

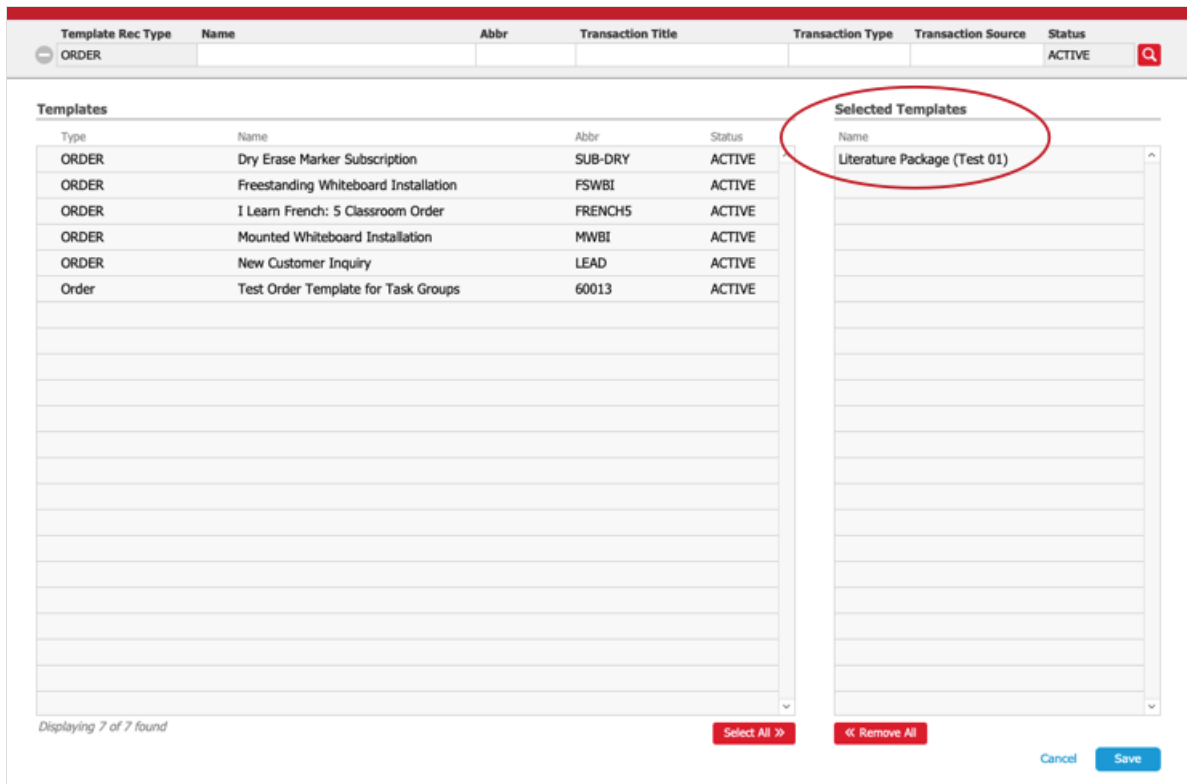
Using Templates in Orders

Last Modified on 07/31/2023 11:04 pm EDT

This guide explains how to efficiently build orders using templates. It is intended for general users.

Creating a template can help you build complicated or standard orders more quickly.

1. Navigate from **Main Menu > Order Management > Orders**.
2. Click **New** and select one of the three options: **Sales, Production, or Service**.
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, then click **Save**:



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

aACE copies the prepared information in the selected template(s) to the new order record, as shown in these comparison screenshots.

Templates
Record: 7 of 9
New Edit Delete Print Actions

Template: Literature Package (Test 01) (60012)

ACTIVE

Notices Tasks Emails Docs

Transaction Info

Title: Literature Package

Type: Sales Source: Advertisement Adjustment: 0.00

Shipping

Carrier: UPS Carrier Service: UPS Ground

Shipping Terms: FOB Ship Point: New York

Carrier Account # Shipping Cost Shipping Charge

Description

Test

Additional Info

Test

Items

Code	Description	Quantity	Apply	Amount
1 > TB-LIT101b	The Two Gentlemen of Verona	0		
2 > TB-LIT102	The Complete Works of Shakespeare	0		
3 > TB-LIT120	Complete Poems of Gerard Manley Hopkins	0		
4 > TB-LIT130	Beowulf - A New Translation and	0		
5 > TB-LIT6	6 Famous Classics	0		
6 > LitPack2022	Literature Package (Test 02)	1		

Orders
Record 1: 23 of 23
New Edit Delete Print Actions

Order: 61422 Literature Package

09/12/22 PENDING

Notices Tasks Emails Docs

Bill To

Customer (Bill To) Customer PO #

Rate Card Disc %

Billing Terms

Description

Test

Additional Info

Test

Ship To End Customer

Ship To Company Ship Type Ship Date

Complete 09/13/22

Inventory Bin

Shipping Terms

Activities & Comments

Order Items

Code	Description	Invtry	Alts	Upps	Opts	Cases	Quantity	BO	DS	SO	Unit Price	Unit Adj	Total	Margin
1 > TB-LIT101b	The Two Gentlemen of	-39	0	0	+		0	X			23.99	0.00	0.00	0%
2 > TB-LIT102	The Complete Works of	48	0	0	+		0				99.99	0.00	0.00	0%
3 > TB-LIT120	Complete Poems of	22	0	0	+		0				37.49	0.00	0.00	0%
4 > TB-LIT130	Beowulf - A New	-14	0	0	+	0	0	X			49.99	0.00	0.00	0%
5 > TB-LIT6	6 Famous Classics	-20	0	0	+		0	X			0.00	0.00	0.00	0%
6 > LitPack2022	Literature Package (Test	0	0	0	+		1				5,475.60	0.00	5,475.60	-54%

Subtotal	5,475.60	-54%
Adjustment	0.00	
Total	5,475.60	-54%
Shipping	0.00	
Tax	OUT 0.00	
Grand Total	5,475.60	-54%

Sales Billing Fulfillment Shipping

Order Type: Sales Payment Account: Recurring Transaction: Currency: Ex Rate:

Dept: AI Assign By: EH Assign To: MH Tracking Status: Quote

Cancel Save