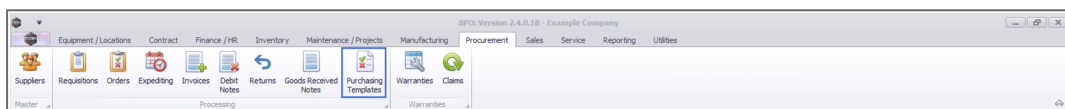


PROCUREMENT

EDIT A STOCK PURCHASING TEMPLATE

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

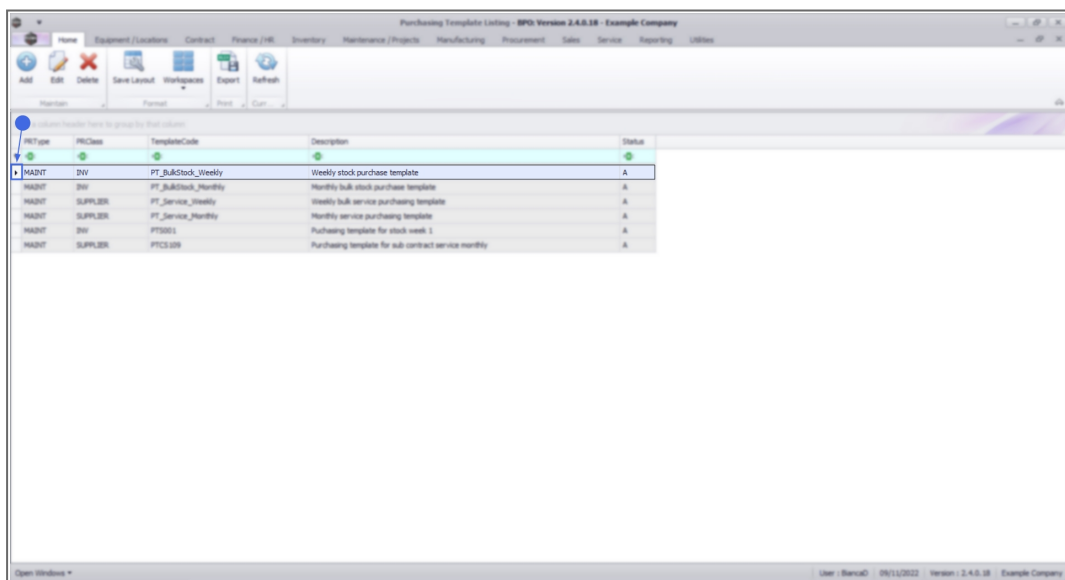
Ribbon Select *Procurement* > *Purchasing Templates*



The *Purchasing Templates Listing* screen will be displayed.

EDIT A PURCHASING TEMPLATE

- Select the **row** of the *Purchasing Template* that you wish to process.



PT Type	PT Class	Template Code	Description	Status
MAINT	INV	PT_BulkStock_Weekly	Weekly stock purchase template	A
MAINT	INV	PT_BulkStock_Monthly	Monthly bulk stock purchase template	A
MAINT	SUPPLIER	PT_Service_Weekly	Weekly bulk service purchasing template	A
MAINT	SUPPLIER	PT_Service_Monthly	Monthly service purchasing template	A
MAINT	INV	PT3001	Purchasing template for stock week 1	A
MAINT	SUPPLIER	PTCS100	Purchasing template for sub-contract service monthly	A

- Click on the **Edit** button.

Purchasing Template Listing - BPO: Version 2.4.0.18 - Example Company

Home Equipment / Locations Contract Finance / HR Inventory Maintenance / Projects Manufacturing Procurement Sales Service Reporting Utilities

Add Edit Delete Save Layout Workspaces Export Refresh

Maintain Format Print Curr

Drag a column header here to group by that column

PRType	PRClass	TemplateCode	Description	Status
MAINT	INV	PT_BulkStock_Weekly	Weekly stock purchase template	A
MAINT	INV	PT_BulkStock_Monthly	Monthly bulk stock purchase template	A
MAINT	SUPPLIER	PT_Service_Weekly	Weekly bulk service purchasing template	A
MAINT	SUPPLIER	PT_Service_Monthly	Monthly service purchasing template	A
MAINT	INV	PT5001	Purchasing template for stock week 1	A
MAINT	SUPPLIER	PTCS109	Purchasing template for sub contract service monthly	A

