Orders - Create order templates

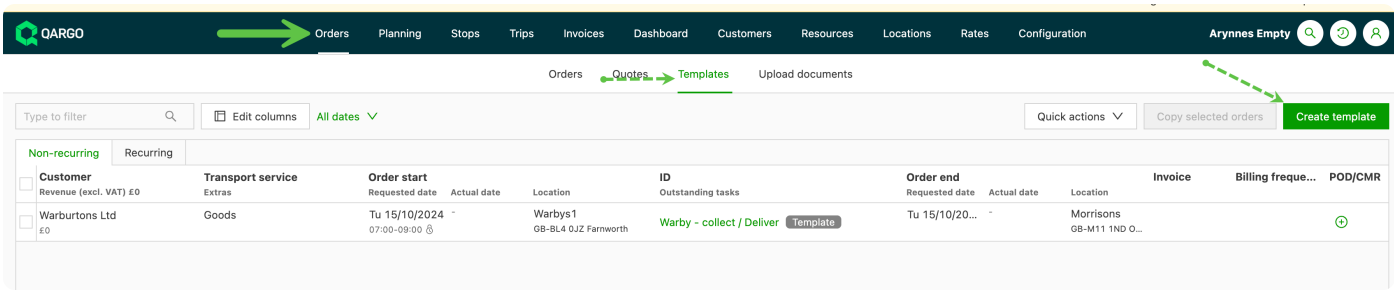
Set up repeat orders quickly: create, schedule, and manage order templates, edit details, assign defaults, and cancel them at any time.

