

# PROCUREMENT

# EDIT A STOCK PURCHASING TEMPLATE

Purchasing Templates can be created to preconfigure purchase requisitions to effectively generate bulk orders.

#### *Ribbon* Select *Procurement > Purchasing Templates*



The *Purchasing Templates Listing* screen will be displayed.

## EDIT A PURCHASING TEMPLATE

• Select the *row* of the *Purchasing Template* that you wish to process.

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Open Windows	*					User : BiancaD 09/11/2022	Version : 2.4.0.18	Example Company

• Click on the *Edit* button.



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#### **TEMPLATE HEADER**

The *Purchasing Template Maintain* screen will open with the Type and Class pre-populated as noted below. These values cannot be changed.

- *Type*: Maintenance Requisition
- *Class*: Inventory

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- *Template Code*: Type in a code that will help you identify the template. This code cannot be longer than 20 characters.
- **Description**: Type in a description to better define the template.

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### ADD TEMPLATE ITEMS

- Click in the *PartCode* field and then on the ellipsis button that will come up
- 2. The Part Code lookup list will come up
- 3. Search for an select the *Part* you wish to add to the template
- 4. Click on the *Ok* button.



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- Update the *Quantity* as required.
- Continue this process to add all the necessary *Parts* to this template.

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### **REMOVE TEMPLATE ITEMS**

Click on the row you wish to remove, *right click* and select *Delete Item* from the context menu.



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A message box will come up asking: *Are you sure you want to delete this row for item [part number]*?

• Click on the **Yes** button.

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#### SAVE TEMPLATE

• Once done, click on the *Save* button.



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A message box will come up noting: *Purchasing Template No [purchasing template number] saved successfully.* 

• Click on the *Ok* button.

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The new template will be added to the *Purchasing Template Listing* screen.





#### **Related Topics**

- Add Purchasing Template
- Edit Purchasing Template
- Delete Purchasing Template
- <u>Create New Purchase Requisition from Template</u>

MNU.057.003