



Copy an Order Template

Background: Copying an Order Template allows you to quickly and easily place orders for your frequently ordered items. Ensure that you have an Order Template created prior to beginning this process.

Notice: See **Create Order Templates** eLearning for instruction on how to create a new template.

To Do and Notice:

1. Navigate to **Purchasing** and select **Ordering**.
2. Click **New Order**.
3. Click **Create from Template**.
4. Make the desired selections in each of these areas:
 - a) **Unit**
 - b) **Vendor Name**
 - c) **Template ID** (*not required*)
 - d) Click **Go**
5. Confirm that you selected the desired template.
6. Click **Next**.
7. Click **Create**.

Add Items

1. Click the **Add Items** button if you wish to add any additional items to the Template.
2. Enter the name of the Item in the **Name** box.
3. Click **Go**.
4. Click the checkbox in front of the desired items.
5. Click **Done**.
6. Click **Save**.

Delete Items

1. Click the checkbox in front of the Item you wish to delete.
2. Click the **Delete Checked** button.
3. Click **Save**.

So What? Using **Add Items** and **Delete Checked** you may modify a template to quickly and easily order the items you currently need.
