

Advanced Template Orders Transcript

Template orders are commonly used to develop a list of standard materials needed for a project. In this course, we'll explore how to create orders from a standard house plan and then use some advanced options. We'll show you how to Copy Multiple Templates and Selected Sections. Then we'll examine Templates with Negative Quantities and how the copy option works with those.

You can copy multiple Template Orders into one sales document. In Find Documents, with the Templates listed for a specific Customer, we see that they are for a variety of house plans and associated options.

To begin, we select a starting Template. From the right-click menu, choose the Copy option. This Template contains the materials needed for the first and second floors, and garage walls. We'll leave the selection at Copy entire Template Order enabled. We'll also enable the Recalculate Prices (excluding Call Off orders) check box. Then we click Copy to Sales Order.

BisTrack opens a new order with all of the Template details copied. Note that this includes the Customer and Deliver to address details, the Customer ref, and all lines including the Section names. We can continue to copy additional documents into this order. To do so, click the Copy From button. To choose another Template, press the letter T, or select it from the list and then proceed to the Next step.

Enter text to search for the Template. Here, we're looking for one that has Siding products. BisTrack shows the matching Templates. If the Template you want was originally created for a different Customer, enable the check box to Include all customers. The system lists all matching Templates regardless of the customer they were created for.

Enable the check box beside the template that you want to use and click Next. This Template has three Sections, with the first two containing the same basic products, but for different color combinations. In this case, we choose to Copy selected lines only. Once selected, check boxes appear beside each line on the

Template. To choose all products within a Section, simply click the check box beside the Section name.

The system enables the check boxes for all lines within the Section. Scrolling through the Template, we see additional lines you can choose. You can select individual products from within a Section without having to take all of them. Set the options for recalculating prices, adding specials, consolidating quantities, and setting multiples.

Then click Next. Now indicate where you want to insert the copied lines. We'll insert the lines after the Garage section. Click Finish. Confirm adding the lines to the existing sales order. The system copies the selected section and lines from the Template into the order. You can continue to add more Templates to the order as needed.

A standard house plan may offer a number of variations. For example, the standard plan may call for eight-foot ceilings but an option may be available for nine foot. Or, the standard elevation may have two front windows with an alternative being one bay window. In most cases, the additional options create a need for more or different products and some of those that are on the standard template are no longer needed.

To demonstrate, we'll continue with the order previously created. The house will include the Bay Window option. From Find Documents, we open the Template Order. Templates created for options need to use the same Section names as the standard when it will reduce certain product quantities or to add different products.

This Template contains the same 1st Floor Walls section with two products that are on the standard house plan. The quantities not needed, because of using this option, get entered as a negative amount. In this case, we need 10 and 15 pieces less of the products shown. Below that are the additional products for the Bay Window option. Now, let's add the Template to the sales order we started in the last example.

Take note of the quantities on lines two and six, affected when we added the Bay Window option. Click the Copy From button. Press the letter T to set the Document type and then click Next. Find the Template Order you want to use.

Select Copy entire template and append. We'll select all lines, including the two negative quantities. Continue to the next step. Set the location where you want to insert the copied lines. When the copy is completed, the system adjusts the product quantities on lines 2 and 6 by the negative amounts from the Template. In addition, the system adds the products needed for the Bay Window option just after the Garage section.

Template Orders are a time-saver when you supply goods for repeated projects, even with variations offered. You should now be able create sales documents from Templates by copying selected sections and lines, and use negative quantities to modify standard Templates with minimal effort.

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