Updated November 19, 2025

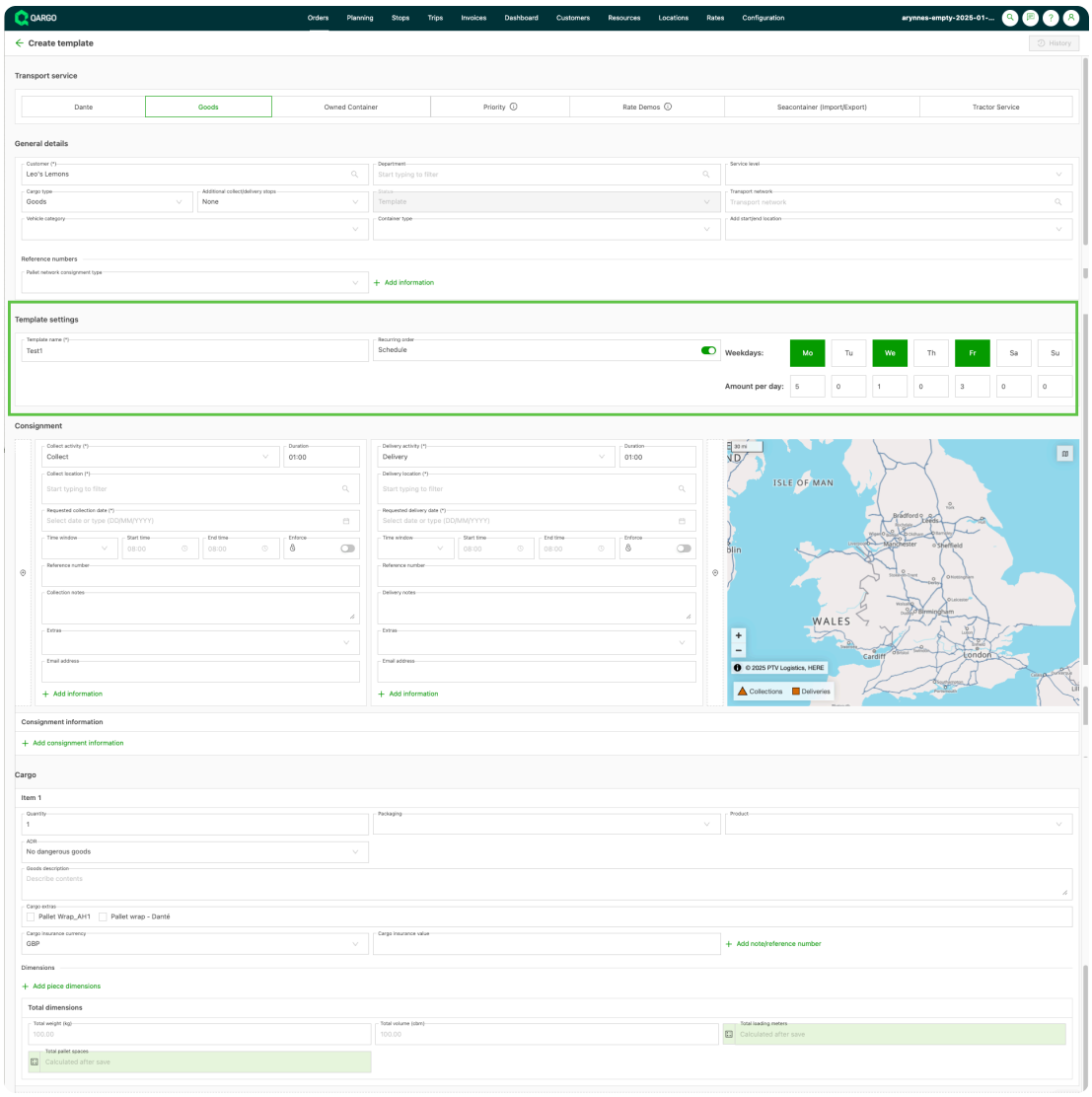
Create a template

An order template can be used to set up the same order multiple times. The steps below show how to create a template.

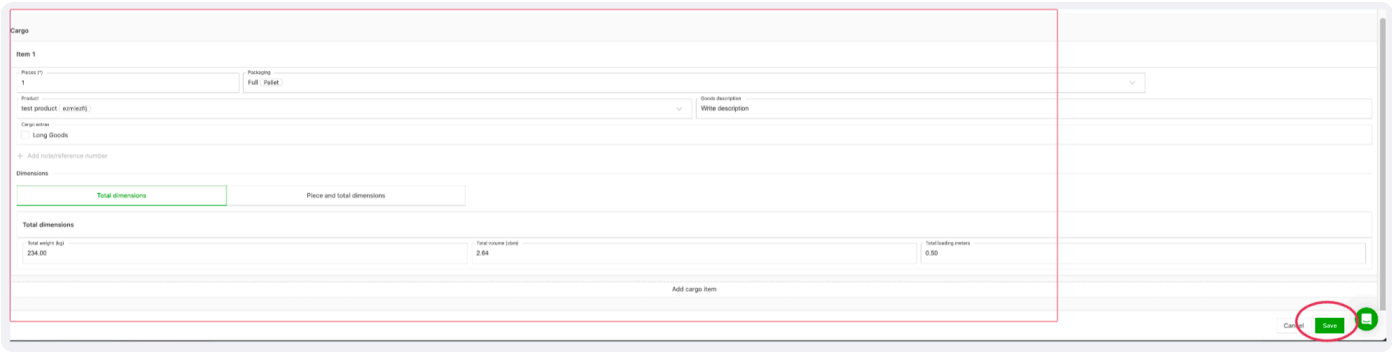
- Navigate to **Orders > Templates**.
- Click **Create template**.



- Name the template according to how it will be used.
- To create a **recurring order template**, toggle **Recurring order / Schedule** on:

