

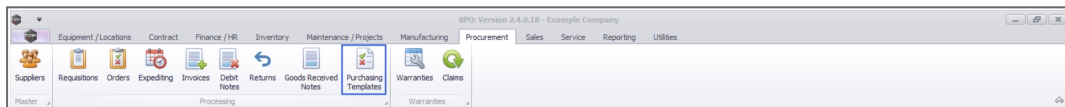
PROCUREMENT

ADD A SERVICE PURCHASING TEMPLATE

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

Use this process to add a purchasing template for service (non-stock) items.

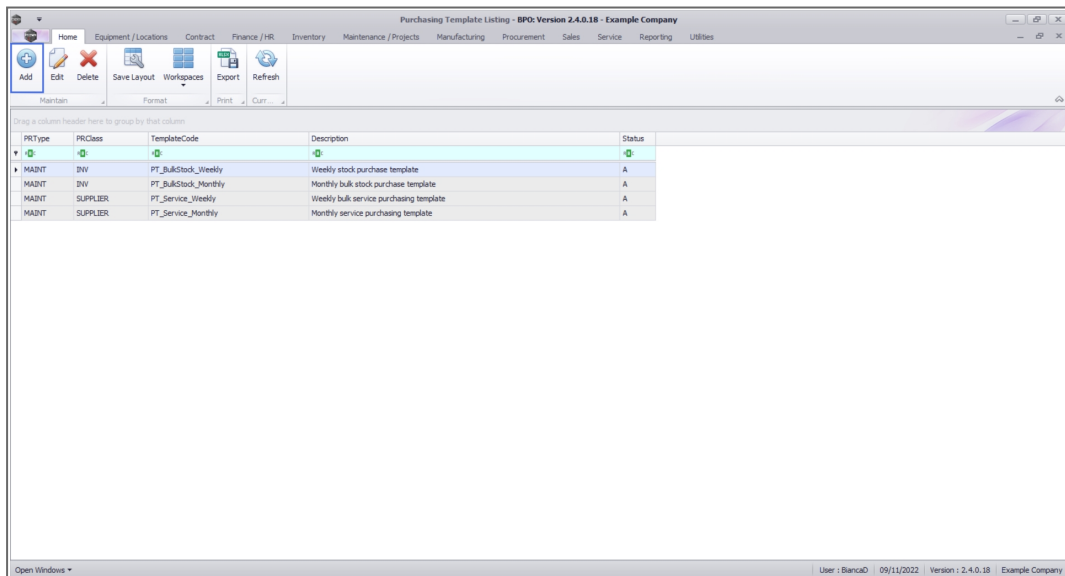
Ribbon Select *Procurement > Purchasing Templates*



The *Purchasing Templates Listing* screen will be displayed.

ADD NEW TEMPLATE

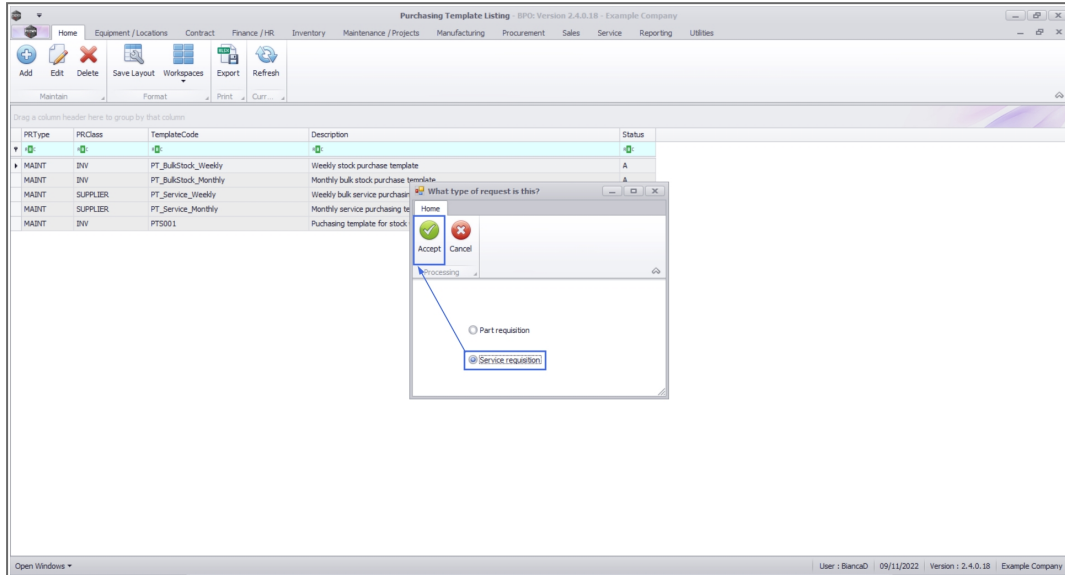
- Click on the **Add** button.



