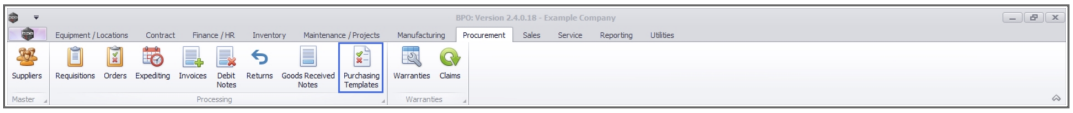
We are currently updating our site; thank you for your patience.

# PROCUREMENT

## EDIT A STOCK PURCHASING TEMPLATE

Purchasing Templates can be created to preconfigure purchase requisitions to effectively generate bulk orders.

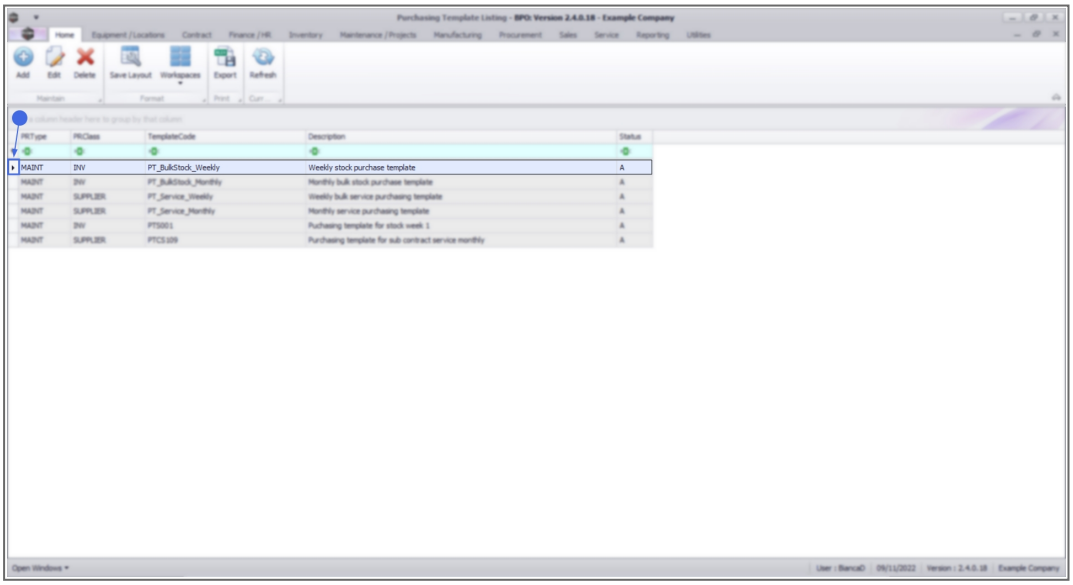
**Ribbon** Select **Procurement > Purchasing Templates**




