

Order Templates

User Guide

(For Online Account Holder Customer Only)



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Company Templates

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Order Templates

Overview

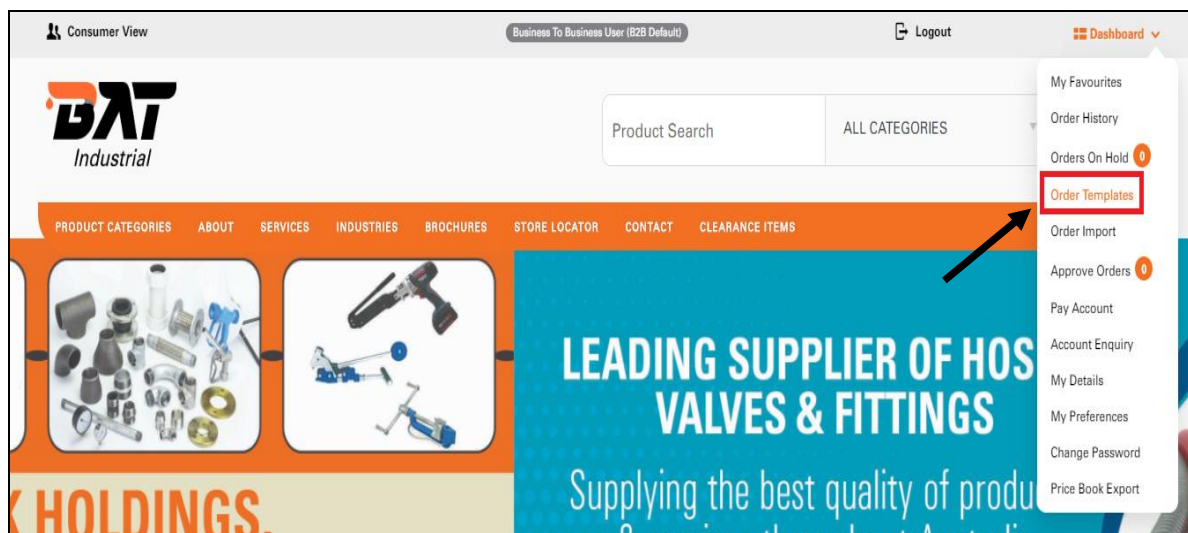
Order templates allow users to save the contents of a current order for use as a template for future orders. An order template can then be copied partially or entirely onto a user's current order at any time in the future.

Some examples of order templates could be:

- Products that a user orders on a regular basis;
- Products that a sales representative orders for a particular customer.

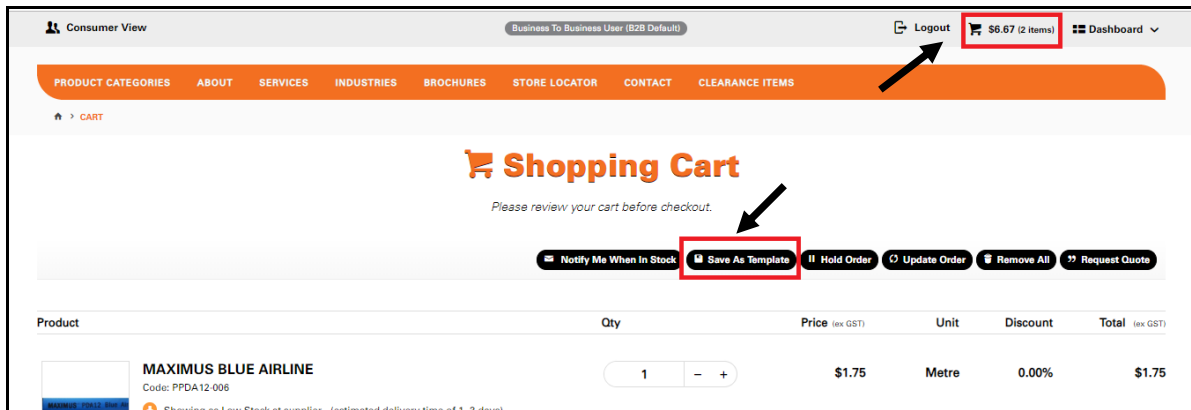
An order template can also be stored at a company level, enabling all users associated with that Customer Code to view and use these templates also.

Login to your account, under Dashboard -> click **Order Templates**:

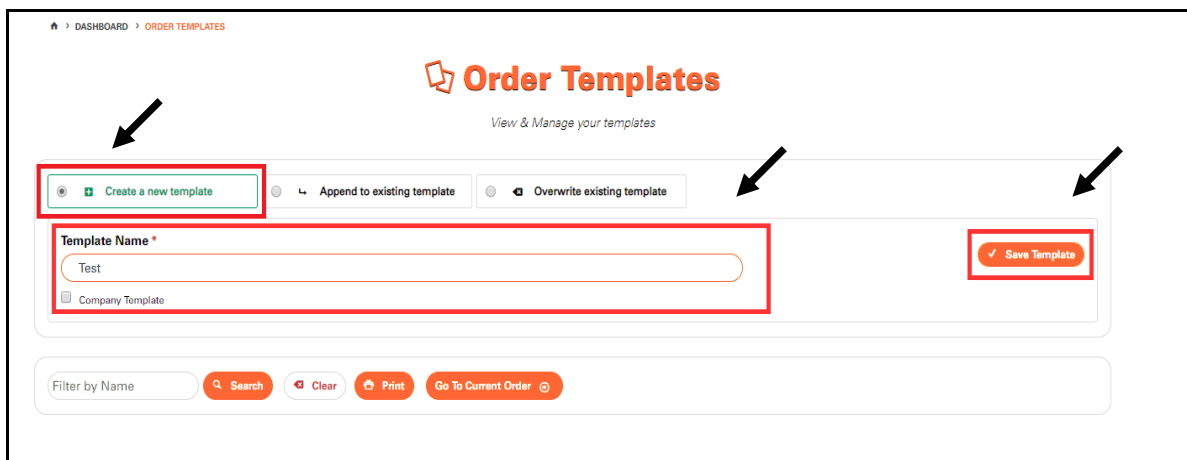


To Create an Order Template:

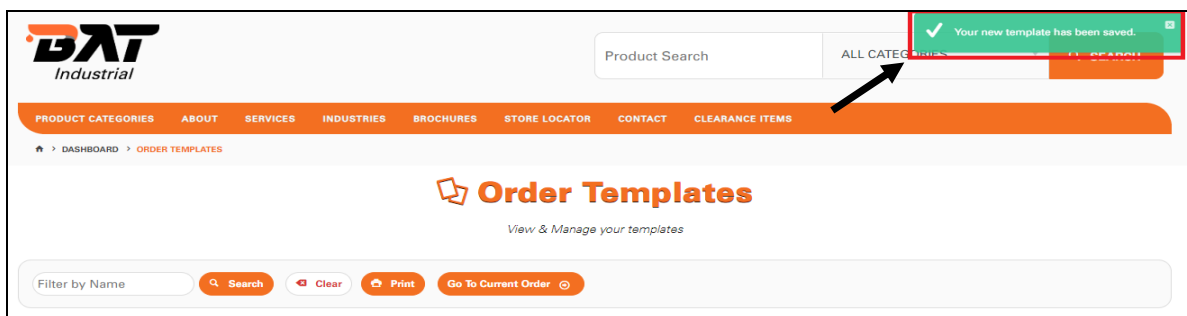
1. Login as a registered user.
2. Browse or search for products and add them to the cart.
3. Navigate to the **Shopping Cart**.
4. Click '**Save as Template**'.



5. Enter a name for the template.
6. Click '**Create a new template**'.

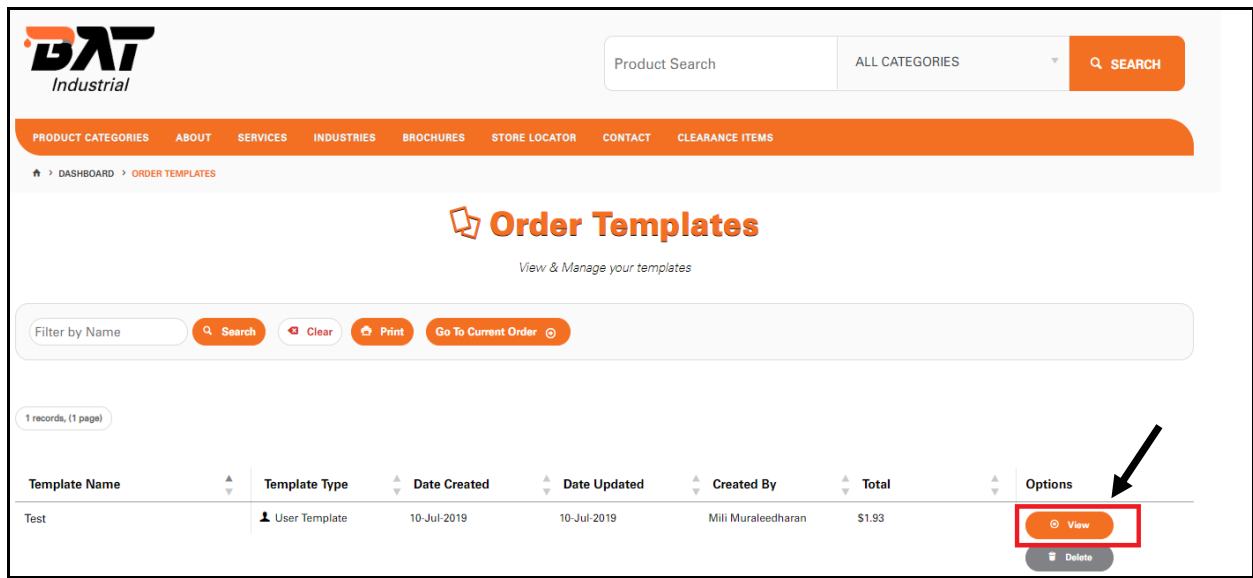


7. Click '**Save Template**'.
8. A message will display confirming that the template has been saved.



To View an Order Template:

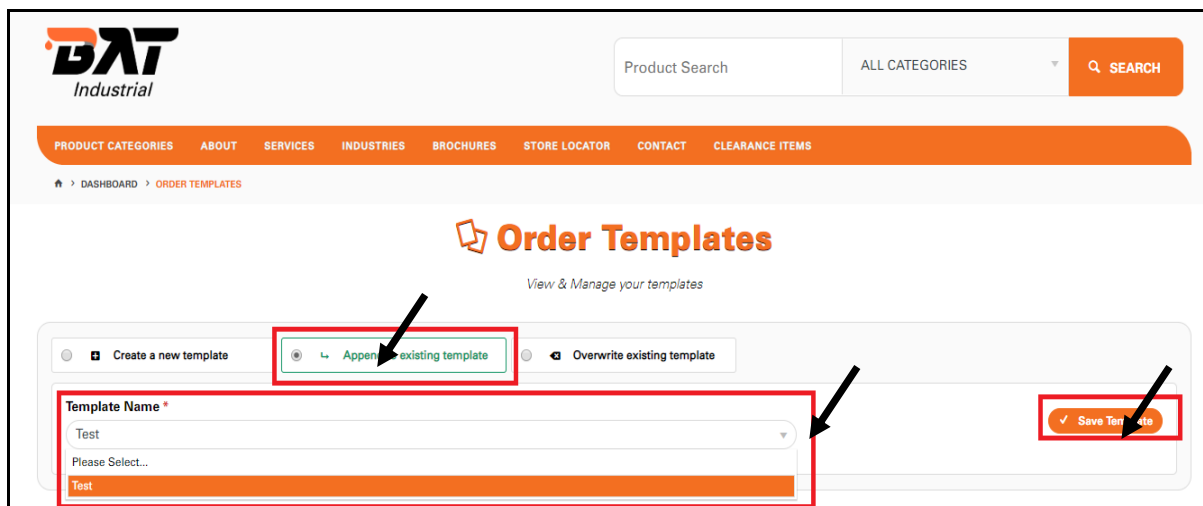
1. Login as a registered user.
2. Navigate to the '**Order Templates**' page (located on the '**Dashboard**' menu).
3. A list of previously saved templates will be displayed.
4. Click '**View**' against the required template.



