

## Applying an Order Template


Follow the steps in the appropriate section to apply a template to an order.

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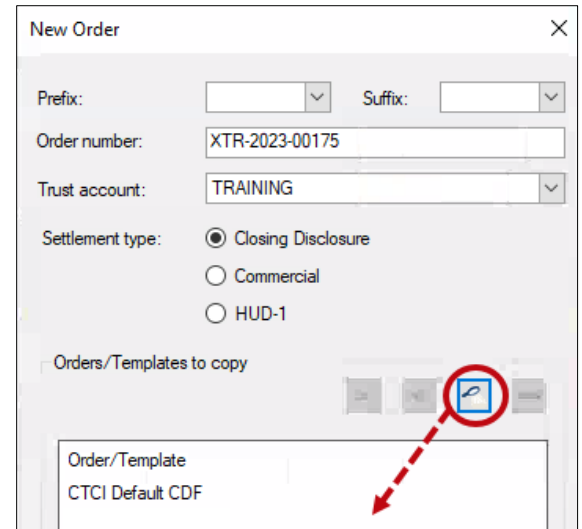
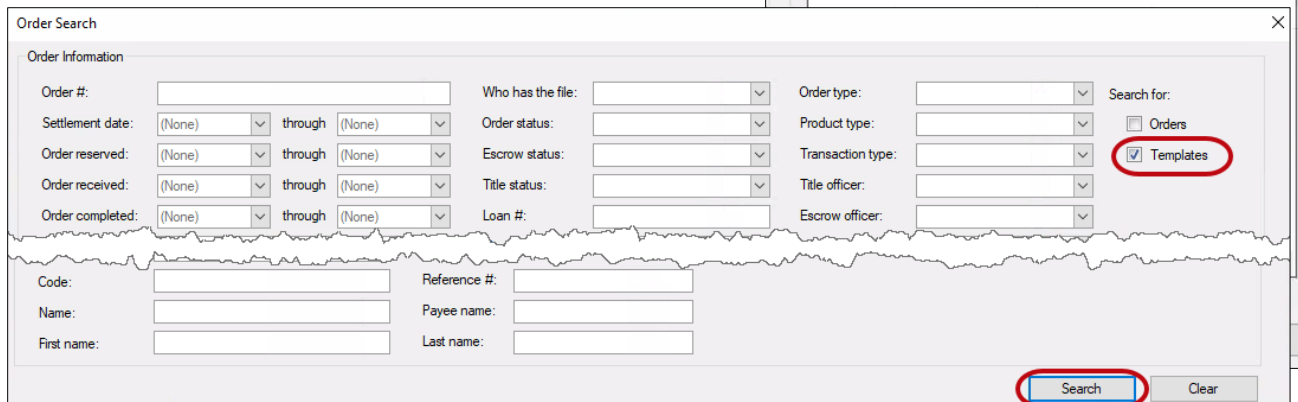
### Rules on Applying Templates

When applying multiple order templates, remember the rule: **First in Wins!** Meaning that all the templates are applied, but the information in the first template takes precedence over the information in the next template, and so on.

### Applying Templates When Creating an Order

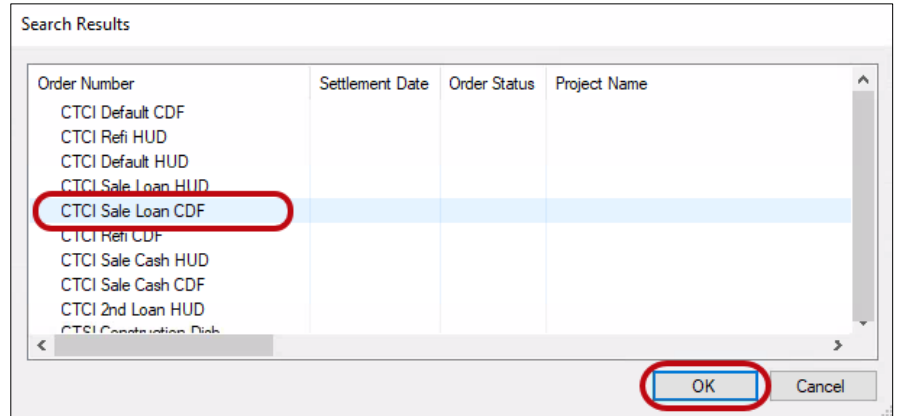
1. Create a new order
2. Select the **Settlement type**
3. If applicable, allow the **Default** template
4. Click the **Search**  icon to search for the transaction-type template
5. In the **Order Search** window, the default **Search for** setting is set to search for **Templates**; click the **Search** button