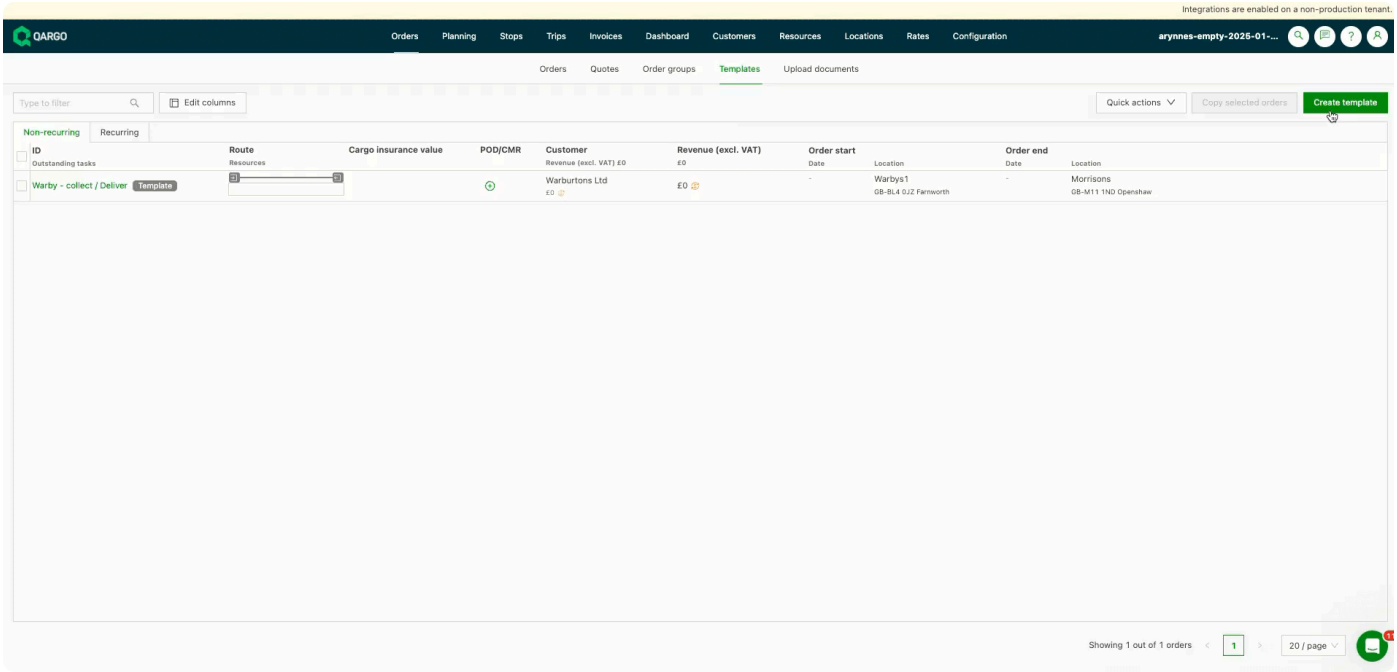


- Fill in the template details just like in order creation
    - Set default values for fields such as shipment type, weight and product details, and load/unload instructions and references.
- Save the template.

