Building a Template

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This guide explains how to create new templates. It is intended for general users.

To streamline repeated processes, you can create templates for orders, invoices, shipments, purchase orders, purchases, and campaigns. You can build a new template in two ways:

- Manually populating the needed information
- Populating the information from an existing record

This guide uses orders as an example.

Manually Populating a Template

- 1. Navigate from Main Menu > Order Setup > Templates.
- 2. In the menu bar, click **New**. Select the desired template type (e.g. order).

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Order Temp	late Details								Notices 😣	Tasks 🔽	Emails 🔀	Docs
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Type	Source	Adjustment			Q,							
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Carrier	Carrier Service											
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FOB	Houston											
Carrier Account #	Shipping Cost	Shipping Charge										
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dditional Info												

3. At the new record's detail view, enter the template details

(https://aace6.knowledgeowl.com/help/overview-of-templates) as needed.

4. Click **Save** and **Activate**.

Populating a Template from an Order

- 1. Navigate from Main Menu > Order Setup > Templates.
- 2. In the menu bar, click **New**. Select the desired template type.
- 3. At the new record's detail view, click **Actions** > **Build Template from Order**.
- 4. In the Orders Selector screen, use the Quick Search bar to locate the desired order and select it.

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Date	Title			Contact		Status		Order		Title		
11/06/2019	aACME Education Sol	utions, Inc				CLOSED	^					-
12/18/2019	Internal - Sales & Mar	keting				CLOSED						
9/17/2020	aACME Education Sol	utions, Inc				CLOSED						
11/06/2019	Mishawaka School Dis	trict		James Corco	ran	CLOSED						
9/14/2020	Fall 2020 Tablet Cam	paign				CLOSED						
11/06/2019	aACME Education Sol	utions, Inc				CLOSED						
11/06/2019	Southglen High Schoo	d		Nikki Huang		CLOSED						
11/06/2019	aACME Education Sol	utions, Inc				CLOSED						
01/27/2020	Request for Informati	on		Fiona Watso	n	CLOSED						
01/28/2020	Request for Informati	on		Anna Klamp	er	CLOSED						
11/21/2019	Regina County Area S	chool Dist	rict	Lauren Padi	la	CLOSED						
11/25/2019	Covered Bridge High	School		Phyllis Evans	5	CLOSED						
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5. Edit the template as needed (see above).