Overview of Templates

Last Modified on 04/05/2019 1:00 pm EDT

To streamline repeated processes, you can create templates populated with common sets of line items. When you use a template to create another record, it quickly adds those line item codes to that record.

Screen Overview

Navigate to Menu > Order Setup > Templates, then click New.

1. **Name / Abbreviation** (required) — This name identifies the template in the list view and in selection drop-down lists throughout the system. The Abbreviation field is automatically assigned a numeric code; however, you can edit this abbreviation as needed to facilitate data entry.
2. **Type** (required) — Select the kind of template you want to create: Order, Invoice, Shipments, Purchase Orders, Purchases, or Campaigns.
3. **Transaction Info** — Auto-populates the Title field with the template Name, but you can edit as needed.
   Note: This field can use merge codes for dates (e.g. <<*Current Month*>> for recurring billing statements in Companies). For proper syntax, click the Merge Fields link in the upper-right corner.
4. **Transaction Description / Additional Info** — Text fields to record notes or tips about using the template.
5. **Shipping** — Enter standard shipping information, if any.
6. **Items** (required) — Click the Line Item Code field and select the needed items. Click the Alts, Upgs, and Opts fields to quickly add related items. For each item, record the default Quantity. As needed, use the Apply field to specify a type of adjustment on the item, with the Amount field to a line item's standard pricing. For example:

Initial Price	Apply	Amount	Effect	Adjusted Price
$7.50	Unit Adjust	-2.50	*Reduce* price	$5.00
$100.00	Unit Adjust %	10%	Increase price	$110.00
$55.00	Fixed Price	50.00	Set new price	$50.00

7. **Adjustment / Shipping** — Field to record any default discount (percentage or flat amount) to apply to the total order (in addition to any adjustments on individual line items), as well as any default shipping charge.

Initial Price	Apply	Amount	Effect	Adjusted Price

Tips

- You can also use existing Order records to create new templates. At the Templates module list view, create a new template, then click Actions > Build Template from Order. In the Orders Selector, locate and click the desired order. You can save the new order as a different Type.