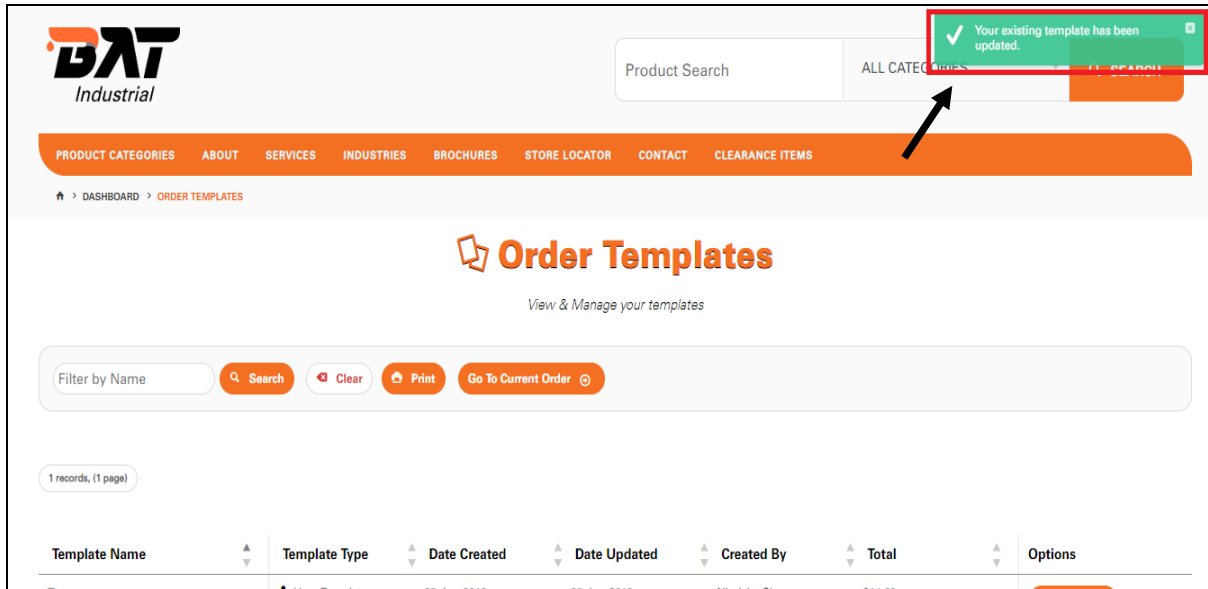
5. The page will reload to display the selected template.

To Add to an Existing Order Template:

1. Login as a registered user.
2. Browse or search for products and add them to the cart.
3. Navigate to the **Shopping Cart**.
4. Select '**Save as Template**'.
5. Enter the name of the existing template that you wish to append to.

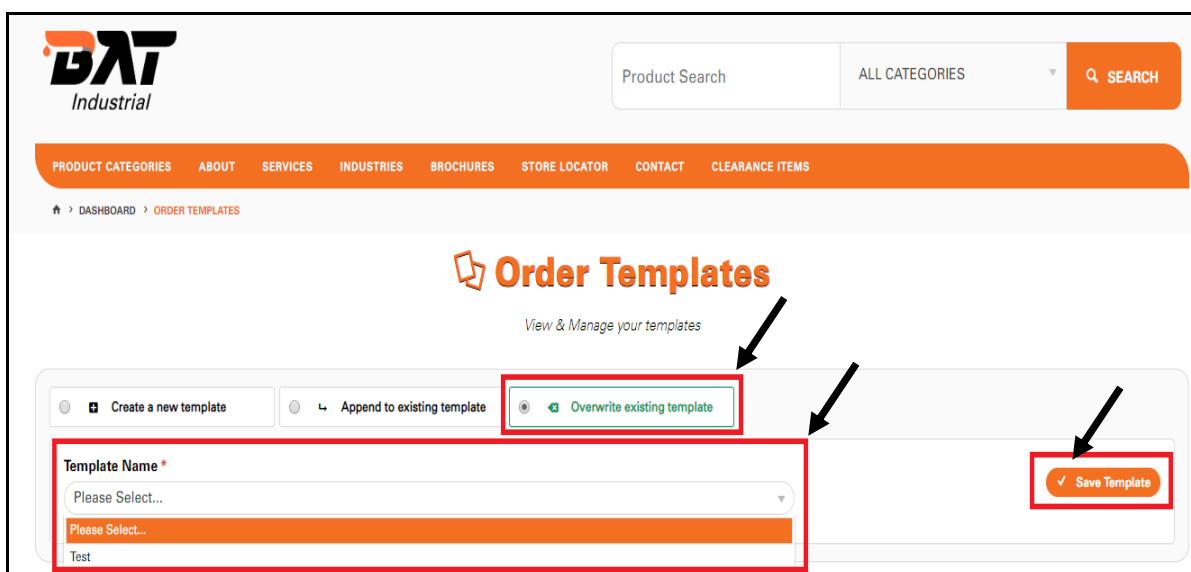


6. Click '**Append to existing template**'.
7. Click '**Save Template**'
8. A message will display confirming that the template has been saved/updated.



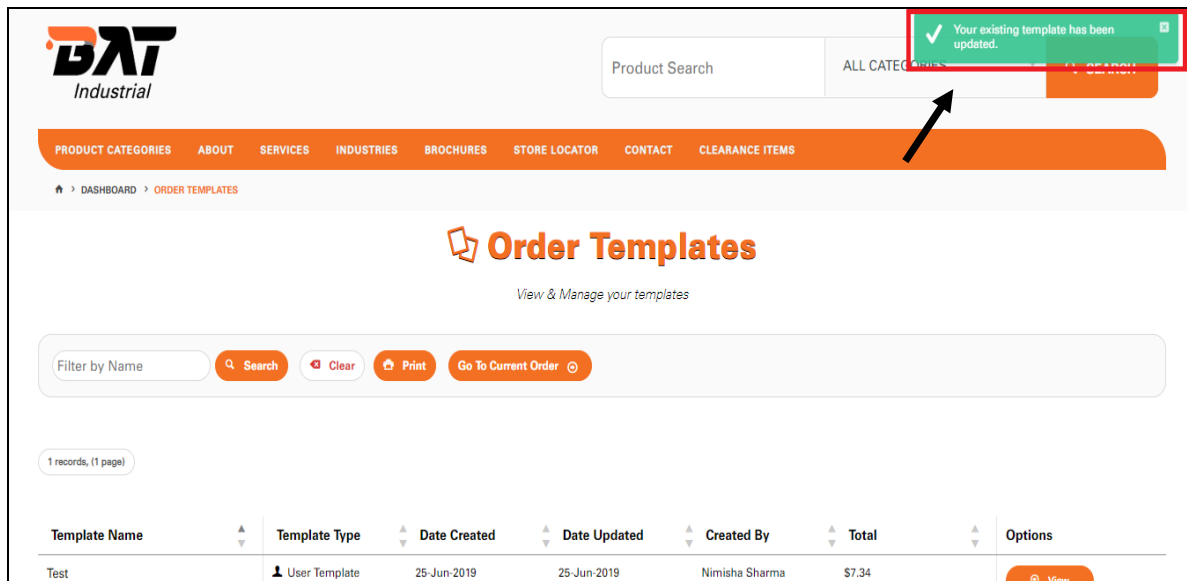
To Overwriting an Order Template:

1. Login as a registered user.
2. Browse or search for products and add them to the cart.
3. Navigate to the **Shopping Cart**.
4. Click '**Save as Template**'.
5. Enter the name of the existing template you wish to overwrite.



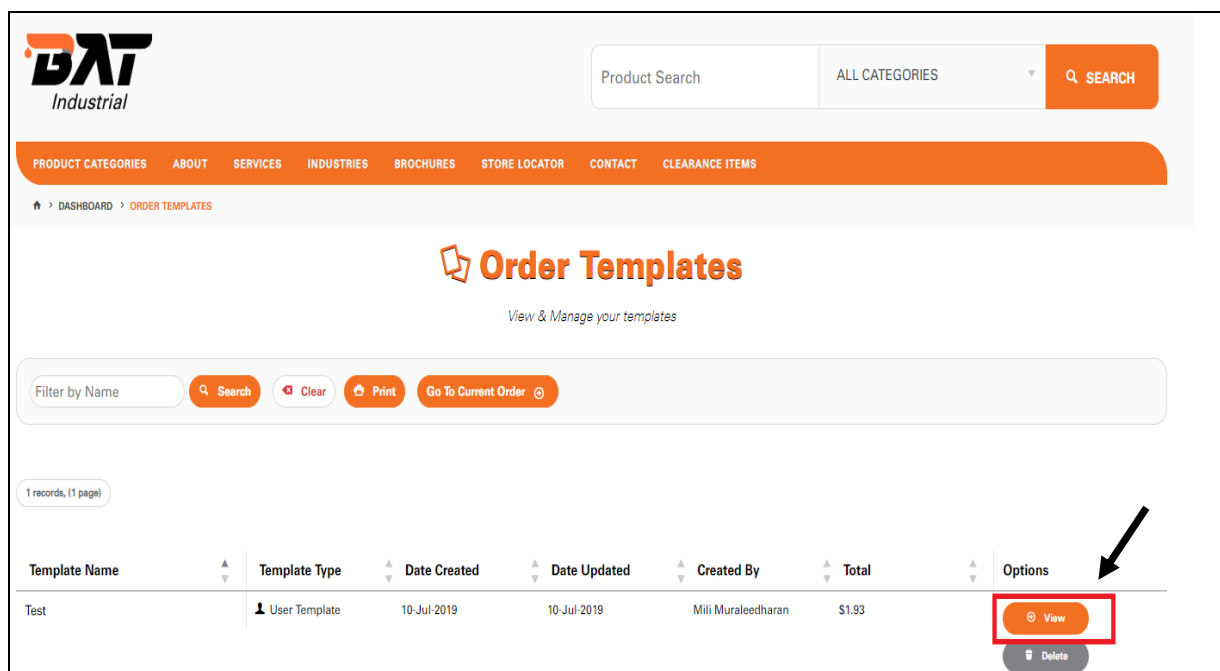
6. Click '**Overwrite existing template**'.

7. Click '**Save Template**'
8. A message will display confirming that the template has been saved/updated.

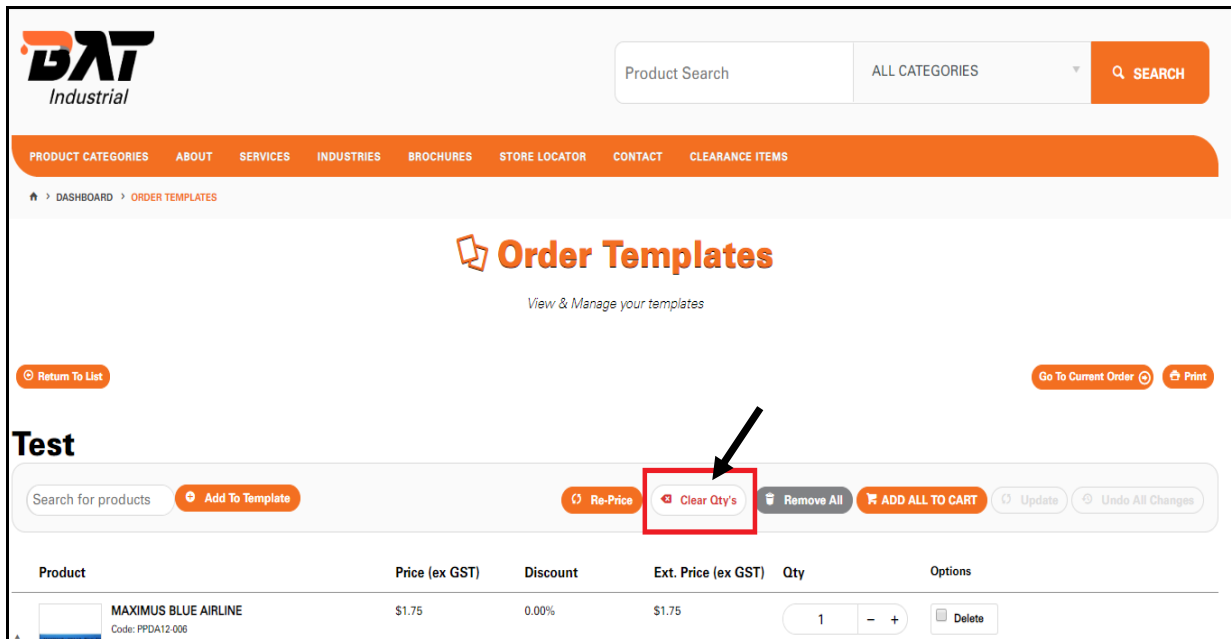


To Update an Order Template:

1. Login as a registered user.
2. Navigate to the '**Order Templates**' page (located on the '**Dashboard**' menu).
3. Select '**View**' against the required template.