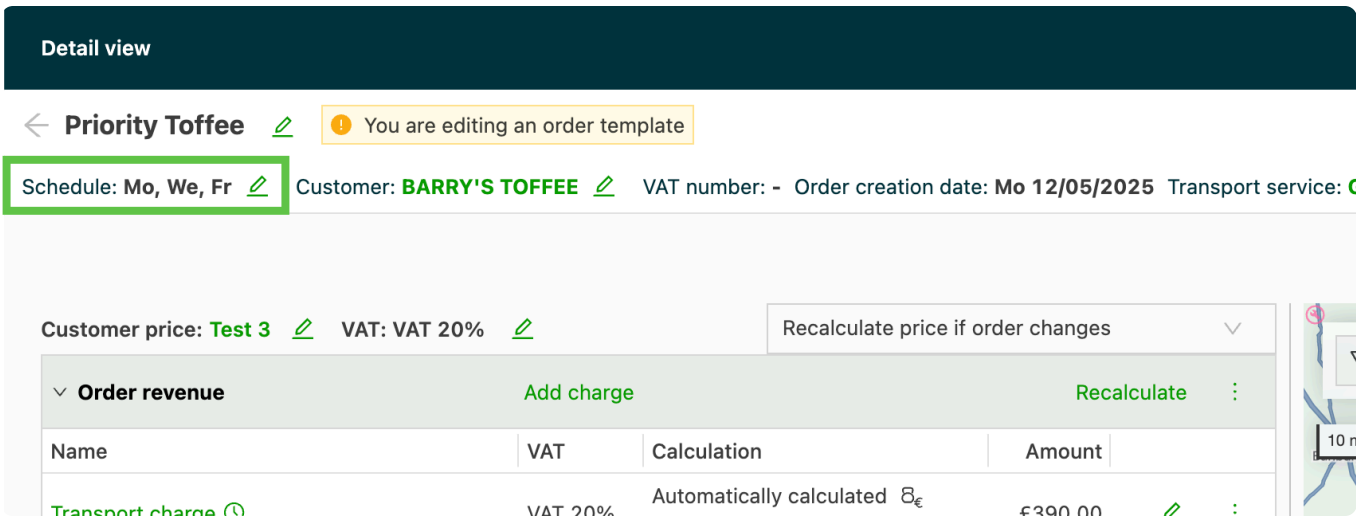


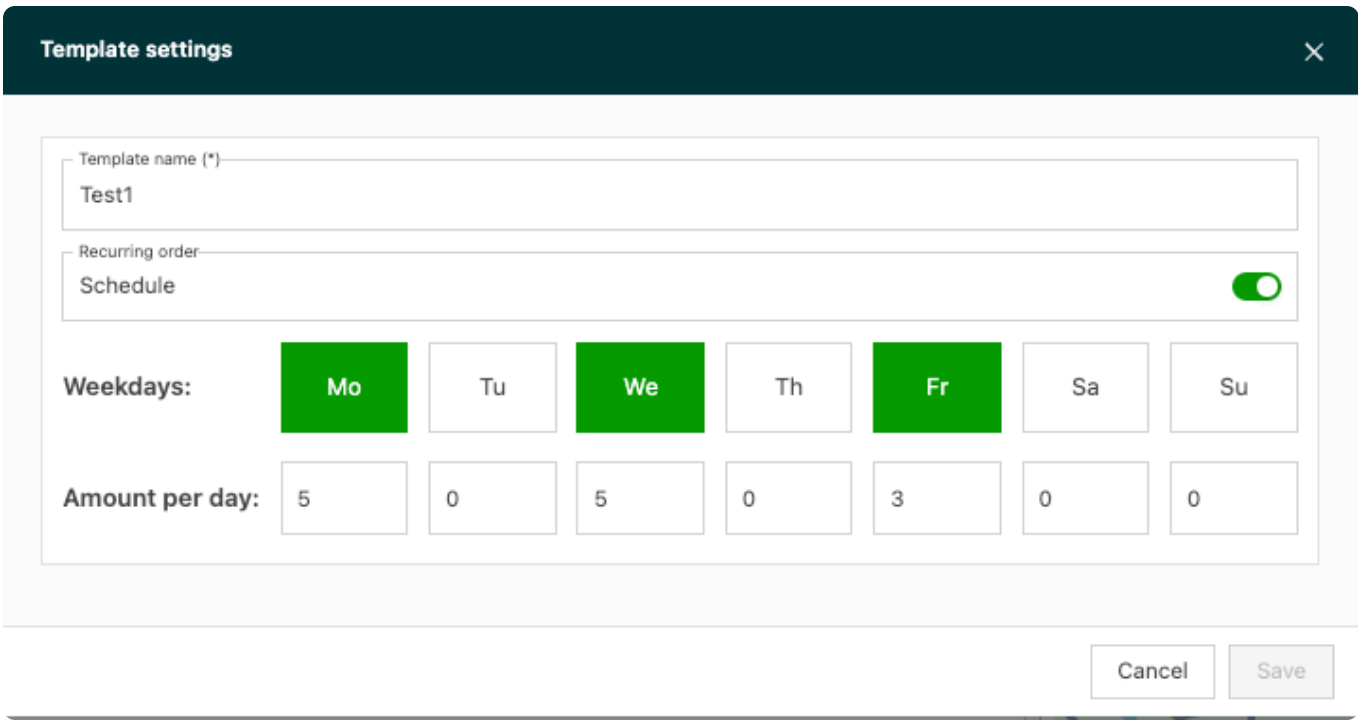
Template settings

- Add the number of copies to generate each day. This allows for variance if the number of orders needed differs each time the template is scheduled.

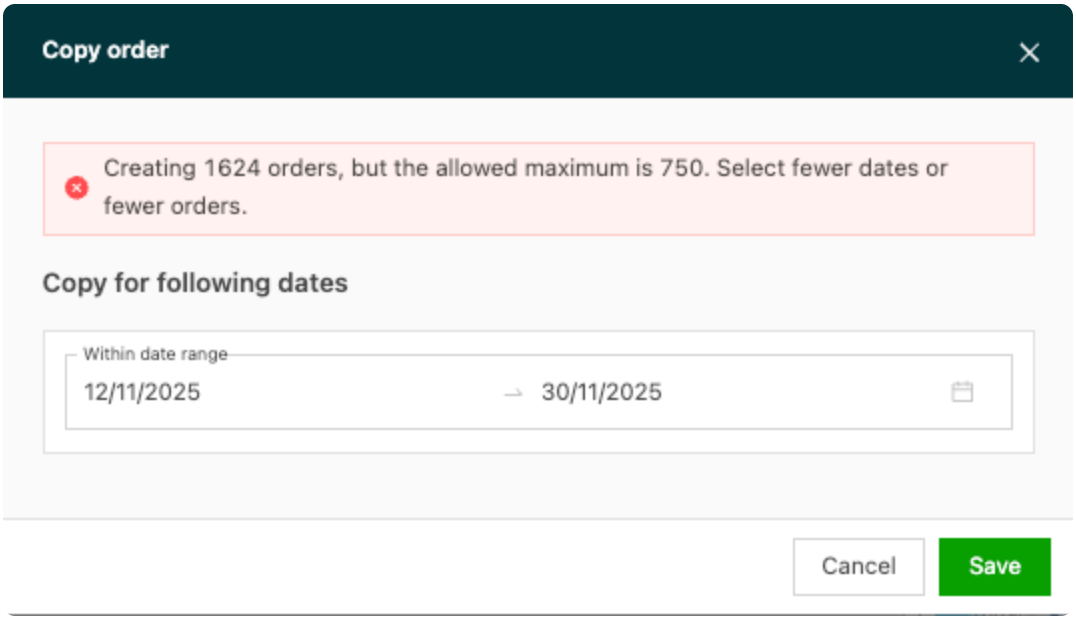


- The schedule appears in the template order details and can be updated directly using the Edit icon.

