

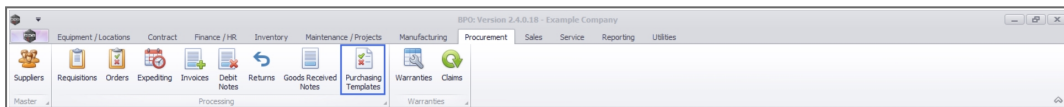
PROCUREMENT

ADD A STOCK 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 stock items.

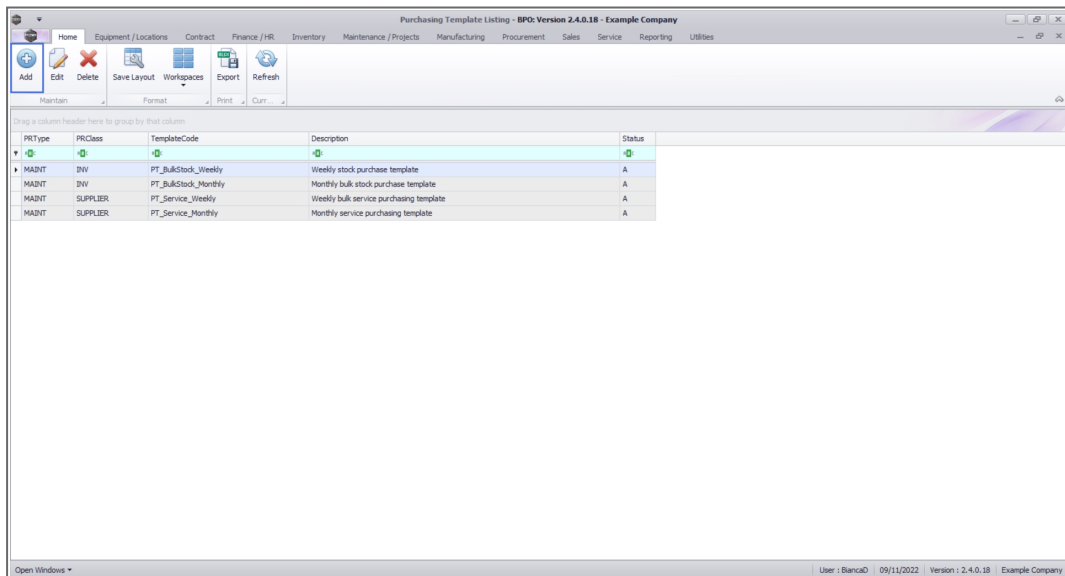
Ribbon Select *Procurement > Purchasing Templates*



The *Purchasing Templates Listing* screen will be displayed.

ADD NEW TEMPLATE

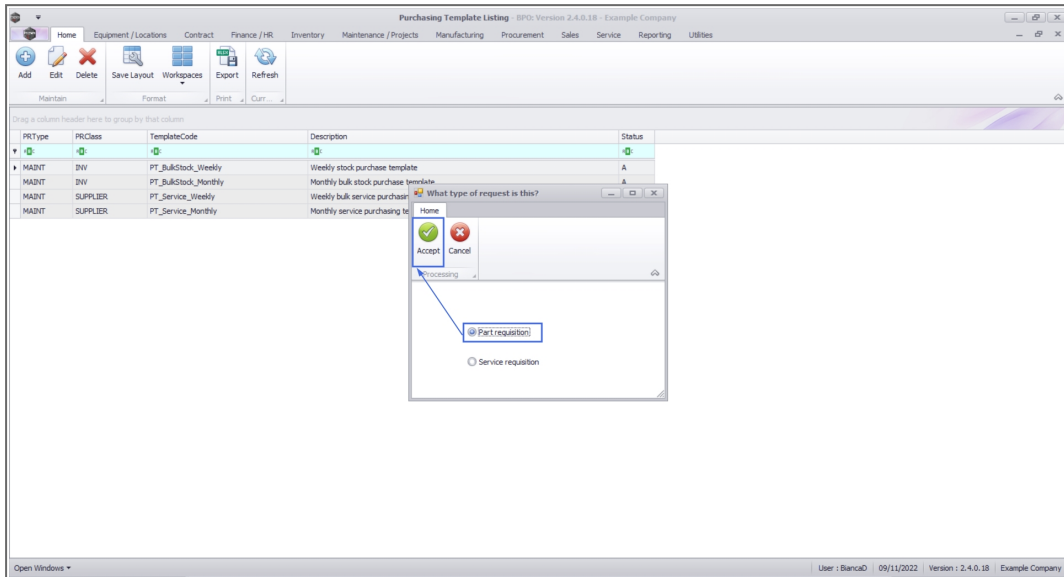
- Click on the **Add** button.