- To clear the quantities of all lines, click the **'Clear Quantities'** button at the top of the order grid.

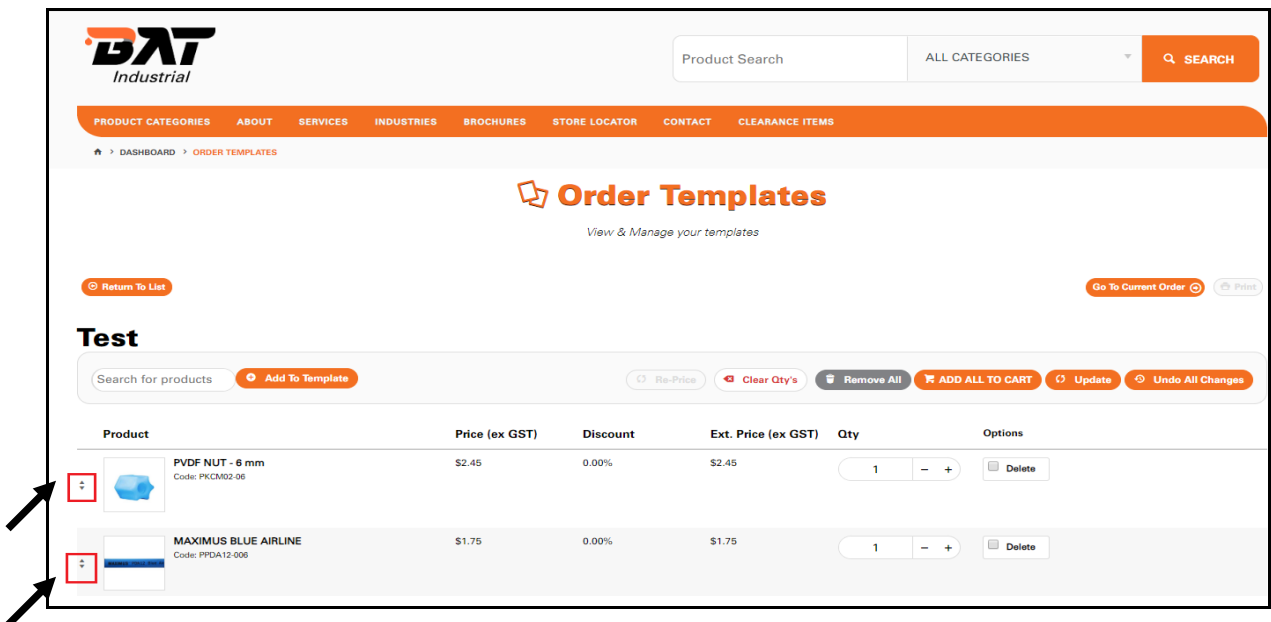


Test

Search for products [Add To Template](#) [Re-Price](#) [Clear Qty's](#) [Remove All](#) [ADD ALL TO CART](#) [Update](#) [Undo All Changes](#)

Product	Price (ex GST)	Discount	Ext. Price (ex GST)	Qty	Options
 MAXIMUS BLUE AIRLINE Code: PPDA12-006	\$1.75	0.00%	\$1.75	1	Delete

- To re-sequence the lines on the template, use the drop-down selection in the re-sequence column for each line.

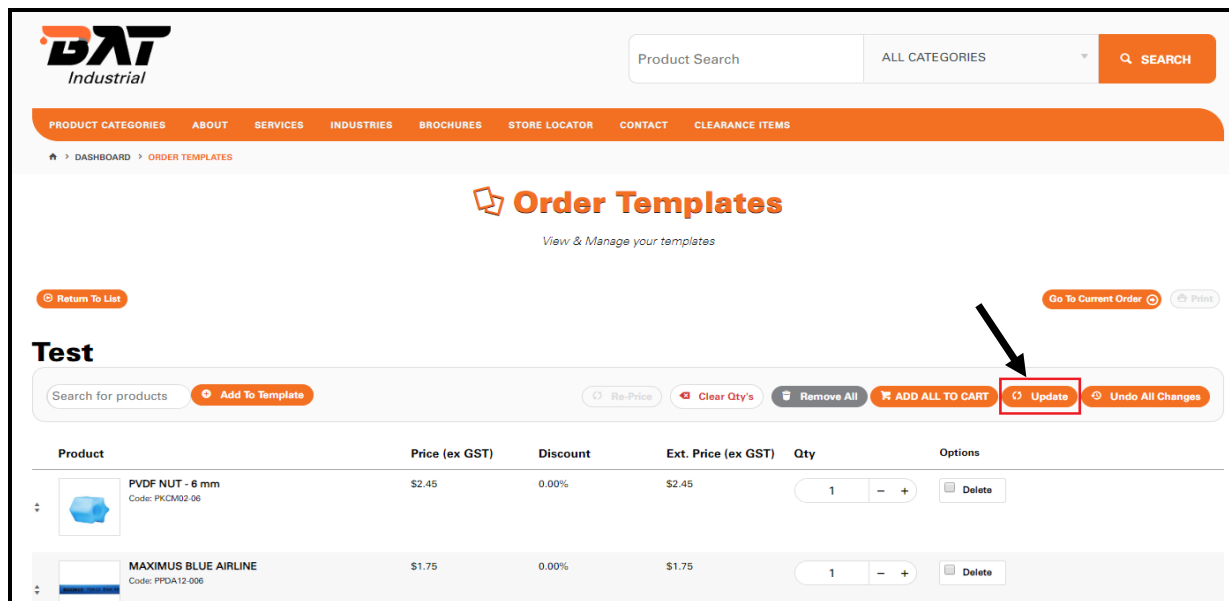


Test

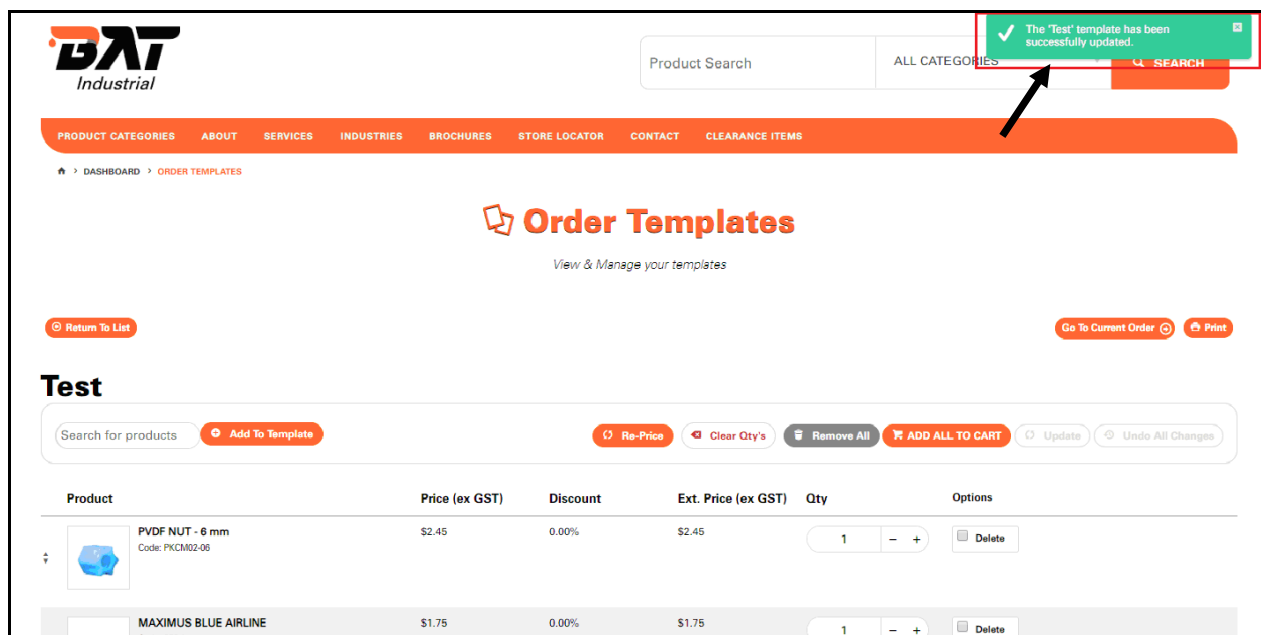
Search for products [Add To Template](#) [Re-Price](#) [Clear Qty's](#) [Remove All](#) [ADD ALL TO CART](#) [Update](#) [Undo All Changes](#)

Product	Price (ex GST)	Discount	Ext. Price (ex GST)	Qty	Options
 PVDF NUT - 6 mm Code: PKCN02-06	\$2.45	0.00%	\$2.45	1	Delete
 MAXIMUS BLUE AIRLINE Code: PPDA12-006	\$1.75	0.00%	\$1.75	1	Delete

6. Click 'Update'.



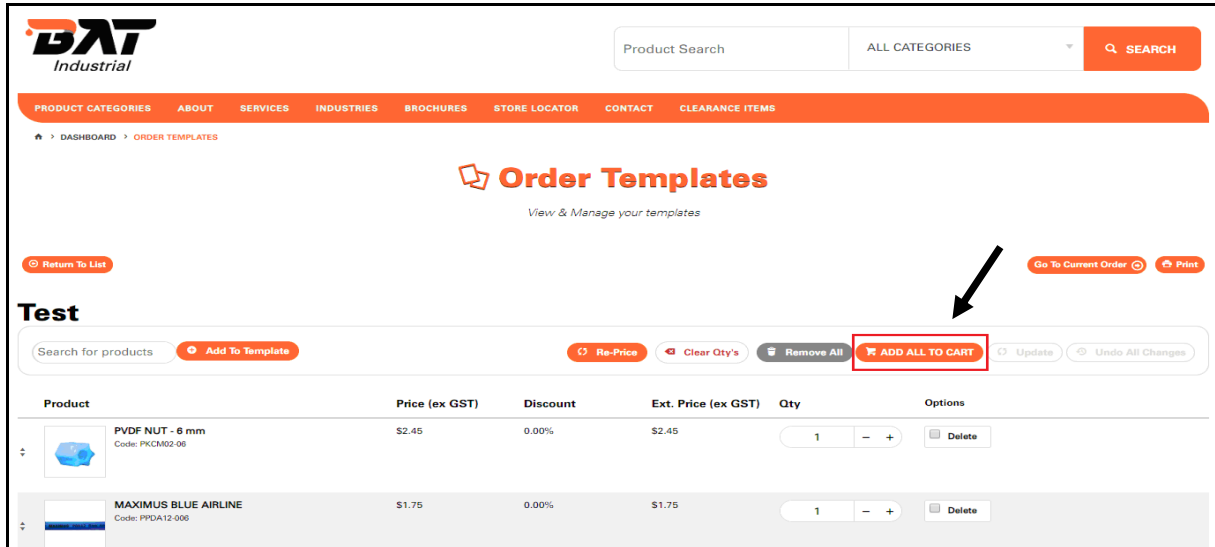
7. A message will display confirming that the template has been updated.



To Use an Order Template:

1. Login as a registered user.
2. Navigate to the 'Order Templates' page (located on the 'Dashboard' menu).
3. A list of previously saved templates will be displayed.
4. Click 'View' against the required template.