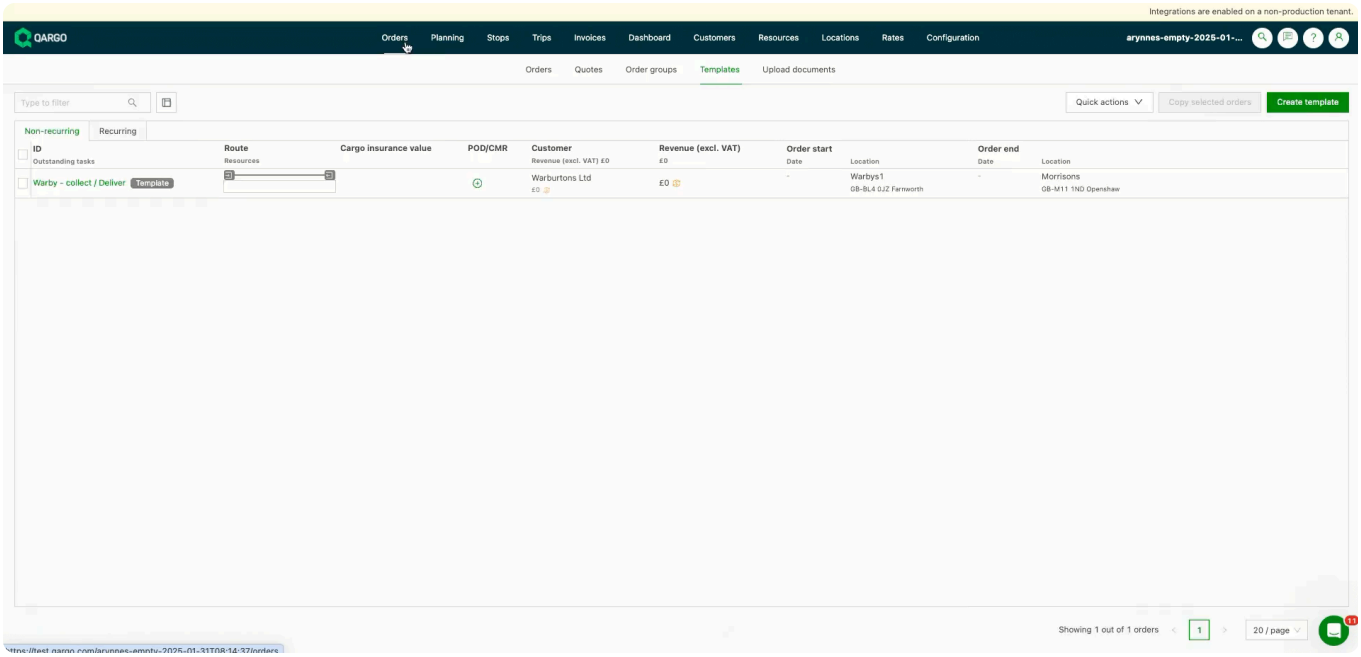




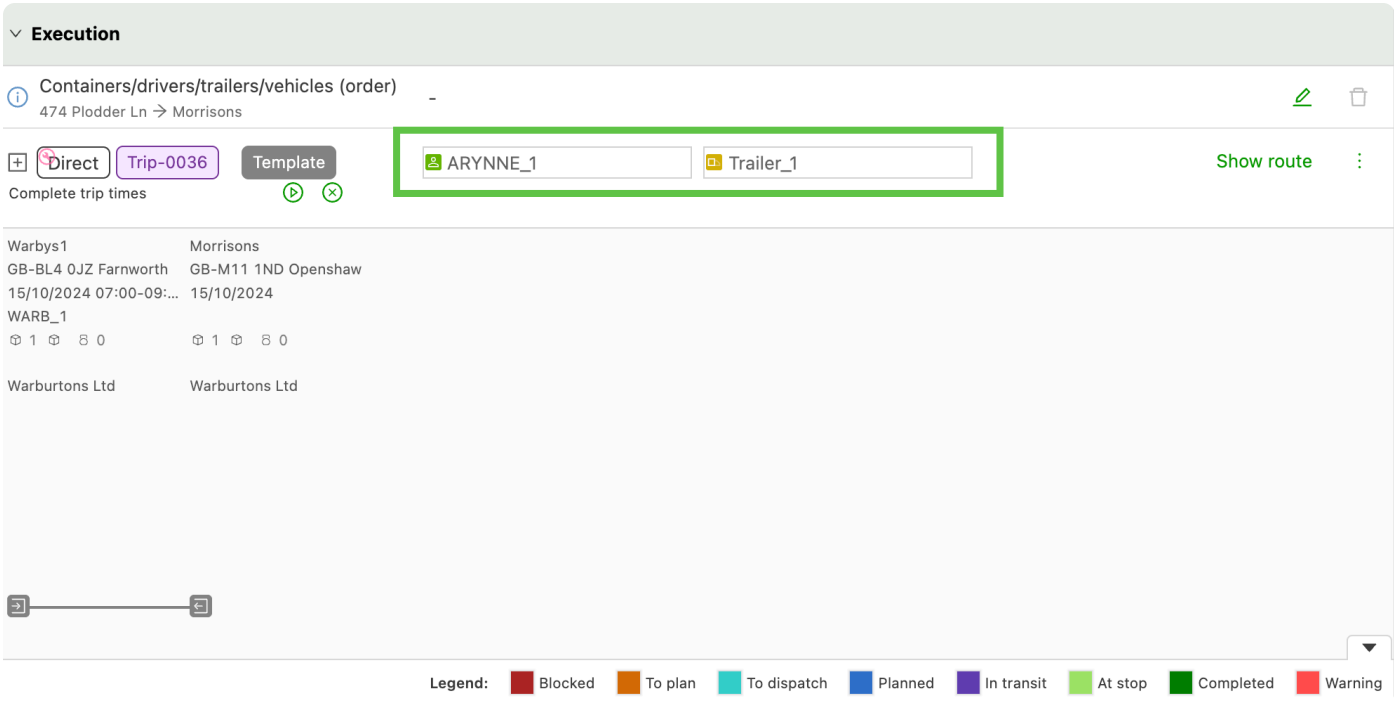
📚 The maximum number of orders created from a template at one time is 750. When copying orders, an error may appear if the total exceeds this limit.