Open Windows

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

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:** Inventory

Add new Purchasing Template - BPO: Version 2.4.0.18 - Example Company

Home Equipment / Locations Contract Finance / HR Inventory Maintenance / Projects Manufacturing Procurement Sales Service Reporting Utilities

Save Back Save Layout

Process Format

Type Maintenance Requisition

Class Inventory

Template Code

Description

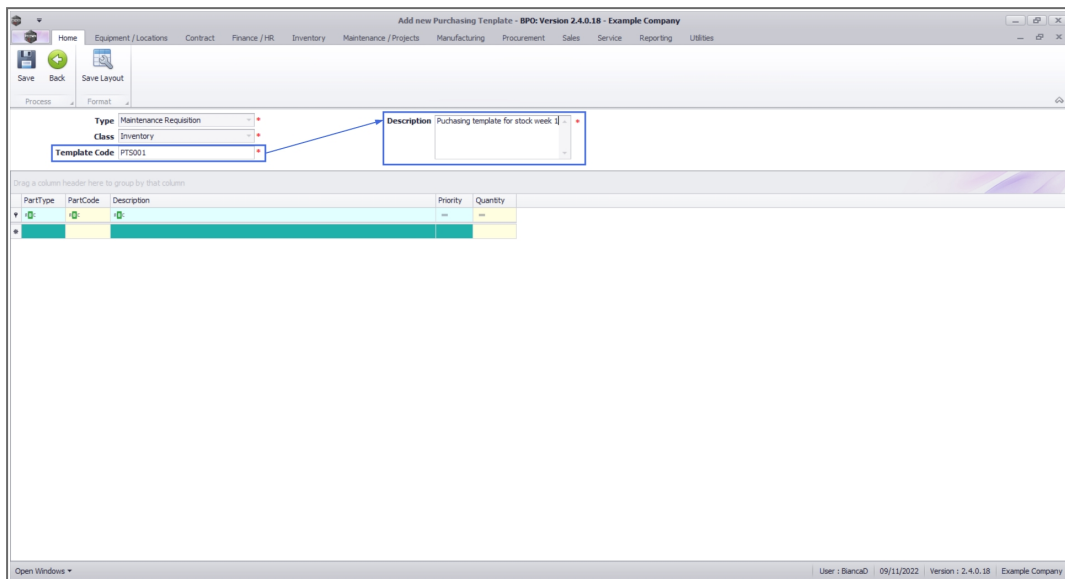
Drag a column header here to group by that column

PartType	PartCode	Description	Priority	Quantity

Open Windows

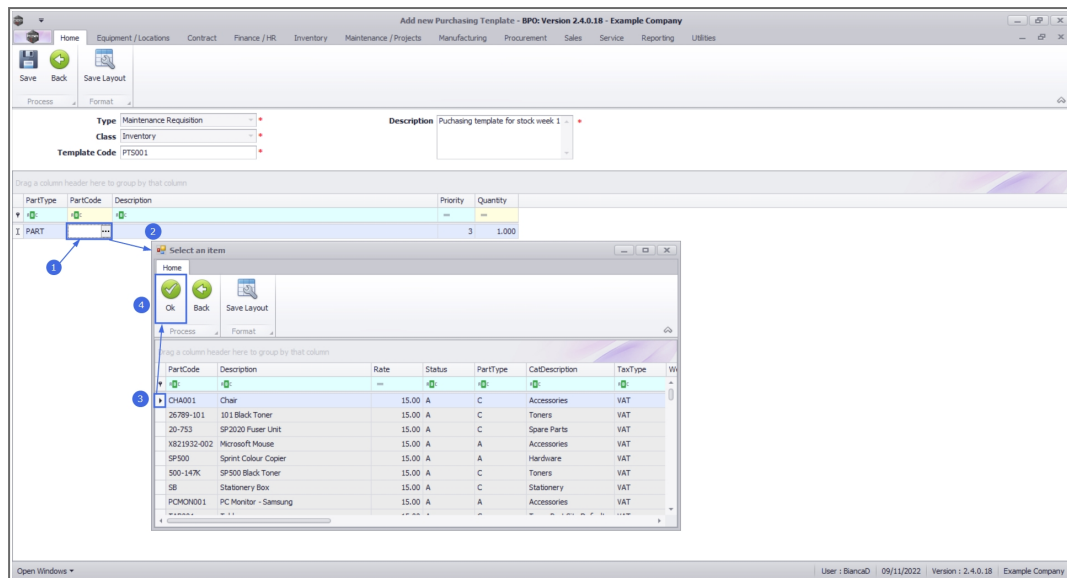
User : BiancaD 09/11/2022 Version : 2.4.0.18 Example Company

