

# Order Templates

Order Templates can be used to create a templated list of set products that can easily be ordered again.

# Shopping Tools

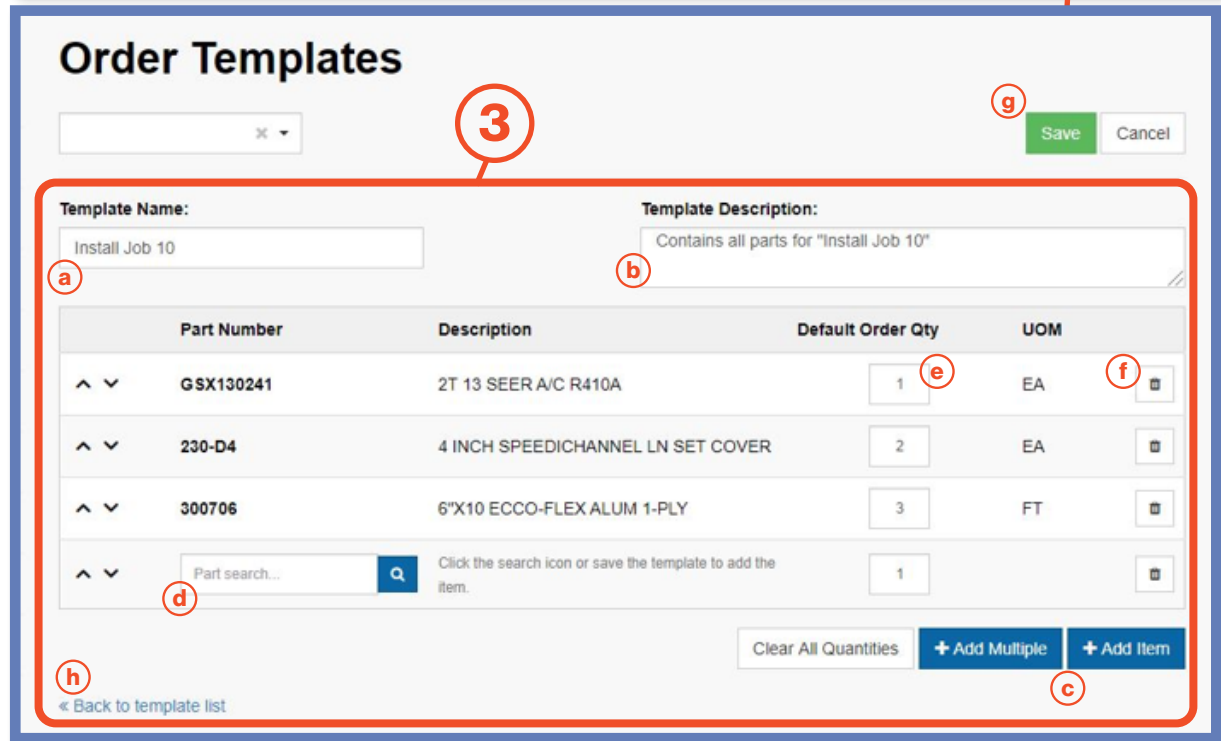
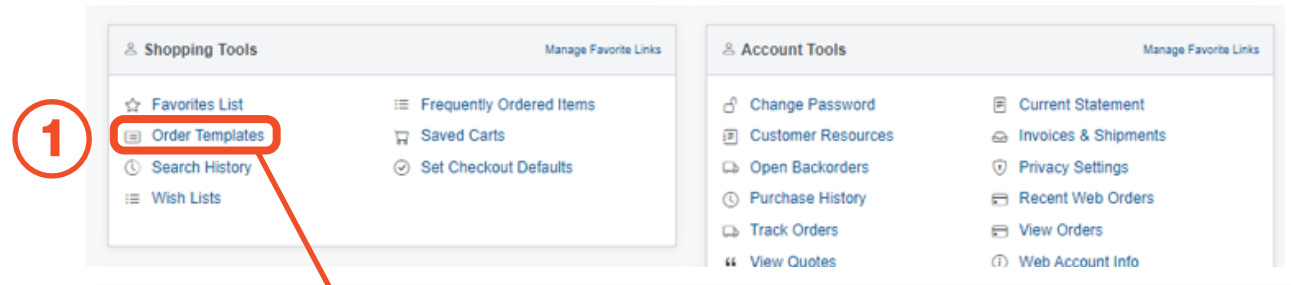
## Order Templates

1 | Click “**Order Templates**” to start creating a new template or to view current templates

2 | On the next page click “**New Template**”

3 | You can now add in the details of your Order Template:

- Add a Name for your template
- Add a Description
- Either copy/paste multiple products at once **OR** add them one at a time
- If you choose the latter you can search for the item by keyword or product #
- Add the Default Order Quantity (these fields can be easily cleared below)
- Delete an item
- Save your template
- Go back to the template list on the previous page



# Shopping Tools

## Order Templates

Once your Order Template has been saved and created you can use it to make the check out process faster.