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

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

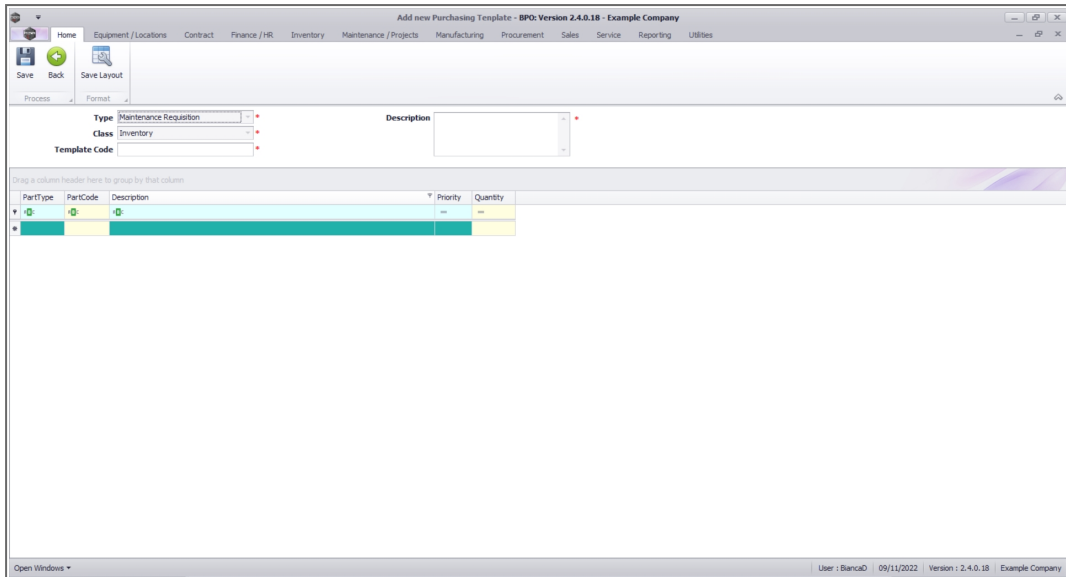
- Click on the **Accept** button.



