

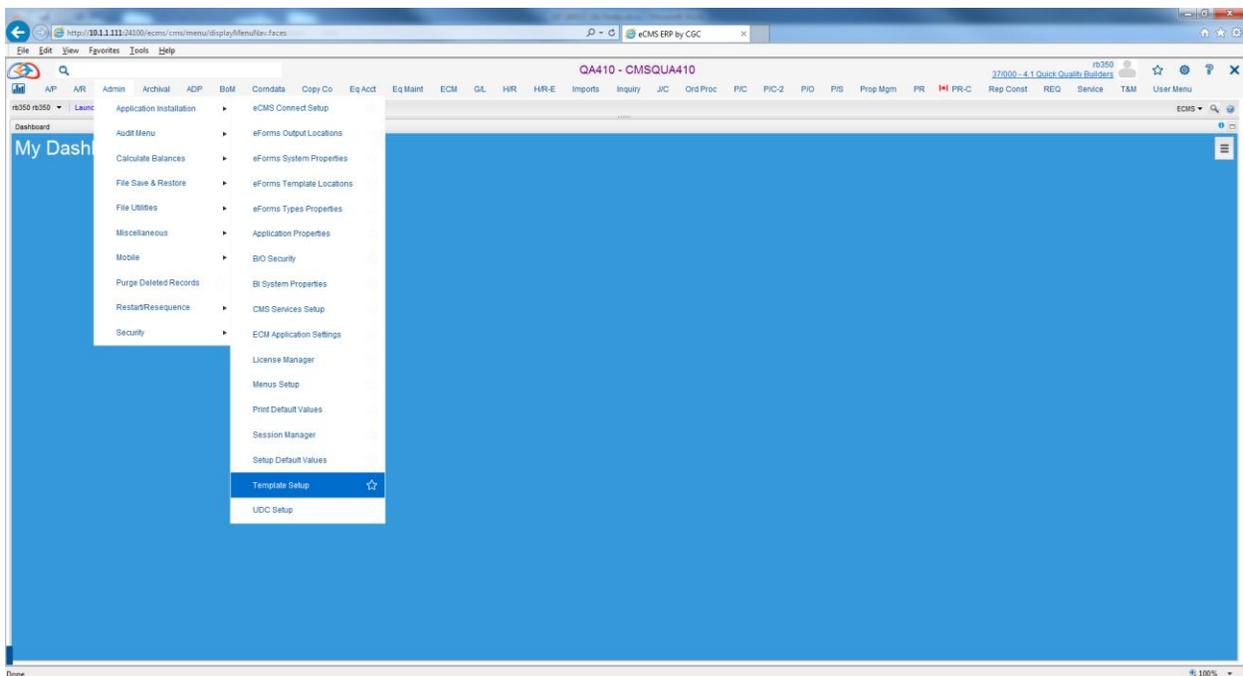
PO Change Import

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.

- a. Setup template



Admin > Application Installation > Template Setup

QA410 - CMSQUA410

Import Template Maintenance

Import Template Setup

Template Name: PO QTY

Selected	Column	Description	Type	Size	Decimal Digits
<input type="checkbox"/>	ACKDATE	ACK Date	NUMERIC	8	0
<input type="checkbox"/>	ANWIT	NEW ITEM ADDED-C/O ENTRY	CHAR	1	0
<input type="checkbox"/>	APTIT	Print All Items-C/O	CHAR	1	0
<input type="checkbox"/>	ARQLN	SVC REG LINE NO	NUMERIC	5	0
<input type="checkbox"/>	ASMS	Small Business Contacted	NUMERIC	3	0
<input type="checkbox"/>	ASVDC	Ship Via Desc	CHAR	15	0
<input type="checkbox"/>	AWAD	WILL ADVISE	CHAR	1	0
<input type="checkbox"/>	BACKORDERCODE	B/O Code	CHAR	1	0
<input type="checkbox"/>	BROKERNUMBER	BROKER NUMBER	NUMERIC	5	0
<input type="checkbox"/>	BUYER15	Buyer	CHAR	15	0
<input type="checkbox"/>	CHANGEORDER	Chg Order	CHAR	1	0
<input type="checkbox"/>	CHGORDITEM	CO ITEM	CHAR	1	0
<input type="checkbox"/>	COMMITTEDITEM	COMMITTED ITEM	CHAR	1	0
<input type="checkbox"/>	COMPONENTNO03	COMPONENT NO	CHAR	3	0
<input type="checkbox"/>	CONTROLCOMPANY	CI Com	NUMERIC	2	0
<input type="checkbox"/>	CONVERSIONFACTOR	CONV FACTOR	NUMERIC	7	2
<input type="checkbox"/>	COSTDOLLARAMT	COST DOLLAR AMT	NUMERIC	11	2
<input type="checkbox"/>	CURRCONVFACT	CURR CONV FACTOR	NUMERIC	19	9
<input type="checkbox"/>	CURRCONVRATEYP	Cur Conv Rt Type	CHAR	5	0