A message box will come up, asking *What type of request is this?*

The **Part Requisition** radio button is selected by default.

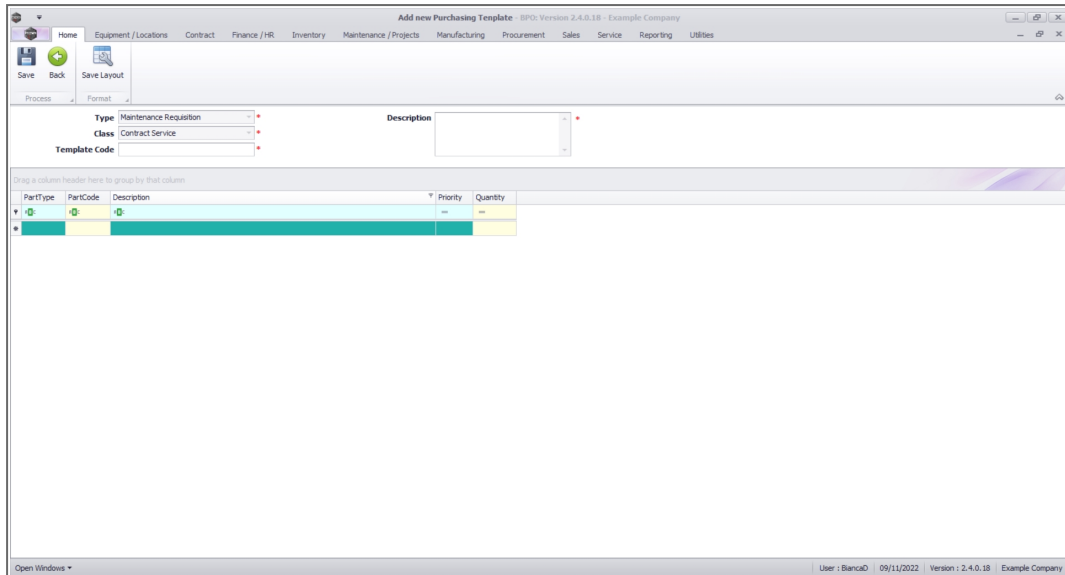
- Click on the **Service Requisition** radio button.
- Click on the **Accept** button.



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:** Contract Service



Process: Format

Type: Maintenance Requisition
 Class: Contract Service
 Template Code:
 Description:

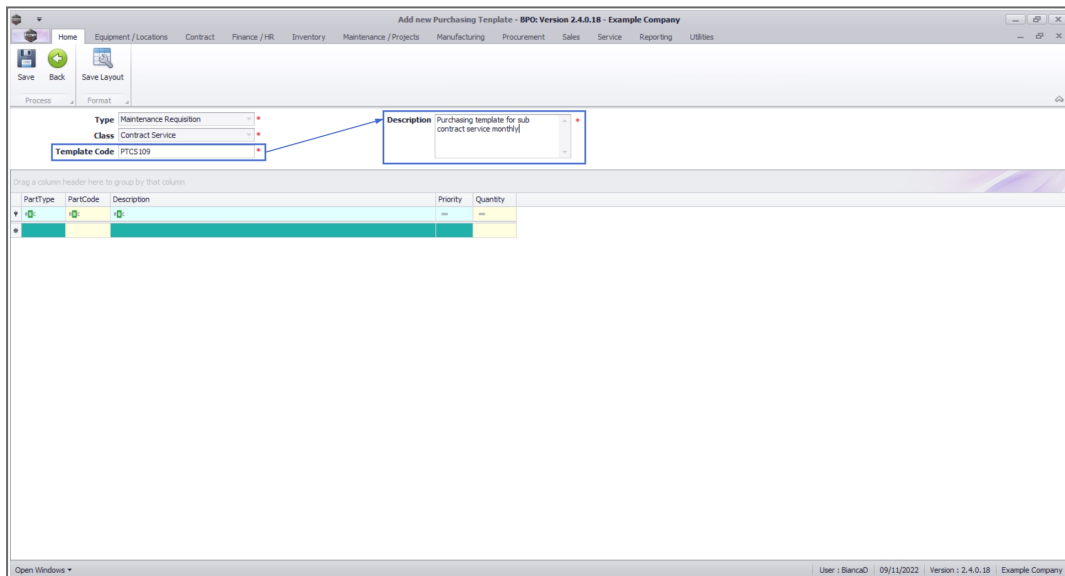
Drag a column header here to group by that column

PartType	PartCode	Description	Priority	Quantity

Open Windows

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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.



Process: Format

Type: Maintenance Requisition
 Class: Contract Service
 Template Code: PTCS109
 Description: Purchasing template for sub contract service monthly

Drag a column header here to group by that column

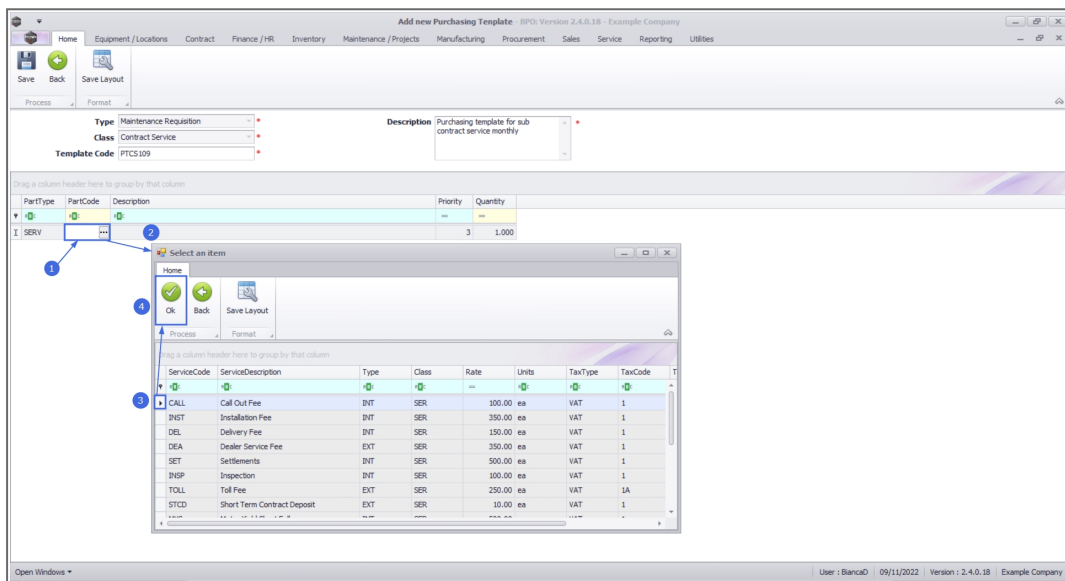
PartType	PartCode	Description	Priority	Quantity