- **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.

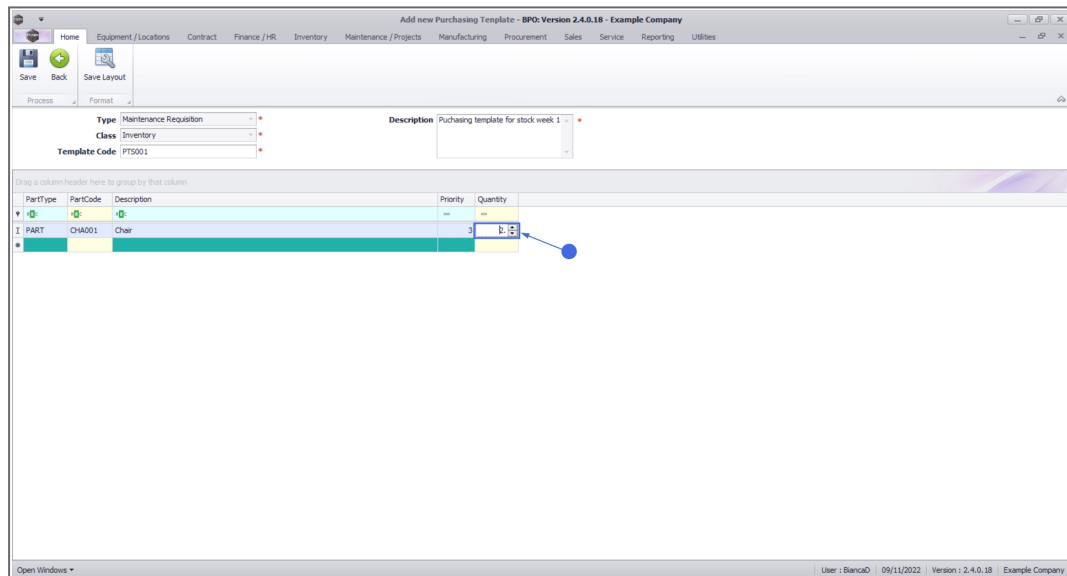


ADD TEMPLATE ITEMS

1. Click in the **PartCode** field and then on the ellipsis button that will come up
2. The **Part Code lookup list** will come up
3. Search for an select the **Part** you wish to add to the template
4. Click on the **Ok** button.

