

We are currently updating our site; thank you for your patience.

# PROCUREMENT

# ADD A STOCK 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 stock items.

#### Ribbon Select Procurement > Purchasing Templates



The **Purchasing Templates Listing** screen will be displayed.

## **ADD NEW TEMPLATE**

• Click on the **Add** button.

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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 **Accept** button.

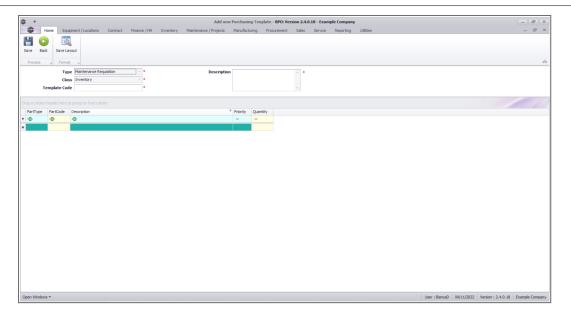
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### **TEMPLATE HEADER**

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





• **Template Code**: Type in a code that will help you identify the template. This code cannot be longer than 20 characters.

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- **Description**: Type in a description to better define the template.



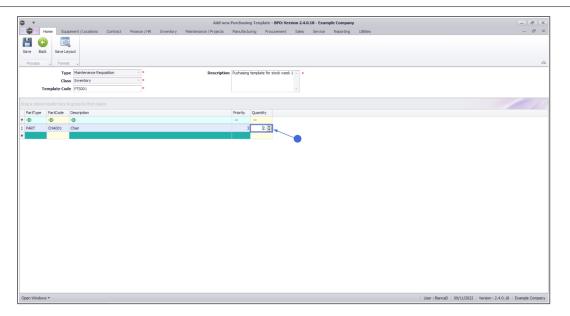
#### **ADD TEMPLATE ITEMS**

- 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.





#### **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.

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#### **Related Topics**

- Add Purchasing Template
- Edit Purchasing Template



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

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