- Template views are split into non-recurring and recurring

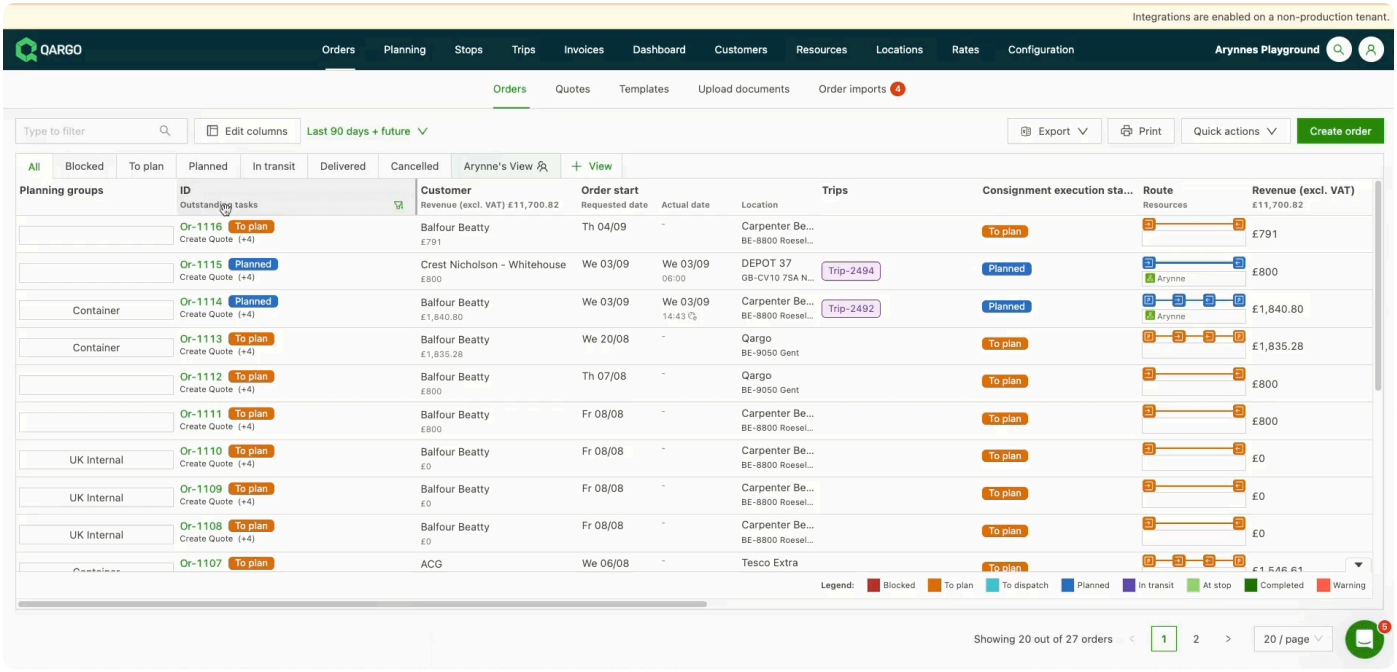


Note: Assign the resources, planning groups, or prices to the template, and these will be set up on new orders created using the template functionality.



