

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

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.

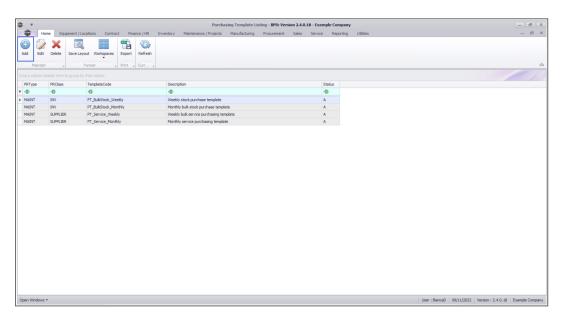
Ribbon Select Procurement > Purchasing Templates



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

ADD NEW TEMPLATE

• Click on the Add button.

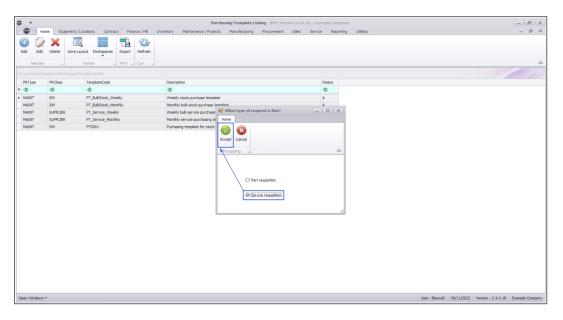




A message box will come up, asking What type of request is this?

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

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



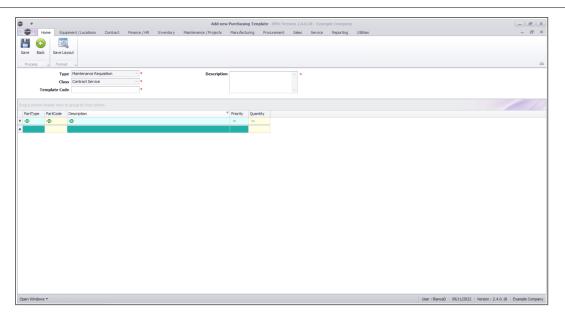
TEMPLATE HEADER

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

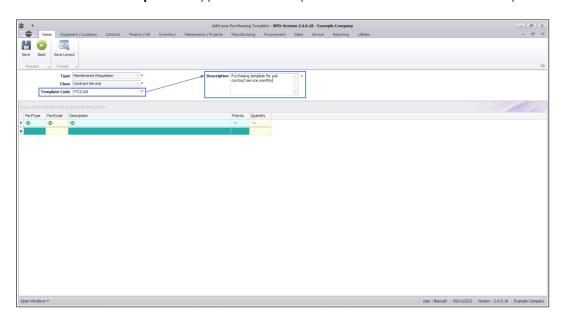
• Type: Maintenance Requisition

• Class: Contract Service





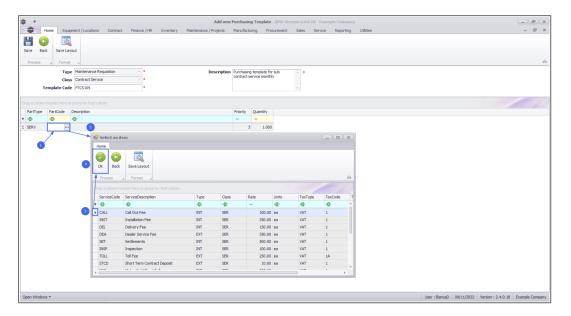
- **Template Code**: Type in a code that will help you identify the template. This code cannot be longer than 20 characters.
- **Description**: Type in a description to better define the template.





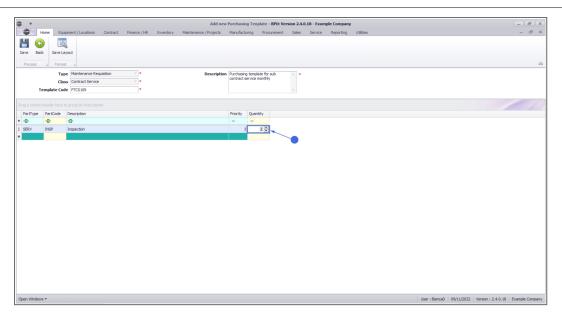
ADD TEMPLATE ITEMS

- 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.