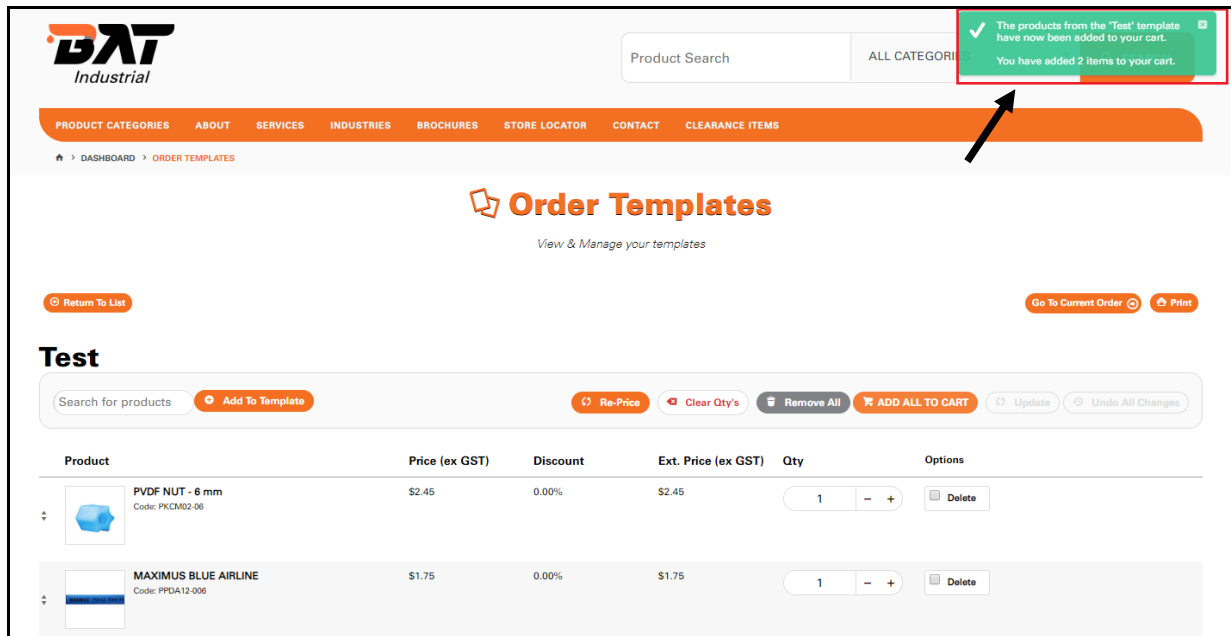
5. Click 'ADD ALL TO CART'.



The screenshot shows the 'Order Templates' page with a table of items. The 'ADD ALL TO CART' button is highlighted with a red box and an arrow pointing to it.

Product	Price (ex GST)	Discount	Ext. Price (ex GST)	Qty	Options
PVDF NUT - 6 mm Code: PKCM02-06	\$2.45	0.00%	\$2.45	1	[-] + [Delete]
MAXIMUS BLUE AIRLINE Code: PPDA12-006	\$1.75	0.00%	\$1.75	1	[-] + [Delete]

6. A confirmation message will display advising that items have been added to the cart.

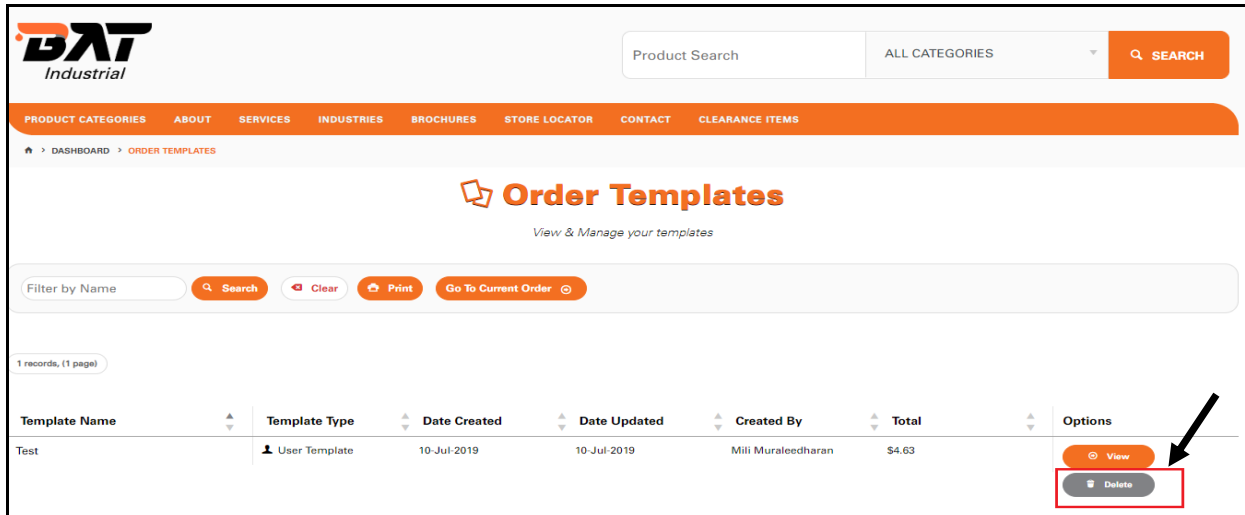


The screenshot shows the 'Order Templates' page with a confirmation message displayed in a green box at the top right. The message states: 'The products from the 'Test' template have now been added to your cart. You have added 2 items to your cart.'

Product	Price (ex GST)	Discount	Ext. Price (ex GST)	Qty	Options
PVDF NUT - 6 mm Code: PKCM02-06	\$2.45	0.00%	\$2.45	1	[-] + [Delete]
MAXIMUS BLUE AIRLINE Code: PPDA12-006	\$1.75	0.00%	\$1.75	1	[-] + [Delete]

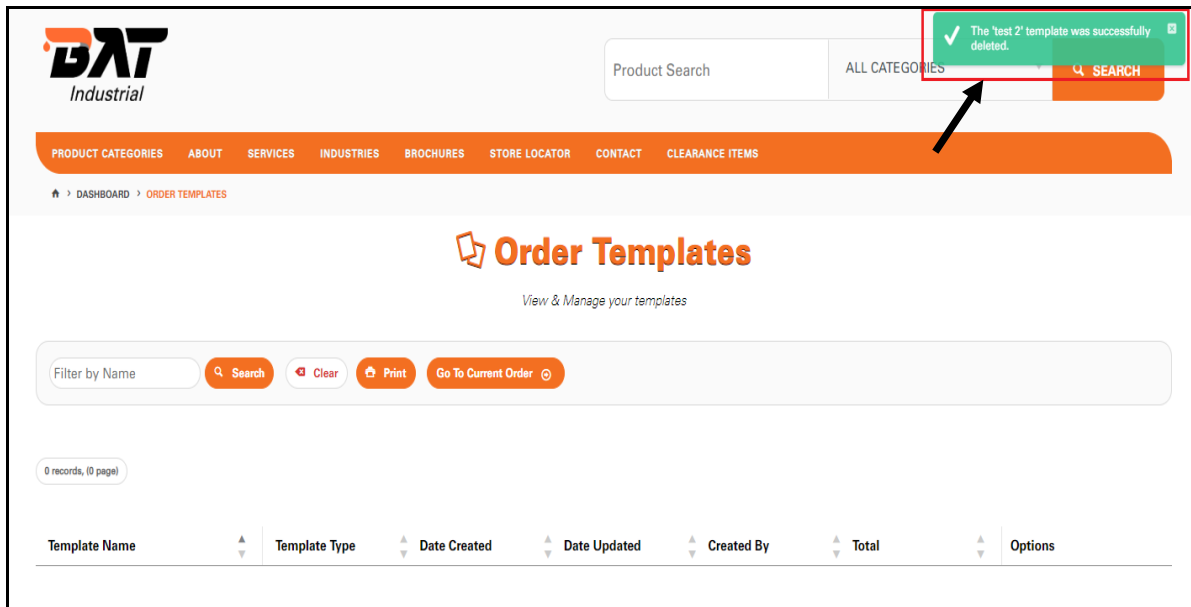
To Delete an Order Template:

6. Login as a registered user.
7. Navigate to the '**Order Templates**' page (located on the '**Dashboard**' menu).
8. Click '**Delete**' against the required template.



The screenshot shows the BAT Industrial website's 'Order Templates' page. At the top, there's a navigation bar with the BAT Industrial logo and a search bar. Below the navigation bar, there's a breadcrumb trail: 'DASHBOARD > ORDER TEMPLATES'. The main heading is 'Order Templates' with a subtext 'View & Manage your templates'. Below this, there's a filter bar with 'Filter by Name', a search button, a clear button, a print button, and a 'Go To Current Order' button. A message indicates '1 records, (1 page)'. Below this is a table with columns: Template Name, Template Type, Date Created, Date Updated, Created By, Total, and Options. The table contains one record: 'Test' (User Template, 10-Jul-2019, 10-Jul-2019, Mili Muralaeddharan, \$4.63). In the 'Options' column for the 'Test' record, there are two buttons: 'View' and 'Delete'. The 'Delete' button is highlighted with a red box, and an arrow points to it.

9. The '**Order Templates**' page will reload, minus the deleted record.

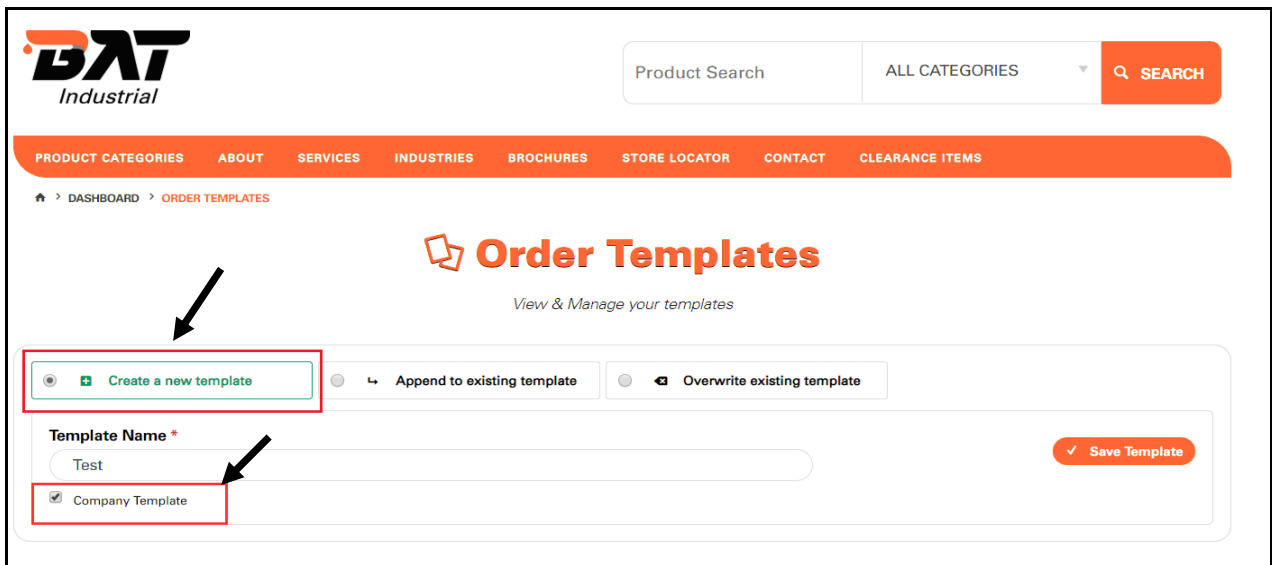


The screenshot shows the BAT Industrial website's 'Order Templates' page after the deletion. A green success message box is visible at the top right, stating 'The 'test 2' template was successfully deleted.' with a checkmark icon. The breadcrumb trail remains 'DASHBOARD > ORDER TEMPLATES'. The main heading is 'Order Templates' with the subtext 'View & Manage your templates'. The filter bar is the same as in the previous screenshot. A message indicates '0 records, (0 page)'. The table now shows no records, with the same column headers: Template Name, Template Type, Date Created, Date Updated, Created By, Total, and Options.

Company Templates

To Create a Company Template:

1. Login as a registered user.
2. Browse or search for products and add them to the cart.
3. Navigate to the **Shopping Cart**.
4. Click '**Save as Template**'.
5. Enter a name for the template.
6. Click '**Create a new template**'.
7. Tick the box marked '**Company Template**'.



