Order Template User Guide

Order Templates are a quick way to manage items your plan to order frequently. You can create multiple Order Templates so that you can have different lists of items you purchase.

Order templates are a great way to create collections of items you purchase. For example, if you have a supply closet that should contain common items, you could create an Order Template with all the items you plan to keep in that closet. If you have work trucks that you expect to stock with certain items, you could create an order template for each truck. If you have different groups of items (e.g. safety, supplies, janitorial, medical, first aid, etc) that you order, you can add items to an order template to make it easy to find them in the future.
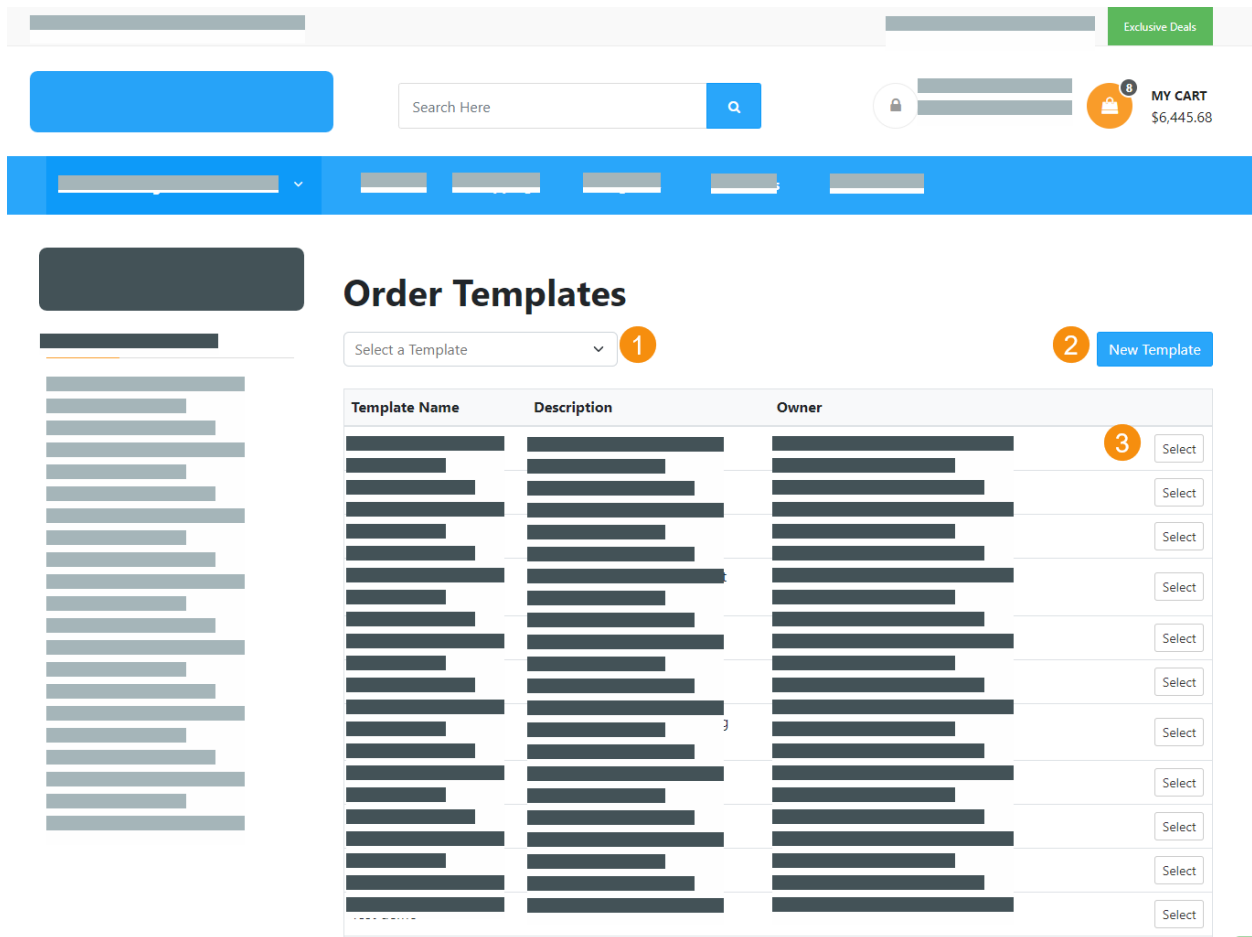
Order Templates serve as a great way to easily find and group items, view their purchase history, and make a purchase quickly and easily.

