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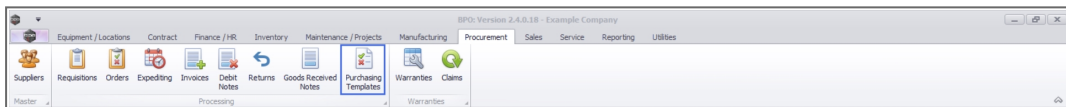
PROCUREMENT

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.
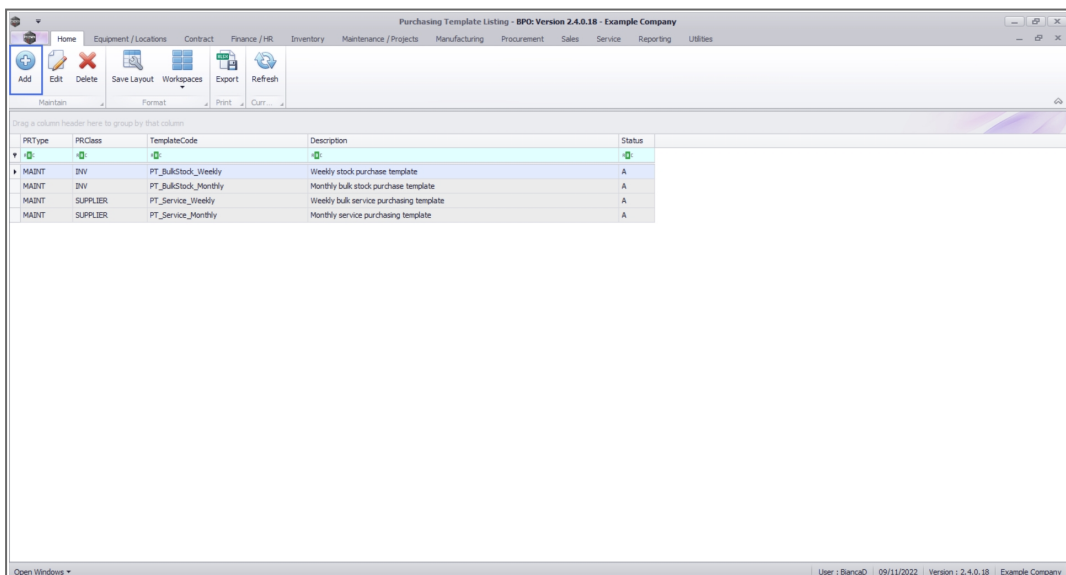
Ribbon Select **Procurement > Purchasing Templates**

The **Purchasing Templates Listing** screen will be displayed.
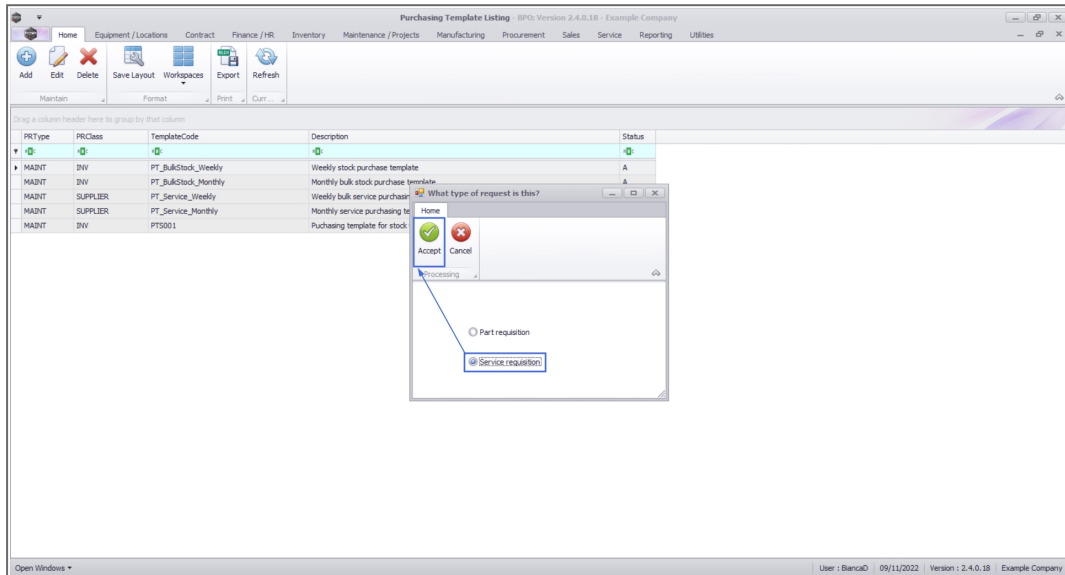
ADD NEW TEMPLATE