BAT Industrial

Product Search ALL CATEGORIES SEARCH

PRODUCT CATEGORIES ABOUT SERVICES INDUSTRIES BROCHURES STORE LOCATOR CONTACT CLEARANCE ITEMS

DASHBOARD > ORDER TEMPLATES

Order Templates

View & Manage your templates

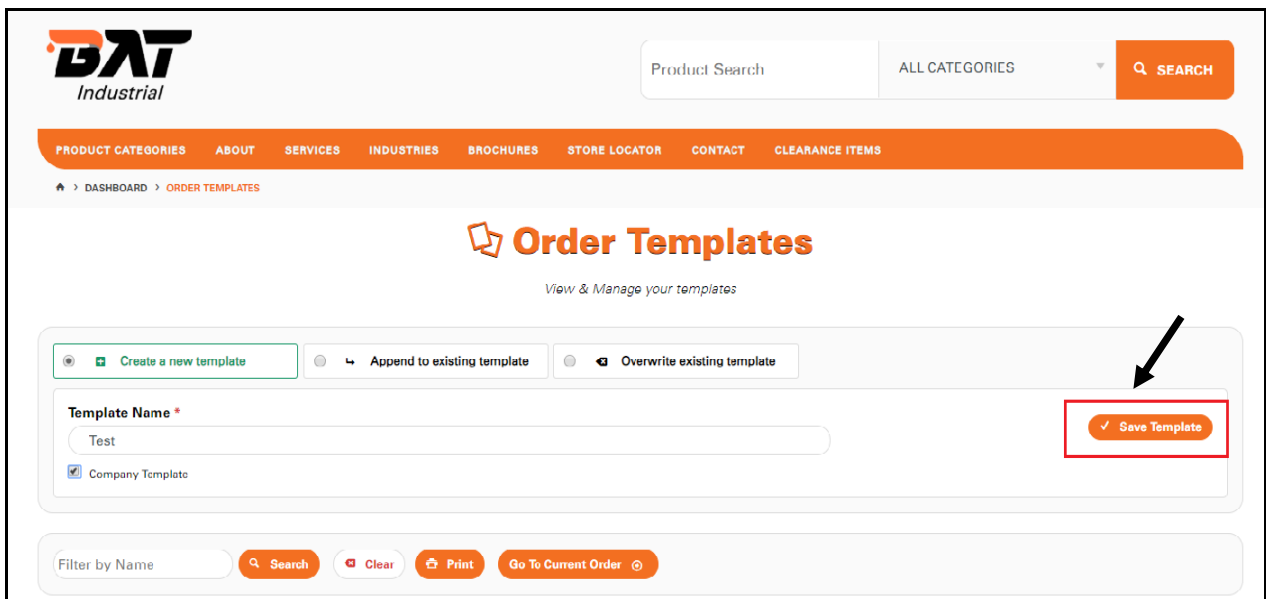
☒ Create a new template ☐ Append to existing template ☐ Overwrite existing template

Template Name *
Test

☒ Company Template

Save Template

8. Click '**Save Template**'.



BAT Industrial

Product Search ALL CATEGORIES SEARCH

PRODUCT CATEGORIES ABOUT SERVICES INDUSTRIES BROCHURES STORE LOCATOR CONTACT CLEARANCE ITEMS

DASHBOARD > ORDER TEMPLATES

Order Templates

View & Manage your templates

☒ Create a new template ☐ Append to existing template ☐ Overwrite existing template

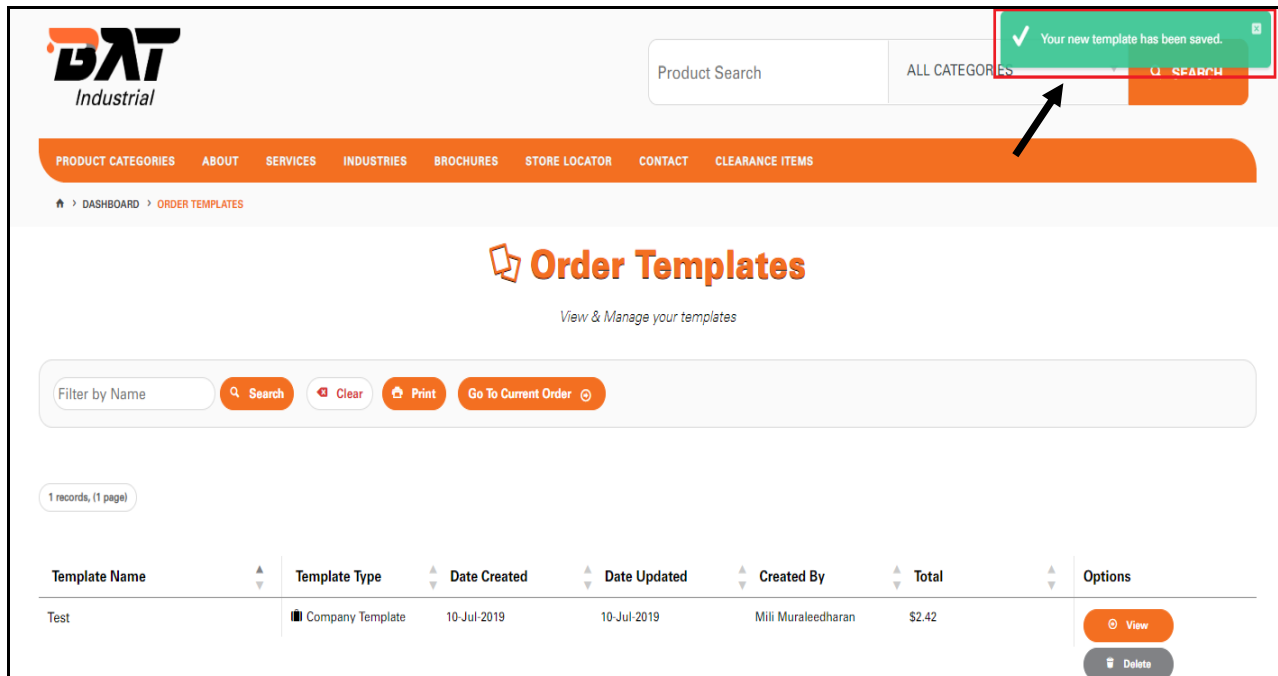
Template Name *
Test

☒ Company Template

Save Template

Filter by Name Search Clear Print Go To Current Order

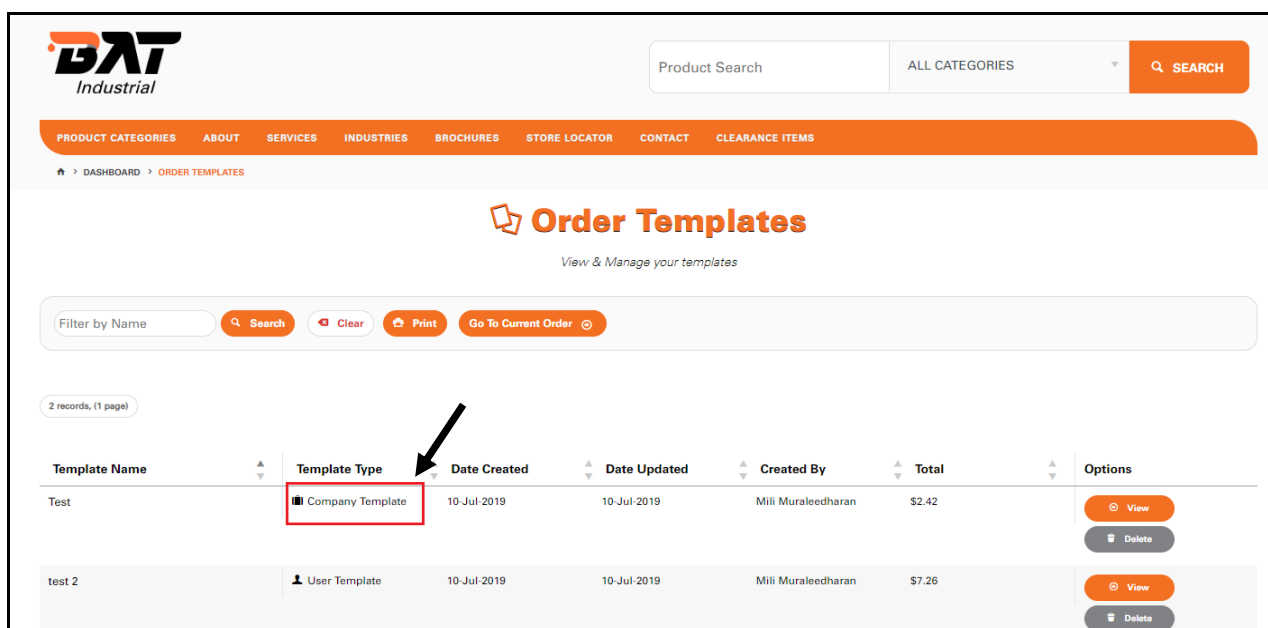
- A message will display confirming that the template has been saved.



The screenshot shows the BAT Industrial website's 'Order Templates' page. A green success message box in the top right corner states 'Your new template has been saved.' with a checkmark icon. The page header includes the BAT Industrial logo, a product search bar, and a navigation menu with links like 'PRODUCT CATEGORIES', 'ABOUT', 'SERVICES', 'INDUSTRIES', 'BROCHURES', 'STORE LOCATOR', 'CONTACT', and 'CLEARANCE ITEMS'. The breadcrumb trail shows 'DASHBOARD > ORDER TEMPLATES'. The main heading is 'Order Templates' with the subtitle 'View & Manage your templates'. Below this is a filter bar with 'Filter by Name', 'Search', 'Clear', 'Print', and 'Go To Current Order' buttons. A table lists templates, showing one record: 'Test' with a 'Company Template' type, created on 10-Jul-2019, by Mili Muraleedharan, with a total of \$2.42. The table has columns for Template Name, Template Type, Date Created, Date Updated, Created By, Total, and Options (View, Delete).

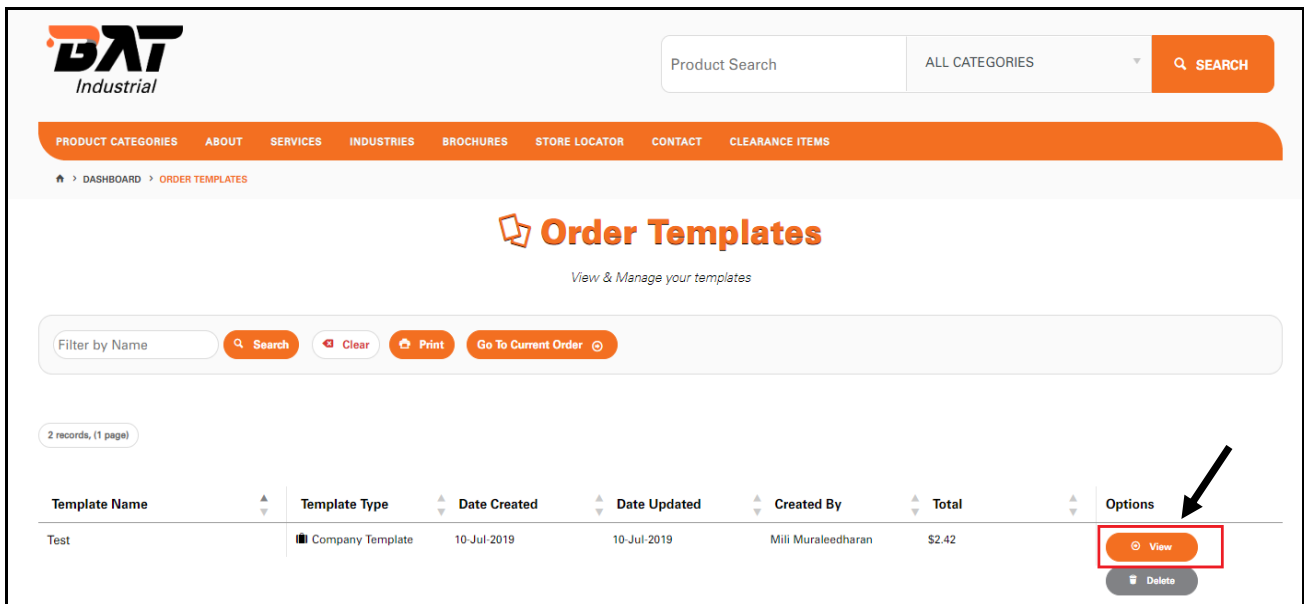
To View a Company Template:

- Login as a registered user.
- Navigate to the 'Order Templates' page (located on the 'Dashboard' menu).
- Company Templates are displayed under 'Template Type' column.



The screenshot shows the BAT Industrial website's 'Order Templates' page with two records displayed in the table. The first record is 'Test' with a 'Company Template' type, created on 10-Jul-2019, by Mili Muraleedharan, with a total of \$2.42. The second record is 'test 2' with a 'User Template' type, created on 10-Jul-2019, by Mili Muraleedharan, with a total of \$7.26. The table has columns for Template Name, Template Type, Date Created, Date Updated, Created By, Total, and Options (View, Delete). An arrow points to the 'Company Template' entry in the 'Template Type' column.