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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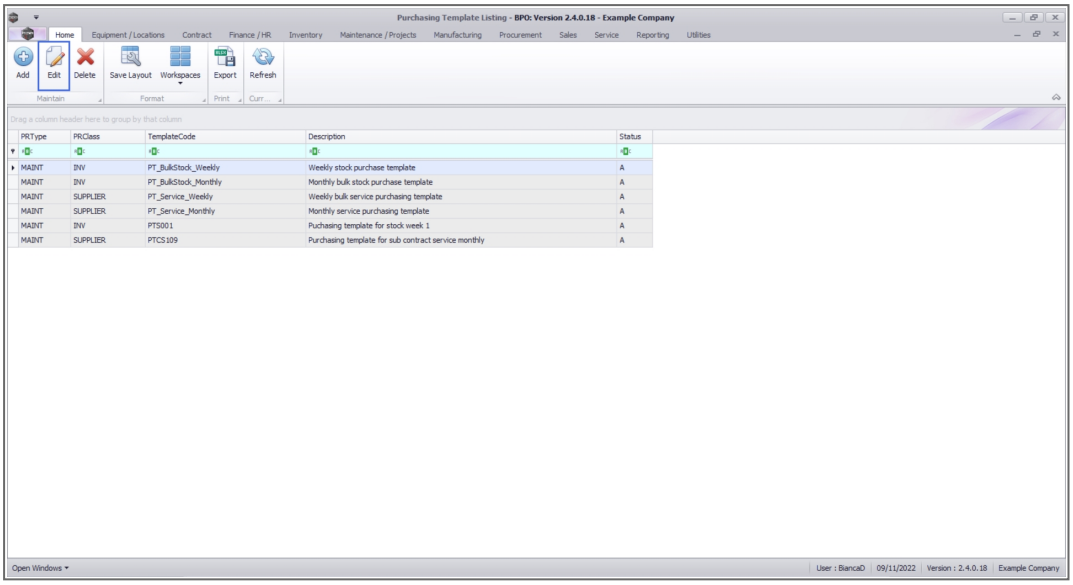
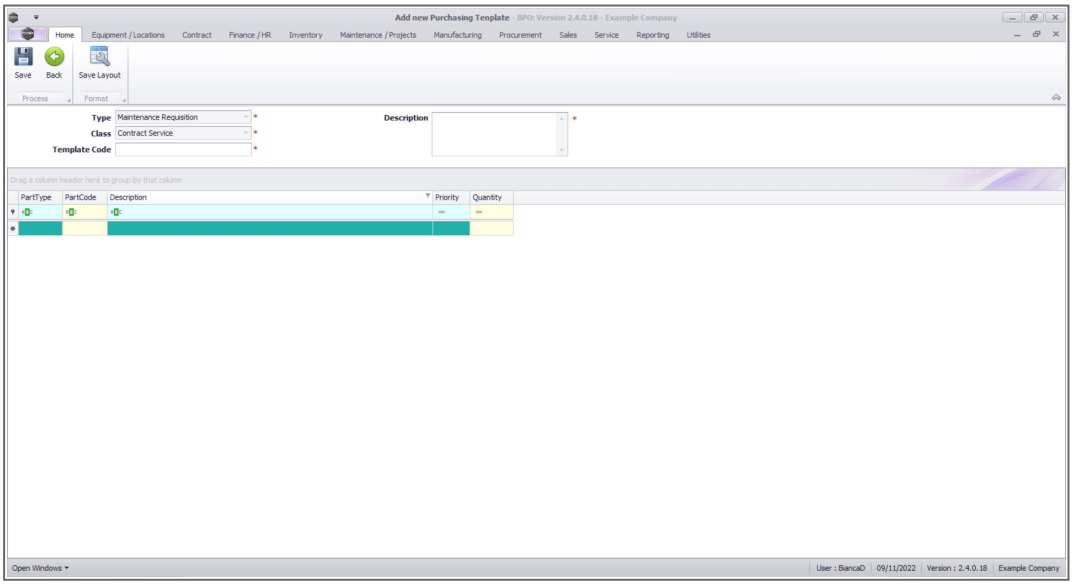
- Click on the **Edit** button.