- Click on the **Add** button.

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

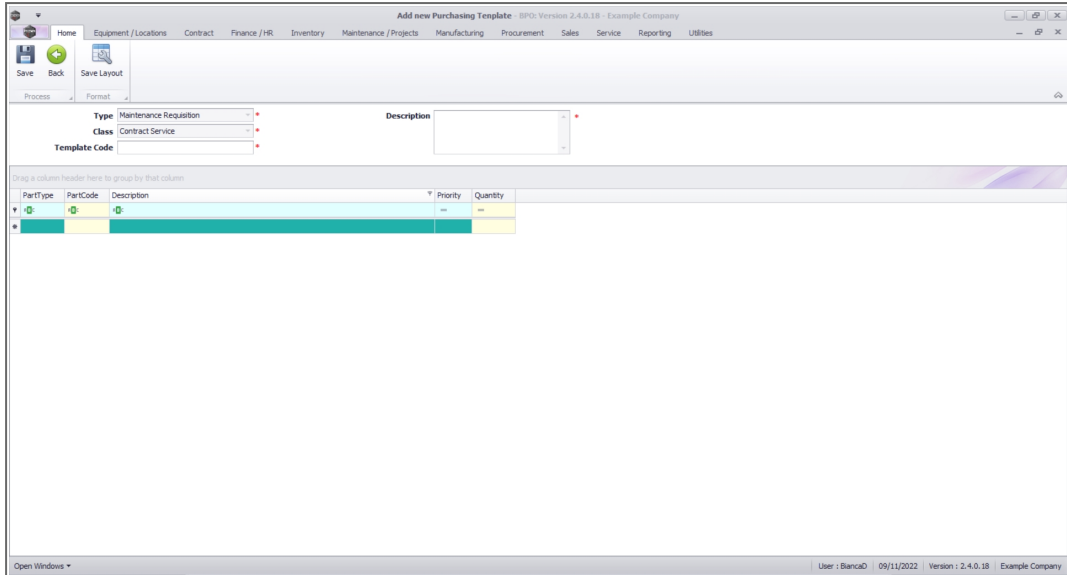The **Part Requisition** radio button is selected by default.