Selected	Column	Description	Type	Size	Decimal Digits
<input type="checkbox"/>	COMPANYNUMBER	Src Com	NUMERIC	2	0
<input type="checkbox"/>	DIVISIONNUMBER	Src Div	NUMERIC	3	0
<input type="checkbox"/>	PONUMBER	PIO No	NUMERIC	8	0
<input type="checkbox"/>	PODATE	PIO Date	NUMERIC	8	0
<input type="checkbox"/>	VENDORNUMBER	Vend No	NUMERIC	5	0
<input type="checkbox"/>	JOBNUMBER	Job No	CHAR	6	0
<input type="checkbox"/>	SUBJOBNUMBER	Sub Job	CHAR	3	0
<input type="checkbox"/>	PIOTYPE	PIO Type	NUMERIC	1	0
<input type="checkbox"/>	CONFIRMTO	Confirm To	CHAR	15	0
<input type="checkbox"/>	PARTNUMBER	PART NO	CHAR	15	0
<input type="checkbox"/>	WHSE	WHSE	CHAR	5	0
<input type="checkbox"/>	DESCRIPTION1	DESCRIPTION	CHAR	30	0
<input type="checkbox"/>	QTYORDERED	QTY ORD	NUMERIC	9	2
<input type="checkbox"/>	UM	UM	CHAR	2	0
<input type="checkbox"/>	UNITCST	UNIT COST	NUMERIC	11	4
<input type="checkbox"/>	PRICECODE	PRC CDE C-PER HUNDRED M	CHAR	1	0
<input type="checkbox"/>	SHPCODE	SHIP DATE	NUMERIC	8	0
<input type="checkbox"/>	VENDORDELVDATE	VEND DELV DATE	NUMERIC	8	0
<input type="checkbox"/>	JOBNUMBER	PROJJOB NO	CHAR	6	0
<input type="checkbox"/>	SUBJOBNUMBER	SUB PROJJOB NO	CHAR	3	0
<input type="checkbox"/>	JCDISTRIBUION	COST DIST	CHAR	15	0
<input type="checkbox"/>	COSTTYPE	COST TYPE	CHAR	1	0
<input type="checkbox"/>	GLELDCERACCT	GL ACCT	NUMERIC	15	0
<input type="checkbox"/>	GROUPNUMBER	Group No	NUMERIC	9	0
<input type="checkbox"/>	POITEM	PIO ITEM	NUMERIC	9	0
<input type="checkbox"/>	REFERENCE10	Reference	CHAR	10	0
<input type="checkbox"/>	STATUSCODE	STATUS CODE	CHAR	1	0
<input type="checkbox"/>	EQUIPMENTNUMBER	EQUIP NO	CHAR	10	0
<input type="checkbox"/>	EQUIPMENTCODE	Equip Code	CHAR	1	0
<input type="checkbox"/>	TYPEPCST	TYPE OF COST	CHAR	1	0

QA410 - CMSQUA410

Import Template Maintenance

Import Template Setup

Template Name: PO QTY

Selected	Column	Description	Type	Size	Decimal Digits
<input type="checkbox"/>	ACKDATE	ACK Date	NUMERIC	8	0
<input type="checkbox"/>	ANWIT	NEW ITEM ADDED-C/O ENTRY	CHAR	1	0
<input type="checkbox"/>	APTIT	Print All Items-C/O	CHAR	1	0
<input type="checkbox"/>	ARQLN	SVC REG LINE NO	NUMERIC	5	0
<input type="checkbox"/>	ASMS	Small Business Contacted	NUMERIC	3	0
<input type="checkbox"/>	ASVDC	Ship Via Desc	CHAR	15	0
<input type="checkbox"/>	AWAD	WILL ADVISE	CHAR	1	0
<input type="checkbox"/>	BACKORDERCODE	B/O Code	CHAR	1	0
<input type="checkbox"/>	BROKERNUMBER	BROKER NUMBER	NUMERIC	5	0
<input type="checkbox"/>	BUYER15	Buyer	CHAR	15	0
<input type="checkbox"/>	CHANGEORDER	Chg Order	CHAR	1	0
<input type="checkbox"/>	CHGORDITEM	CO ITEM	CHAR	1	0
<input type="checkbox"/>	COMMITTEDITEM	COMMITTED ITEM	CHAR	1	0
<input type="checkbox"/>	COMPONENTNO03	COMPONENT NO	CHAR	3	0
<input type="checkbox"/>	CONTROLCOMPANY	CI Com	NUMERIC	2	0
<input type="checkbox"/>	CONVERSIONFACTOR	CONV FACTOR	NUMERIC	7	2
<input type="checkbox"/>	COSTDOLLARAMT	COST DOLLAR AMT	NUMERIC	11	2
<input type="checkbox"/>	CURRCONVFACT	CURR CONV FACTOR	NUMERIC	19	9
<input type="checkbox"/>	CURRCONVRATEYP	Cur Conv Rt Type	CHAR	5	0