Open Windows

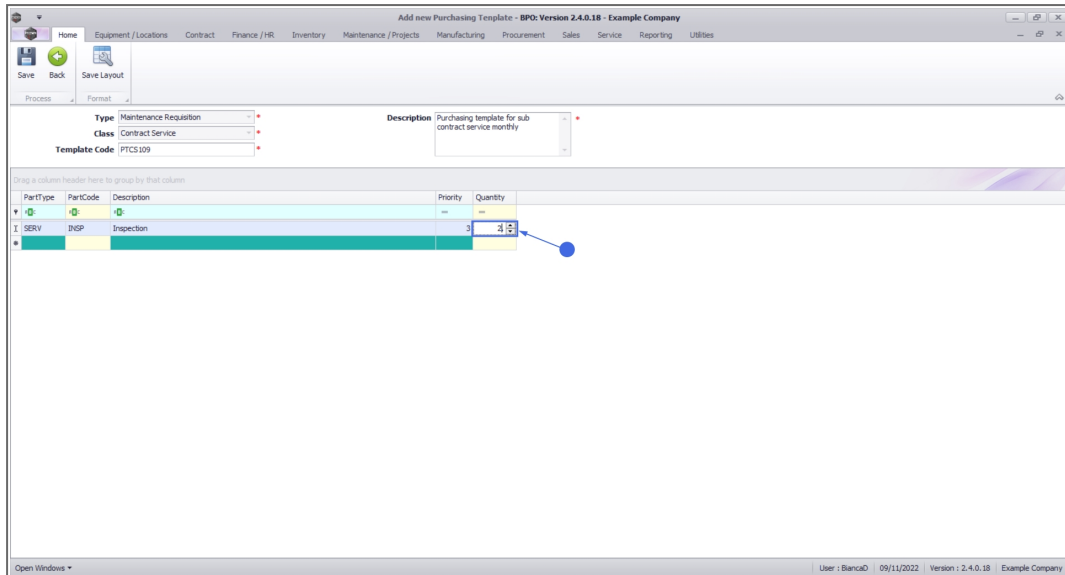
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ADD TEMPLATE ITEMS

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



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



Process

Type Maintenance Requisition

Class Contract Service

Template Code PTCS109

Description Purchasing template for sub contract service monthly

Drag a column header here to group by that column

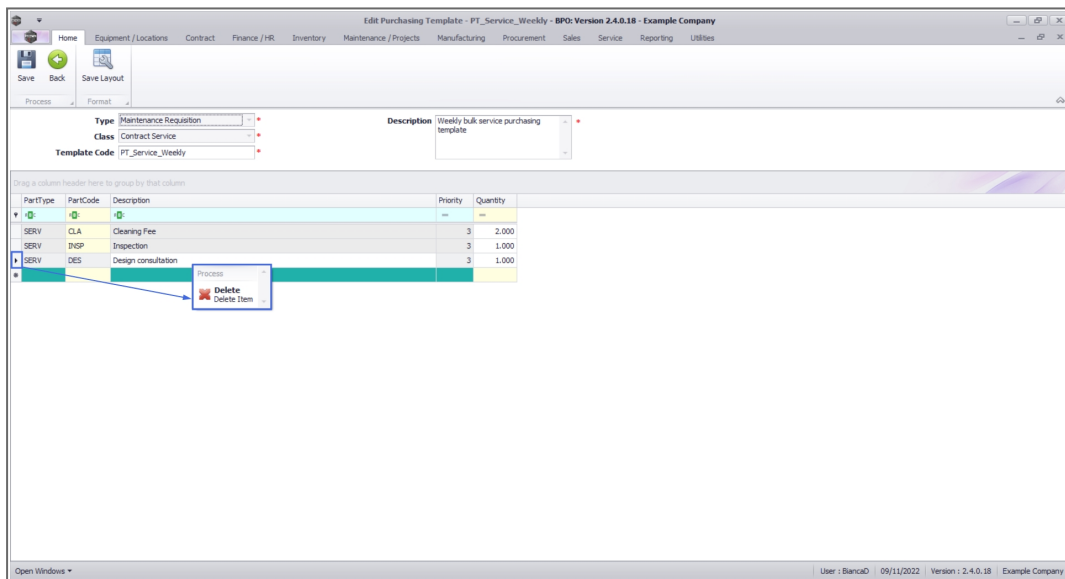
PartType	PartCode	Description	Priority	Quantity
I SERV	INSP	Inspection	3	1

Open Windows

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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.