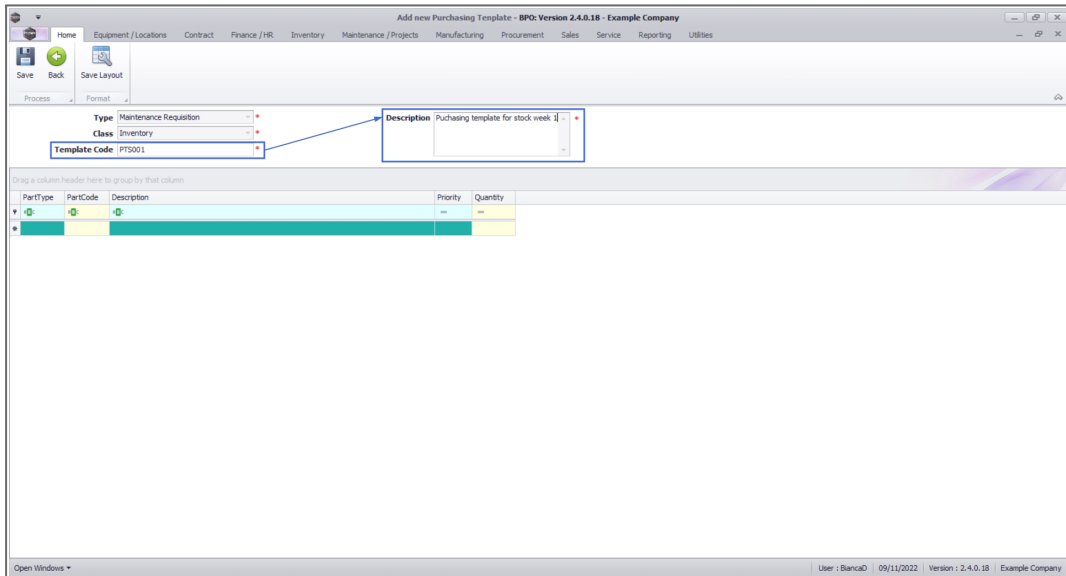
TEMPLATE HEADER

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:** Inventory

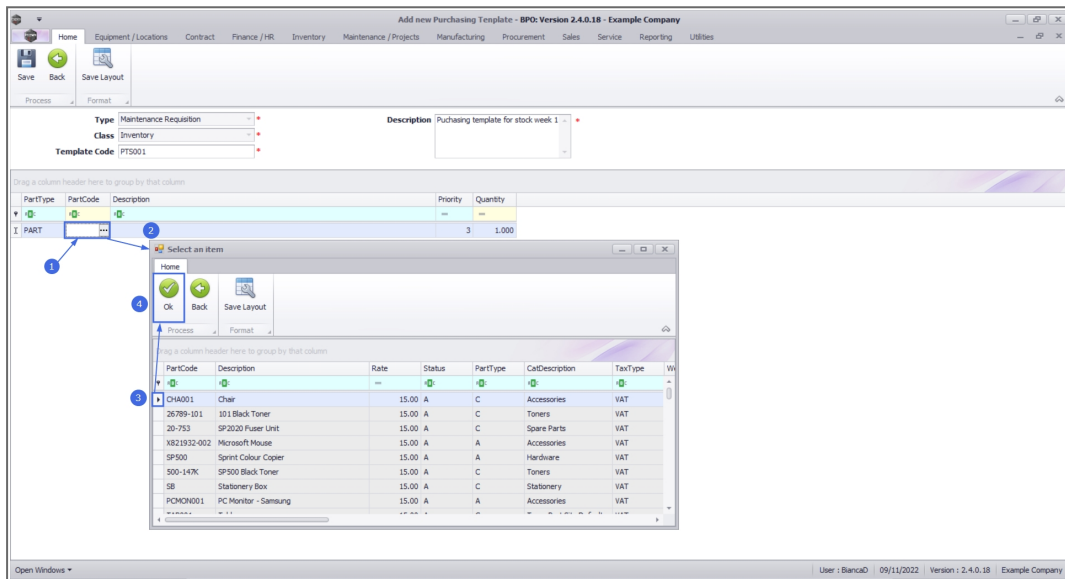


- **Template Code:** Type in a code that will help you identify the template. This code cannot be longer than 20 characters.
- **Description:** Type in a description to better define the template.