## 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



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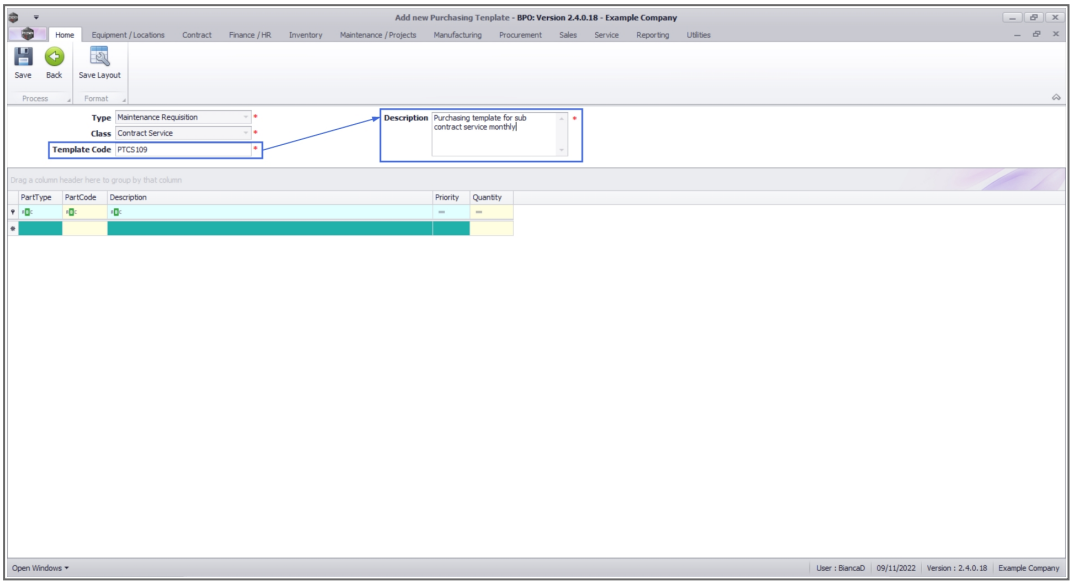
- **Template Code**: Type in a code that will help you identify the template. This code cannot be longer than 20 characters.
- **Description**: Type in a description to better define the template.




## 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.



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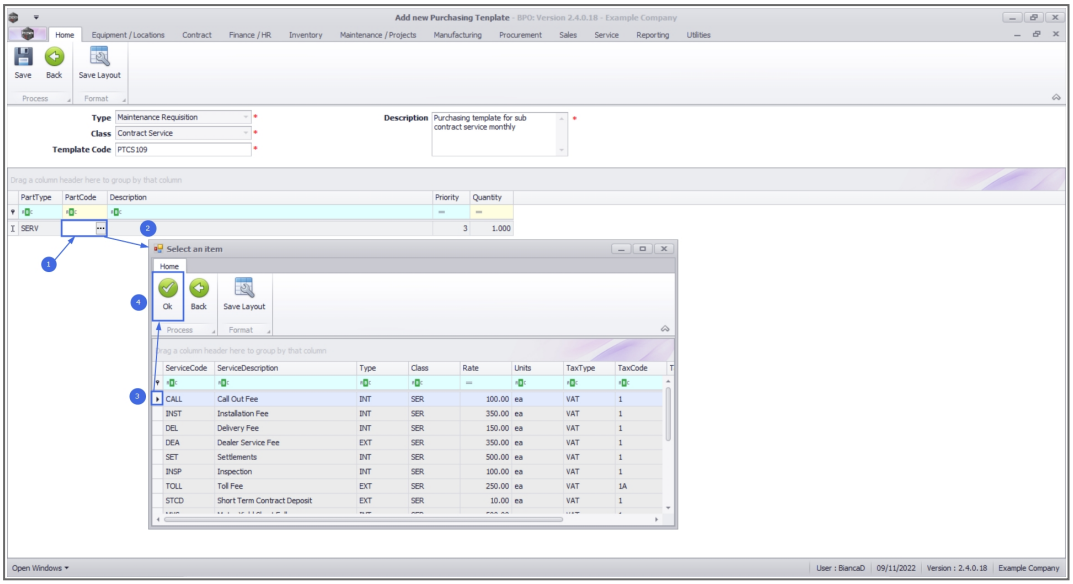
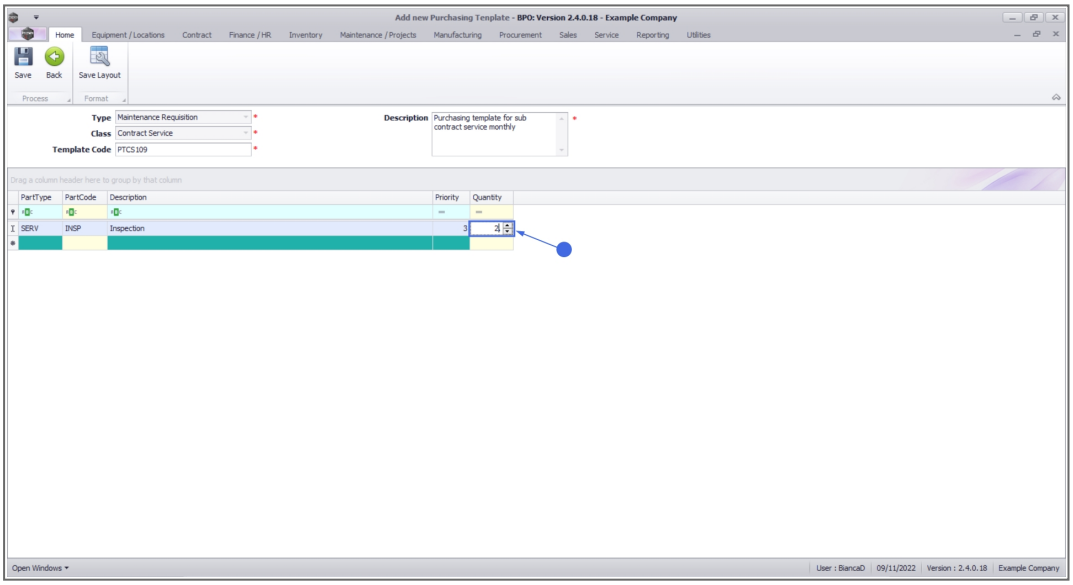



