Using Template Orders Transcript

Template orders are used to create product lists for a variety of projects. You can use them to sell standard deck or garage packages or to set out the products needed for a house plan that your Customer will buy multiple times. In this course, we'll show you the key features of Template orders. Then we'll show you how to copy them into a sales document using two methods: The Copy From Button and the Copy Menu Option. Let's get to it.

You create Template orders like sales orders, with just a few differences. To begin, we'll Find an existing Template to review. From Find Documents, we set the Look for dialog box to Template orders. To search for a specific one, enter additional filters or press Enter to show all.

To open a Template, select it and then double-click. You can give Template orders a Description as an identifier. This one is for a standard Deck Package. Unlike a Sales order, you can leave the Customer blank.

Templates are given an Expiry date. You can delete expired templates using the Remove Elapsed Document options found on the Tools menu. All other entries on the General tab are the same as those on a Sales order.

Use the Schedule tab to plan product delivery. This is particularly useful for a large project Template, such as a house plan, where you deliver the products by section. For more information on adding a Schedule, be sure to watch the Training on Demand course Using Call Off Order Schedules.

Use the standard method to add lines, insert Sections, use Pricing Options, or enter Notes. Unlike a Sales order, the product quantities entered on a Template do not affect Available Stock. To close the document, click Save and Close.

Next, we'll review a Template for a specific customer. This time, when we select the template in Find Documents, we'll use the right-click menu to Open it. This document is for a specific Customer and Delivery address. A Contact name, phone and Customer ref has also been entered. Along with the product lines, you can transfer this information to a sales order when using this template.

When you want to use the contents of a Template order, you copy it into a sales document. Let's begin with the Deck Package Template. A sales order is started for a customer and two products have already been added. To add products from a Template, click the Copy From button.

From the Document type drop-down list, choose Template, and then proceed to the Next step. If you know the number of the Template, you can enter it, or type a partial description. The system lists all those matching the text entered. Check the box to select one and then click Next.

To use all lines of the template and add them to the current sales order, select Copy entire template and append. This ensures that you copy all of the items without removing the existing lines on the order. The system enables the check boxes beside all lines of the Template.

You have four options to complete the copy. Select Recalculate prices when you want to use this Customer's price profile to set the Sell prices instead of the prices from the Template. If there are special order items, you can create new specials, which will generate new product codes for those items. Enable Consolidate positive qty within sections to reduce any duplicate product lines when copying from multiple templates. Finally, when selling more than one of this Template, enter that value in Multiply qty by.

Click Next to proceed. When there are already lines on the order, you can specify where you want to insert the copied lines. Click Finish to copy the template. Confirm adding the lines to the existing order. The lines from the Template appear in order after the existing products. The system recalculated the prices using the Customer's price profile.

You can copy the contents of a Template without having started a new sales document. From Find Documents, we see the Templates for Nick's Custom Homes with the first in the list selected. From the right-click menu, choose the Copy option. The system shows all lines of the Template Order. You can copy the entire Template or selected lines.

You also have available the same options to recalculate prices and create specials. The buttons at the bottom of window include all the document types you can copy to. Click the desired button to continue. Bistrack opens the new order with all the information from the Template inserted, including the Contact person, number, and Customer reference.

Template orders provide a quick way to generate sales documents containing products that you sell in a standard package or sell to a specific Customer multiple times. You should now be able to recognize the difference between Templates and Sales Orders. Using the Copy From Button or Copy Menu Option should be tasks you can use every day!

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