Process

Type Maintenance Requisition

Class Contract Service

Template Code PT_Service_Weekly

Description Weekly bulk service purchasing template

Drag a column header here to group by that column

PartType	PartCode	Description	Priority	Quantity
SERV	CLA	Cleaning Fee	3	2,000
SERV	INSP	Inspection	3	1,000
SERV	DES	Design consultation	3	1,000

Process

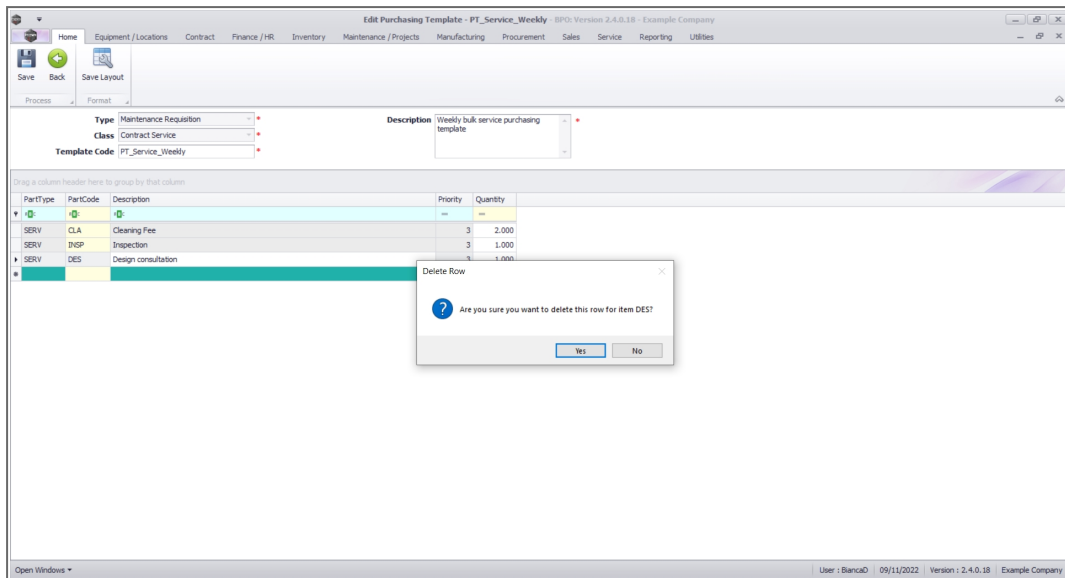
Delete Item

Open Windows

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

- Click on the **Yes** button.