- Update the **Quantity** as required.
- Continue this process to add all the necessary **Services** to this template.




## REMOVE TEMPLATE ITEMS

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



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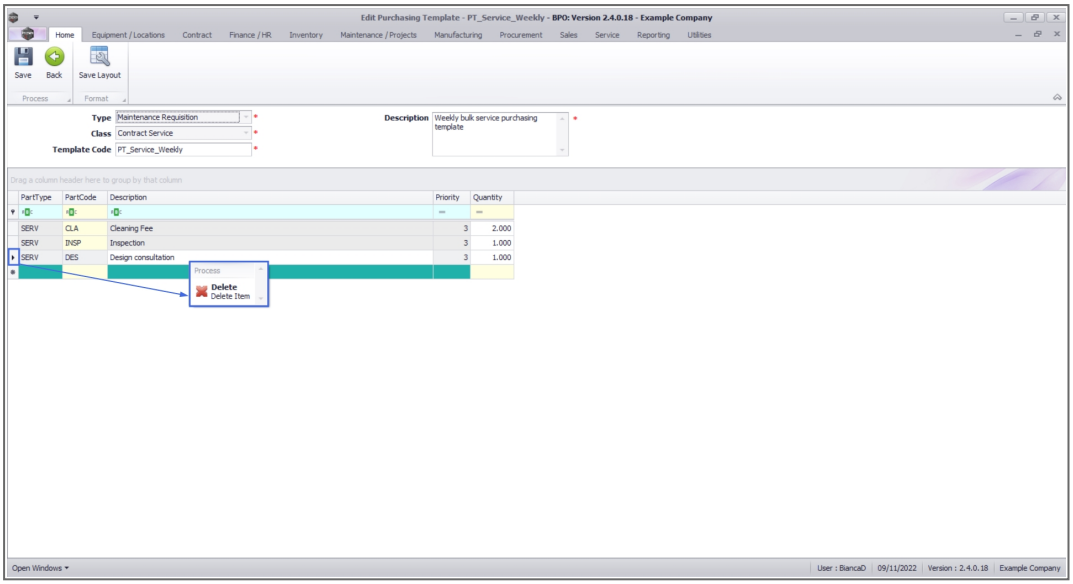
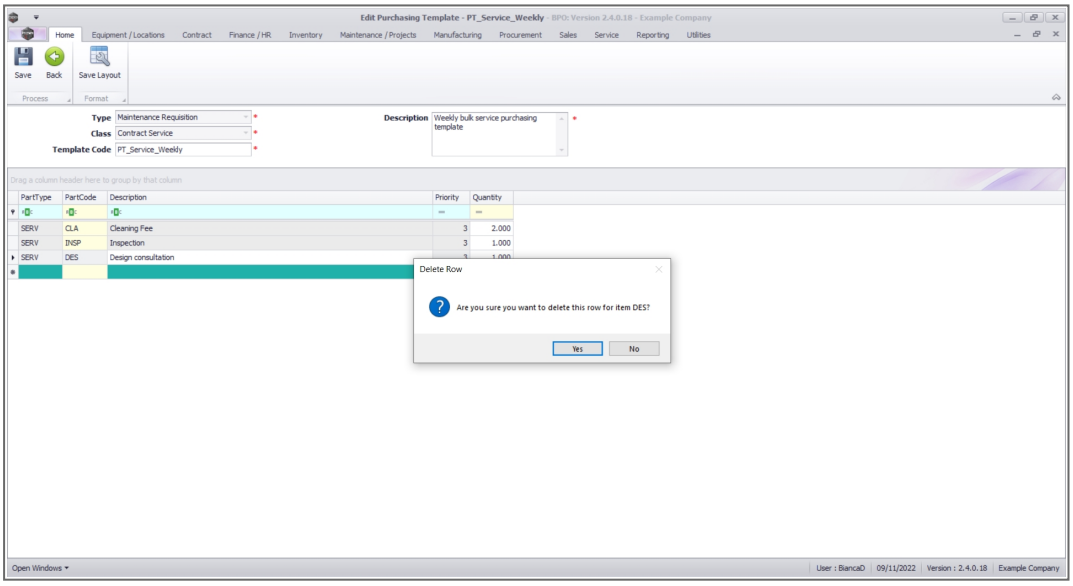