Selected	Column	Description	Type	Size	Decimal Digits
<input type="checkbox"/>	WHSE	WHSE	CHAR	5	0
<input type="checkbox"/>	DESCRIPTION1	DESCRIPTION	CHAR	30	0
<input type="checkbox"/>	QTYORDERED	QTY ORD	NUMERIC	9	2
<input type="checkbox"/>	UM	UM	CHAR	2	0
<input type="checkbox"/>	UNITCST	UNIT COST	NUMERIC	11	4
<input type="checkbox"/>	PRICECODE	PRC CDE C-PER HUNDRED M	CHAR	1	0
<input type="checkbox"/>	SHPCODE	SHIP DATE	NUMERIC	8	0
<input type="checkbox"/>	VENDORDELVDATE	VEND DELV DATE	NUMERIC	8	0
<input type="checkbox"/>	JOBNUMBER	PROJJOB NO	CHAR	6	0
<input type="checkbox"/>	SUBJOBNUMBER	SUB PROJJOB NO	CHAR	3	0
<input type="checkbox"/>	JCDISTRIBUION	COST DIST	CHAR	15	0
<input type="checkbox"/>	COSTTYPE	COST TYPE	CHAR	1	0
<input type="checkbox"/>	GLELDCERACCT	GL ACCT	NUMERIC	15	0
<input type="checkbox"/>	GROUPNUMBER	Group No	NUMERIC	9	0
<input type="checkbox"/>	POITEM	PIO ITEM	NUMERIC	9	0
<input type="checkbox"/>	REFERENCE10	Reference	CHAR	10	0
<input type="checkbox"/>	STATUSCODE	STATUS CODE	CHAR	1	0
<input type="checkbox"/>	EQUIPMENTNUMBER	EQUIP NO	CHAR	10	0
<input type="checkbox"/>	EQUIPMENTCODE	Equip Code	CHAR	1	0
<input type="checkbox"/>	TYPEPCST	TYPE OF COST	CHAR	1	0

PO QTY.xls [Compatibility Mode] - Microsoft Excel

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U											
1	Src Com	37	Sec Div	9	PIO No	123	PIO Date	12/20/2016	Vend No	101	Job No		Sub Job		PIO Type	1	RDB	Confirm To	PART NO	ARFILTER	WHSE	DESCRIPTION	QTY ORD	UM	UNIT COST	PRC CDE C-PER HUNDRED M	SHIP DATE	VEND DELV DATE	PROJJOB NO	SUB PROJJOB NO	COST DIST	
2																																
3																																
4																																

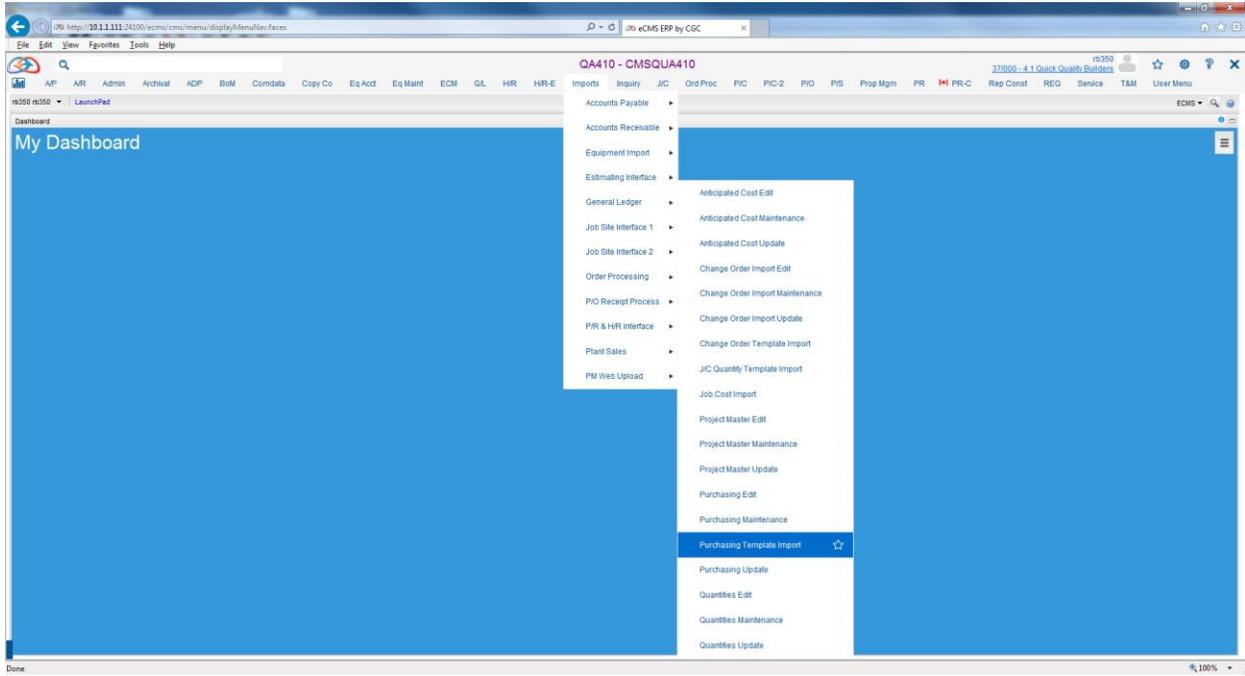
PO QTY.xls [Compatibility Mode] - Microsoft Excel

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	AB	AC	AD	AE
1	DESCRIPTION	QTY ORD	UM	UNIT COST	PRC CDE C-PER HUNDRED M	SHIP DATE	VEND DELV DATE	PROJJOB NO	SUB PROJJOB NO	COST DIST	COST TYPE	GL ACCT	Group No	PIO ITEM	Reference	STATUS CODE	EQUIP NO	Equip Code	TYPE OF COST												
2		10 EA		10	10	12/20/2016	12/20/2016	ALB	001	011	P		123	1 ISP160270	A	A1	Y														
3																															
4																															

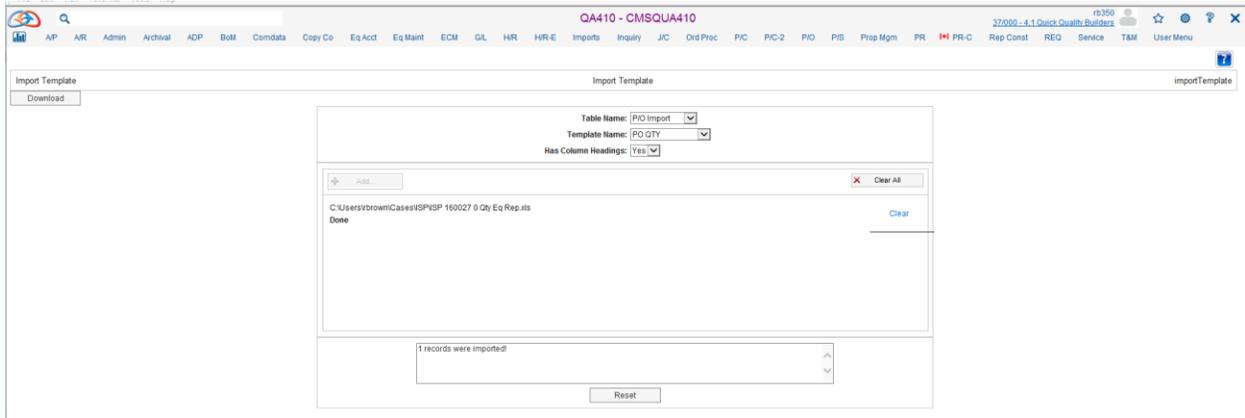
Date Entry for PO Template

- A. Depending on your default settings for PO Auto numbering set to yes, a number will need to be 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.