To create a template from an existing order

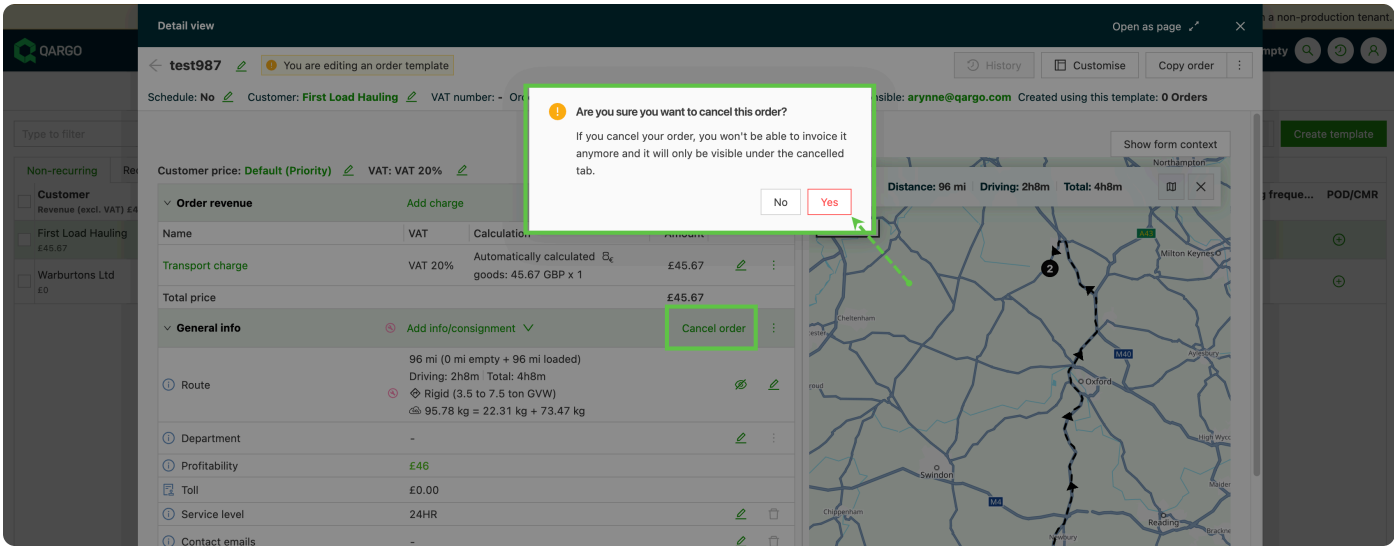
- Open the order that will be used as the basis for the template
- Click the **Create similar order** button
- Select **Template** as the status
- Update/complete the remaining order details
- Click **Save**.