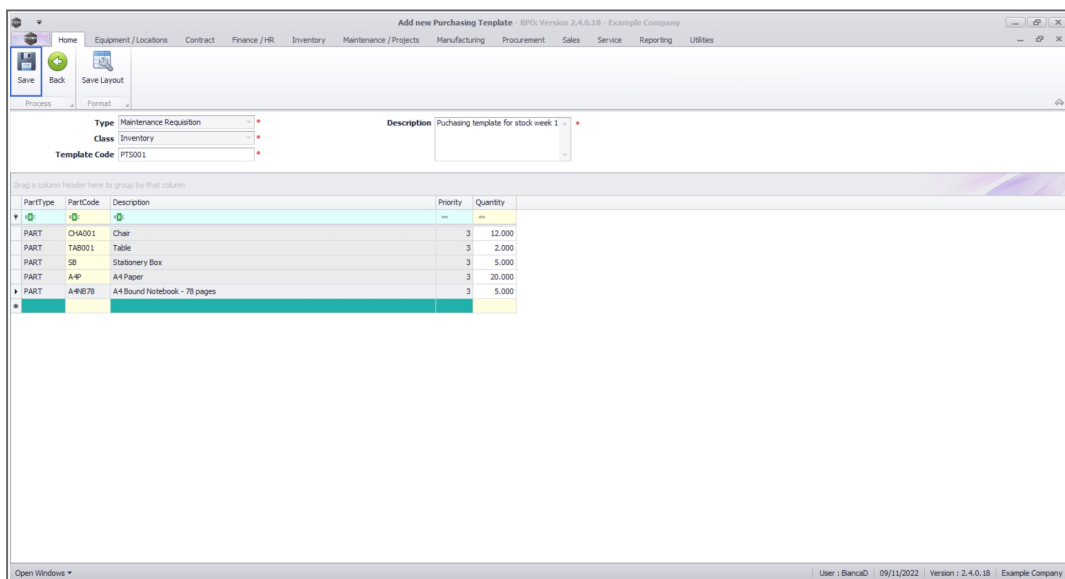
The screenshot shows the 'Edit Purchasing Template' window for 'PT_Service_Weekly'. The table lists the following items:

PartType	PartCode	Description	Priority	Quantity
SERV	CLA	Cleaning Fee	3	2,000
SERV	INSP	Inspection	3	1,000
SERV	DES	Design consultation	3	1,000

A 'Delete Row' dialog box is open, asking: 'Are you sure you want to delete this row for item DES?'. The 'Yes' button is highlighted.

SAVE TEMPLATE

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

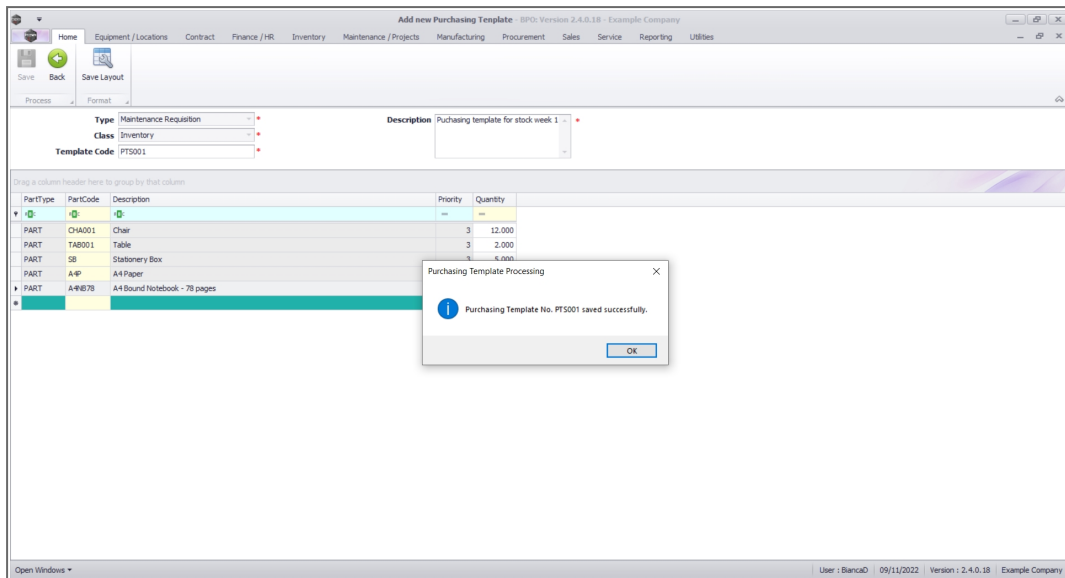


The screenshot shows the 'Add new Purchasing Template' window for 'PT5001'. The table lists the following items:

PartType	PartCode	Description	Priority	Quantity
PART	CH4001	Chair	3	12,000
PART	TAB001	Table	3	2,000
PART	SB	Stationery Box	3	5,000
PART	A4P	A4 Paper	3	20,000
PART	A4NB78	A4 Bound Notebook - 78 pages	3	5,000

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

- Click on the **Ok** button.