- Click '**View**' against the required Company Template.



Order Templates
View & Manage your templates

Filter by Name

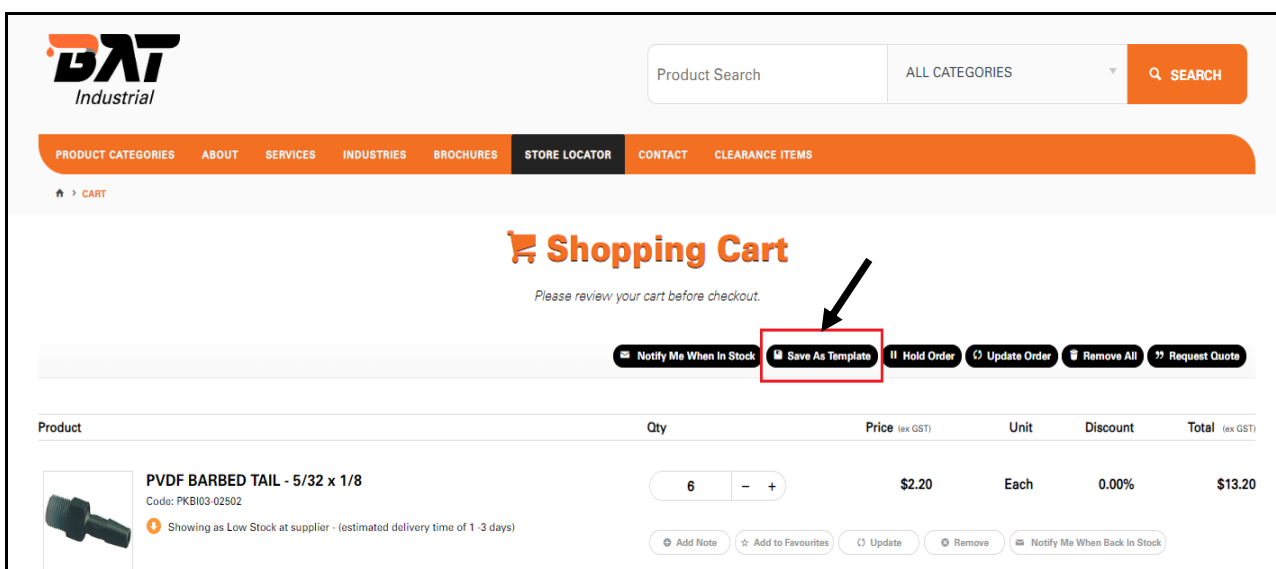
2 records, (1 page)

Template Name	Template Type	Date Created	Date Updated	Created By	Total	Options
Test	Company Template	10-Jul-2019	10-Jul-2019	Mili Muraleedharan	\$2.42	View Delete

- The page will reload to display the selected template.

To Add to a Company Template:

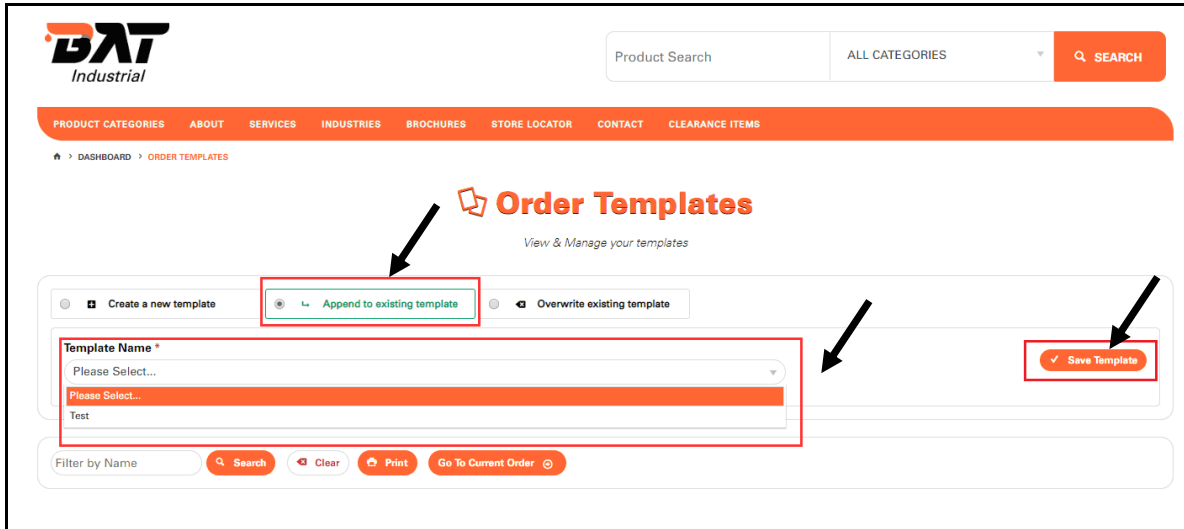
- Login as a registered user.
- Browse or search for products and add them to the cart.
- Navigate to the **Shopping Cart**.
- Click '**Save as Template**'.



Shopping Cart
Please review your cart before checkout.

Product	Qty	Price (ex GST)	Unit	Discount	Total (ex GST)
 PVDF BARBED TAIL - 5/32 x 1/8 Code: PKBI03-02502 Showing as Low Stock at supplier - (estimated delivery time of 1 -3 days)	6	\$2.20	Each	0.00%	\$13.20

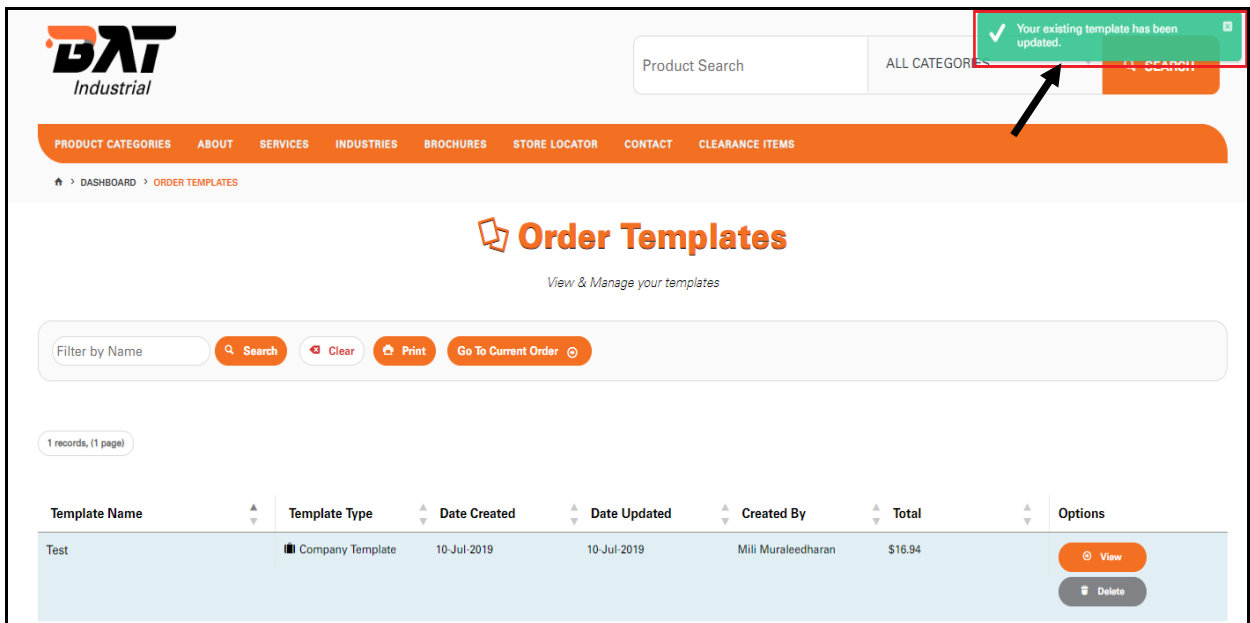
5. Enter the name of the existing company template that you wish to append to.
6. Click '**Append to existing template**'.
7. Click '**Save Template**'



The screenshot shows the 'Order Templates' page with the following elements:

- Navigation Bar:** Includes 'PRODUCT CATEGORIES', 'ABOUT', 'SERVICES', 'INDUSTRIES', 'BROCHURES', 'STORE LOCATOR', 'CONTACT', and 'CLEARANCE ITEMS'.
- Search Bar:** Contains 'Product Search' and 'ALL CATEGORIES' with a 'SEARCH' button.
- Breadcrumbs:** 'DASHBOARD > ORDER TEMPLATES'.
- Section Header:** 'Order Templates' with a subtitle 'View & Manage your templates'.
- Form:**
 - Buttons: 'Create a new template', 'Append to existing template' (highlighted with a red box and an arrow), and 'Overwrite existing template'.
 - Dropdown: 'Template Name *' with options 'Please Select...', 'Please Select...', and 'Test'.
 - Buttons: 'Save Template' (highlighted with a red box and an arrow).
 - Buttons: 'Filter by Name', 'Search', 'Clear', 'Print', and 'Go To Current Order'.

8. A message will display confirming that the template has been saved/updated.



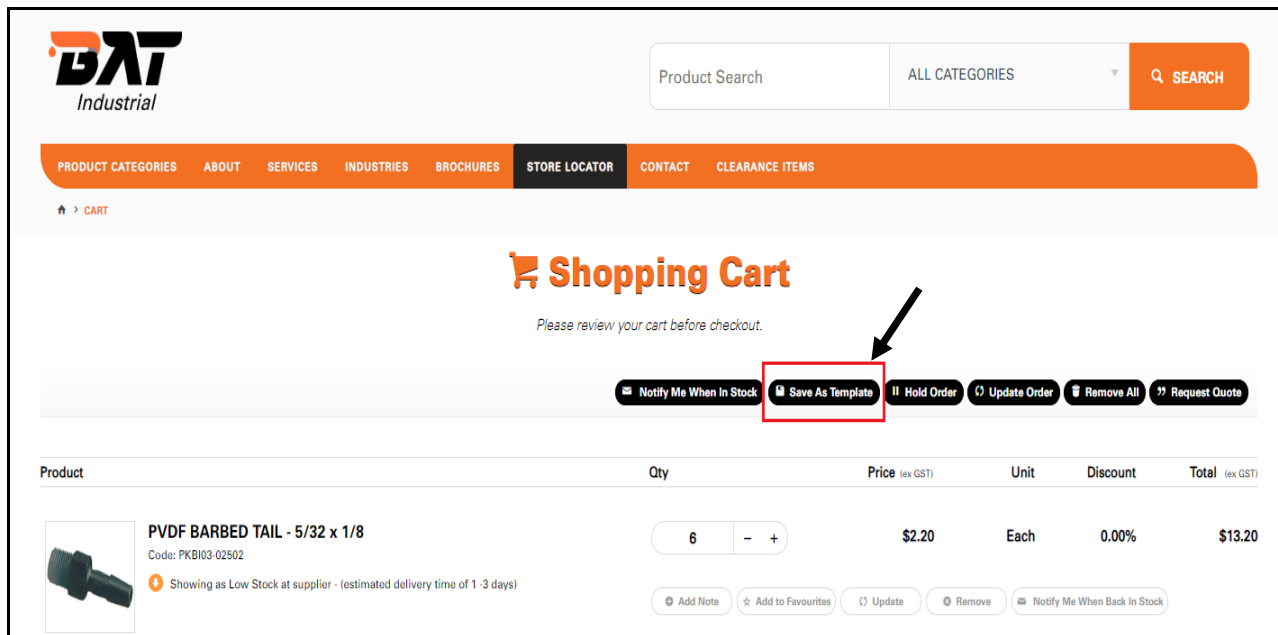
The screenshot shows the 'Order Templates' page with a confirmation message at the top right: '✓ Your existing template has been updated.' (highlighted with a red box and an arrow).

