

Order Template User Guide

Order Templates are a quick way to manage items your plan to order frequently. You can create multiple Order Templates so that you can have different lists of items you purchase.

Order templates are a great way to create collections of items you purchase. For example, if you have a supply closet that should contain common items, you could create an Order Template with all the items you plan to keep in that closet. If you have work trucks that you expect to stock with certain items, you could create an order template for each truck. If you have different groups of items (e.g. safety, supplies, janitorial, medical, first aid, etc) that you order, you can add items to an order template to make it easy to find them in the future.

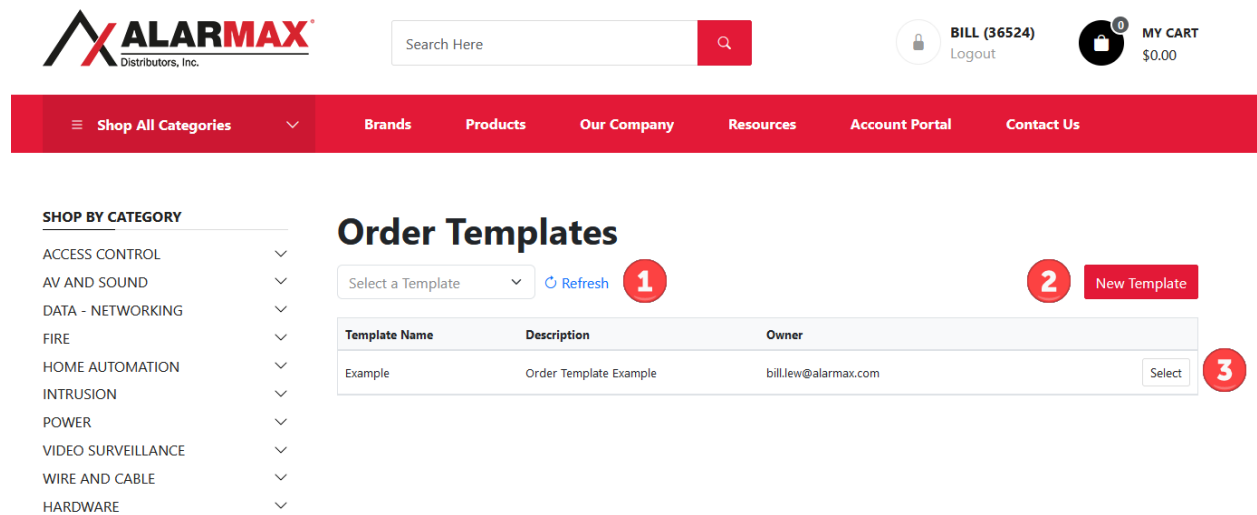
Order Templates serve as a great way to easily find and group items, view their purchase history, and make a purchase quickly and easily.

Order Templates have several pages as shown below

Order Template User Guide

Main Order Template Page

- 1) On the Order Templates page, you can jump to a template or start typing a template name in the Select a Template box to quickly access an Order Template.
- 2) You can create new Order Templates by clicking on the “New Template” button.
- 3) You can select one of your templates to use from the list using the Select button.



The screenshot shows the ALARMAX website interface. At the top left is the ALARMAX logo. To its right is a search bar with the text "Search Here" and a magnifying glass icon. Further right are links for "BILL (36524) Logout" and "MY CART \$0.00". Below this is a red navigation bar with links: "Shop All Categories", "Brands", "Products", "Our Company", "Resources", "Account Portal", and "Contact Us". On the left side, there is a "SHOP BY CATEGORY" menu with a list of categories: ACCESS CONTROL, AV AND SOUND, DATA - NETWORKING, FIRE, HOME AUTOMATION, INTRUSION, POWER, VIDEO SURVEILLANCE, WIRE AND CABLE, and HARDWARE. The main content area is titled "Order Templates". It features a "Select a Template" dropdown menu with a "Refresh" button and a red circle with the number "1" next to it. To the right of the dropdown is a "New Template" button with a red circle with the number "2" next to it. Below the dropdown is a table with columns "Template Name", "Description", and "Owner". The table contains one row with the values "Example", "Order Template Example", and "bill.lew@alarmax.com". To the right of the table is a "Select" button with a red circle with the number "3" next to it.

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Order Template Detail Page

This page is shown after you select a template.

- 1) Change your order template selection here
- 2) Edit the items, default order quantity, or item order using the Edit button
- 3) Delete this Order Template (note – this cannot be undone!)
- 4) Add the items with order quantities greater than 1 to your cart using the quantity specified for each item.
- 5) Add the items with order quantities greater than 1 to a quote request using the quantity specified for each item. *This feature may not be available for all sites.
- 6) Change the history time used for displaying the Purchased Qty and Invoice Count values for each item.
- 7) Return to the main Order Template page and view the order template list
- 8) Clear all Order Quantities for the entire order template.

Order Templates

Refresh **1**

Edit
Delete
Add To Cart
Add To Quote

Quick Checkout is disabled for this template.

Example - Order Template Example

90 Days
6

Part #	Price	Order Qty	Purchased Qty	Invoice Count
EXL-PS12VDC2A 12VDC, 2A SCREW TERMINAL ADAPTER	\$13.98/EA	1	0	0

Clear All Quantities
Add To Cart
Add To Quote

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Add or Edit an Order Template

This page allows you to add or edit your order template details

- 1) Permissions allows you to manage the permissions other users have to this order template. You can allow other users to view or modify this template making it possible for others to use and/or manage the template with you.
- 2) Delete this template (note – this cannot be undone!)
- 3) Save your changes to this template
- 4) Cancel your current action and return
- 5) Enable Quick Checkout – When enabled, Quick Checkout allows you to preset where this Order Template will ship, how it will ship, and is available for orders that are available to be paid for on Account Terms. Enabling this option allows for a fast checkout by skipping the traditional cart checkout process and allowing a complete checkout with minimal time and effort.
- 6) You can set or change the template name here
- 7) You can optionally add a description of this order template
- 8) The sort arrows allow you to move your items up or down in the list to set the display order
- 9) The Default Order Quantity will be populated in the Order Qty box for a selected order template
- 10) If an item allows for multiple UOMs, this allows you to select the default UOM for this item
- 11) The delete icon removes an item from your order template
- 12) This option resets all Default Order Quantities to zero.
- 13) Add Multiple allows you to add multiple items to the order template at one time
- 14) Add Item allow you to add a single item to the order template

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Order Templates

Example

1 Permissions **2** Delete **3** Save **4** Cancel

Allow Quick Checkout **5**

Template Name: **6**
Example

Template Description: **7**
Order Template Example

8	Part #	Description	Default Order Qty	UOM	11
	EXL-PS12VDC2A	12VDC, 2A SCREW TERMINAL ADAPTER	1 9	EA 10	11

Clear All Quantities **12** + Add Multiple **13** + Add Item

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