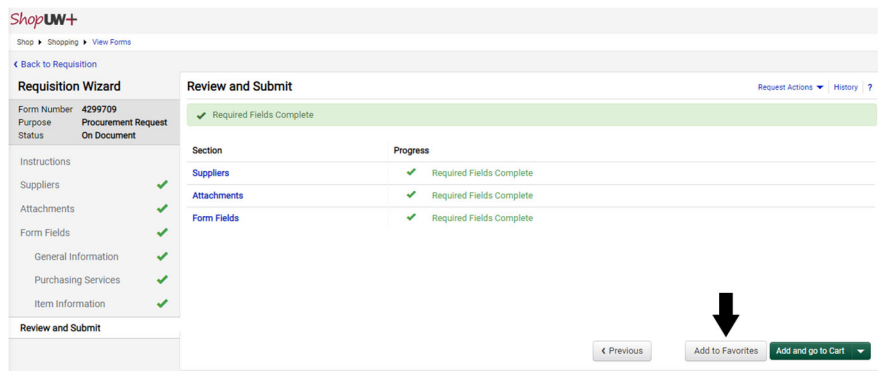


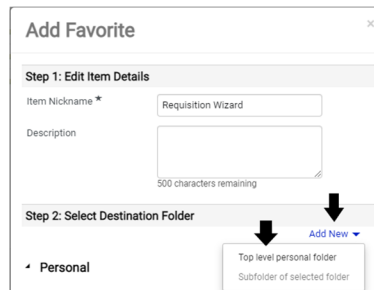
## Saving a Form as a Template

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.

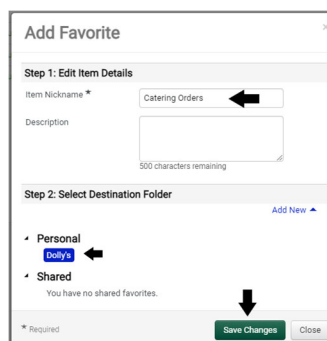
1. From the Review and Submit Page of the form you wish to save, click **Add to Favorites** before submitting.



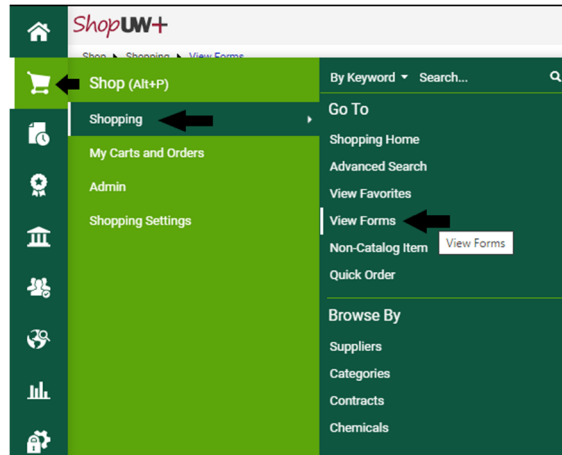
2. If this is the first time you are saving a template, click **Add New**. Then click **Top Level Personal Folder**. Name the folder (Your name is suggested) and click **Save Changes**.



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**.



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



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.