A message box will come up asking: **Are you sure you want to delete this row for item [service code]?**

- Click on the **Yes** button.




## SAVE TEMPLATE

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



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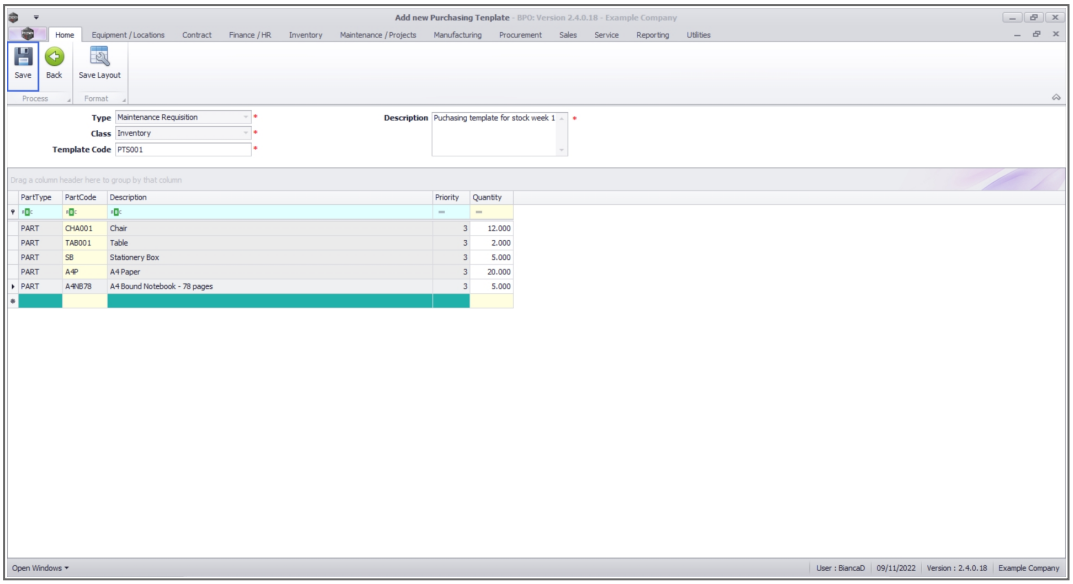
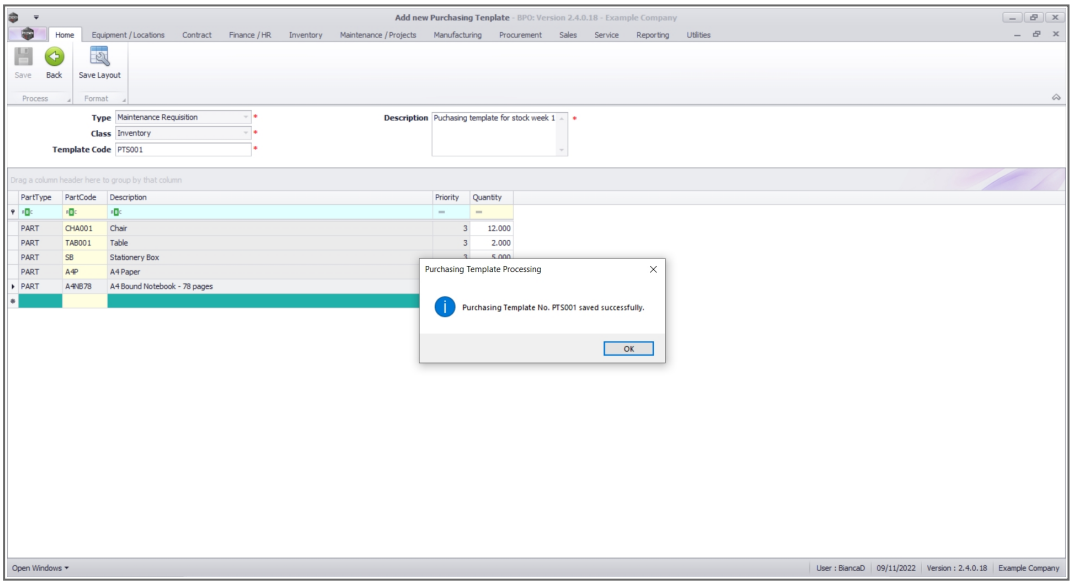