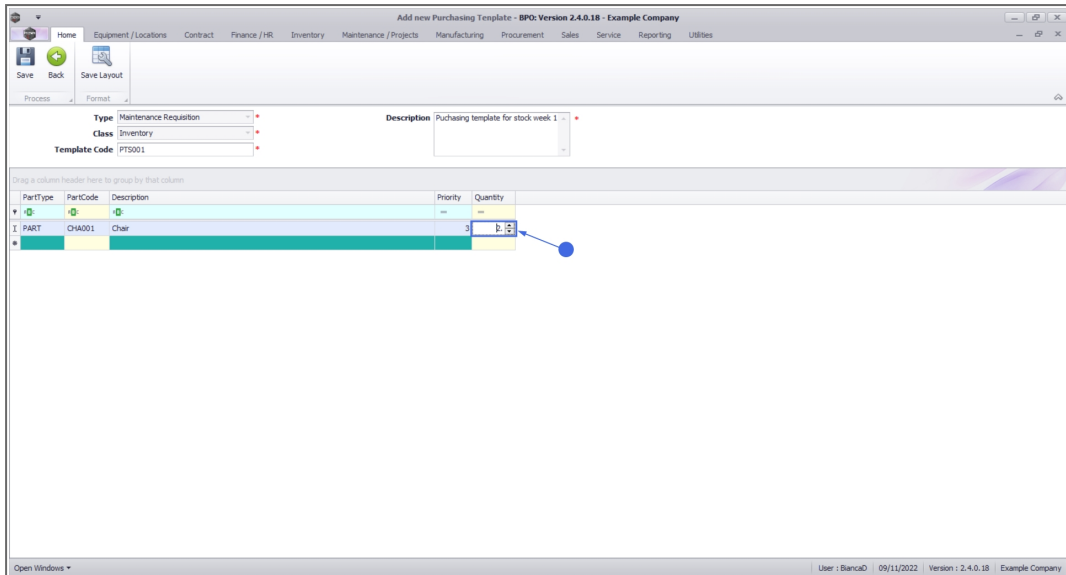


ADD TEMPLATE ITEMS

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.

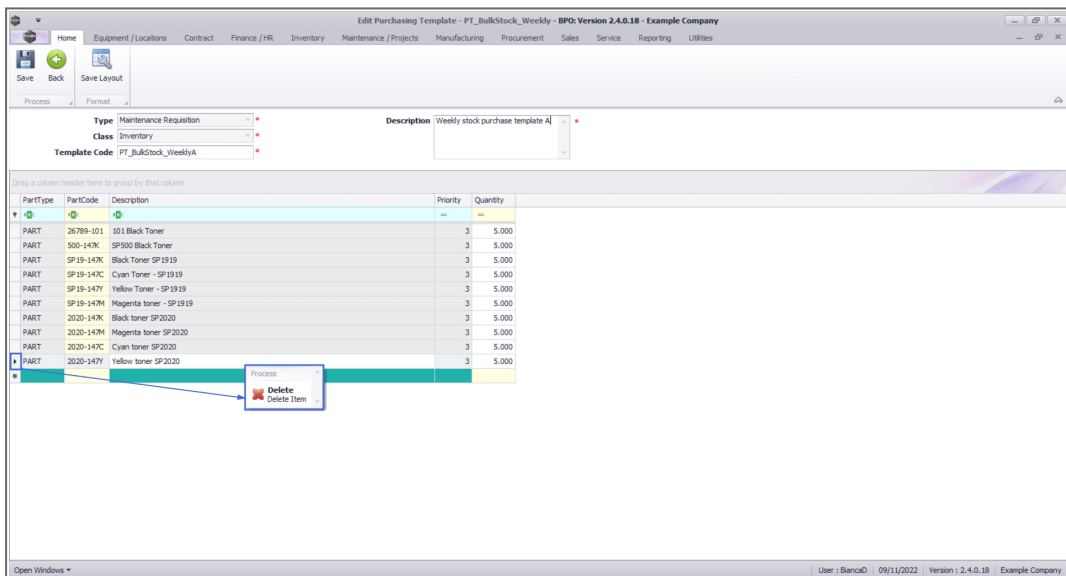


- Update the **Quantity** as required.
- Continue this process to add all the necessary **Parts** to this template.