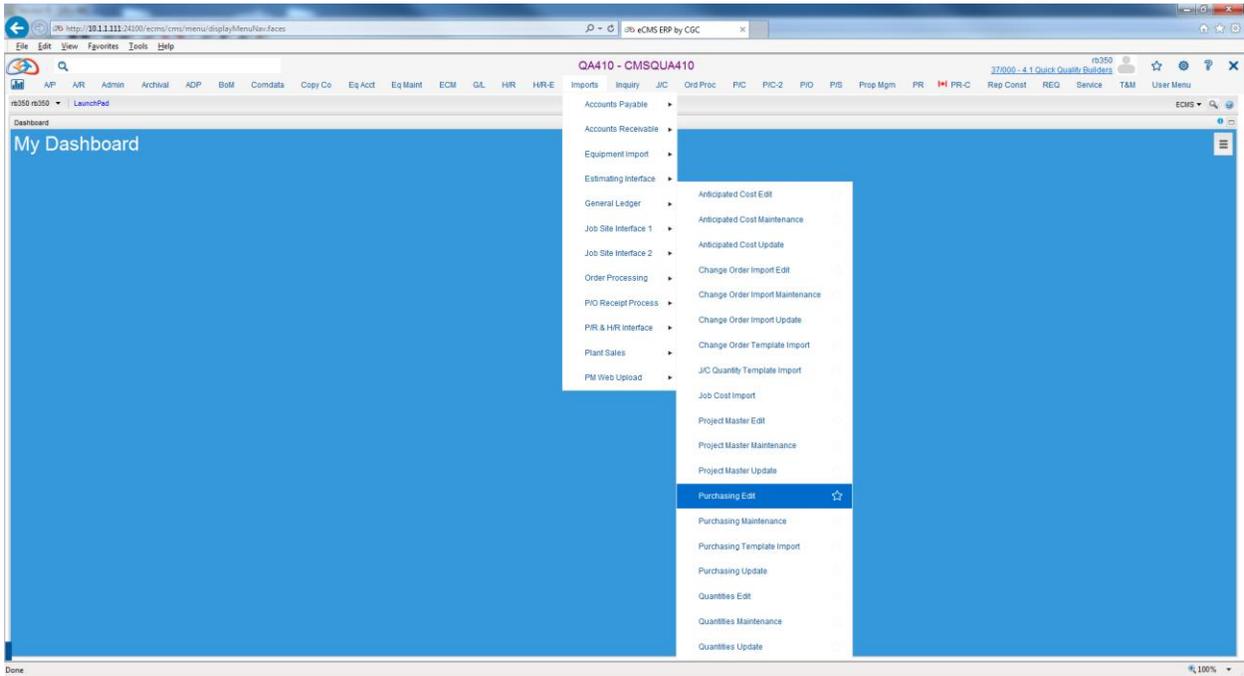
b. Import Template



Imports > Job Site Interface 1 > Purchasing Template Import



c. Purchasing Edit



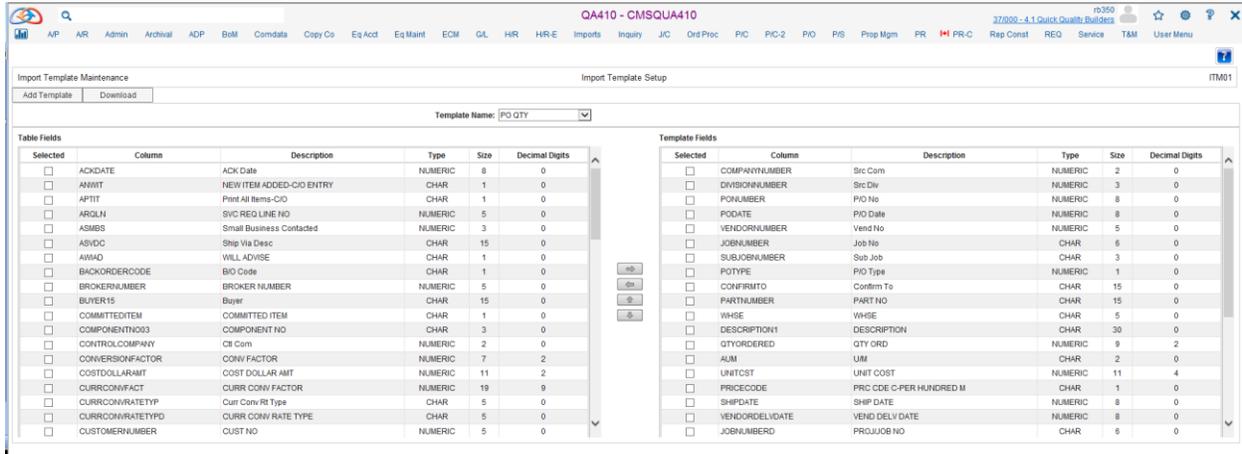
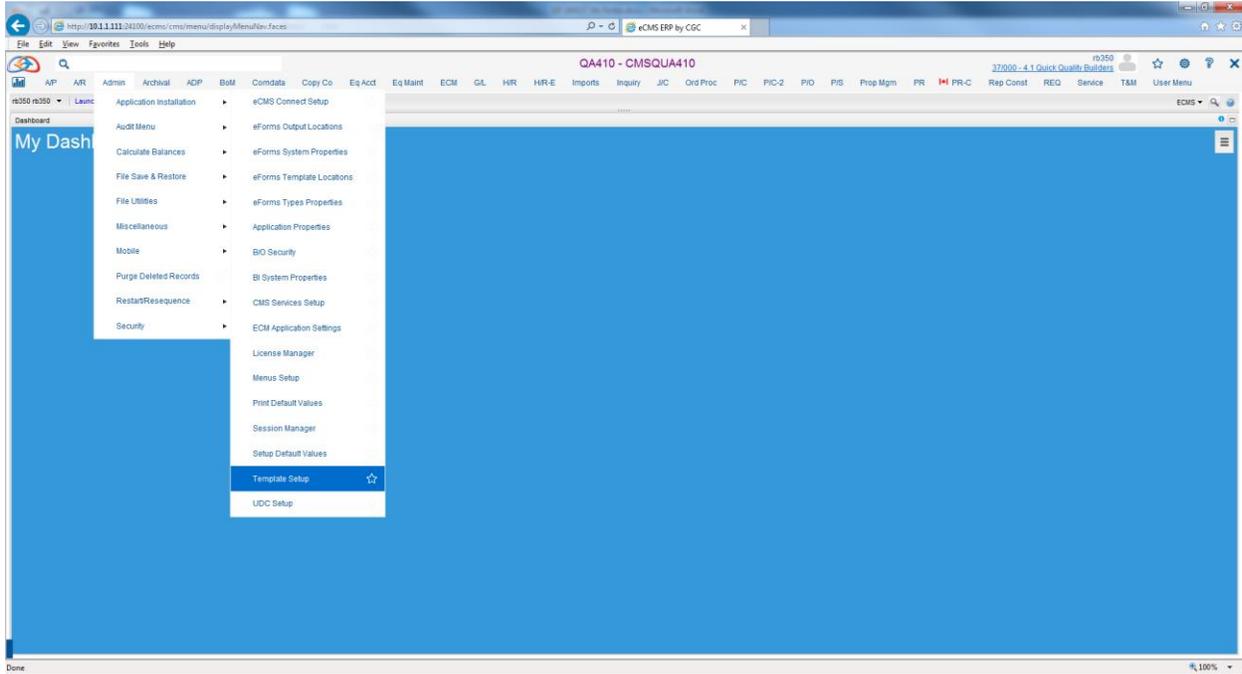
Imports > Job Site Interface 1 > Purchasing Edit

