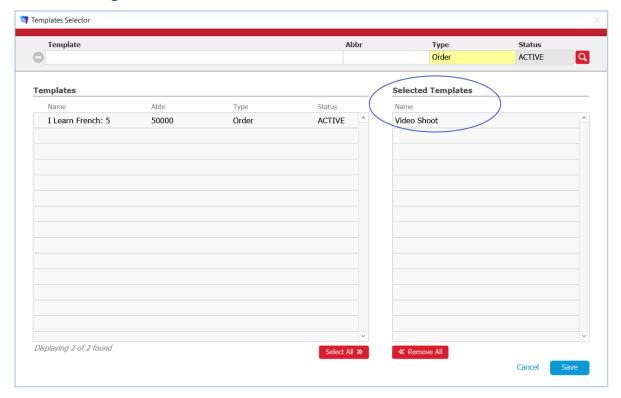
Using Templates in Orders

Last Modified on 01/23/2019 1:27 pm EST

Templates can help you build complicated or standard orders more quickly:

- 1. Navigate to Order Management > Orders.
- 2. Click New.
- 3. On the new order detail view, click **Actions** > **Build Order from Template**.
- 4. In the left column of the Templates Selector, click the desired template(s) to move them to the right column.



- 5. Edit the order as needed, removing or adding line items.
- 6. Click Save.

Information prepared in the selected template(s) is copied to the new order record, as shown in these comparison screenshots:

