

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

# 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

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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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MAINT	DW	PT_BulkStock_Monthly	Monthly bulk stock purchase template	A	
MAINT	SJPPLER	PT_Service_Weekly	Weekly bulk service purchasing template	A	
MAINT	SJPPLER	PT_Service_Monthly	Monthly service purchasing template	A	
MAINT	DW	PT5001	Puchasing template for stock week 1	A	
MAINT	SJPPLER	PTCS 109	Purchasing template for sub-contract service monthly	A	
Open Windows					User (BancaD) 09/11/2022 Version (2.4.6.18) Example Company

Help v2024.5.0.7/1.0 - Pg 1 - Printed: 21/08/2024



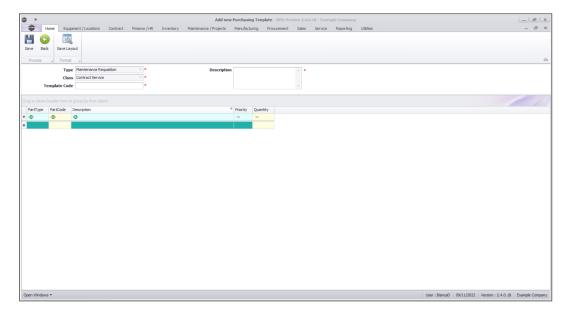
• Click on the **Edit** button.

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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: 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.

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### ADD TEMPLATE ITEMS

- 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.



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

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Open Wir	idows 🕶								User : BiancaD 09/11/202	2 Version : 2.4.0.18	Example Company

## **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 [service code]?

• Click on the **Yes** button.

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#### SAVE TEMPLATE

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



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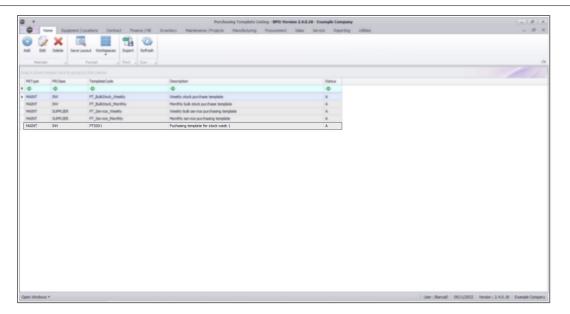
A message box will come up noting: **Purchasing Template No [purchasing template number] saved successfully.** 

• 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>

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