- 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.
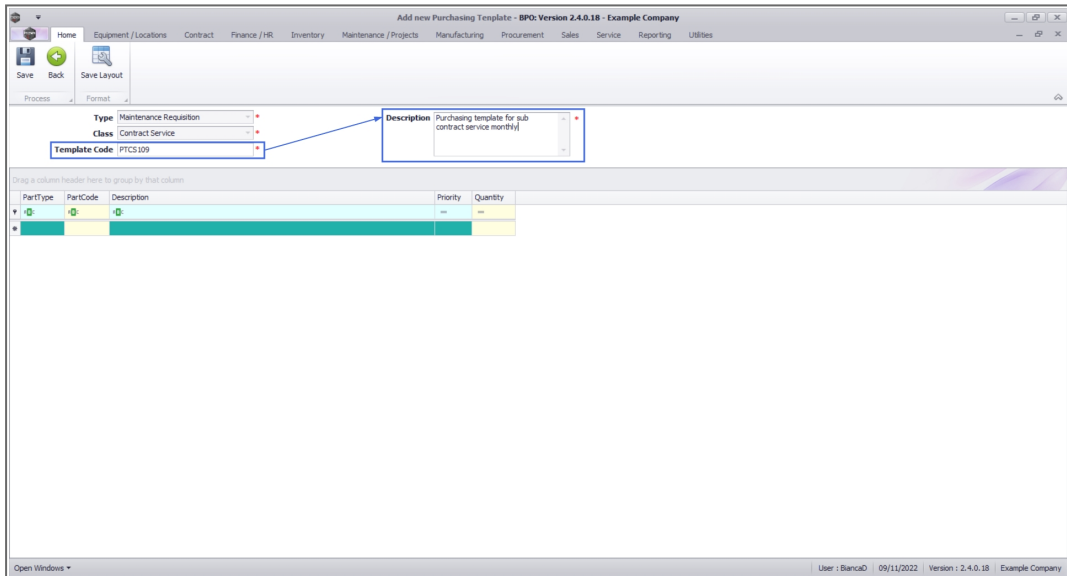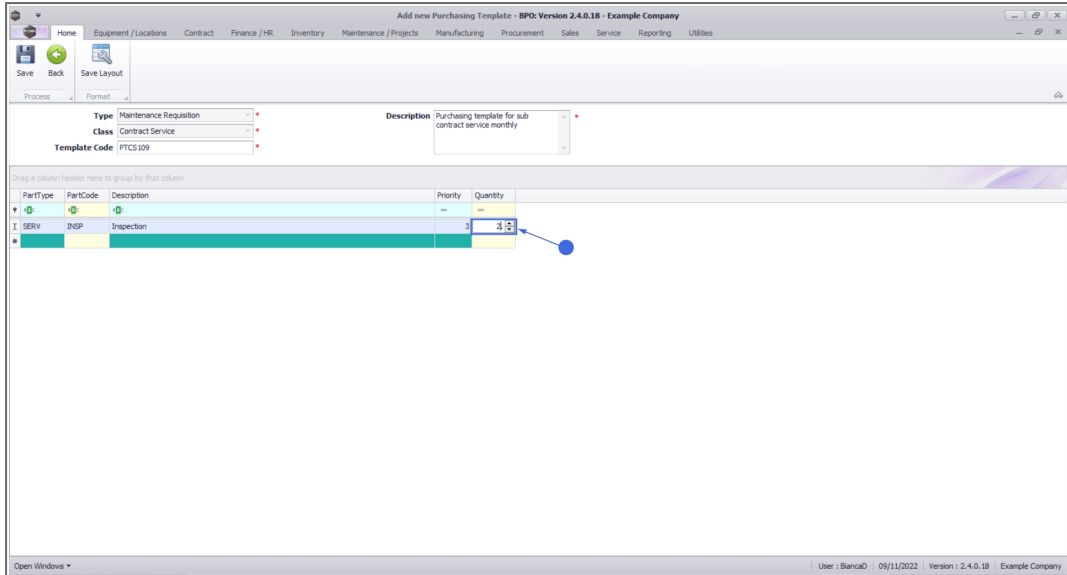
ADD TEMPLATE ITEMS

