

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.

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



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.

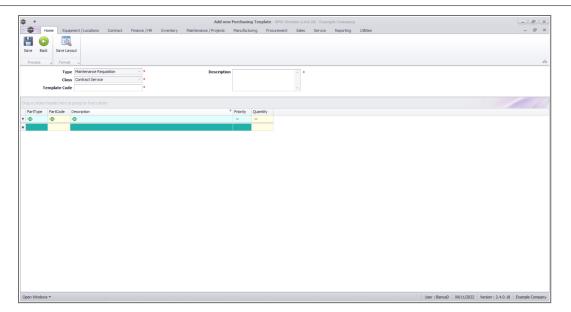
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TEMPLATE HEADER

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.

User : BiancaD 09/11/2022 Version : 2.4.0.18 Example

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



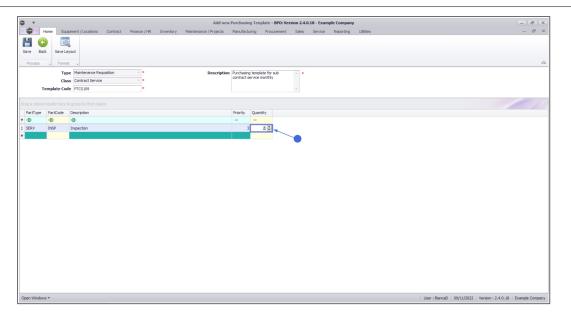
ADD TEMPLATE ITEMS

- Click in the **PartCode** field and then on the ellipsis button that will come up
- 2. The 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.





REMOVE TEMPLATE ITEMS

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

Edit Purchasing Te	mplate - PT_Service_Weekly - BPO: Version 2.4.0.18 - Example Company	- 8 >
Home Equipment / Locations Contract Finance / HR Inventory Maintenance / Projects		- 8 >
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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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PART		A4Paper	3	20.000				
PART	A4N878	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.

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	w Purchasing Tenplate - BPO: Version 2.4.0.18 - Example Company	- 8 ×
Home Equipment / Locations Contract Finance / HR Inventory Maintenance / Projects	Manufacturing Procurement Sales Service Reporting Utilities	_ & ×
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	OK	
Open Windows *		1/2022 Version : 2.4.0.18 Example Company

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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