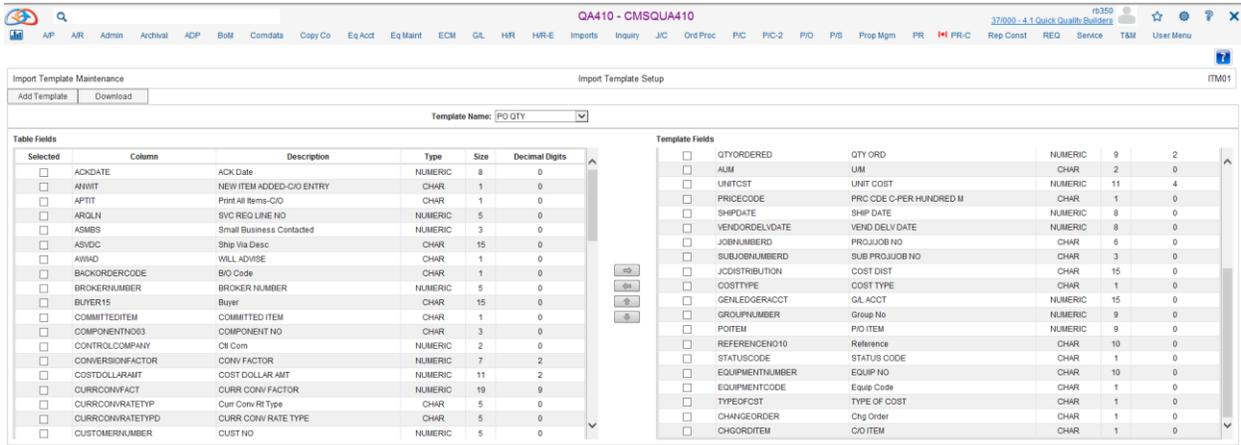


GROUP	NUMBER	DATE	NUMBER	NAME	NUMBER	NAME	QTY/\$	QTY/\$	REQUESTED BY	BUYER	REQUISITION NO.
DESCRIPTION	Pay Item/Cost Code	Y	DESCRIPTION	ORDERED	OPEN	UM	UNT/PR C	TAX RATE	AMOUNT	REQUEST DATE	
123 ISPL600270	12/20/2016		00101	AL Lumber	10.00	10.00	PHD	10.0000	100.00	12/20/2016	
REF #	ALB	001	Alberici								
000000001	AIRFILTER		MWH# 566MFG#9987AIR456856END	G/L 0600.11000.000		ER					
Equip # Al	Work Order	000000	Component	Type of Cost 1	WO Line #	000					
			* PURCHASE ORDER TOTAL				10.00		100.00		
			** DIVISION TOTAL				10.00		100.00		
			** COMPANY TOTAL				10.00		100.00		
			** REPORT TOTAL						100.00		

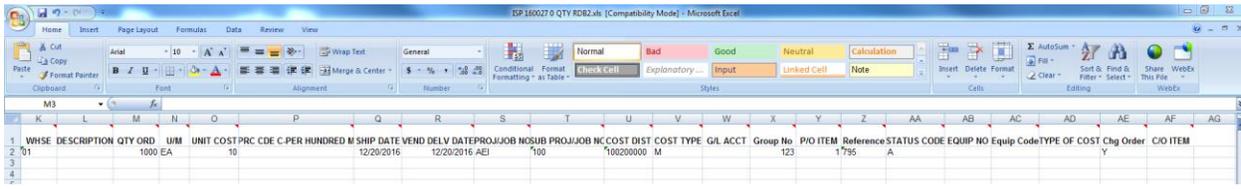
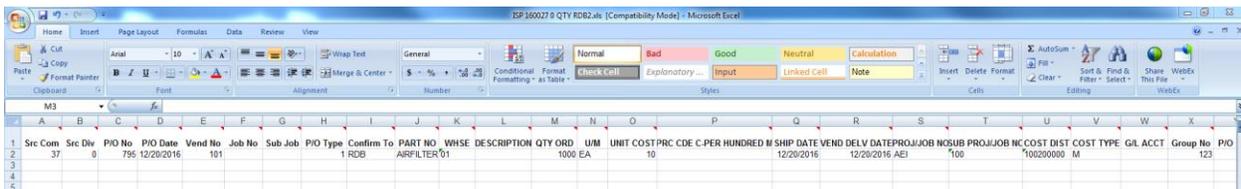
3. PO Change Order

a. Template Setup





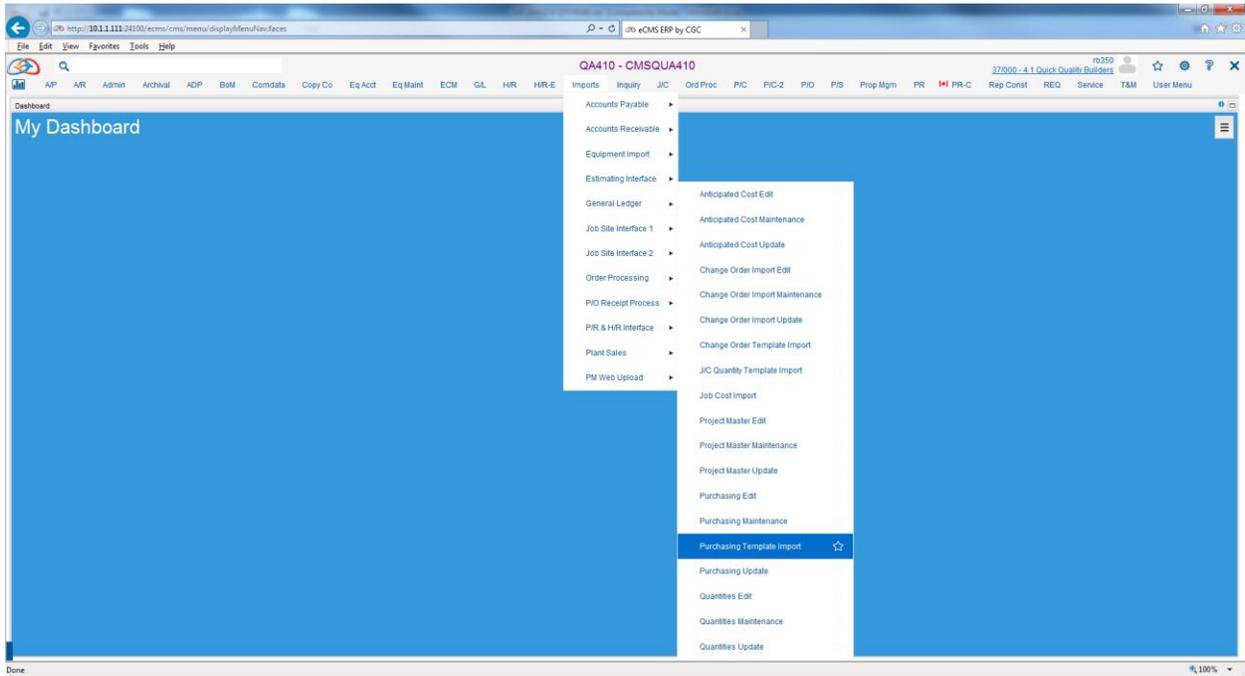
- A. Change Order added to template
- B. C/O Item added to the template.