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
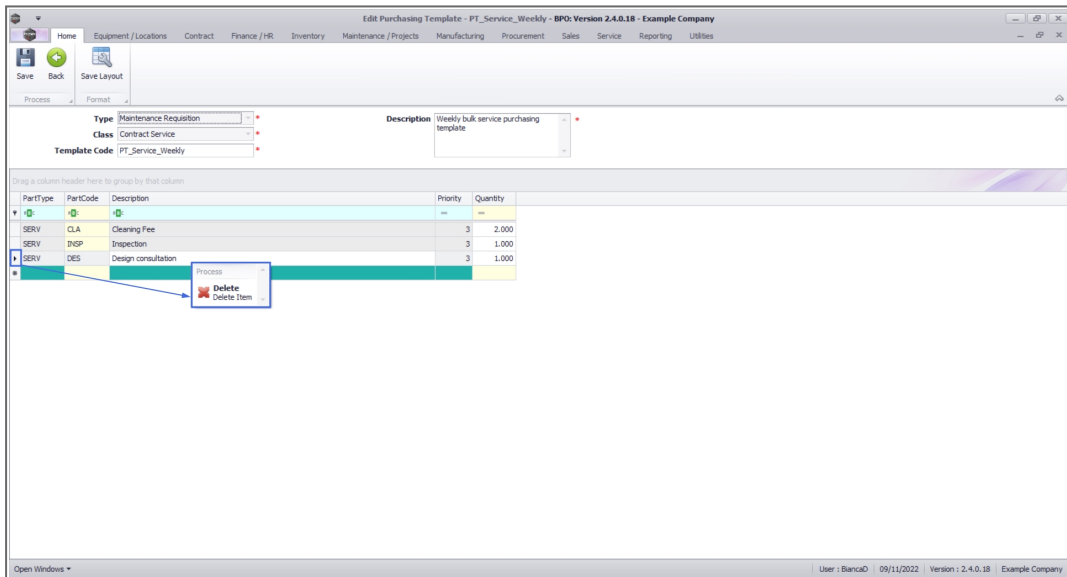
4. Click on the **Ok** button.
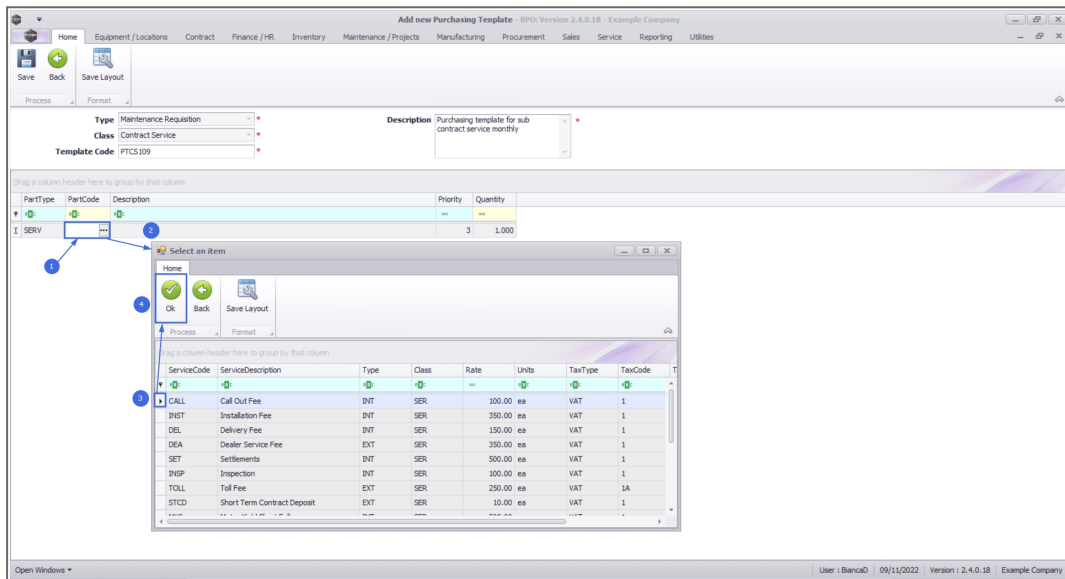
- Update the **Quantity** as required.
- Continue this process to add all the necessary **Services** to this template.
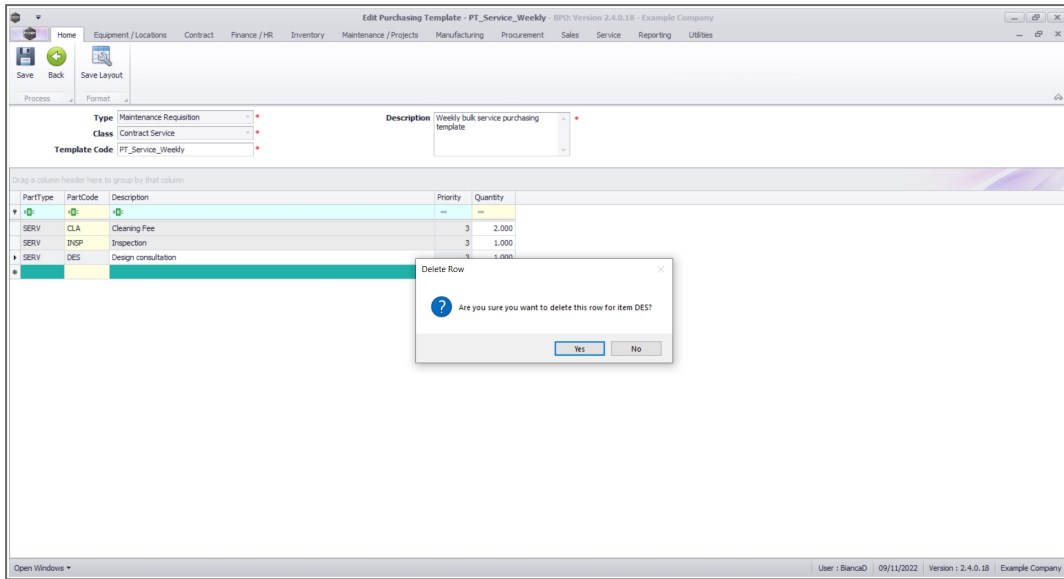
REMOVE TEMPLATE ITEMS

