PURPOSE:

The template order type provides an alternative to recurring PO's and is designed for situations in which certain items, services, quantities or special instructions will be used over and over again when ordering from vendors. Order entry is the same as a standard purchase order except for the Order type, which must be changed to "Template". Unlike recurring PO's which are handled by a separate transaction, templates are designed so that user may select line items from the template to copy into regular purchase orders via the "Copy PO" button on the purchase order header.

PROCESS STEPS:

1. Navigate to Purchasing > New Purchase Order.
2. On the General tab:
    a. Confirm Order Type is set to Template
    b. Click the magnifying glass in the 'Vendor' field to search for a vendor – double click on vendor to select.
    c. Verify the Freight, Ship Via, and Terms fields are populated and correct.
3. On the Misc1 tab, confirm the Ship-To is correct. Change if needed.
4. On the Dates tab, complete applicable date fields.
5. Click the Add button to add parts to the Purchase Order. The 'Edit Purchase Order Line' window will open.
    a. Click the magnifying glass in the 'Part Number' field to search for a part.
    b. Enter the Quantity for the part
    c. Confirm the Purchase unit and Pricing unit are correct. Change if needed.
    d. Enter the Blanket Quantity
    e. Click Next to add additional parts and follow the same steps as above.
    f. Click Save and close the window.
6. Click Save – a Purchase Order number will now be generated in the PO number field on the General Tab.

To Create the new Purchase Order:

1. Navigate to Purchasing > New Purchase Order
2. Enter the vendor
3. Click Copy PO soft button
4. Click on Magnifying Glass
5. Choose the Template to copy
6. Click continue
7. Move any items you don't wish to order to the left
8. Click continue
9. Change any dates as needed
10. Change any items or quantities as needed.

REVISIONS

Rev	Date	Change
I/R	11/29/17	New