

Building a Template

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To streamline repeated processes, you can create templates for orders, invoices, shipments, purchase orders, purchases, and campaigns. You can build a new template in two ways:

- Manually populating the needed information
- Populating the information from an existing record

Manually Populating a Template

1. Navigate to **Menu > Order Setup > Templates**.
2. In the menu bar, click **New**.

The screenshot shows the 'Templates' application window. The title bar reads 'Templates'. Below the title bar, there is a red navigation bar with 'Record: 1 of 1' and several icons: New, Edit, Delete, Print, and Actions. The main content area has a header with 'Template: I Learn French: 5 Classroom Order', a numeric code '50000', and a status 'PENDING' with a yellow circle icon. Below this, there are tabs for 'Template Details', 'Notices', 'Emails', and 'Docs'. The 'Template Details' tab is active, showing a form with the following sections:

- Template Info:** Type: Order
- Transaction Info:** Title: I Learn French: 5 Classroom Order, Type: Sales, Source: (empty)
- Shipping:** Courier Service: FedEx Ground, Account #: 9587456, Shipping Terms: FOB, FOB: Chicago
- Transaction Description:** For schools ordering J'Apprends: I Learn French textbooks and teacher's manuals for 5 classrooms. 5% bulk discount.
- Additional Info:** (empty)
- Items:** A table with columns: Line Item Code, Description, Alts, Upgs, Opts, Quantity, Apply, Amount.

Line Item Code	Description	Alts	Upgs	Opts	Quantity	Apply	Amount
1 > 50002	J'Apprends: I Learn French Teacher's Manual	0	0	+ ↗	5	Unit Adj %	-5.00%
2 > TB-FRNCH3	J'Apprends: I Learn French 3rd Edition	0	0	+ ↗	150	Unit Adj %	-5.00%

At the bottom right, there is an 'Adjustment' section with a value of '-5.00%' and a 'Shipping' section with a value of '24.99' and a total of '24.99'. A 'Save' button is visible at the bottom right.

3. In the new template, enter the details as needed:
 - **Type** (required) — Click the field and select the kind of template (e.g. Order).
 - **Title** (required) — Auto-populates with the template name. You can also enter a short, descriptive name. This name will identify the template in the list view and from selection drop-down lists throughout your system. You can also change the numeric code that is automatically assigned. This code can be used for quicker data entry in other screens.

- **Transaction Info** – Enter a default Title (and for Order templates, a default Type and Source).
Note: The Title field can use merge codes for dates (i.e. *Current Month* or *Previous Year* for recurring billing statements in Companies). For proper syntax, click the Merge Fields link in the upper right corner.
 - **Shipping** – Enter standard shipping information.
 - **Items** (required) – Click the Line Item Code field and select the needed items, then enter the default quantity (Quantity field), price application (Apply field), and amount (Amount field) for each line item. (For details, see below.)
Note: In the template, you can use Alts, Upgs, and Opts just as you would in the Orders module.
 - **Adjustment** – In the lower right corner, enter a default discount (percentage or flat amount) to the total order.
Note: This discount will apply to all line items, even if they have special pricing.
 - **Shipping** – Enter a default shipping charge.
4. Click **Save**.
 5. At the confirmation dialog, click **Activate**.

Populating a Template from an Order

1. Navigate to **Menu > Order Setup > Templates**.
2. In the menu bar, click **New**.
3. In the menu bar, click **Actions > Build Template from Order**.
4. In the Orders Selector screen, use the [Quick Search](#) bar to locate the desired order and click on it.

Order	Date	Type	Title	Customer	Tracking Status	Status
50000	5/22/18		aACME Education Solutions, Inc.			OPEN
50002	5/22/18		Brightside Charter School	Luisa Ramos		OPEN
50003	5/24/18		Shea Township School District	Tim Collins		OPEN
50004	5/25/18		SU History and Physics Departments	Sabina Roz		OPEN
50005	5/25/18		Highbridge Academy			CLOSED
50006	5/25/18		Full STEAM Charter School	Tina J Rivera		OPEN
50007	5/25/18		Educause Marketing	Jamie Callaway		VOID
50008	5/25/18		Educause Marketing	Jamie Callaway		OPEN
50009	5/25/18		Educause Marketing	Jamie Callaway		OPEN
50010	5/29/18		Highbridge Academy			OPEN
50011	5/29/18		Cognitio	Samuel Johnson		OPEN
50012	5/30/18		Cognitio	Samuel Johnson		OPEN
50013	6/21/18		Regina County Area School District	Lauren Padilla		OPEN
50014	7/11/18		Montboro School District	Sam Patel		CLOSED
50015	7/11/18		New Start Academy Charter School	Tony Conforto		OPEN
50016	7/13/18		New Start Academy Charter School	Tony Conforto		OPEN

Displaying 21 of 21 found

Cancel

5. Edit the template as needed (see above).

Apply Field and Amount Field

The template Apply and Amount fields modify a line item's standard pricing. For example:

- **Unit Adjust** and **-2.50** will discount the standard unit pricing for the item by 2.50.
- **Unit Adj %** and **15.00%** will discount the standard unit pricing for each item by 15%.
- **Fixed Price** and **50.00** will set the pricing for the item at 50.00 regardless of the standard pricing.