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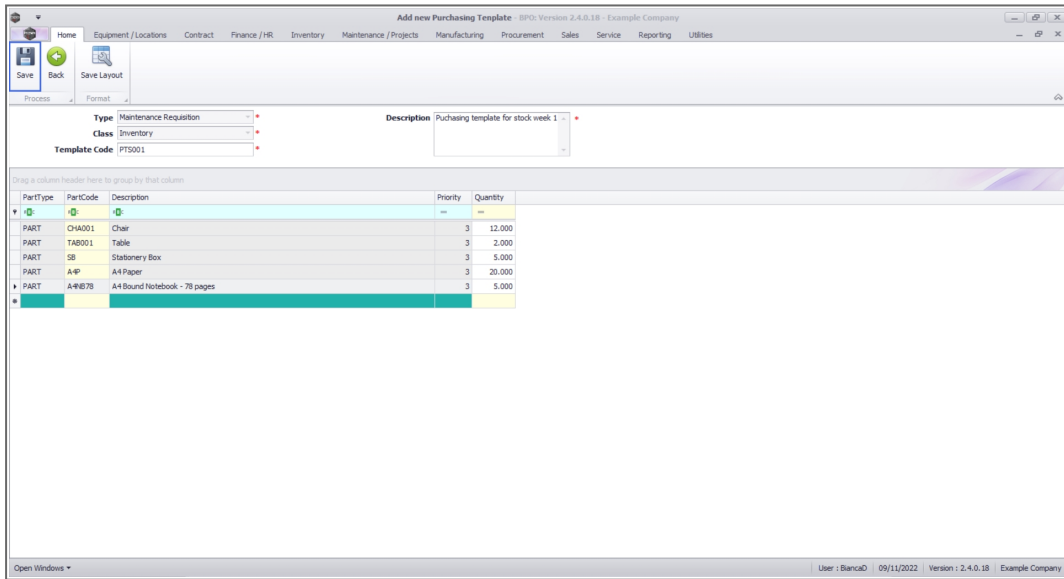

