

Lesson: using the Express Order feature

The Express Order feature allows you to create an order template. By creating an Express Order template, you can use the shipping, billing, and format information for that order in any future orders. Express orders are a quick and easy method to reduce repetitive entry for orders you process on a regular basis.



When ordering from a specific database, you can only use express order templates that were created for the same database.

To create an Express Order template:

1. In the Order Summary window, click the **Save as Express Order** check box.
2. Enter a name for the Express Order template, in this example we entered "Template A".
3. Specify if you want to make the template available for the current user only or for all users in your company.
4. To continue with the order confirmation, click on **Confirm**. The saved express order can now be used as a template for future orders.

The screenshot shows a web form with the following sections:

- Your Order Confirmation will be sent to E-Mail Address *** [jane]
- E-Mail blind copy of Order Confirmation to** []
- Please Read and Accept the Following License**
- EXPERIAN ONLINE DATA LICENSE TERMS AND CONDITIONS
- By clicking on the "I Accept" button set forth below, you agree that both of which you are licensing the Experian data through this website (collectively, "Experian") shall be the beneficiary of such agreement at these terms:
- * **I Accept the License Agreement above**
- Save as Express Order** [Template A]
- Make available to: **JaneDoe123 only** All users at **Default**
- Assign to Campaign**
- Existing Campaign [None]
- New Campaign []
- Make available to: **JaneDoe123 only** All users at **Default Regi**

To use an Express Order template:

1. After you have made all entries on the first screen of the order process, click on the **Express Order based on previous order** hyperlink located in the lower right side corner of the screen.

The screenshot shows the 'Place Order' interface. At the top, there is a navigation bar with 'My Account', 'Options', and 'Contact Us'. Below this is a grid of links: 'Start New Search', 'Download Orders', 'Previous Orders', 'Previous Activity', 'Account Preferences', 'Load Search by ID', 'Help', 'Previous Searches', 'User Seeding', 'Rerun Order', and 'Log Out'. A secondary bar contains 'Edit Search Description' and 'Tips'. The main content area is titled 'Place Order' and shows search results for 'JaneDoe123-6 ECS 7/16/07' with 189,128 records. It includes sections for 'Please make following selections to calculate price:', 'Postal Presort', and 'Select Data Usage'. At the bottom right, there are two buttons: 'Continue with Order' and 'Express Order based on previous Order', with an arrow pointing to the latter.

2. The Express Order Templates drop-down list contains the templates you saved during previous order transactions, as well as, the templates designated for all users that were saved by other users in you company.

This screenshot shows the 'Express Order Templates' section. It features a radio button for 'Saved Templates' and a dropdown menu with 'Select a Template' as the current selection. Below the dropdown is another radio button for 'Use this order as' followed by a text input field containing 'Template A' and an 'Apply' button. Below this is an 'Order Summary' table.

Order Summary	
Total Before Shipping	\$475.00
Order Total (shipping included)	\$475.00
Click here to view the full invoice for your order	Edit Invoice

3. Select the Express Order Template you want to use for the current order and then click on the **Apply** button.
4. Review the updated order information and make any changes that are necessary. When you have completed your review of the order, click on the **All information is correct, process order now** hyperlink that is located in the lower right side corner of the screen.

To copy an order that was not saved as a template:

1. Click on the radial button for **Use this order as a template** and enter the number of the order you want to copy.

The screenshot shows the 'Express Order Templates' window. At the top, there are two radio buttons: 'Saved Templates:' (unselected) and 'Use this order as template:' (selected). The 'Use this order as template:' option has an input field and three buttons: 'View', 'Find', and 'Apply'. Below this is the 'Order Summary' table:

Order Summary	
Total Before Shipping	\$475.00
Order Total (shipping included)	\$475.00
Click here to view the full invoice for your order	Edit Invoice

2. If you don't know the order number, click on the **Find** button. The window for finding previously submitted regular orders and saved Express Orders opens.

The screenshot shows the 'Use Express Order Functionality' window. It has a 'Company' input field at the top. Below it is a 'Filter by Company' section with a list box containing 'Default Registered (Jane Doe)'. To the right are two columns: 'Order #' and 'Saved Express Orders'. The 'Order #' column contains a list of order numbers: U1743132, U1743165, U1744197, and U1797488. The 'Saved Express Orders' column contains 'Template A'. At the bottom, there are 'Total: 1' labels under each column and 'Cancel' and 'Submit' buttons.

3. Highlight your company name by placing your cursor over it and clicking on it. This action will populate the Order # and Saved Express Orders columns.
4. Select the order number you want to copy. Click on the **Submit** button.
5. Click on the **Apply** button. This will apply the previous order's perimeters to the current order.
6. Review the order information and make any changes that are necessary. When you have completed your review of the order, click on the **All information is correct, process order now** hyperlink that is located in the lower right side corner of the screen.