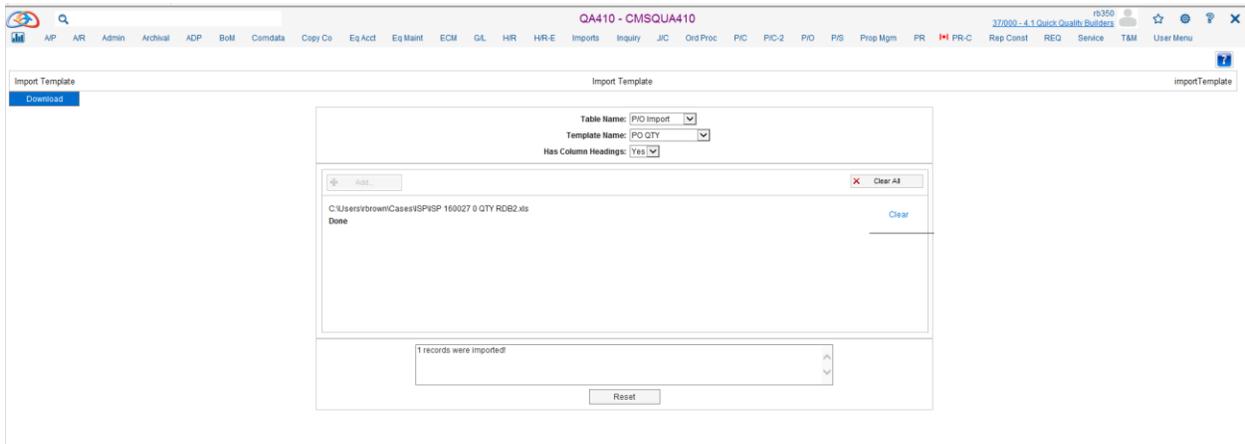
Data Entry

- 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.