A message box will come up asking: **Are you sure you want to delete this row for item [service code]?**
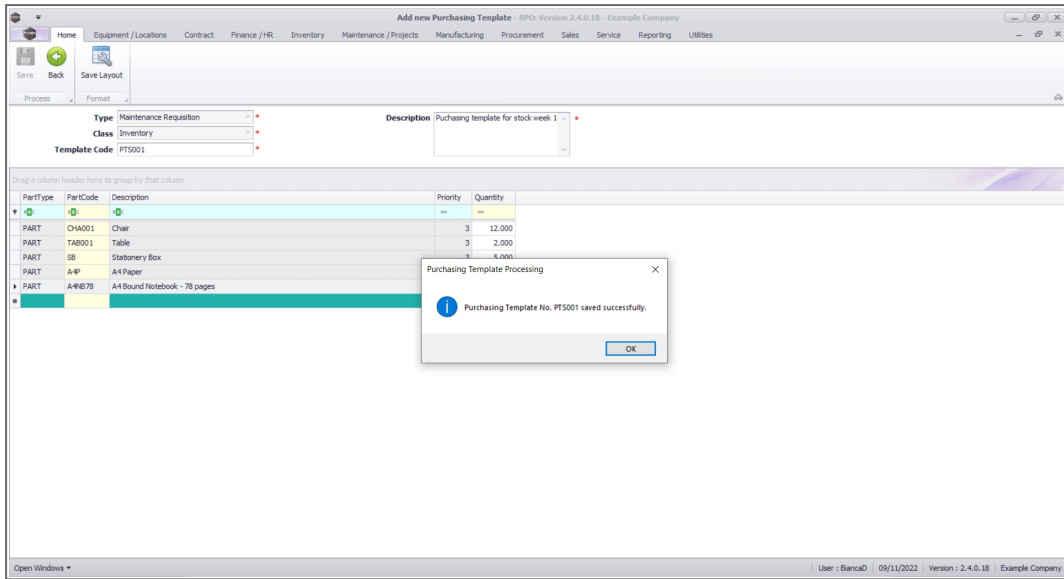
- Click on the **Yes** button.

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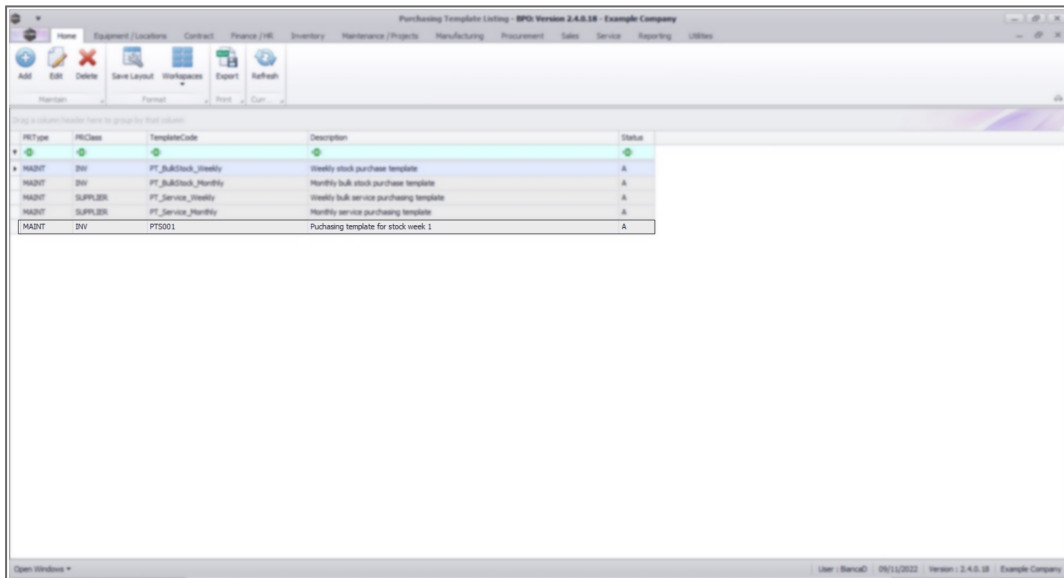
- Once done, click on the **Save** button.

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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