

Overview of Templates

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This guide provides an overview of templates. It is intended for general users.

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

Templates Overview

Navigate from Main Menu > Order Setup > Templates. Click New, then select which template type you need. As an example, shown below is an Order template example.

The screenshot displays the 'Templates' interface for an 'Order Template'. The template name is 'I Learn French: 5 Classroom Order' with the code 'FRENCH5' and it is currently 'ACTIVE'. The interface is divided into several sections:

- Transaction Info (1):** Includes fields for Title ('I Learn French: 5 Classroom Order'), Type ('Sales'), Source, and Adjustment.
- Shipping (2):** Includes fields for Carrier ('FedEx Ground'), Shipping Terms ('FOB'), Ship Point ('Chicago'), Carrier Account # ('9587456'), Shipping Cost ('24.99'), and Shipping Charge ('24.99').
- Description:** A text box containing the note: 'For schools ordering J'Apprends: I Learn French textbooks and teacher's manuals for 5 classrooms. 5% bulk discount.'
- Additional Info (3):** An empty text box for further details.
- Items (4):** A table listing the items included in the template.

	Code	Description	Alts	Upps	Opts	Quantity	Apply	Amount
1 >	TM-FRNCH3	J'Apprends: I Learn	0	0	+ -	5	Unit Adj %	5.00%
2 >	TB-FRNCH3	J'Apprends: I Learn	0	2	+ -	150	Unit Adj %	5.00%

Note: Common icons and fields will not be discussed below. For information on these icons, please read the related help guides on the [List View](https://aace6.knowledgeowl.com/help/overview-of-the-list-view) and the [Detail View](https://aace6.knowledgeowl.com/help/overview-of-the-detail-view).

1. Transaction Info

aACE auto-populates the Title field from the template Name, but you can edit it as needed.

The Title field can use merge codes for dates (e.g. <<Current Month>> for recurring billing statements). For proper syntax, click the Merge Fields link in the upper-right.



You can also specify the type of template you are creating. This can vary depending on the chosen template. For this example, an Order template has three options: Sales, Production, and Inventory Replenishment.

2. Shipping



aACE allows you to specify standard shipping information, if applicable.



3. Description and Additional Info

The [Description and Additional Info fields](https://aace6.knowledgeowl.com/help/adding-and-using-notes#NotelconsFields) (https://aace6.knowledgeowl.com/help/adding-and-using-notes#NotelconsFields) provided are used to add immediate notes or tips about using the template. When you create an order from a template with details entered in either of these fields, this info will also flow through to the order.

[Record-specific notes](https://aace6.knowledgeowl.com/help/adding-and-using-notes#InternalVSExternalNotes) (https://aace6.knowledgeowl.com/help/adding-and-using-notes#InternalVSExternalNotes) can be added by clicking the Pin icon (). aACE displays a text field for the notes. After you have added notes to the text field, the Pin icon is highlighted in yellow ().

4. Items

You can add desired LICs by typing in the Code field or by clicking the Line Item Codes Selector icon (). Clicking the [Alts or Upgs](https://aace6.knowledgeowl.com/help/working-with-alt-upsgrades-and-options) (https://aace6.knowledgeowl.com/help/working-with-alt-upsgrades-and-options) numbers or the [Add Options](https://aace6.knowledgeowl.com/help/working-with-alt-upsgrades-and-options) (https://aace6.knowledgeowl.com/help/working-with-alt-upsgrades-and-options) icon () allows you to quickly select and add related items.

To view an added LIC record, click the Go-To icon () for that item. To delete an item from the template, click the Delete icon ().

Once you have added any desired line item codes, record the default Quantity. As needed, use the Apply field to specify any adjustments on the item, using the Amount field to adjust the LIC's standard pricing. For example:

Initial Price	Apply	Amount	Effect	Adjusted Price
\$7.50	Unit Adjust	-2.50	Reduce price	\$5.00

Initial Price	Apply	Amount	Effect	Adjusted Price
\$100.00	Unit Adjust %	10%	Increase price	\$110.00
\$55.00	Fixed Price	50.00	Set new price	\$50.00

Additional 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 template as a different Type.