The table below lists the templates:

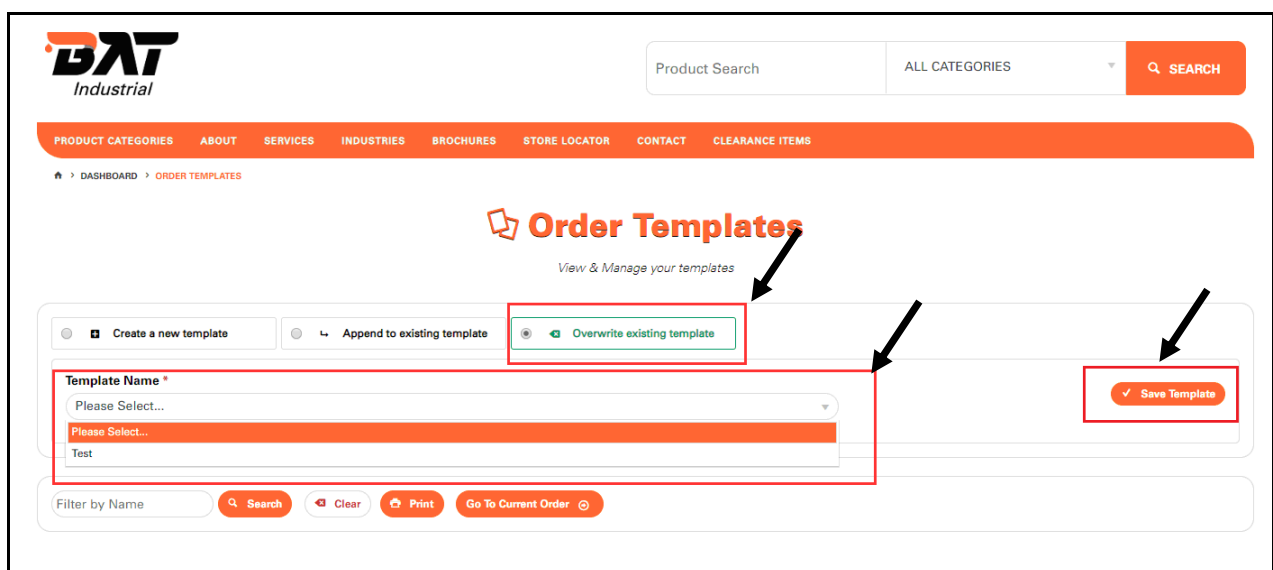
Template Name	Template Type	Date Created	Date Updated	Created By	Total	Options
Test	Company Template	10-Jul-2019	10-Jul-2019	Mili Muraledharan	\$16.94	View Delete

To Overwrite a Company Template:

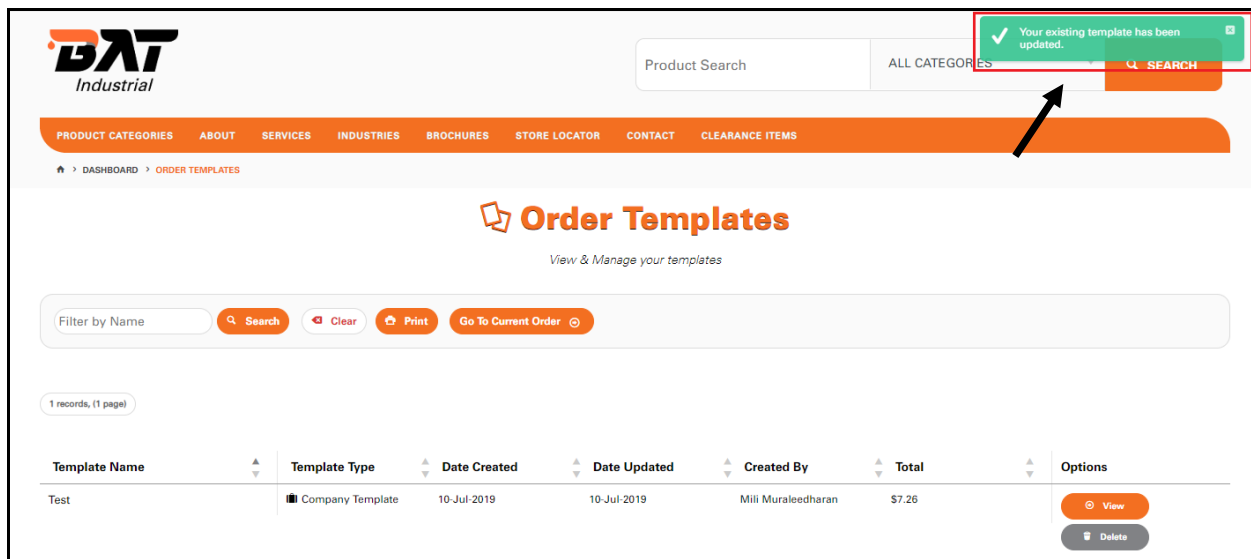
1. Login as a registered user.
2. Browse or search for products and add them to the cart.
3. Navigate to the **Shopping Cart**.
4. Click '**Save as Template**'.



5. Enter the name of the existing company template that you wish to overwrite.
6. Click '**Overwrite existing template**'.
7. Click '**Save Template**'.



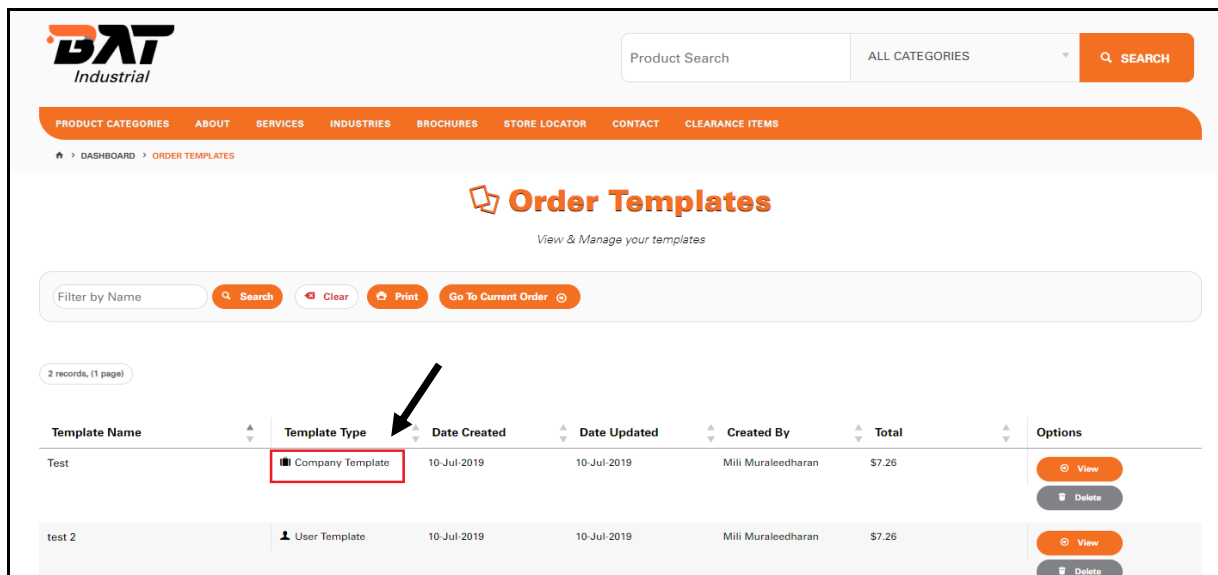
8. A message will display confirming that the template has been saved/updated.



The screenshot shows the BAT Industrial web application interface. At the top right, a green notification box displays the message: "Your existing template has been updated." with a checkmark icon. Below the notification, the page title "Order Templates" is centered, followed by the subtitle "View & Manage your templates". A search bar and filter options are visible. Below the filters, a table lists the templates. The table has columns: Template Name, Template Type, Date Created, Date Updated, Created By, Total, and Options. The first row shows a template named "Test" with a "Company Template" type, created and updated on 10-Jul-2019 by Mili Muraleedharan, with a total of \$7.26. The "Options" column for this row includes "View" and "Delete" buttons.

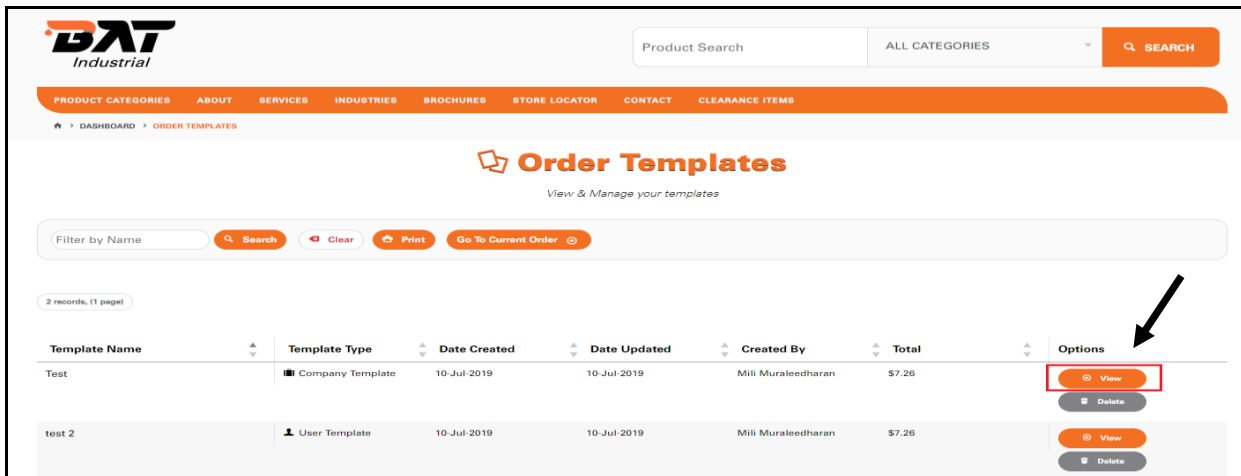
To Use a Company Template:

1. Login as a Registered User.
2. Navigate to the '**Order Templates**' page (located on the '**Dashboard**' menu).
3. A list of previously saved templates will be displayed.
4. Company Templates are displayed under '**Template Type**' column.

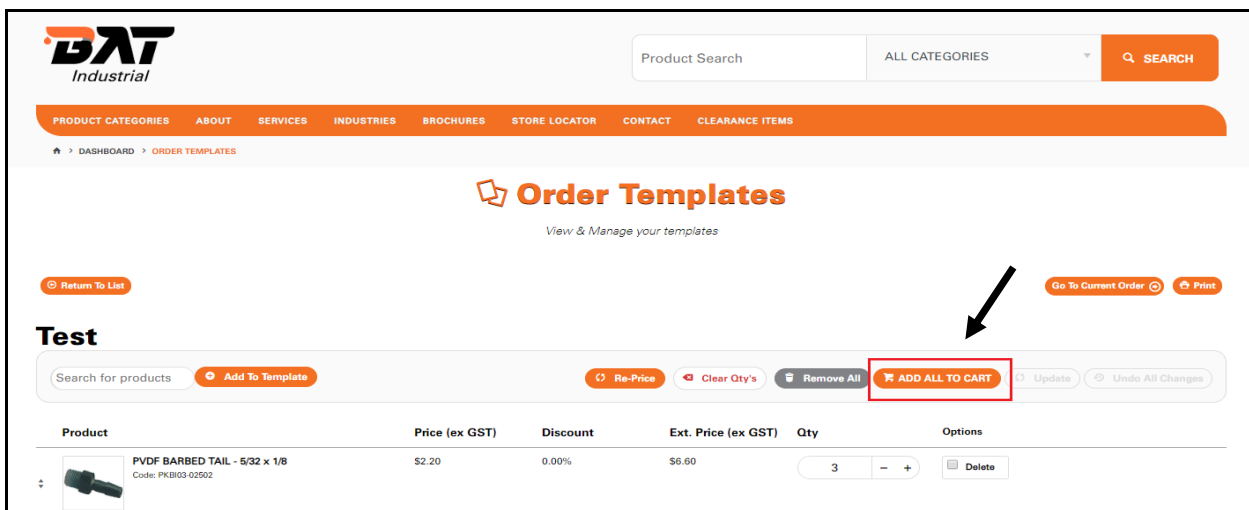


The screenshot shows the BAT Industrial web application interface. The page title "Order Templates" is centered, followed by the subtitle "View & Manage your templates". A search bar and filter options are visible. Below the filters, a table lists the templates. The table has columns: Template Name, Template Type, Date Created, Date Updated, Created By, Total, and Options. The first row shows a template named "Test" with a "Company Template" type, created and updated on 10-Jul-2019 by Mili Muraleedharan, with a total of \$7.26. The "Options" column for this row includes "View" and "Delete" buttons. The second row shows a template named "test 2" with a "User Template" type, created and updated on 10-Jul-2019 by Mili Muraleedharan, with a total of \$7.26. The "Options" column for this row includes "View" and "Delete" buttons. An arrow points to the "Company Template" type in the first row.

