

Date	July 17, 2024
Subject	Mass PO Creation Utility

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Purpose

The purpose of the Mass PO Creation is to allow the user to auto create purchase orders by uploading a spreadsheet.

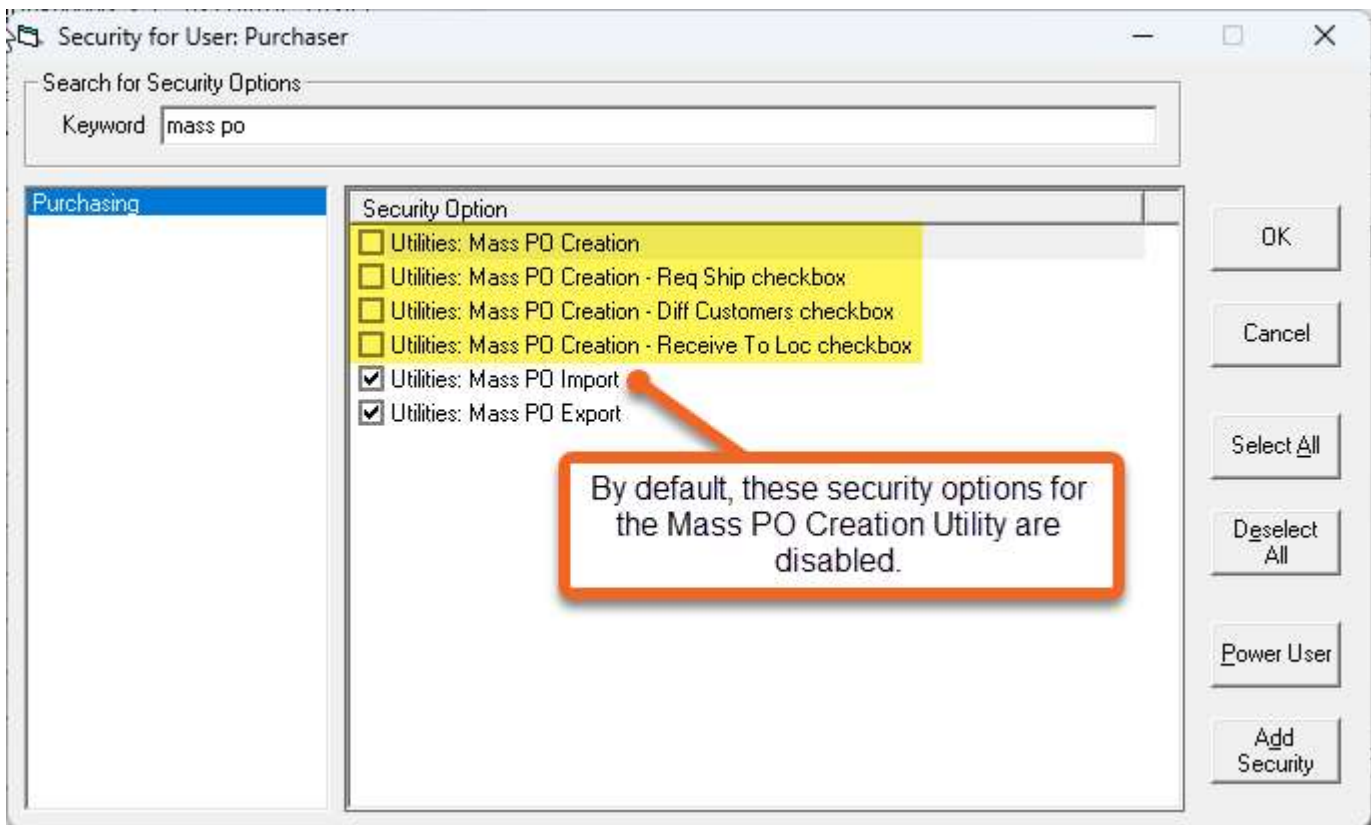
Setup

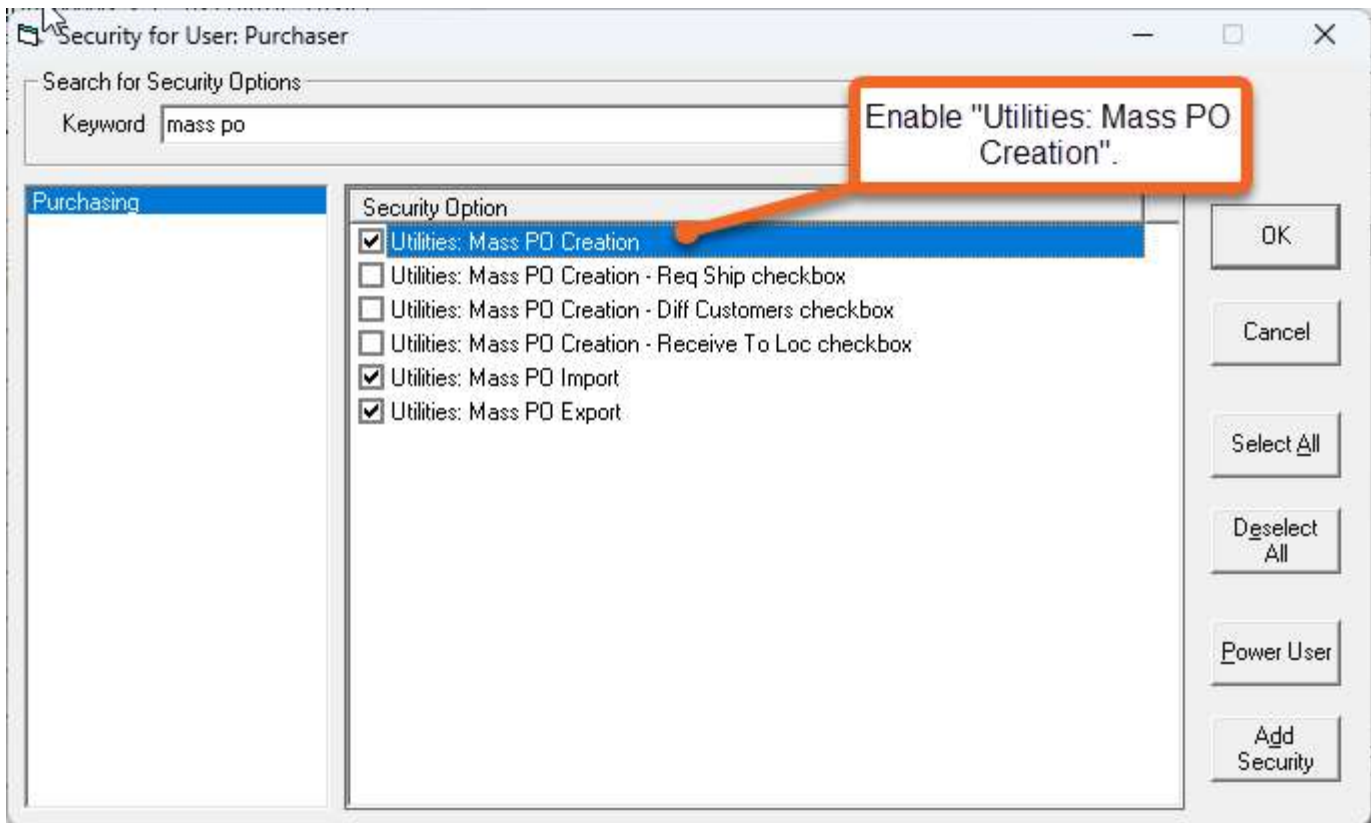
User Security Options

Type in the keyword “mass” to bring up the security options under “Purchasing”.

Definitions

Utilities: Mass PO Creation	Enables the Mass PO Creation utility
Utilities: Mass PO Creation – Req Ship checkbox	Enabling this checkbox allows the user to add different requested ship dates on the same purchase order.
Utilities: Mass PO Creation – Diff Customers checkbox	Enabling this checkbox allows the user to add different customer numbers in the Packing Slip field on the same purchase order.
Utilities: Mass PO Creation – Receive To Loc checkbox	Enabling this checkbox allows the user to add different receive to locations on the same purchase order.





