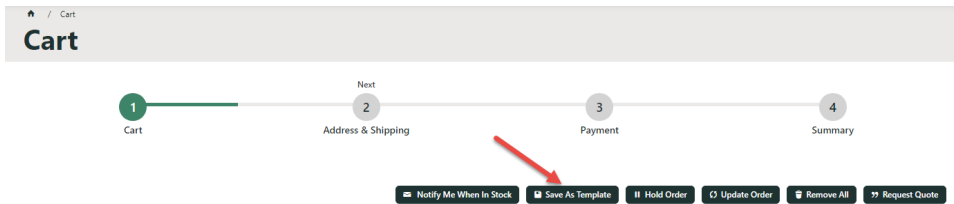
☒ The products from the 'Reorder 1' template have now been added to your cart.

You have added 1 item to your cart.

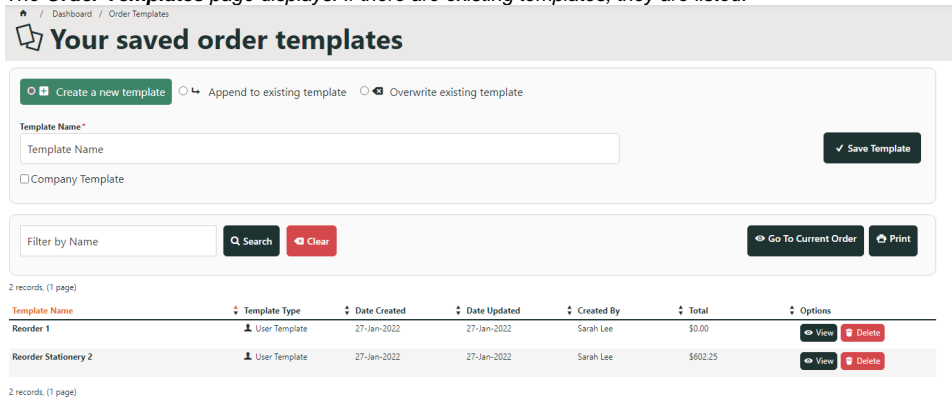
Create an Order Template

From the Cart page

1. Browse or search for each product you wish to add. Once in the product page, adjust quantity and click **Add to Cart**.
2. Continue adding products until you have all required products.
3. Go to the Shopping Cart.
4. Select **Save As Template**.



5. The **Order Templates** page displays. If there are existing templates, they are listed.



6. Click **Create a new template**.

7. In **Template Name**, enter a name for the new template.

8. If this template can be used by other users with the same Customer Code, tick **Company Template**. If Role-level order templates is enabled, the **Role Template** checkbox is displayed. Tick to limit this template to your Role. If Company Template is also ticked, the template is limited to Company users in your Role. Leave both unticked to create a User Template. The template will be available only to the creator.

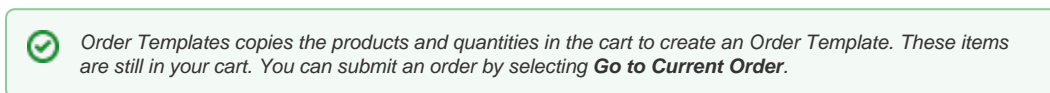
☐ **Create a new template**
☐ Append to existing template
 ☐ Overwrite existing template

Template Name *

☐ Company Template
☐ Role Template

9. To save the template, click **Save Template**.

10. A message displays to confirm the template has been saved. It will be listed in your saved templates.



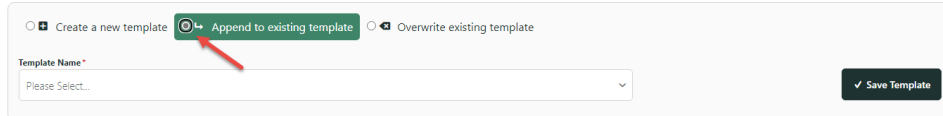
From the Product Detail page

To create an Order Template or append to an existing template while on the Product Detail page, see: [Add Product to Order Template](#) .

Add to Existing Order Template

To add cart products and quantities to an Existing Order Template:

1. While in the Order Templates page, select **Append to existing template**.



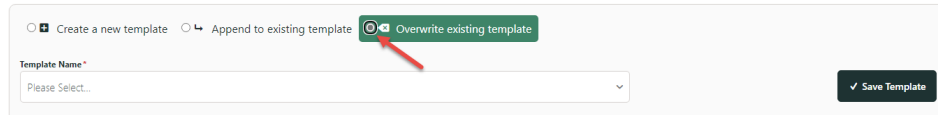
The screenshot shows a form with three radio button options: 'Create a new template', 'Append to existing template' (which is selected and highlighted with a green box and a red arrow), and 'Overwrite existing template'. Below the options is a dropdown menu labeled 'Template Name*' with the text 'Please Select...' and a downward arrow. To the right of the dropdown is a dark button labeled 'Save Template' with a checkmark icon.

2. In **Template Name**, select an existing template.
3. Click **Save Template**.
4. A message displays to confirm the template has been updated.

Overwrite an Order Template

To overwrite an existing template with current cart products and quantities:

1. While in the Order Templates page, select **Overwrite existing template**.



The screenshot shows a form with three radio button options: 'Create a new template', 'Append to existing template', and 'Overwrite existing template' (which is selected and highlighted with a green box and a red arrow). Below the options is a dropdown menu labeled 'Template Name*' with the text 'Please Select...' and a downward arrow. To the right of the dropdown is a dark button labeled 'Save Template' with a checkmark icon.

2. In **Template Name**, select an existing template.
3. Click **Save Template**.
4. Check a message confirms the template was updated.

Related Resources

- [Order Templates](#)
- [Order Line Notes](#)
- [Order Template Maintenance](#)
- [Add To Order Template from Product Pages](#)
- [Par Value VMI Templates](#)