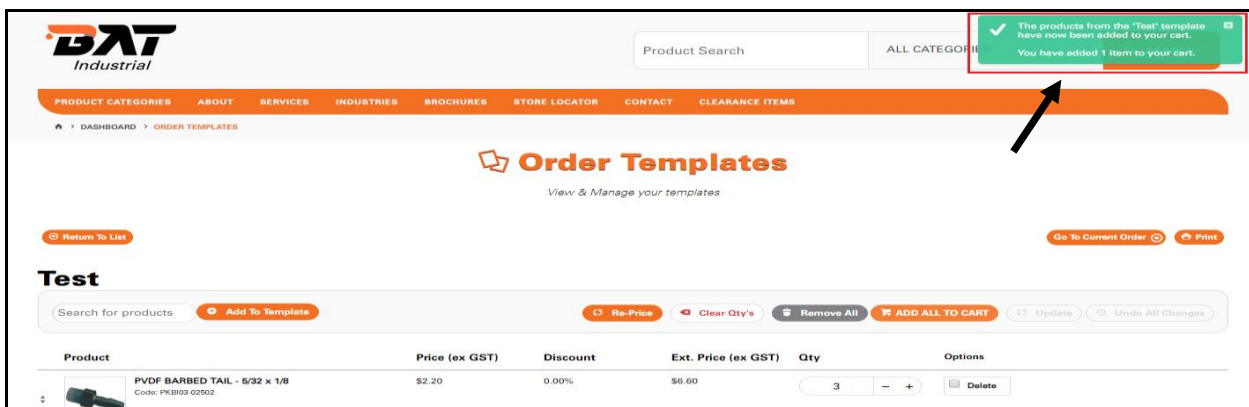
5. Click 'View' against the required Company Template.



6. Click 'ADD ALL TO CART'.

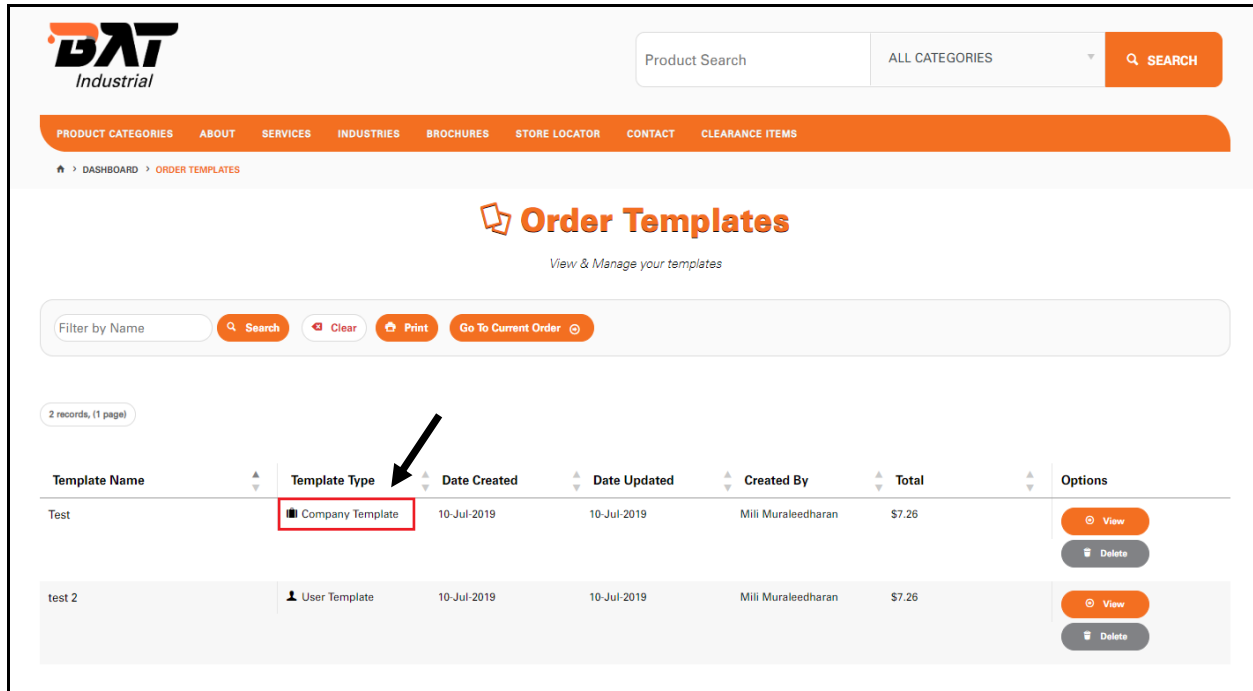


7. A message will display confirming that items have been added to the cart.



To Delete a Company Template:

1. Login as a registered user.
2. Navigate to the '**Order Templates**' page (located on the '**Dashboard**' menu).
3. Company Templates are displayed under '**Template Type**' column.



Product Search ALL CATEGORIES

PRODUCT CATEGORIES ABOUT SERVICES INDUSTRIES BROCHURES STORE LOCATOR CONTACT CLEARANCE ITEMS

DASHBOARD > ORDER TEMPLATES

Order Templates

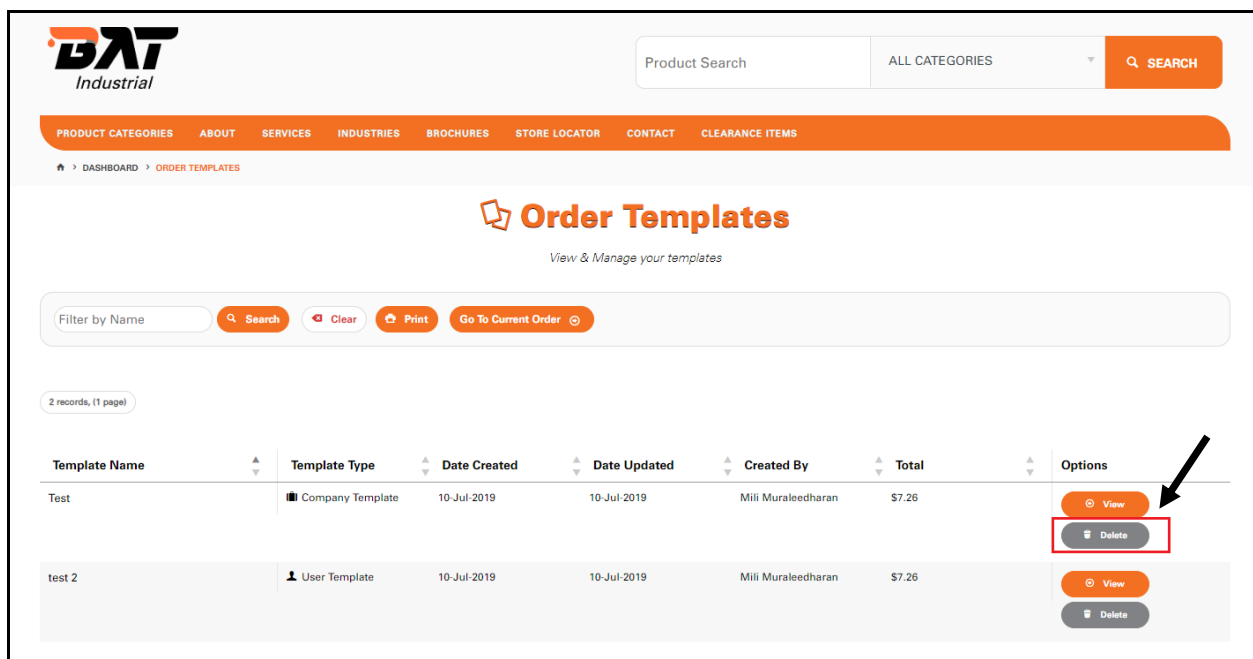
View & Manage your templates

Filter by Name

2 records, (1 page)

Template Name	Template Type	Date Created	Date Updated	Created By	Total	Options
Test	Company Template	10-Jul-2019	10-Jul-2019	Mili Muralaeddharan	\$7.26	View Delete
test 2	User Template	10-Jul-2019	10-Jul-2019	Mili Muralaeddharan	\$7.26	View Delete

4. Click '**Delete**' against the required template.



Product Search ALL CATEGORIES

PRODUCT CATEGORIES ABOUT SERVICES INDUSTRIES BROCHURES STORE LOCATOR CONTACT CLEARANCE ITEMS

DASHBOARD > ORDER TEMPLATES

Order Templates

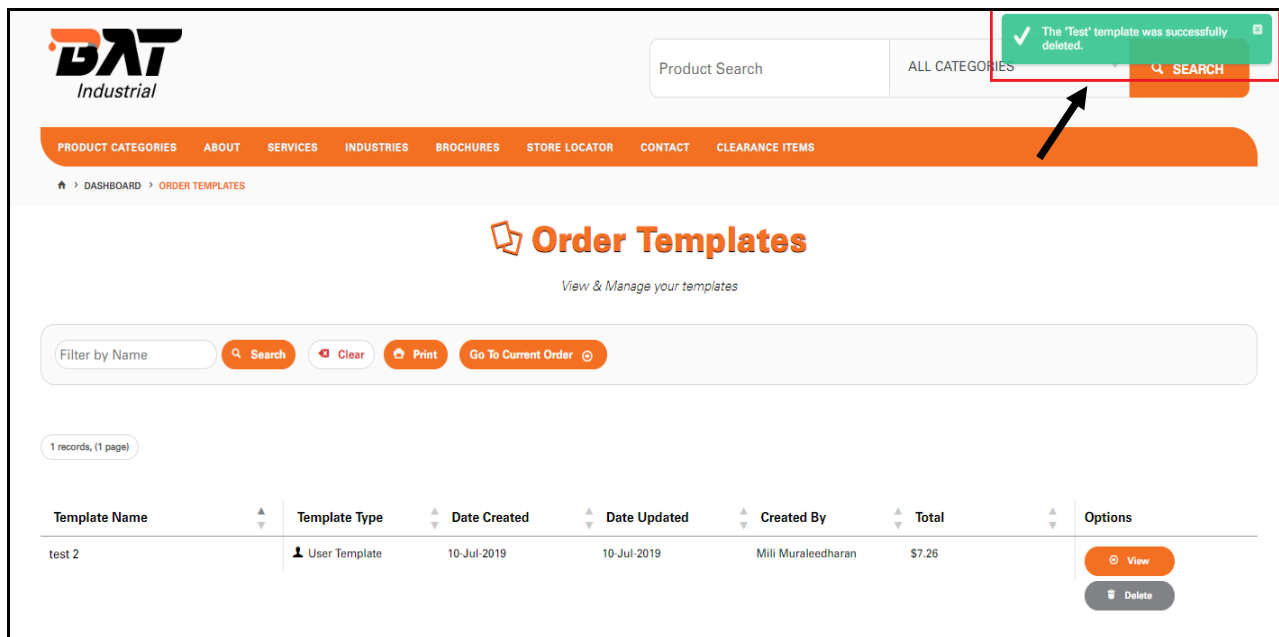
View & Manage your templates

Filter by Name

2 records, (1 page)

Template Name	Template Type	Date Created	Date Updated	Created By	Total	Options
Test	Company Template	10-Jul-2019	10-Jul-2019	Mili Muralaeddharan	\$7.26	View Delete
test 2	User Template	10-Jul-2019	10-Jul-2019	Mili Muralaeddharan	\$7.26	View Delete

5. The 'Order Templates' page will reload, minus the deleted record.



The screenshot shows the 'Order Templates' page in the BAT Industrial system. A green notification box at the top right states: "The 'Test' template was successfully deleted." Below the notification, a table lists the remaining order templates. The table has columns for Template Name, Template Type, Date Created, Date Updated, Created By, Total, and Options. Only one record is visible: 'test 2' of type 'User Template', created and updated on 10-Jul-2019 by Mili Muralaeddharan, with a total of \$7.26. The Options column for this record contains 'View' and 'Delete' buttons.

Template Name	Template Type	Date Created	Date Updated	Created By	Total	Options
test 2	User Template	10-Jul-2019	10-Jul-2019	Mili Muralaeddharan	\$7.26	View Delete