Purchasing Variables

Go to Tools > System Maintenance > Variables > Purchasing and enable "Link Projects using Packing Slip field". This checkbox turns on the logic to check the customer number in the "Packing Slip" field on the purchase order against the customer number in the project for a matching model. If there is a current project that has a corresponding model, it will take the project cost and insert into the quoted cost on the purchase order.

Purchasing Variables

General | Printing | Bin Labels | Part Labels | Discount Labels

Last PO Number: 242887

Bar Code Delimiter: []

Default Item Quoted Cost: Last

Default Model Quoted Cost: Original

Order For Job Status: ORDER FOR [] ORDER FOR DATE []

Fully Received Job Status: []

Only update once ALL invoices for the customer are received

Default Order Qty: 1

Req Delivery Date Caption: Req Ship Date

Display PO Fully Received
 Update Accounts Payable
 Auto Create A/P Invoice during Costing
 Recalculate Item Prices
 Audit Trail
 Auto Scroll PO Detail
 Warranty Claims
 Auto Satisfy Warranty Claims on Return PO's
 Backorder Items for Same Location as Invoice
 Auto Split During Cost
 Warning If Customer on Credit Hold
 Serial Type Required (not ALL)
 Wireless / Single Barcode Solution

Default Supplier Invoice On Return Serial
 Auto Commit Invoices on Receiving Backorders
 Update Invoice Item Selling Price
 Order all Open Lines in Recommended Backorders
 Default Branch Code on PO-12 to Current Branch
 Allow Invalid Item/Models in Transfer Requests
 Reserve on Receive
 Warning If Item Cost Changes
 Order for Terminal Location
 Update Invoice Item Location on Order
 Transfers Default Batch Number
 Create Transfer Request when receiving to a different location than ordered for
 Link Projects using Packing Slip field

OK
Cancel

Utilities: Mass PO Creation

Go to Purchasing > Utilities > Mass PO Creation

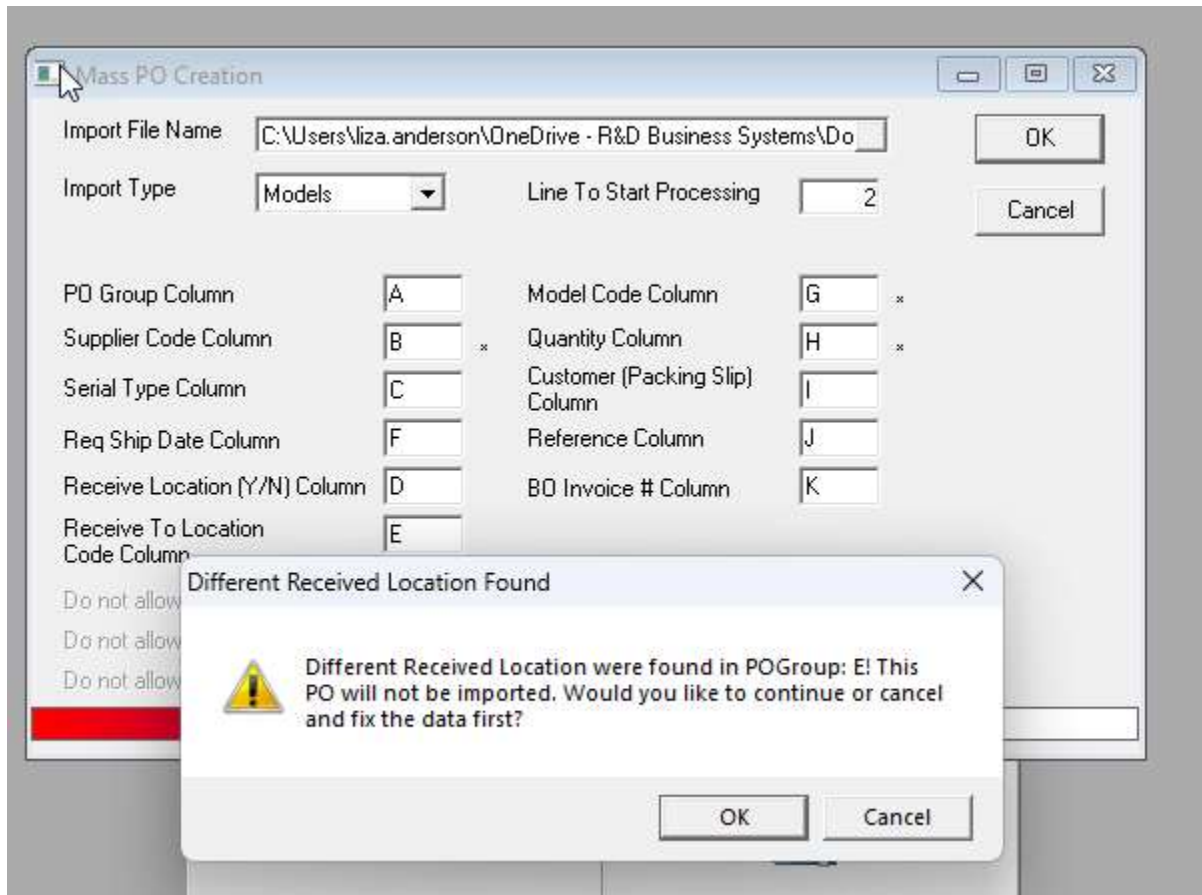
1. Map the fields to the spreadsheet.

