

Saving a Form as a Template

Requisition Wizards, PIR (Payment to Individual Request) forms, ROR (Refund of Receipts) forms, and DP (Direct Pay) forms can be saved as a template. This is very helpful if you have requests that are similar throughout the year or from year to year. Examples: Catering orders for events if you do not have a standing order, awards that are processed every year, speakers for annual events. Every field in a template can be changed, even supplier.

1. From the Review and Submit Page of the form you wish to save, click **Add to Favorites** before submitting.

Shop uw+			
Shop + Shopping + View Forms			
Back to Requisition			
Requisition Wizard	Review and Submit		Request Actions 👻 History ?
Form Number 4299709 Purpose Procurement Request	✓ Required Fields Complete		
Status On Document	Section	Progress	
Instructions	Suppliers	 Required Fields Complete 	
Suppliers 🗸	Attachments	 Required Fields Complete 	
Attachments Form Fields	Form Fields	 Required Fields Complete 	
General Information			
Purchasing Services 🗸			
Item Information			
Review and Submit			
			Add to Favorites Add and go to Cart

2. If this is the first time you are saving a template, click **Add New**. Then click **Top Level Personal Folder**. Name the folder (Your name is suggested) and click **Save Changes**.

Add Favorite	9	
Step 1: Edit Item De	tails	
Item Nickname *	Requisition Wiza	rd
Description		
	500 characters rem	aining
Step 2: Select Desti	500 characters rem	aining
Step 2: Select Desti	500 characters rem	aining
Step 2: Select Destin	500 characters rem	aining Add New ~ Top level personal folder

- 3. Name the template. This name is not shared. For example, Catering Orders or MLK Day Performance Payments.
- 4. Click on your folder to highlight it in blue.
- 5. Click Save Changes.

Add Favorite	×
Step 1: Edit Item Det	ails
Item Nickname *	Catering Orders
Description	
	500 characters remaining
Step 2: Select Destin	ation Folder
	Add New 📥
Personal	
Shared	
You have no share	i favorites.
* Required	Save Changes Close



1. To access the saved forms in ShopUW+, hover over the **Shopping Cart** on the Left menu, hover over **Shopping**, Click **View Forms**.

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1	Shop (Alt+P)	By Keyword 👻 Search Q	
ío	Shopping	Go To Shopping Home	
Q	My Carts and Orders Admin	Advanced Search View Favorites	
俞	Shopping Settings	View Forms	
л.		Non-Catalog Item	
.70		Browse By	
87°		Suppliers Categories	
հր		Contracts Chemicals	
A		Chemicals	

- 2. Click on your folder on the left under Personal.
- 3. Click on **Submit Request** for the template you want to use. This will bring you to the first page of the form. You can make any changes needed, including supplier, prior to submitting.

Shop uw+		
Shop Shopping View Forms		
Build a New Form Non-Catalog Item	Dolly's	Folder Actions 🔻 💡
Expand All Collapse All		Actions for Selected Favorites 👻
Personal		
Dolly's	Airfare CC from US BANK CORPORATE PAYMENT SYSTEMS	Submit Request 👻
4 Shared	Template Title: Direct Pay: Adjustments Only	Edit Move Copy Delete
AP Forms	Purpose: Check Request	
AP ONLY Procurement Forms	Version Description: Airfare CC	
	Catering Order from CHARTWELLS DINING SERVICES	5,773.75 USD
	Template Title: Requisition Wizard	Submit Request 🗸
	Purpose: Procurement Request	Edit Move Copy Delete