

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.

The screenshot shows the main view of the Purchase Order Template module. At the top, there is a breadcrumb trail: Purchases | Purchase Order | Purchase Order Template. Below this, there are several filter fields: PO Template Number (with a dropdown arrow), Any Part of Field (with a dropdown arrow), and NONE (with a dropdown arrow). There are also Search and Show All buttons. Below the filters, there are two more dropdowns: Item Category (set to RAW MATERIAL) and Active (set to All). On the right side, there is a Page label. The main table has a header with columns: PO Template Number, Vendor, Order By, and Status. Below the header, there is a message: ...: No Record Found :... At the bottom, there are three buttons: New, Print, and Change Status.

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.

A rectangular button with a light blue background and a thin border, containing the word "New" in a dark blue font.

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. Vendor * : *-Please Select Item-*

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

Payment Term

:

A rectangular input field with a light blue background and a thin border, containing a small downward-pointing arrow icon in the bottom right corner.

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

Notes :

Step 3: Detail the Standard Items

In the detail table at the bottom:

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