



DASHBOARD

How to create a template (AKA Easy Ships)

- A. Order templates are a convenient way to dramatically increase your order-entry productivity.
 - An order template is essentially an order where all the information needed to book it is pre-filled, but you have not finalized the order and clicked on the final **CREATE ORDER** button.
 - When using a template all you need to do is apply minor adjustments and click on **CREATE ORDER** to get the job done.
- B. There are four parts to Template management: Creating them, using them, updating them, and searching for them.
- C. To create an order template, go to the "My Orders" table, click on the new order button and simply fill in all the information you need to create a new order like the pickup and delivery locations, items being handled, the service level, the vehicle type and ready time. Instead of clicking on the green **CREATE ORDER** button, click on the chevron to its right. Two self-explanatory options will appear:
 - The first one is **Create Order and Template**, and the second one is **Only Create Template**.
 - If you click **Create Order and Template**, you will create a live order and a template for future use
 - If you click **Only Create Template** you will create a template for future use, no live order will be generated
 - For either option you select, a popup will appear requiring you to name the template.
 - If the Company names are entered under the pickup and delivery information sections in the order, the template name will be pre-populated with the pick-up and delivery company names.
 2. If no company name was input in the order, the current date will be populated as the template name in the pop-up box. You can change the template name to meet your needs
 3. Once the template name is filled in Click **Create** to complete the process
 4. Depending on the selected option, either the order and template will both be created, or just the template will be created.
 5. Once created, a message will pop-up at the top of the screen as confirmation.