Add new Purchasing Template - BPD: Version 2.4.0.18 - Example Company

Save Back Save Layout

Type: Maintenance Requisition
Class: Inventory
Template Code: PT5001

Description: Purchasing template for stock week 1

PartType	PartCode	Description	Priority	Quantity
PART	CH4001	Chair	3	12,000
PART	TAB001	Table	3	2,000
PART	SB	Stationery Box	1	4,000
PART	A4P	A4 Paper		
PART	A4B78	A4 Bound Notebook - 78 pages		

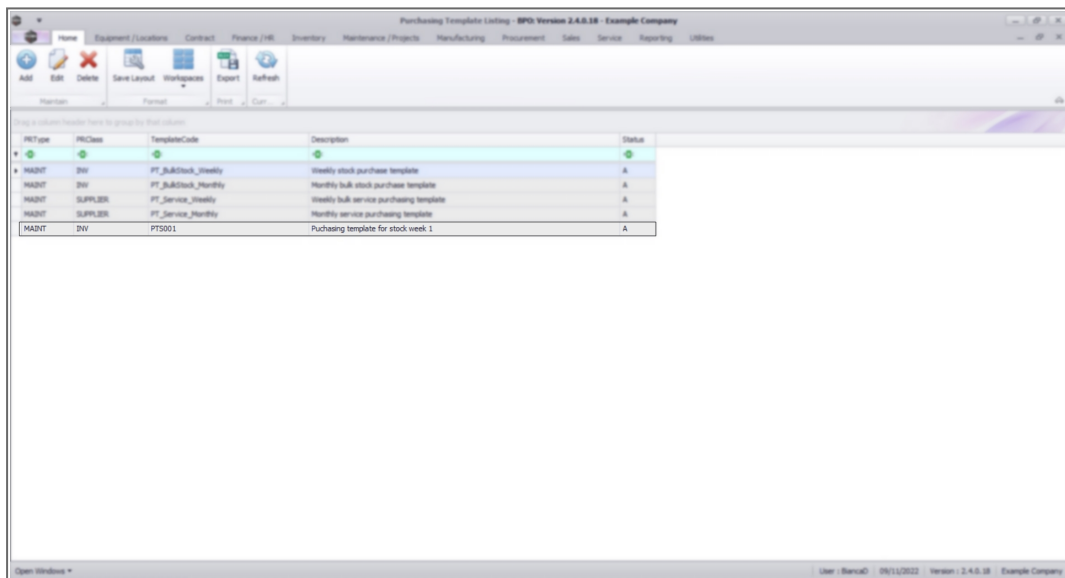
Purchasing Template Processing

Purchasing Template No. PT5001 saved successfully.

OK

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



Purchasing Template Listing - BPD: Version 2.4.0.18 - Example Company

Add Edit Delete Save Layout Workspaces Export Refresh

PCTType	PCTClass	TemplateCode	Description	Status
WASDT	INV	PT_BulkStock_Weekly	Weekly stock purchase template	A
WASDT	INV	PT_BulkStock_Monthly	Monthly bulk stock purchase template	A
WASDT	SUPPLIER	PT_Service_Weekly	Weekly bulk service purchasing template	A
WASDT	SUPPLIER	PT_Service_Monthly	Monthly service purchasing template	A
WASDT	INV	PT5001	Purchasing template for stock week 1	A

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Related Topics

- [Add Purchasing Template](#)
- [Edit Purchasing Template](#)

- [Delete Purchasing Template](#)
- [Create New Purchase Requisition from Template](#)

MNU.057.005