

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

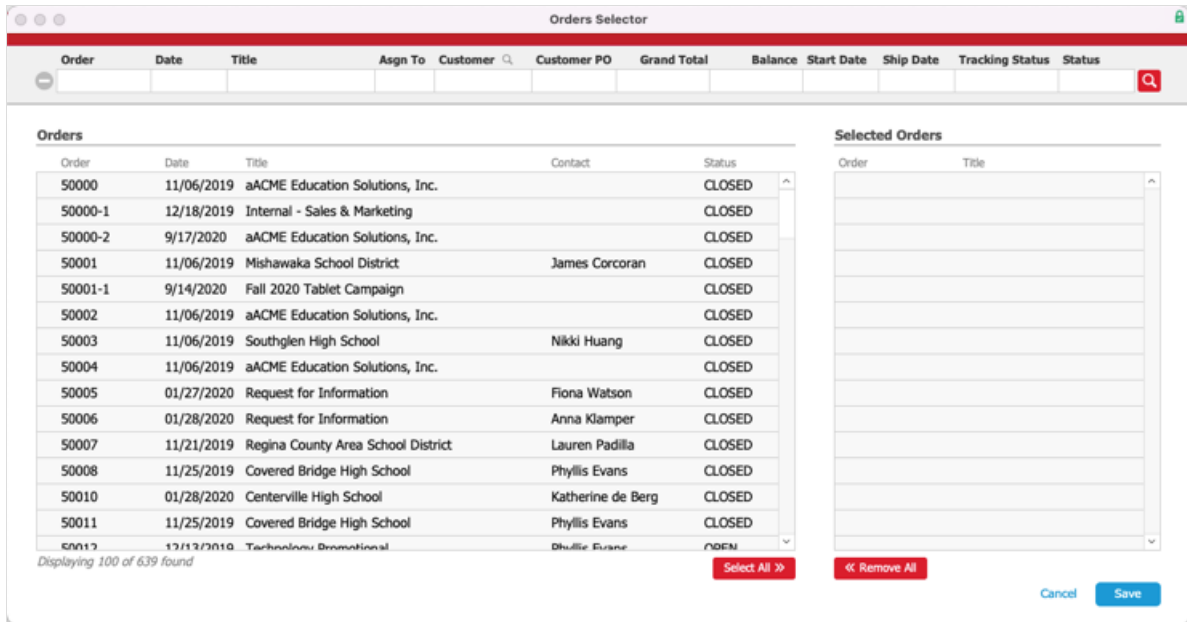
1. Navigate from **Main Menu > Order Setup > Templates**.
2. In the menu bar, click **New**. Select the desired template type (e.g. order).

The screenshot displays the 'Templates' application window. The title bar reads 'Templates'. Below the title bar, there is a navigation menu with 'Record: 13 of 13' and action buttons: 'New', 'Edit', 'Delete', 'Print', and 'Actions'. The main content area is titled 'Template: I Learn French: 5 Classroom Order' with a value of '60014' and a status of 'PENDING'. Below this, there are tabs for 'Order Template Details', 'Notices', 'Tasks', 'Emails', and 'Docs'. The 'Order Template Details' tab is active, showing a form with several sections: 'Transaction Info', 'Shipping', 'Description', and 'Additional Info'. The 'Transaction Info' section includes fields for Title, Type, Source, and Adjustment. The 'Shipping' section includes fields for Carrier, Carrier Service, Shipping Terms, Ship Point, Carrier Account #, Shipping Cost, and Shipping Charge. The 'Description' section has a large text area. The 'Additional Info' section has a smaller text area. To the right of the form is an 'Items' table with columns: Code, Description, Alts, Upps, Opts, Quantity, Apply, and Amount. The table contains one row with the following data: Code: TB-FRNCH3, Description: J'Apprends: I Learn, Alts: 0, Upps: 0, Opts: +, Quantity: 150, Apply: (empty), Amount: -5.00%. At the bottom right of the form, there are 'Cancel' and 'Save' buttons.

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.



5. Edit the template as needed (see above).