

How to create and edit templates... Training Guide 2

Create:

1. Connect to the Internet and go to <http://www.3663online.co.uk>. Log in using your Username, Org ID and Password.



Quick login

Username

Organisation ID

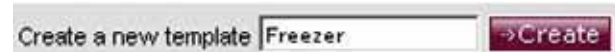
Password

[→ Forgotten Password?](#) [→ Login](#)

2. Click [My orders home](#)

3. Click [Manage order templates](#)

4. Enter template name in "Create a new template" and click "Create."



Create a new template [→ Create](#)

5. This will be added to your list of templates.

6. To populate your template with products click [→ Add/Remove items](#) next to the required template.

7. Locate the products you require by using any of the following methods:

a) **Search by product code** up to 5 different item codes can be selected followed by clicking "Find".

OR

b) **Search by keyword** allows you to enter a keyword e.g. "Ham" followed by clicking "Find". You can refine your search with a further 2 keywords e.g. "Sliced" and "Honey" to narrow the search.

OR--

c) **Browse by category** navigate through the catalogue using the headings in the left hand column on the screen.

8. Add these products to your template by ticking "Add" next to your required products.

Supplier	Code	Product description	Cost	Cs/Ea	Add
3663 MTemp	12426	Honey Roast Ham Sliced (1 x 500g)	£12.65	CS	<input checked="" type="checkbox"/>

9. Click [→ Add to template](#)

10. Items you have added to your template are displayed at the bottom of the page.

11. Repeat steps 7-10 to add further items to your template.

12. Once your template is complete click [→ Save](#)

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Edit:

1. Click [My orders home](#)

2. Click [Manage order templates](#)

3. Click [→ Add/Remove items](#) against the required template.

4. If you wish to delete an item click [Remove](#) next to this item.

5. Additional items can be added by searching the catalogue (see step 7 on previous page).

6. Tick the add box against the required item and then click [→ Add to template](#)

7. To save the changes made to your template click [→ Save](#)