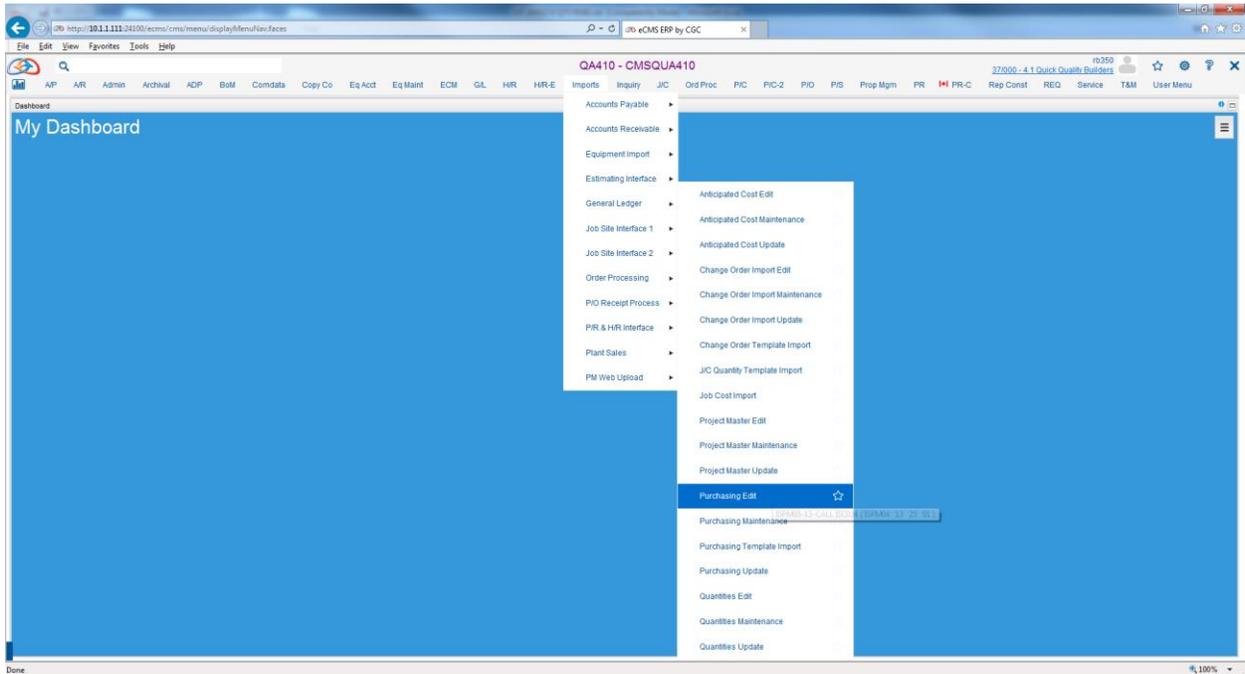
4. Template Import



Imports > Job Site Interface 1 > Purchasing Template Import



5. Purchasing Edit



Imports > Job Site Interface 1 > Purchasing Edit

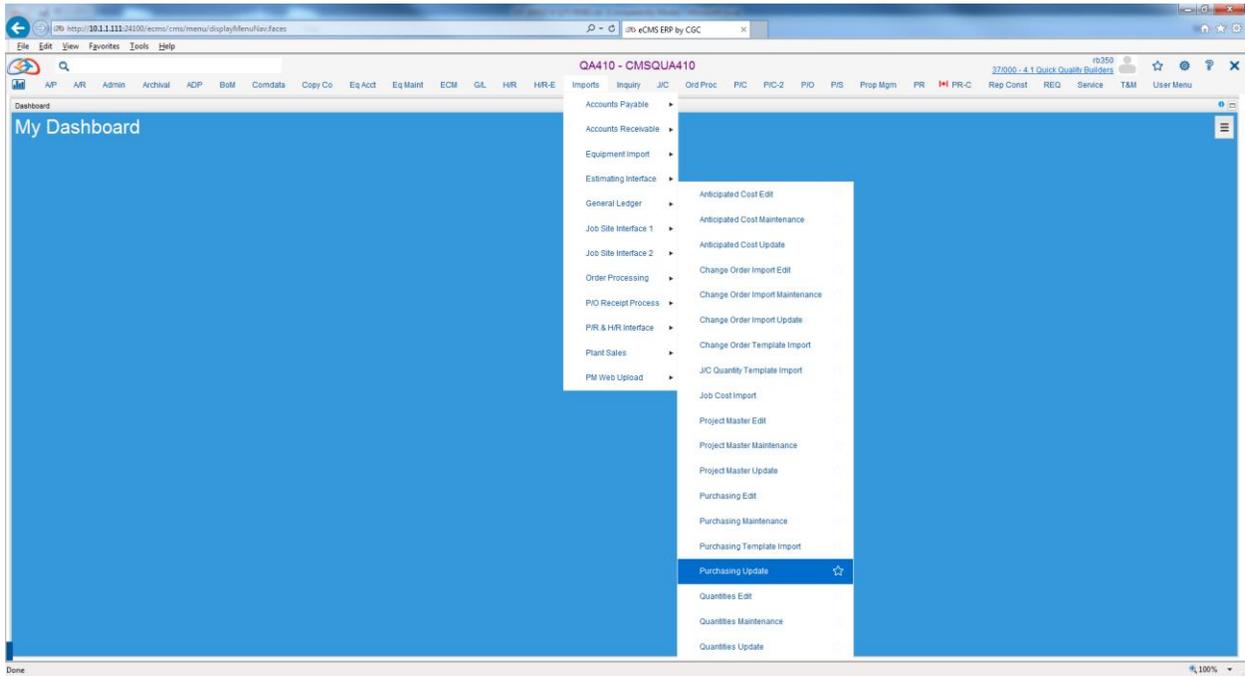


```

DATE 12/20/16      ISP034      37 000  4.1 Quick Quality Builders
REMOTE P/O AUDIT REPORT                                TIME 12.06      PAGE 1
----- P / O -----J O B-----                    -V E N D O E-

GROUP  NUMBER  DATE      NUMBER  NAME          NUMBER  NAME          REQUESTED BY  BUYER  REQUISITION NO.
D E S C R I P T I O N  Pay Item/Cost Code Y  DESCRIPTION  ORDERED  QTY/$      QTY/$      OPEN  UM  UNT/PRC  TAX  AMOUNT  REQUEST  REQUISITION NO.
                                *-CNV QTY  *-CNV QTY
123  ISF160027  12/20/2016      00101  AJ Lumber Compa  EHD      PAUL D
REF #
000000001  NEI 100 Aldridge Electric
                                M          1000.00  1000.00  10.0000  10,000.00  12/20/2016
PART#  AIRFILTER  AMH#  566MPC#9987AIR456856END  G/L 1300.00033.000  EA
* PURCHASE ORDER TOTAL          1,000.00          10,000.00
** DIVISION TOTAL          1,000.00          10,000.00
** COMPANY TOTAL          1,000.00          10,000.00
** REPORT TOTAL          1,000.00          10,000.00
    
```

6. Purchasing Update



Imports > Job Site Interface 1 > Purchasing Update