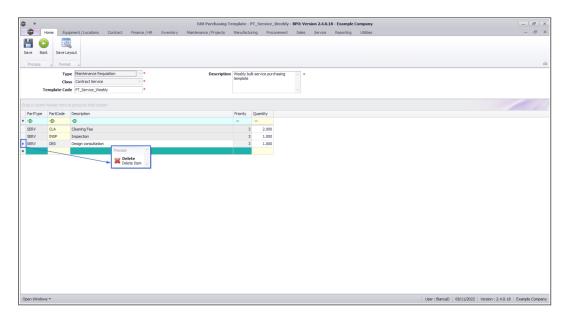
- Update the **Quantity** as required.
- Continue this process to add all the necessary Services to this template.





REMOVE TEMPLATE ITEMS

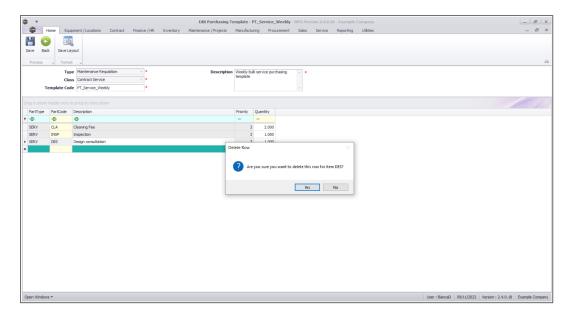
Click on the row you wish to remove, right click and select Delete
Item from the context menu.



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

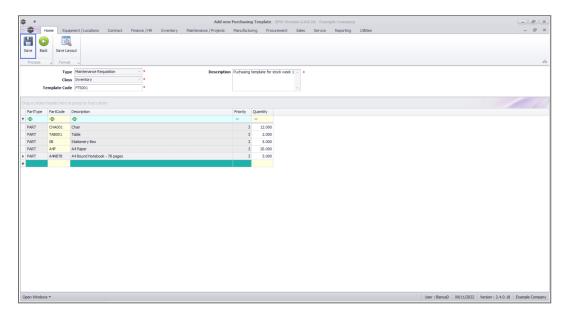


• Click on the Yes button.



SAVE TEMPLATE

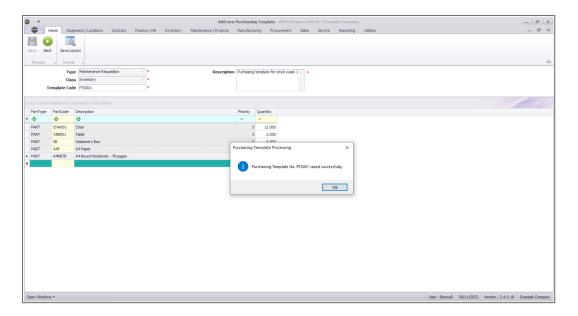
• Once done, click on the Save button.



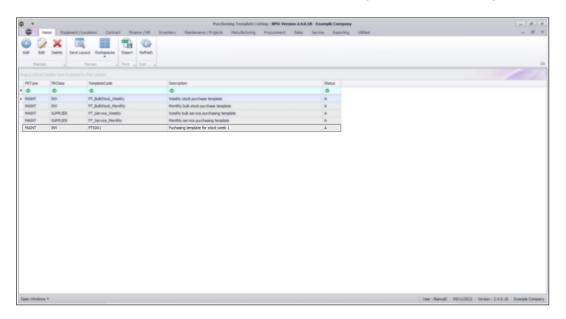
A message box will come up noting: Purchasing Template No [purchasing template number] saved successfully.



• Click on the **Ok** button.



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



Related Topics

- Add Purchasing Template
- Edit Purchasing Template



- Delete Purchasing Template
- Create New Purchase Requisition from Template

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