- 1 | To quickly add the order to your cart click **“Add to Cart”**
- 2 | If you would like to change the default order quantities you can update individual item quantities before adding to your cart
- 3 | Use the drop-down to easily switch order templates
- 4 | Edit or Delete the template

### Notes:

To the right of the Order Qty you can view the total Purchased Qty and Invoice Count within a specific time range. To change the range use the time period drop-down.

The screenshot shows the 'Order Templates' page. At the top, there is a search bar containing 'Install Job 10' with a close button (marked with a circled 3). To the right of the search bar are 'Edit', 'Delete', and 'Add To Cart' buttons (marked with a circled 4). Below the search bar is a yellow warning message: 'Quick Checkout is disabled for this template.' Underneath, there is a title 'Install Job 10 - Contains all parts needed for "Install Job 10"' and a '90 Days' time range selector. A table lists the items with columns for Part #, Description, Price, Order Qty, Purchased Qty, and Invoice Count. The 'Order Qty' column is highlighted with a circled 2. At the bottom right of the table area are 'Clear All Quantities' and 'Add To Cart' buttons (marked with a circled 1). A 'Back to template list' link is at the bottom left.

Part #	Description	Price	Order Qty	Purchased Qty	Invoice Count
GSX130241	2T 13 SEER A/C R410A	\$674.40/EA	1	0	0
AFP04	4"X10" ECCO-FLEX ALUM 1-PLY	\$2.48/FT	2	0	0
230-D4	4 INCH SPEEDICHANNEL LN SET COVER	\$30.19/EA	3	72	9

# Shopping Tools

## Order Templates

When editing an Order Template you can make any changes to the template details or products as outlined in the steps on the previous page.

You will also see some new options:

### 1 | Permissions

Permissions can be granted to users within your company that allows them to View, Edits or Delete the template

### 2 | Quick Checkout

Mark the checkbox and complete the fields to enable **“Quick Checkout”**. This feature allows you to assign a specific Ship To, Shipping Method, and Payment Method so that you can skip to those sections of the checkout process

### 3 | Save your changes

### Order Templates

Install Job 10 x

1 Permissions Delete Save Cancel

User Name Permissions + Add Permission

View Edit Delete

Allow Quick Checkout

Ship To Name Shipping Method

Address 1 Payment Method

Address 2 On Account Validate Shipping Methods

City State Zip

Template Name: Install Job 10

Template Description: Contains all parts needed for "Install Job 10"

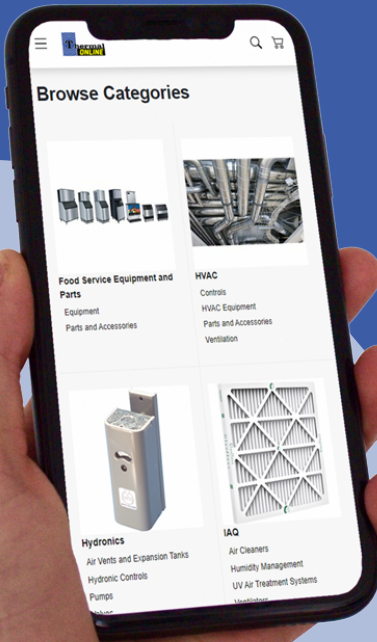
	Part Number	Description	Default Order Qty	UOM	
^ v	GSX130241	2T 13 SEER A/C R410A	1	EA	
^ v	AFP04	4"X10" ECCO-FLEX ALUM 1-PLY	2	FT	
^ v	230-D4	4 INCH SPEEDICHANNEL LN SET COVER	3	EA	

Clear All Quantities + Add Multiple + Add Item

<< Back to template list

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## Still Have Questions?



For additional questions, feedback, or to request a virtual tour of the website via Zoom or Microsoft Teams please reach out to our web team:

## CONTACT

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