**NOTE:** You can also press the **Enter** key if no search criteria is to be entered.

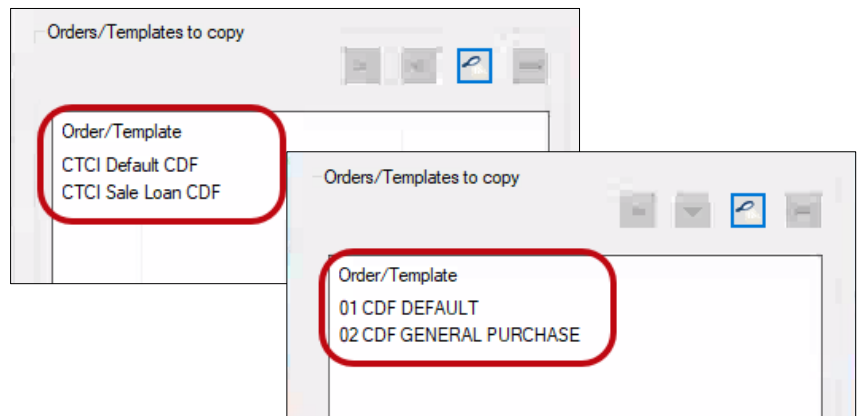
## Applying an Order Template

6. Select the transaction-type template; click **OK**



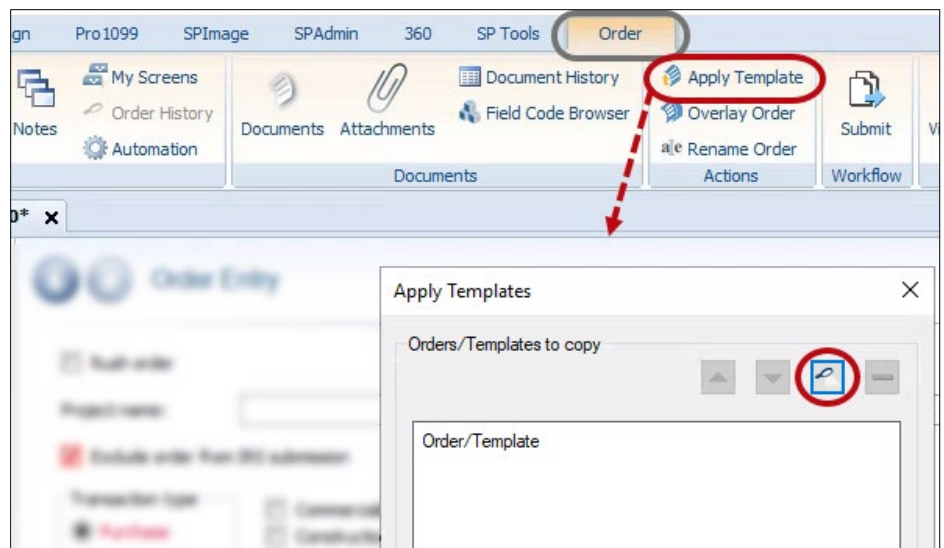
Your operation may

- use a Default template. Because the Default template is first, its order details take precedence over the transaction-type template.
- number your templates to indicate the order in which they should be applied.



## Applying Templates After Creating an Order

1. From the **Order** ribbon, click **Apply Template**
2. Click the **Search** icon to search for the additional template
3. From the **Order Search** window, press the **Search** button (or **Enter** key) to bypass the search screen



## Applying an Order Template

- Double-click the additional template you wish to apply

**NOTE:** If you are applying multiple templates, remember that the first template's order details take precedence over the one below it, and so on.

- Click **OK** to apply the template
- Click **OK** to confirm