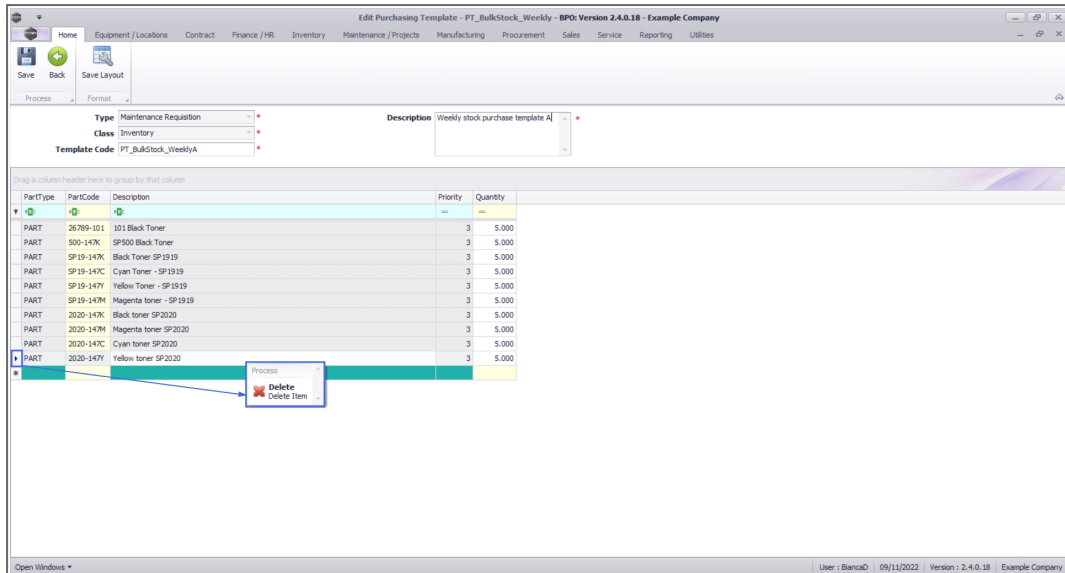


- Update the **Quantity** as required.
- Continue this process to add all the necessary **Parts** to this template.



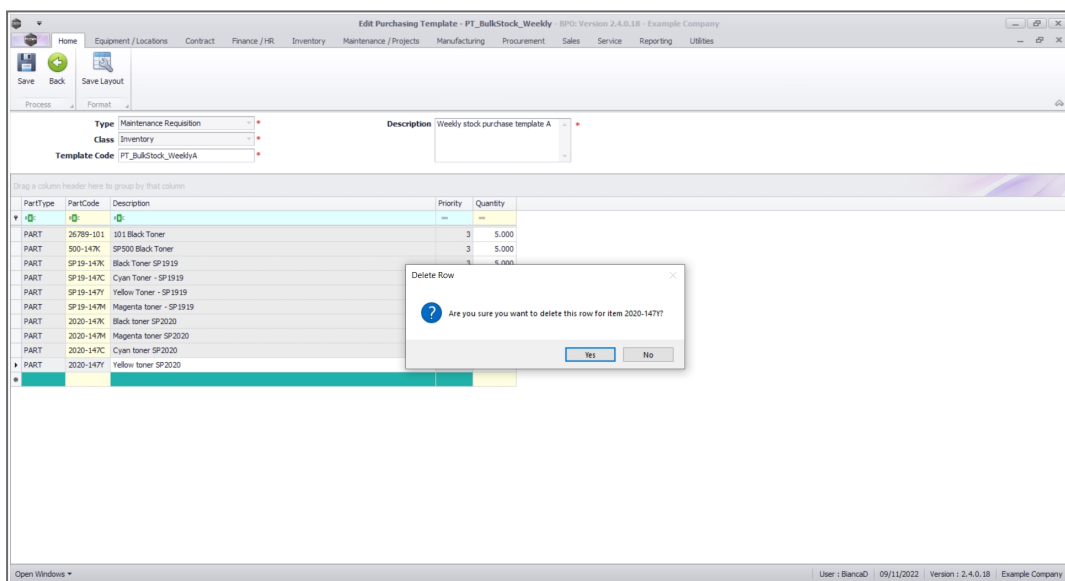
REMOVE TEMPLATE ITEMS

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



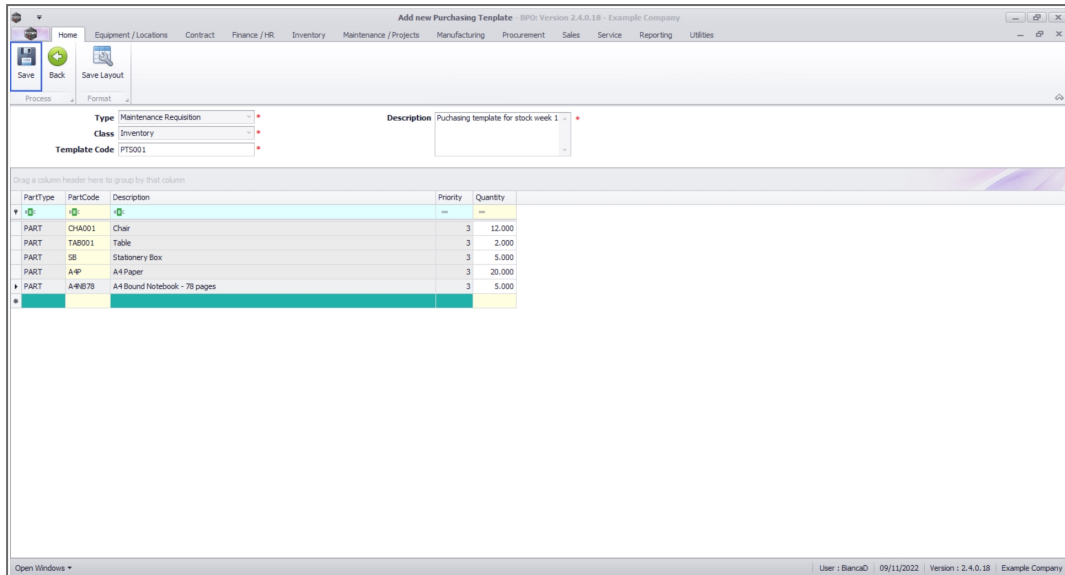
A message box will come up asking: ***Are you sure you want to delete this row for item [part number]?***

