Purchase Order Template

Module Guide: Purchase Order Template

Module Location

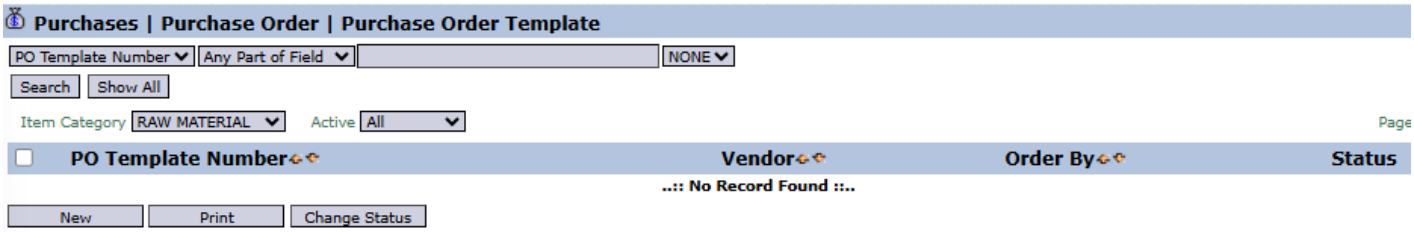
Purchasing > Purchase Order > Purchase Order Template

Module Objective

The **Purchase Order Template** module is used to create and save templates or drafts for routine and recurring purchase orders (POs). By creating a template, you can significantly speed up the PO creation process for frequent purchases made to the same vendor for the same items, while also reducing the risk of input errors.

1. Main View (PO Template List)

The main page of this module displays a list of all PO templates that have been created.



View Explanation & Filters

This page is for viewing and managing all existing PO templates.

- **Filters**: You can search for a specific template by **PO Template Number**, **Item Category**, or **Active** status.

- **Template List**: The table below will display all templates that match the filters, with columns such as **PO Template Number**, **Vendor**, **Order By**, and **Status**.

Button Functions

- **New**: The primary button to create a new PO template.
- **Print**: To print the details of a selected template.
- **Change Status**: To change the status of a selected template (e.g., from active to inactive).

2. Steps to Create a New PO Template

Step 1: Create a New Template

From the Main View, click the **New** button to open the template creation form.



Step 2: Fill in Header Information

On the form that appears, fill in the general information that will become the standard for this template:

- **Vendor**: Select the supplier (vendor) to whom you will frequently send this order. 

- **Payment Term**: Set the standard payment term.



- **Notes**: Add standard notes that will always appear on the PO.



Step 3: Detail the Standard Items

In the detail table at the bottom:

1. Click the **[+] Multiple Item [-]** link to add a row.

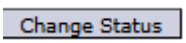
2. Enter the **Item Code**, **Qty** (the standard quantity usually ordered), and **Unit Price** that applies for this item from this vendor.

3. Repeat for all items you want to include in the template.

Step 4: Save the Template

After all data is filled in, click the **Save** button in the bottom-left section to save your PO draft. 

How to Use the Template

To use a created template, find the appropriate template in the Main View, select it, and then there will most likely be a button or action (for example, under [Change Status] or a separate button) to **'Create PO from Template'**. This will create a new Purchase Order document in the **Purchase Order** module that is automatically pre-filled according to the draft you created. 

Tips & Important Notes

- Use this feature for all your **routine purchases** (e.g., monthly raw material purchases) to save time and ensure

consistency.

- If there is a price change from the vendor, do not forget to return to this module and **update the price** in the relevant template.

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