A message box will come up noting: **Purchasing Template No** [purchasing template number] **saved successfully.**

- Click on the **Ok** button.




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



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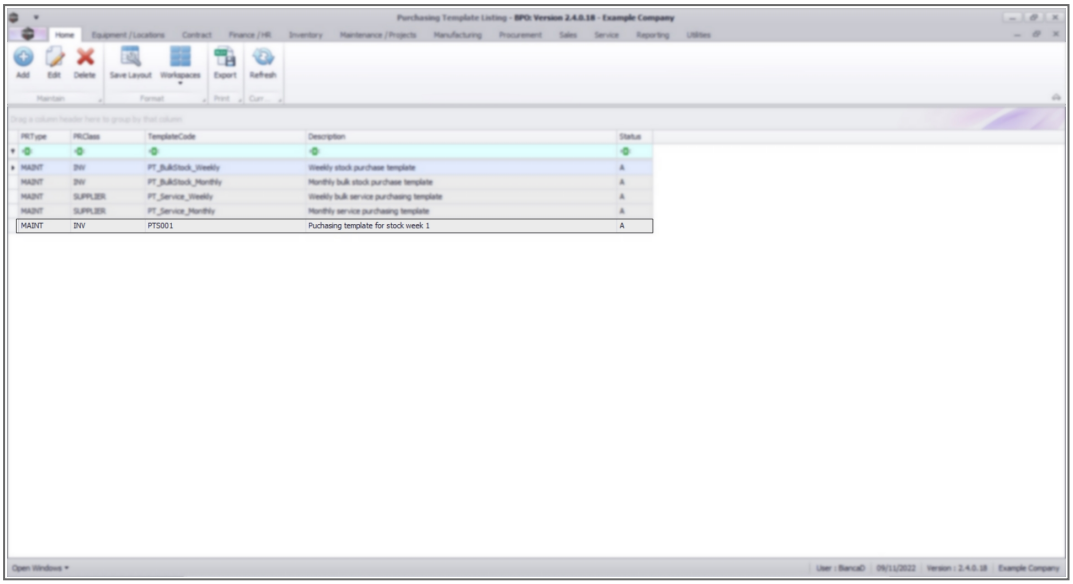

## Related Topics

- Add Purchasing Template
- Edit Purchasing Template
- Delete Purchasing Template
- Create New Purchase Requisition from Template

MNU.057.006



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