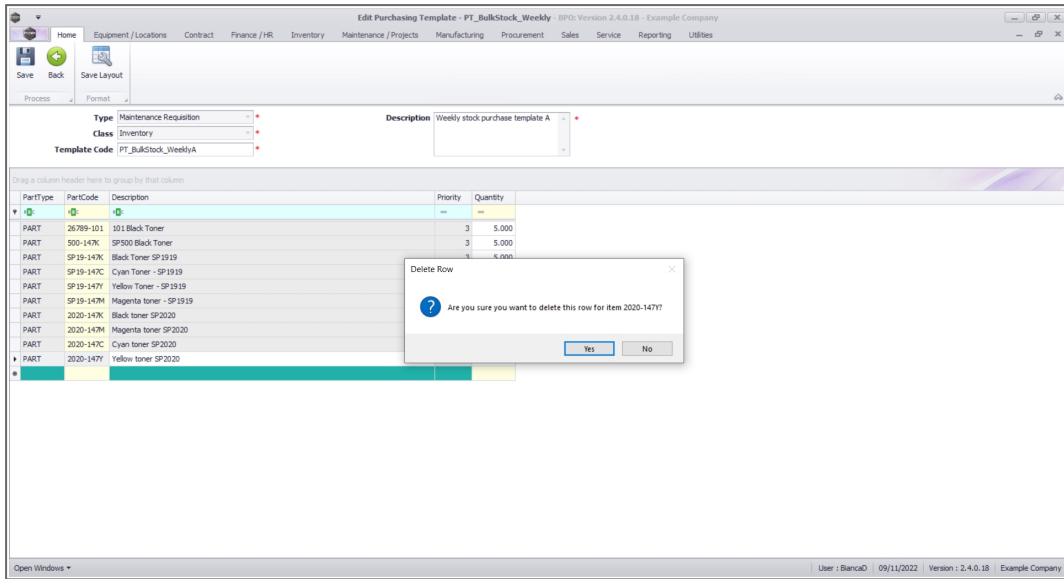
REMOVE TEMPLATE ITEMS

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



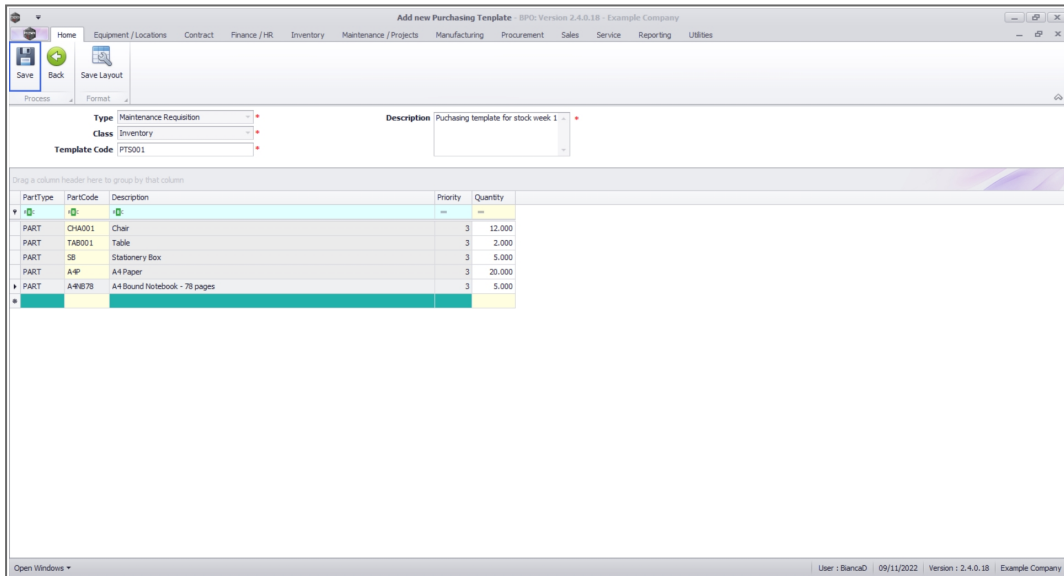
A message box will come up asking: **Are you sure you want to delete this row for item [part number]?**

- Click on the **Yes** button.



