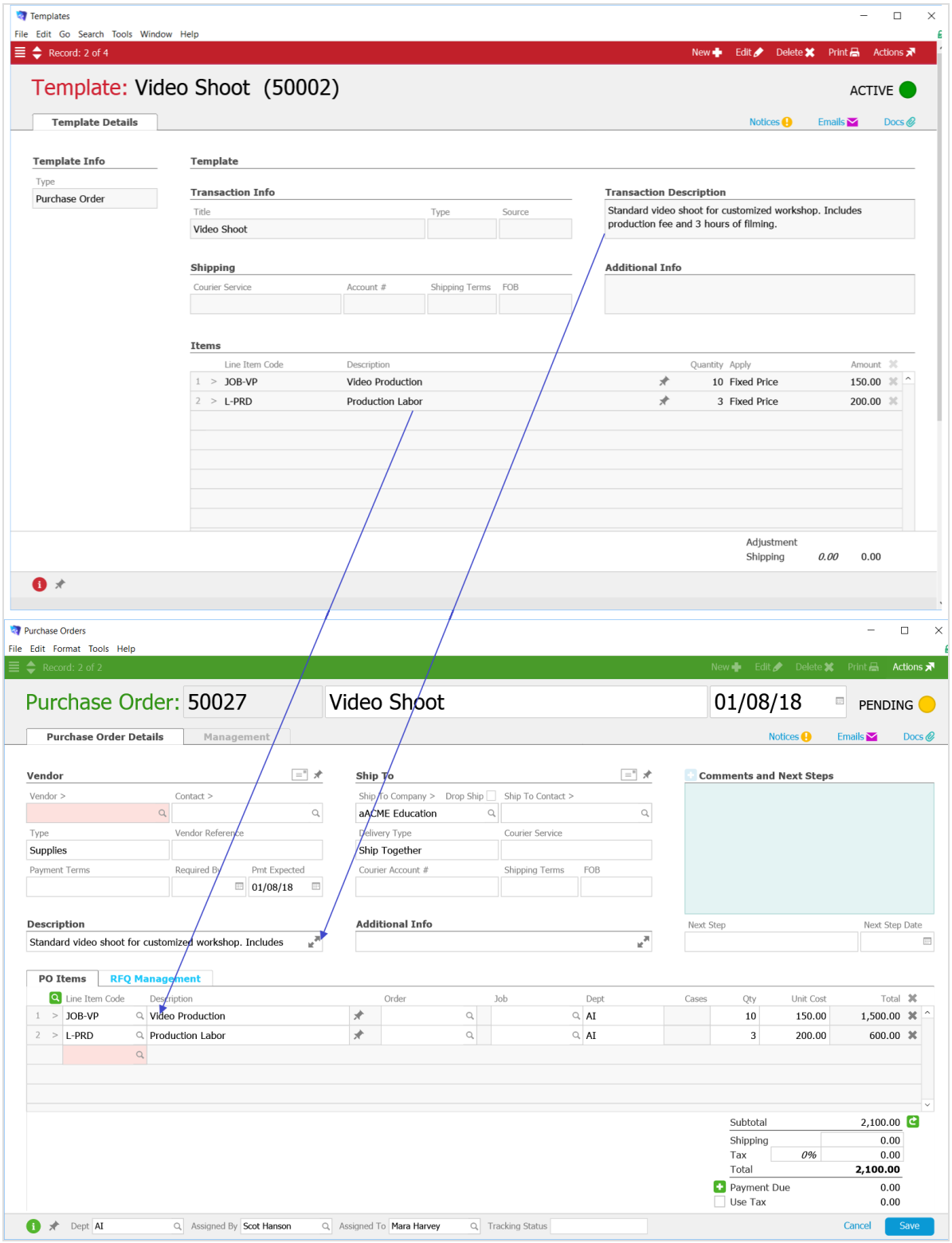
Using Templates for Purchase Orders

Last Modified on 02/07/2018 6:54 pm EST

Templates can help you build complicated or standard purchase orders more quickly:

1. Navigate to **Accts Payable** > **Purchase Orders**.
2. Click **New**.
3. Click **Actions** > **Build Purchase Order from Template**.
4. In the left column of the Templates Selector, click the desired template(s) to move them to the right column. (For multiple templates, simply append additions to the existing line items.)
5. Click **Save**, then complete the purchase order.

Information prepared in the selected template(s) is copied to the new purchase order record, as shown in these comparison screenshots:


Templates
File Edit Go Search Tools Window Help
Record: 2 of 4
New Edit Delete Print Actions
Template: Video Shoot (50002)
ACTIVE
Template Details
Notices Emails Docs
Template Info
Type
Purchase Order
Template
Transaction Info
Title
Video Shoot
Type
Source
Transaction Description
Standard video shoot for customized workshop. Includes production fee and 3 hours of filming.
Shipping
Courier Service
Account #
Shipping Terms
FOB
Additional Info
Items
Line Item Code
Description
Quantity
Apply
Amount
1 > JOB-VP Video Production 10 Fixed Price 150.00
2 > L-PRD Production Labor 3 Fixed Price 200.00
Adjustment
Shipping 0.00 0.00
Purchase Orders
File Edit Format Tools Help
Record: 2 of 2
New Edit Delete Print Actions
Purchase Order: 50027
Video Shoot
01/08/18
PENDING
Purchase Order Details
Management
Notices Emails Docs
Vendor
Vendor >
Contact >
Type
Supplies
Vendor Reference
Payment Terms
Required By
Pmt Expected
01/08/18
Ship To
Ship To Company >
Drop Ship
Ship To Contact >
aACME Education
Delivery Type
Ship Together
Courier Service
Courier Account #
Shipping Terms
FOB
Comments and Next Steps
Next Step
Next Step Date
Description
Standard video shoot for customized workshop. Includes
Additional Info
PO Items
RFQ Management
Line Item Code
Description
Order
Job
Dept
Cases
Qty
Unit Cost
Total
1 > JOB-VP Video Production AI 10 150.00 1,500.00
2 > L-PRD Production Labor AI 3 200.00 600.00
Subtotal 2,100.00
Shipping 0.00
Tax 0% 0.00
Total 2,100.00
Payment Due 0.00
Use Tax 0.00
Dept AI
Assigned By Scot Hanson
Assigned To Mara Harvey
Tracking Status
Cancel
Save