Order Templates have several pages as shown below

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Main Order Template Page

1) On the Order Templates page, you can jump to a template or start typing a template name in the Select a Template box to quickly access an Order Template.
2) You can create new Order Templates by clicking on the "New Template" button.
3) You can select one of your templates to use from the list using the Select button.
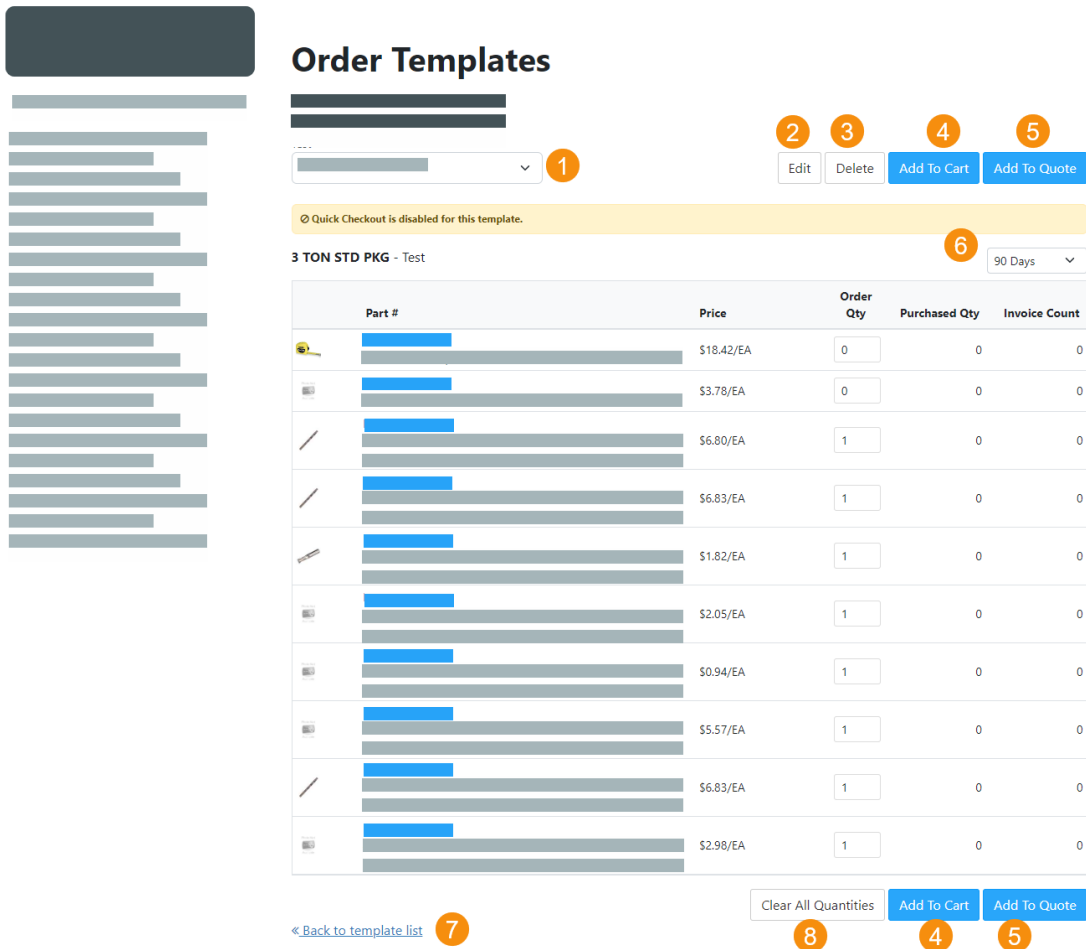
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Order Template Detail Page

This page is shown after you select a template.

1) Change your order template selection here
2) Edit the items, default order quantity, or item order using the Edit button
3) Delete this Order Template (note – this cannot be undone!)
4) Add the items with order quantities greater than 1 to your cart using the quantity specified for each item.
5) Add the items with order quantities greater than 1 to a quote request using the quantity specified for each item. *This feature may not be available for all sites.
6) Change the history time used for displaying the Purchased Qty and Invoice Count values for each item.
7) Return to the main Order Template page and view the order template list
8) Clear all Order Quantities for the entire order template.

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Add or Edit an Order Template

This page allows you to add or edit your order template details

1) Permissions allows you to manage the permissions other users have to this order template. You can allow other users to view or modify this template making it possible for others to use and/or manage the template with you.
2) Delete this template (note – this cannot be undone!)
3) Save your changes to this template
4) Cancel your current action and return
5) Enable Quick Checkout – When enabled, Quick Checkout allows you to preset where this Order Template will ship, how it will ship, and is available for orders that are available to be paid for on Account Terms. Enabling this option allows for a fast checkout by skipping the traditional cart checkout process and allowing a complete checkout with minimal time and effort.

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6) You can set or change the template name here
7) You can optionally add a description of this order template
8) The sort arrows allow you to move your items up or down in the list to set the display order
9) The Default Order Quantity will be populated in the Order Qty box for a selected order template
10) If an item allows for multiple UOMs, this allows you to select the default UOM for this item
11) The delete icon removes an item from your order template
12) This option resets all Default Order Quantities to zero.
13) Add Multiple allows you to add multiple items to the order template at one time
14) Add Item allow you to add a single item to the order template