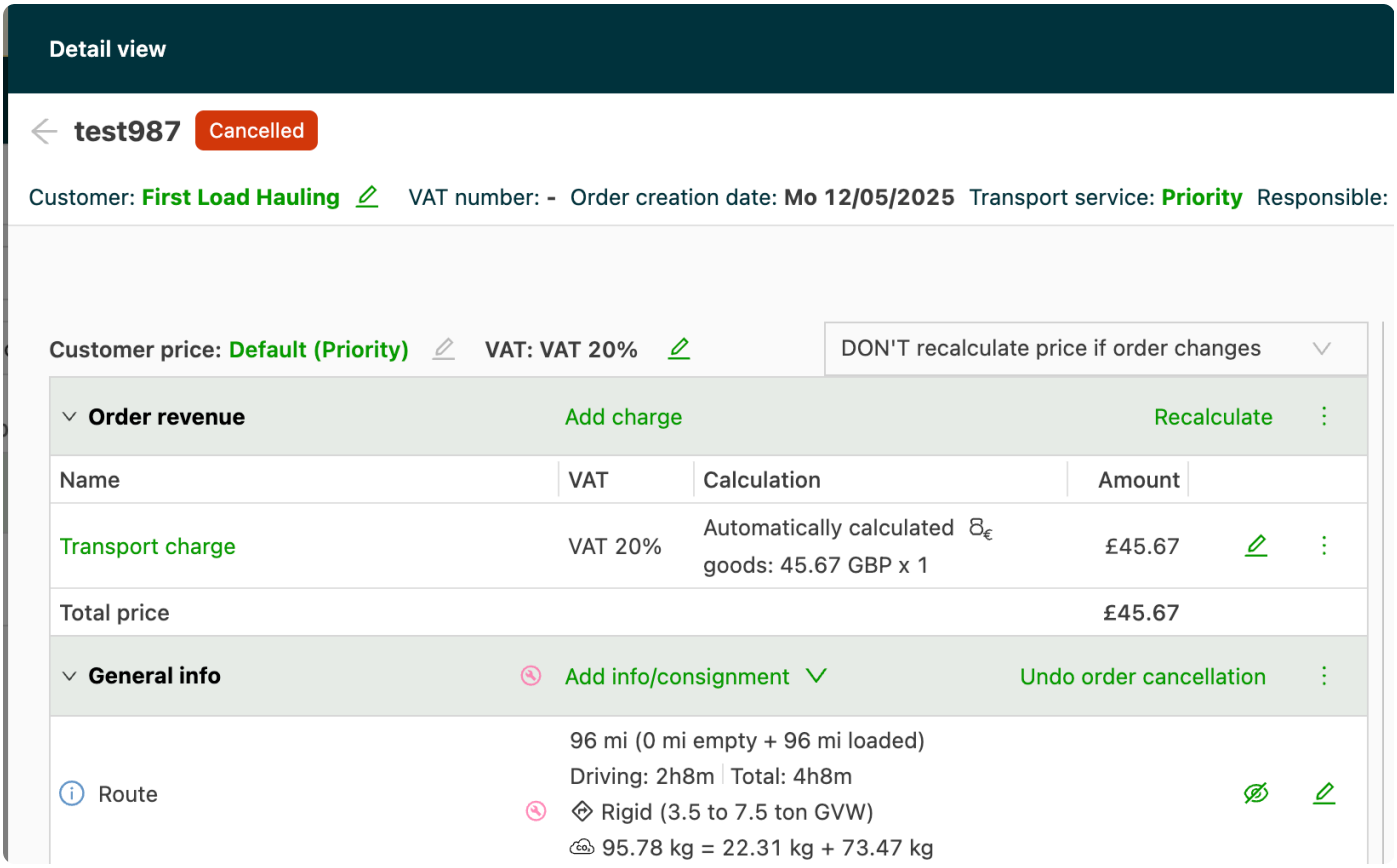
Once a template is set up, it can be used to create orders in bulk.

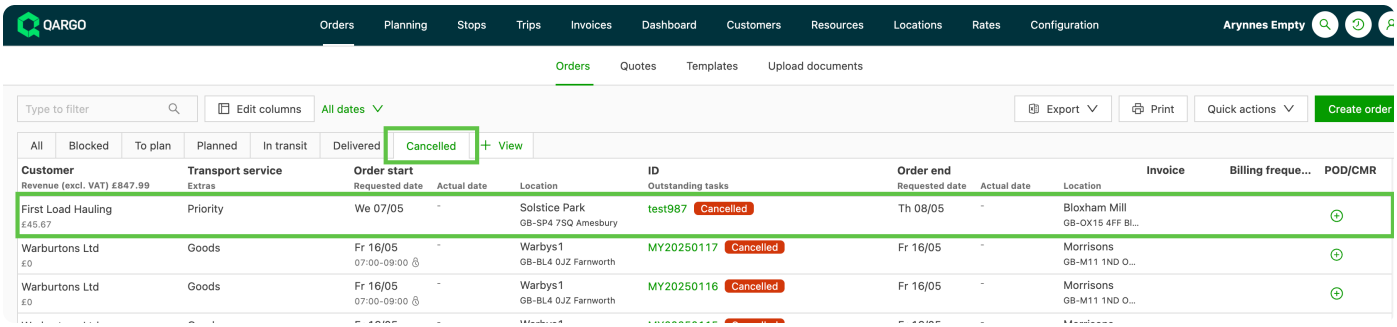
Cancel a template

- Navigate to **Orders > Templates**.
- Click the template to cancel.
- Click **Cancel order** and confirm the cancellation of the order.



- Once the template has been canceled, it has the status **Canceled** and automatically disappears from the templates list.
  - It appears in the **Canceled** tab on the Orders list page.





To learn more about using template orders in bulk, click the link below👇

Create orders in bulk