

## Using Templates for Recurring Orders

As your Purchasing Partner, KCDA understands the purchasing patterns of its Customers and their seasonal and recurring nature. Saving your orders as Templates allows you to easily recreate your repeat orders in few easy steps and also share them with others as needed.

### Creating a Template

Step 1: Open the Order you would like to save as a Template by clicking on Cart Name/# from

- Cart Manager
- Order History (link to Cart)

**Cart Manager** Create New cart View Cart Templates

Cart Number Search

146 results Show: 10

**OFFICE - 1229935** Merge

April 1, 2019 - Teri Mathews  
ILALKO ELEMENTARY - 103053

**Order History**

1877403

Completed

\$133.36 - PO-#/Clay

ALPAC ELEMENTARY - 103043

April 1, 2019 - Leanne Raybuck

**#/Clay - 1229880**

Step 2: Select “Save as Template” option on the top of the Cart

**Holiday items Order for 2nd Grade (3) - 346**

Print Export to CSV Special Items Request **Save as Template**

Special Instructions

- Please ship before Dec 1st

Cart Notes

+ View All

Show: 10 Sort by: Recently Added

**13553 - Domtar Hots Color Paper** \$31.56  
Domtar Hots color paper, great for newsletters, bulletins and lunch menus. \$7.89/ream

Paper Color: Red  
Paper Type:  
Paper Size:

Account Code (optional)  
4  
Update remove

Step 3: You are presented with the Template saved in the same name as the original cart. Use “Edit Template” to give it a name and description you will remember.

**Holiday items Order for 2nd Grade (3) - 346**

How do I use Cart Templates?

New Cart from Template

**Edit Template**

36004 - Scotch-Brite Commercial Scouring Pads \$11.14/box  
Pads, commercial scouring, 6"x9", green synthetic fiber, 20 pads/box. Account Code: 9770-63-5000-540-0000-000 Qty: 2

30936 - Toilet Bowl Mop \$0.66/each  
Toilet bowl mop, acrylic yarn, 12" plastic handle. Account Code: 9770-63-5000-540-0000-000 Qty: 10

Template Name  
Yearly Thanks Giving Order

Template Description  
Yearly Thanks Giving Order to be ordered by End of October

Public Template

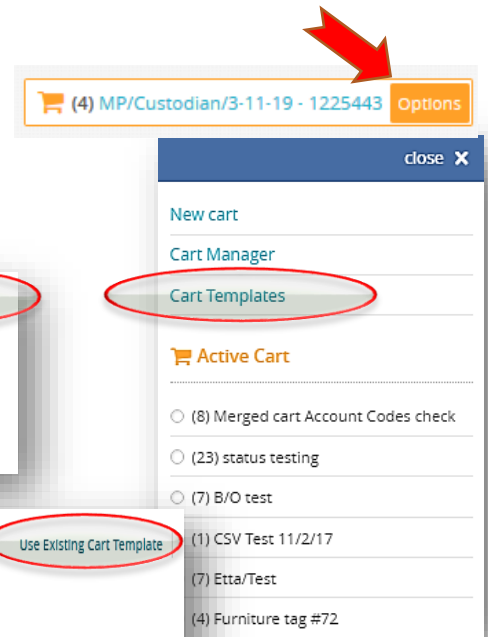
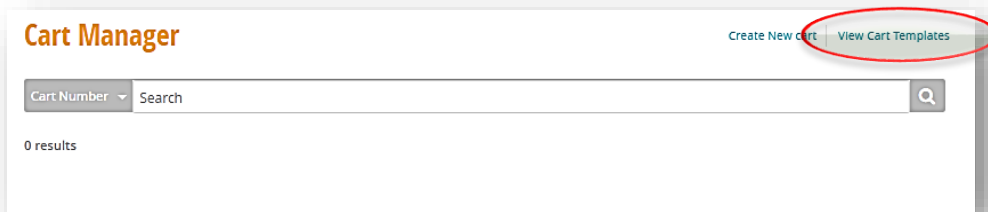
- Make it a Public Template to share it with users across your entire location.



## Using a Template

Step 1: Where are the templates? You will find them -

- Cart Manager on the top right corner
- Using the Orange Options button by your Open Cart Name
- On the Create New Cart page



### Create Cart

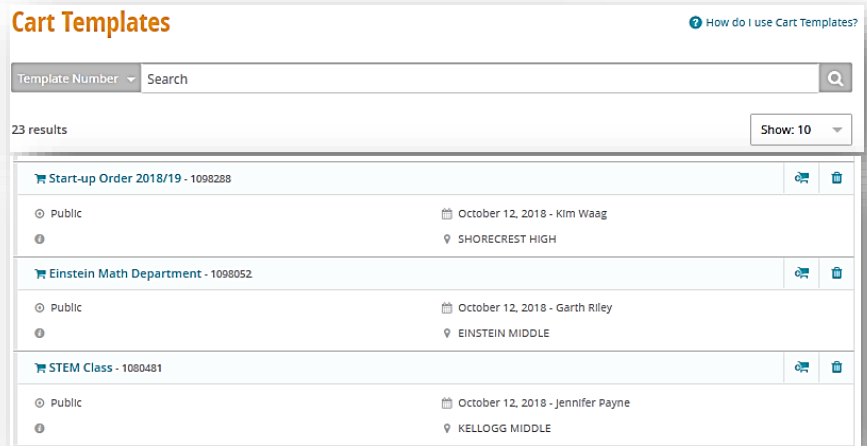
Owner  
Renu Grover

Cart Name/Mark For  
Cart Name/Mark For

Special Instructions (optional)

Use Existing Cart Template

Step 2: Find and Select the Template you want to use from the Cart Templates Page



Step 3: Review the template and click on "New Cart from Template" to use to create a New Order at the click of a button. You may change quantities, add/remove items and add budget codes to the new cart like you would on a new order.

Hope you find this feature easy to use and efficient for your business!

Enjoy!