- Click on the **Yes** button.



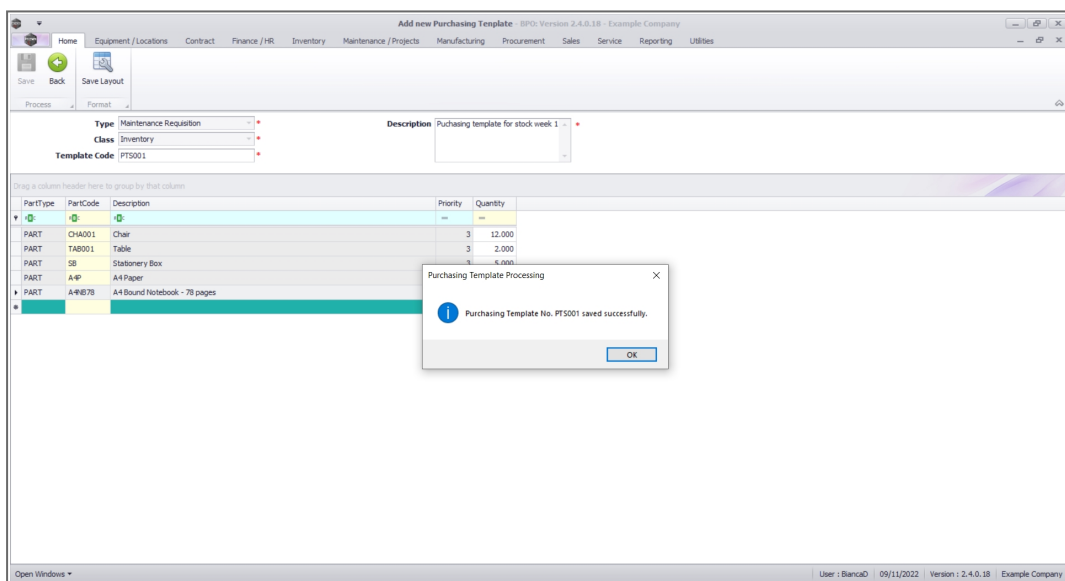
SAVE TEMPLATE

- 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.

Purchasing Template Listing - BPO Version 2.4.6.18 - Example Company

Home Equipment / Locations Contract Finance / HR Inventory Maintenance / Projects Manufacturing Procurement Sales Service Reporting Utilities

Add Edit Delete Save Layout Workspaces Export Refresh

Help > Admin/Security Tools > Group By Stock column

PTType	PTClass	TemplateCode	Description	Status
MAINT	INV	PT_BulkStock_Weekly	Weekly stock purchase template	A
MAINT	INV	PT_BulkStock_Monthly	Monthly bulk stock purchase template	A
MAINT	SUPPLIER	PT_Service_Weekly	Weekly bulk service purchasing template	A
MAINT	SUPPLIER	PT_Service_Monthly	Monthly service purchasing template	A
MAINT	INV	PT5001	Purchasing template for stock week 1	A

Open Windows

User: RensuID 28/11/2022 Version: 2.4.6.18 Example Company

Related Topics

- [Add Purchasing Template](#)
- [Edit Purchasing Template](#)
- [Delete Purchasing Template](#)
- [Create New Purchase Requisition from Template](#)

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