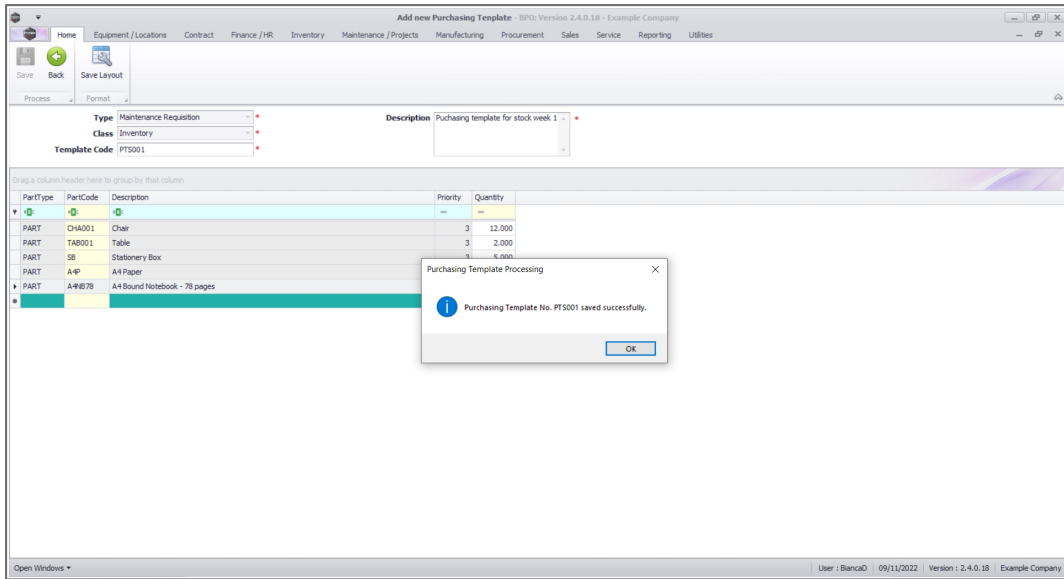
SAVE TEMPLATE

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

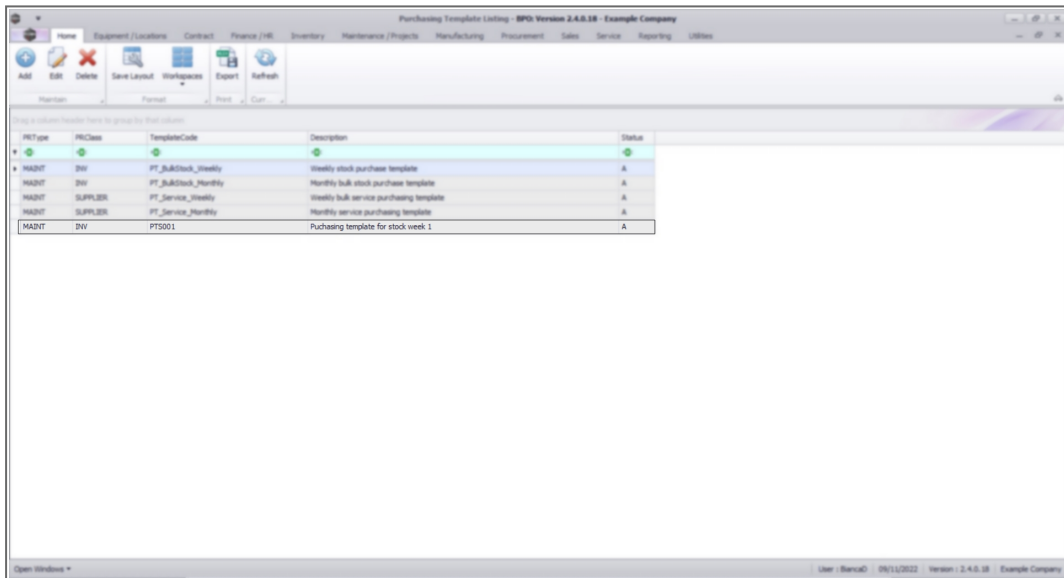


A message box will come up noting: **Purchasing Template No [purchasing template number] saved successfully.**

- Click on the **Ok** button.



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



Related Topics

- [Add Purchasing Template](#)
- [Edit Purchasing Template](#)

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

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