Using Templates for Purchase Orders

Last Modified on 06/16/2022 10:46 am EDT

This guide explains how to use templates to build purchase orders. It is intended for general users.

<u>Templates (https://aace5.knowledgeowl.com/help/overview-of-templates)</u> can help you build complicated or standard purchase orders more quickly:

- 1. Navigate from Main Menu > Accts Payable > Purchase Orders.
- 2. Click New.
- 3. Click Actions > Build Purchase Order from Template.

		_	Purchase Orders			_				_
Record: 1 of 1							Actions View Logs			
Purchase Or	rder: 60029	-	Title							
								ase Order from ase Order from	Previous Purcha Template	se Ord
Purchase Order De	etails Management					_	Build Items	for Inventory I	Replenishment	
/endor		*	Ship To		*				ot Requiring Rep	lenish
Vendor >	🖄 ♀ Vendor Referen		Ship To Company >	Ship Type	Expected Date 🖈		Import Pure	hase Order Ite	ms	
			aACME Education Solutions, Inc.	Complete	TBD 🗆		Adjust Item Quantities to Match Received			
	Required By		Mark Jennings 1238 Broadway	Inventory Bi	Inventory Bin		Adjust Item Quantities to Match Purch			
			New York, NY 10001		Q					
	Payment Terms			Shipping Ter	ms					
escription			Additional Info			Ne	xt Step		Next Step	Date
		ы ²⁰			×21					1
	Management				Dept	Cases		Unit Cost	Total	
Code	Description		Order Job		L/C/V		Qty	Unit Cost	i Uldi	~
Code	Q,		Order Job		Debr	cuses	Qty	Unit Cost	10(2)	
Code			Order Job		Dep.		Qty	Unit Cost	10.0	
Code			Order Job		vept		Qty	Unit Lost	TUG	
Code			Order Job				Subtota	1	0.00	
			Order Job		ndr		Subtota Shipping		0.00	
Purchasing Rec	eiving	rring Transactio		ancy	Ex Rate		Subtota	1	0.00	
	eiving	rring Transactio		ency			Subtota Shippin Tax	l 0% t Due	0.00 0.00 0.00	

- 4. Move the needed record(s) to the Selected Templates column:
 - Click on the individual record
 - Click Select All

Template Type	Name	Abbr	Transaction Title		Tra	nsaction Type	Transaction Source	Status	C
emplates						Selected 1	emplates		
Type	Name		Abbr	Status		Name			
CAMPAIGN	20% Off Tablet Accessories		20TAB	ACTIVE	^	Magazine A	Ad - French Textbook D	liscount	
ORDER	Dry Erase Marker Subscription	1	SUB-DRY	ACTIVE					
SHIPPING	FedEx Ground		FEDX-GR	ACTIVE					
ORDER	Freestanding Whiteboard Inst	allation	FSWBI	ACTIVE					
ORDER	I Learn French: 5 Classroom C	Order	FRENCH5	ACTIVE					
ORDER	Mounted Whiteboard Installat	ion	MWBI	ACTIVE					
ORDER	New Customer Inquiry		LEAD	ACTIVE					
CAMPAIGN	Teacher Appreciation Sale		TEACH	ACTIVE					
CAMPAIGN	Technology Promotional		TECHPRO	ACTIVE					
PURCHASE ORDER	Video Shoot		VIDEO	ACTIVE					
Displaying 11 of 11 found	, ,			Select All 3	~	« Remove	Al	Cancel	Save

5. Click **Save**, then complete the purchase order.

aACE copies information prepared in the selected template(s) to the new purchase order record, as shown in these comparison screenshots:

Record: 4 of 11							'		lit 🥜 🛛 Delete	🗙 Print 🖶	Actions 🖈
emplate	: Magaz	ine Ad - Fr	ench	Textbook	Discount	t (FRNCHMA	G)			ACT	IVE
			chien	I CALDOON	Discouri		-				
CAMPAIGN 1	Template Details							iotices 😣	Tasks 🗹	Emails 🎽	Docs 6
ransaction Info	0		Items								
itle			Co	de	Description			Quantity	Apply	Amou	nt 30
lagazine Ad - Fre	ench Textbook Disc	ount	1 > TM	4-FRNCH3	J'Apprend	is: I Learn French Teacher's	s ⊀	5	Unit Adj %	5.00	% ≍ ^
ype	Source	Adjustment	2 > TB	3-FRNCH3	J'Apprend	is: I Learn French 3rd Editio	on 🖈	150	Unit Adj %	5.00	% ≫
àles	Advertisement					1					
hinning						/					
hipping arrier	Carrier Service				/						
an ref	Carrier Service				/						
hipping Terms	Ship Point										
arrier Account #	Shipping Cost	Shipping Charge			/						
	0.00	0.00			_ /						
escription	Education Magazin	6 841			1						
				/	/						
dditional Info				/	Purchase Orders		N	ew 🔶 Ed	k 🖋 Delete :	X Print 🖴 🗸	Actions 🛪
dditional Info Record: 1 of 1			ngazir	ne Ad - Fr		tbook Discou		cw↓ Ed 06/14		¥ Print品 /	Actions 🛪
e Record: 1 of 1 Purchase Or Purchase Or	Order: 6		ngazir	ne Ad - Fr		tbook Discou	int				_
dditional Info Record: 1 of 1 Urchase Or	Order: 6	50029 Ma	agazir	_/		tbook Discou	int (06/14 otices	ł/22 ™ssks ⊠	PENDI Emails 🎽	NG 😑
dditional Info Record: 1 of 1 PUTChase Purchase Or endor	Order: 6	50029 Ma Management		Ship To	ench Tex		int i	06/14 otices	ł/22	PENDI Emails 🎽	NG 😑
e Record: 1 of 1 Purchase	Order: 6	50029 Ma		Ship To thip To Company > aACME Education	ench Tex		int i	06/14 otices	ł/22 ™ssks ⊠	PENDI Emails 🎽	NG 😑
dditional Info Record: 1 of 1 PUTChase Purchase Or endor	Order: 6	50029 Ma Management		Ship To	ench Tex	Ship Type Expected Da		06/14 otices	ł/22 ™ssks ⊠	PENDI Emails 🎽	NG 😑
dditional Info Record: 1 of 1 UITCHASE Purchase Or andor	Order: 6	50029 Ma Management		Ship To Prip To Company > AACME Education Mark Jennings	ench Tex	Ship Type Expected Da Complete TBD		06/14 otices	ł/22 ™ssks ⊠	PENDI Emails 🎽	NG 😑
dditional Info Record: 1 of 1 UrChase Purchase Or andor	Order: 6	50029 Ma Management		Ship To hip To Company > aACME Education Mark Jennings 1238 Broadway	ench Tex	Ship Type Expected Da Complete TBD		06/14 otices	ł/22 ™ssks ⊠	PENDI Emails 🎽	NG 😑
dditional Info Record: 1 of 1 UrChase Purchase Or andor	Order: 6	50029 Ma Management Vendor Reference Required By		Ship To hip To Company > aACME Education Mark Jennings 1238 Broadway	ench Tex	Ship Type Expected Da Complete TBD Inventory Bin		06/14 otices	ł/22 ™ssks ⊠	PENDI Emails 🎽	NG 😑
dditional Info Record: 1 of 1 UITChase Purchase Or andor endor >	Order: 6	50029 Ma Management Vendor Reference Required By		Ship To hp To Company > aACME Education Mark Jennings 1238 Broadway New York, NY 100	ench Tex	Ship Type Expected Da Complete TBD Inventory Bin		06/14	ł/22 ™ssks ⊠	PENDI Emails M t Steps	NG O
dditional Info Record: 1 of 1 UIChase Purchase Or andor endor > endor > escription	Order: 6	50029 Ma Management Vendor Reference Required By	*	Ship To hip To Company > aACME Education Mark Jennings 1238 Broadway	ench Tex	Ship Type Expected Da Complete TBD Inventory Bin		06/14 otices	ł/22 ™ssks ⊠	PENDI Emails 🎽	NG O
dditional Info Record: 1 of 1 UIChase Purchase Or andor endor > endor > escription	Order: 6	50029 Ma Management Vendor Reference Required By Payment Terms		Ship To hp To Company > aACME Education Mark Jennings 1238 Broadway New York, NY 100	ench Tex	Ship Type Expected Da Complete TBD Inventory Bin		06/14	ł/22 ™ssks ⊠	PENDI Emails M t Steps	ING ODOCS @
dditional Info Record: 1 of 1 UIChase Or endor endor endor > escription or ads placed in I	Order: 6	50029 Ma Management Vendor Reference Required By Payment Terms e for 5% off French	*	Ship To hp To Company > aACME Education Mark Jennings 1238 Broadway New York, NY 100	ench Tex	Ship Type Expected Da Complete TBD Inventory Bin		06/14	ł/22 ™ssks ⊠	PENDI Emails M t Steps	ING ODOCS @
dditional Info Record: 1 of 1 UIChase Or endor endor endor > escription or ads placed in I	Order: 6 er Details	50029 Ma Management Vendor Reference Required By Payment Terms e for 5% off French	*	Ship To hp To Company > aACME Education Mark Jennings 1238 Broadway New York, NY 100	ench Tex	Ship Type Expected Da Complete TBD Inventory Bin		06/14	ł/22 ™ssks ⊠	PENDI Emails M t Steps	ng Docs @
dditional Info Record: 1 of 1 Purchase Or endor endor endor > escription or ads placed in I PO Items	Corder: 6 Fer Details	50029 Ma Management Vendor Reference Required By Payment Terms e for 5% off French	* 	Ship To hip To Company > aACME Education Mark Jennings 1238 Broadway New York, NY 100 Additional Info Order	ench Tex	Ship Type Expected Da Complete TBD Inventory Bin Shipping Terms		06/14 otices () Commer	trasks 🖸	PENDI Emails 🐱 t Steps	al al an