

Overview - Form Template

Last Modified on 07/27/2023 11:16 am EDT

Order Time offers options for customizing the Forms Templates that are used in different transactions. This will allow you to email and/or print the Forms out for your customers with the information that suits your needs.

This article will guide you through the setup of the Form Templates available in Order Time.

On the Form Templates Edit List you will find the list of templates that can be modified. You can use the search field to search for the Form by Template Name, Created By, Modified By, Description, or Template Type to make it easier to find the template you are looking for.

The screenshot displays the OrderTime web application interface for managing Form Templates. The top navigation bar includes Home, Sales, Purchasing, Production, Warehouse, and Reports. The current page is 'Admin > Form Templates'. A search bar is highlighted with a red box, and a dropdown menu is open below it, showing search criteria: Name, Created By, Description, and Modified By. The main content area is a table of Form Templates with the following data:

NAME	DESCRIPTION	IS CUSTOM	IS DEFAULT	MODIFIED DATE/TIME	MODIFIED BY	ACTIONS
Adjustment Form	Adjustment Form	○	●	11/17/2017 11:56 AM	Admin	[PDF] [Print]
Work Order Form	Work Order Form	○	●	11/17/2017 11:56 AM	Admin	[PDF] [Print]
Ship Doc Form	Ship Doc Form	○	●	11/17/2017 11:56 AM	Admin	[PDF] [Print]
Quote RFQ Form	Quote RFQ Form	○	●	11/17/2017 11:56 AM	Admin	[PDF] [Print]
Purchase Order Form	Purchase Order Form	○	●	11/17/2017 11:56 AM	Admin	[PDF] [Print]
Sales Order Form	Sales Order Form	○	●	3/31/2016 07:07 AM	Admin	[PDF] [Print]
Sales Order information without prices	Sales Order information without prices	○	○	3/31/2016 12:08 PM	Admin	[PDF] [Print]
Disassembly Form	Disassembly Form	○	●	11/17/2017 11:56 AM	Admin	[PDF] [Print]
Customer Return Form	Customer Return Form	○	●	11/17/2017 11:56 AM	Admin	[PDF] [Print]
Quote Form	Quote Form	○	●	3/31/2016 05:43 AM	Admin	[PDF] [Print]

The list will also show you which Report is marked as the "Default" report, if it's a "Custom" Report, and the time/date and user it was last modified by.

The "Default" Report will be the one selected when you click on the PDF Button in the transaction.

OrderTime Veronica's Company

Home Sales Purchasing Production Warehouse Reports

Create New Open Full List

Recent Records

- 110
- Veronica
- Alex Easton
- 108
- 104
- 83
- WL-CSEP
- Poly Source
- ABC Parts

Admin > Form Templates

Form Templates

TYPE	NAME	DESCRIPTION	ISCUSTOM	ISDEFAULT	MODIFIED DATE/TIME	MODIFIED BY	ACTIONS
Adjustment	Adjustment	Adjustment Form	<input type="radio"/>	<input checked="" type="radio"/>	11/17/2017 11:56 AM	Admin	[Edit] [Clone]
Work Order	Work Order	Work Order Form	<input type="radio"/>	<input checked="" type="radio"/>	11/17/2017 11:56 AM	Admin	[Edit] [Clone]
Ship Doc	Ship Doc	Ship Doc Form	<input type="radio"/>	<input checked="" type="radio"/>	11/17/2017 11:56 AM	Admin	[Edit] [Clone]
Transfer	Transfer	Quote RFQ Form	<input type="radio"/>	<input checked="" type="radio"/>	11/17/2017 11:56 AM	Admin	[Edit] [Clone]
Purchase Order	Purchase Order	Purchase Order Form	<input type="radio"/>	<input checked="" type="radio"/>	11/17/2017 11:56 AM	Admin	[Edit] [Clone]
Sales Order	Sales Order	Sales Order Form	<input type="radio"/>	<input checked="" type="radio"/>	3/31/2016 07:07 AM	Admin	[Edit] [Clone]
Sales Order	Pick List	Sales Order information without prices	<input type="radio"/>	<input type="radio"/>	3/31/2016 12:08 PM	Admin	[Edit] [Clone]
Disassembly	Disassembly	Disassembly Form	<input type="radio"/>	<input checked="" type="radio"/>	11/17/2017 11:56 AM	Admin	[Edit] [Clone]
Customer Return	Customer Return	Customer Return Form	<input type="radio"/>	<input checked="" type="radio"/>	11/17/2017 11:56 AM	Admin	[Edit] [Clone]
Quote	Quote	Quote Form	<input type="radio"/>	<input checked="" type="radio"/>	3/31/2016 05:43 AM	Admin	[Edit] [Clone]

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How to make a New Form Template

Under the Action Column, you can 'Edit' the existing Form Templates or 'Clone' it to create a new Form Template.

There is no "Add" Button to make a new form template.

Your browser does not support HTML5 video.