PO Change Import

- 1. Overview
 - a. If you choose not to use your import this will require a new quote to include the template import, since you previously said you would use your existing import.
 - 1. The import will be accomplished using the eCMS Template logic which imports from an Excel file
 - 2. Customer will define field matching via the template editor
 - 3. Each Excel row will contain both the header and the detail information for each line item on the purchase order to be imported
 - b. System will do a full edit of data that was imported via a standard menu options
 - c. Customer will be able to maintain imported records via a standard menu option.
 - d. Data will be moved to the appropriate tables via a standard menu option
 - e. IMPORTING PURCHASE ORDER DATA WILL NOT BE ALLOWED IF THE PURCHASE ORDER HAS ANY PRIOR RECEIVING
 - f. THIS WILL ONLY ALLOW FOR IMPORT OF HEADER AND DETAIL INFORMATION (NO INSTRUCTIONS OR COMMENTS), AND ONLY FOR STANDARD AND DOLLAR PURCHASE ORDERS. NO BLANKET OR LOT PURCHASE ORDERS WILL BE IMPORTED
- 2. Quantity equipment repair PO template example.



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| IVIY Dasin | Calculate Balances | | eForms System Properties | | | | | | | | | | | | | | | | | = |
| | File Save & Restore | ٠ | eForms Template Locations | | | | | | | | | | | | | | | | | |
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| | Miscellaneous | | Application Properties | | | | | | | | | | | | | | | | | |
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| | | | Print Default Values | | | | | | | | | | | | | | | | | |
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Admin > Application Installation > Template Setup

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Date Entry for PO Template

- A. Depending on your default settings for PO Auto numbering set to yes, a number will need to ne entered and for processing and will be overridden by the system.
- B. Depending on your default settings for PO Auto numbering set to no, you will have to enter the number desired.
- C. A reference number must be populated.

b. Import Template



Imports > Job Site Interface 1 > Purchasing Template Import

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c. Purchasing Edit

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| | | Anticipated Cost Edit | | | | | |
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| | Order Processing | Change Order Import Edit | | | | | |
| | P/O Receipt Process | Change Order Import Maintenance | | | | | |
| | P/R & H/R Interface | Change Order Import Update | | | | | |
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| | PM Web Upload | J/C Quantity Template Import | | | | | |
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Imports > Job Site Interface 1 > Purchasing Edit

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d. Purchasing Update

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| | Order Processing | Change Order Import Edit | | | | |
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Imports > Job Site Interface 1 > Purchasing Update

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| | GROUP NO. 123 | REMOTE PO#/ REFERENCE # ISP1600270 | PURCHASE ORDER # 791 | VENDOR NO. 101 | VENDOR NAME AJ Lumber Company | JOB | SUB JOB | QUANTITY 10.00 | EXTENDED AMOUNT 100.00 | | |
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3. PO Change Order

a. Template Setup



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| | ACKDATE | ACK Date | | | NUN | IERIC | 8 | 0 | | | | COMPANYNU | MBER | Src Com | | | | NUMERIC | 2 | 0 | |
| | ANWIT | NEW ITEM ADDED | C/O ENTRY | | CH | HAR | 1 | 0 | | | | DIVISIONNUM | IBER | Src Div | | | | NUMERIC | 3 | 0 | |
| | APTIT | Print All Items-C/O | | | CH | HAR | 1 | 0 | | | | PONUMBER | | P/O No | | | | NUMERIC | 8 | 0 | |
| | ARQLN | SVC REQ LINE NO | | | NUM | IERIC | 5 | 0 | | | | PODATE | | P/O Date | | | | NUMERIC | 8 | 0 | |
| | ASMBS | Small Business Co | ntacted | | NUM | IERIC | 3 | 0 | | | | VENDORNUM | IBER | Vend No | | | | NUMERIC | 5 | 0 | |
| | ASVDC | Ship Via Desc | | | CH | HAR | 15 | 0 | | | | JOBNUMBER | | Job No | | | | CHAR | 6 | 0 | |
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| | BUYER15 | Buyer | | | CH | HAR | 15 | 0 | | 合 | | PARTNUMBER | R | PART NO | | | | CHAR | 15 | 0 | |
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| | COMPONENTN003 | COMPONENT NO | | | CH | HAR | 3 | 0 | | | | DESCRIPTION | N1 | DESCRIPTI | DN | | | CHAR | 30 | 0 | |
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| | CONVERSIONFACTOR | CONV FACTOR | | | NUM | IERIC | 7 | 2 | | | | AUM | | U/M | | | | CHAR | 2 | 0 | |
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- A. Change Order added to template
- B. C/O Item added to the template.

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Data Entry

- A. Enter data as needed for the change.
- B. The PO number needs to refer to the original PO number.
- C. The reference number needs entered with the original PO number.

4. Template Import



Imports > Job Site Interface 1 > Purchasing Template Import

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5. Purchasing Edit



Imports > Job Site Interface 1 > Purchasing Edit

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| DATE 12/20/ GROUP D E S (123 1 REF 000000001 | 16 P/O NUMBER RIP SP16002 # AIRFIL PART# 2 | ISP034 DATE TION 7 12/20 AEI TER AIRFILTE | 1 P: /2016 100 AJ R | ; UMBER y Item, dridge 10 AWH# | 37 (0 B NJ Cost (Cost (Electr 0.1000 566MJ | 000 4 RI NME T Code Y ric 000. RG#998' | .1 QI EMOTI - DI 7AIR | uick E P/ ESCR M 4568 | c Qua 'O RU LIPTI SSGEN: | lity B DIT RE -V E : NUMBE CN * 00101 D G/L | uilders FORT N D O F R NAN QTY/ ORDERE -CNV QT AJ | :- gr \$ ID Y *-C Lumber 1000. 0033.0 | QTY/\$ OPEN NV QTY Compa 00 | 미처 1000. | 00 EA | TII REQUI VT/PR PHD : | Æ 12. STED S | .06 BY TAX RATE DO | | BUYER AMOUNT OPEN PAUL D 10,00 | PAGE 7 REQ 1)0.00 | UEST DATE 12/2 | REQU: 20/201 | ISIT] 6 | ION N | ο. | |
| DRTE 12/20/ GROUP D E S (123 1 REF 000000001 | 16 P / O · NUMBER R I P : SP16002' # AIRFIL/ PART# J | ISP034 DATE TION 7 12/20 AEI TER AIRFILTE | 1 P: /2016 100 A] R | UMBER y Item, dridge 10 AWH# | 37 (10 B NJ COST (2005t (Electr 0.1000 566MJ | 000 4 RH NME T Code Y ric FG#998' * FURCE | .1 Q EMOTI - DI 7AIR HASE | uick E P/ ESCR M 4568 ORD | C Qua (O AU: RIPTI) SSGEN: DER T(| lity B DIT RE -V E: NUMBE CN * 00101 D G/L OTAL | uilders PORT N D O F R NAN QTY/ ORDERE -CNV QT AJ | :- E \$ D Y *-C Lumber 1000. 0033.0 | QTY/\$ OPEN NV QTY Compa 00 00 | ரங 1000. | 00 EA | TIN REQUI 4T/PR PHD : | QE 12. CSTED C | .06 BY TAX RATE D0 | 0,00 | BUYER AMOUNT OPEN PAUL D 10,00 0.00 | PAGE T REQ DO.00 | UEST DATE 12/2 | REQU: 20/201 | ISIT] 6 | ION N | ο. | |
| DATE 12/20, GROUP D E S (123 J REF 000000001 | 16 P/O- NUMBER RIP SP16002' # AIRFIL PART#) | ISP034 DATE FION 7 12/20 AEI TER AIRFILTE | 1 P: /2016 100 AJ R | UMBER y Item, dridge 10 AWH# | 37 (10 B NF Cost (Electr 0.1000 566MP | 000 4 RH RME T Code Y ric rG#9987 * PURCE | .1 Q EMOTI - DI 7AIR- HASE * DI' | uick E P/ ESCR M 4568 ORD VISI | C Qua (O AU) SIPTI S56EN DER T ION T | lity B DIT RE -V E : NUMBE ON * 00101 D G/L OTAL | uilders FORT N D O F R NAN QTY/ ORDERE -CNV QT AJ | :- gr \$ JD YY *-C Lumber 1000. 0033.0 1, 1, | QTY/\$ OPEN NV QTY Compa 00 00 000.00 | UM 1000. | 00 EA | TII REQUI #T/PR PHD : | (E 12. STED 3 | .06 BY TAX RATE 00 1 | 0, OC 0, OC | BUYER AMOUNT OPEN PAUL D 10,00 0.00 | PAGE 7 REQ 1 00.00 | UEST DATE | REQU: 20/201 | 151T) 6 | ION N | 0. | |
| DATE 12/20/ GROUP DES(1231 REF 000000001 | 16 P/O NUMBER RIP SP16002 # AIRFIL PART# 3 | ISP034 DATE TION 7 12/20 AEI TER AIRFILTE | 1 P: /2016 100 A] R | Jumber y Item, dridge 10 AGH# | 37 (0 B NJ Cost (Electr 0.1000 566M | 000 4 RI RME T 30de Y ric 000. RG#998" * PURCH | .1 Q EMOTI - DI 7AIR. HASE * DI ** C | uick E P/ ESCR M 4568 ORD VISI | c Qua (O AU: RIPTI- S56EN: DER T- LON T- | lity B DIT RE -V E : NUMBE CON * 00101 D G/L CTAL CTAL | uilders PORT N D O F R NAN QTY/ ORDERE -CNV QTY/ AJ | :- EE \$ ID YY *-C Lumber 1000. 00033.0 1, 1, | 000.00 000.00 | UM 1000. | 00 EA | TIN REQUI WT/PRO PHD | Æ 12. SSTED 2 | .06 BY TAX RATE D0 1 1 | 0, 00 0, 00 0, 00 | BUYER AMOUNT OPEN PAUL D 10,00 0.00 0.00 | PAGE 7 REQ 1 000.00 | UEST DATE | REQU: 20/201 | 151T) 6 | ION M | 0. | |

6. Purchasing Update



Imports > Job Site Interface 1 > Purchasing Update

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