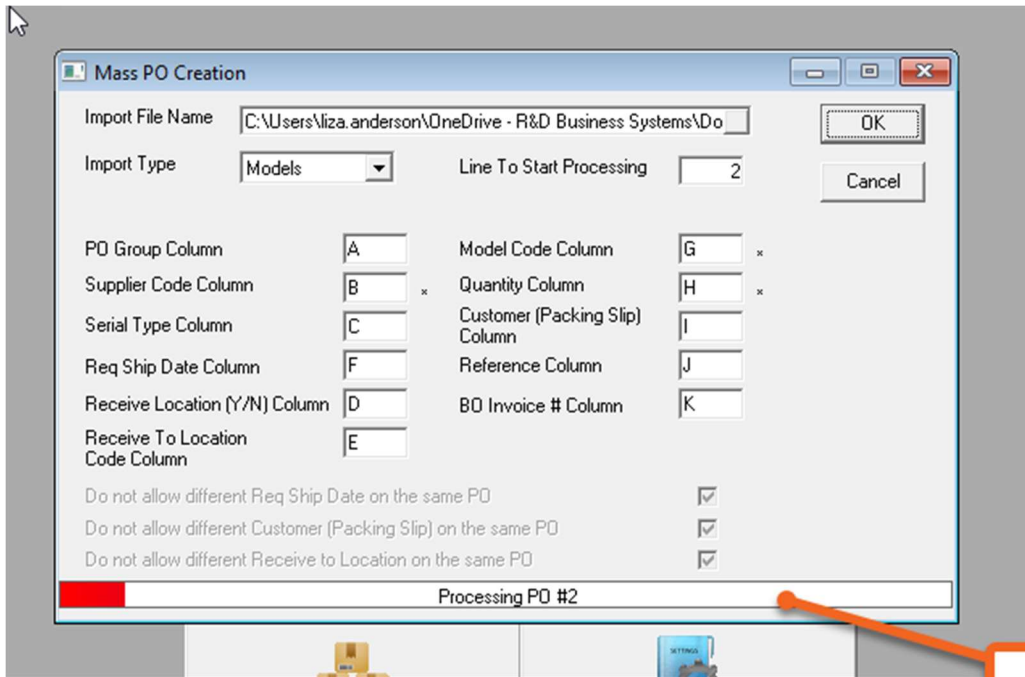
2. Select the spreadsheet.

3. Click OK when you're ready to run the import.

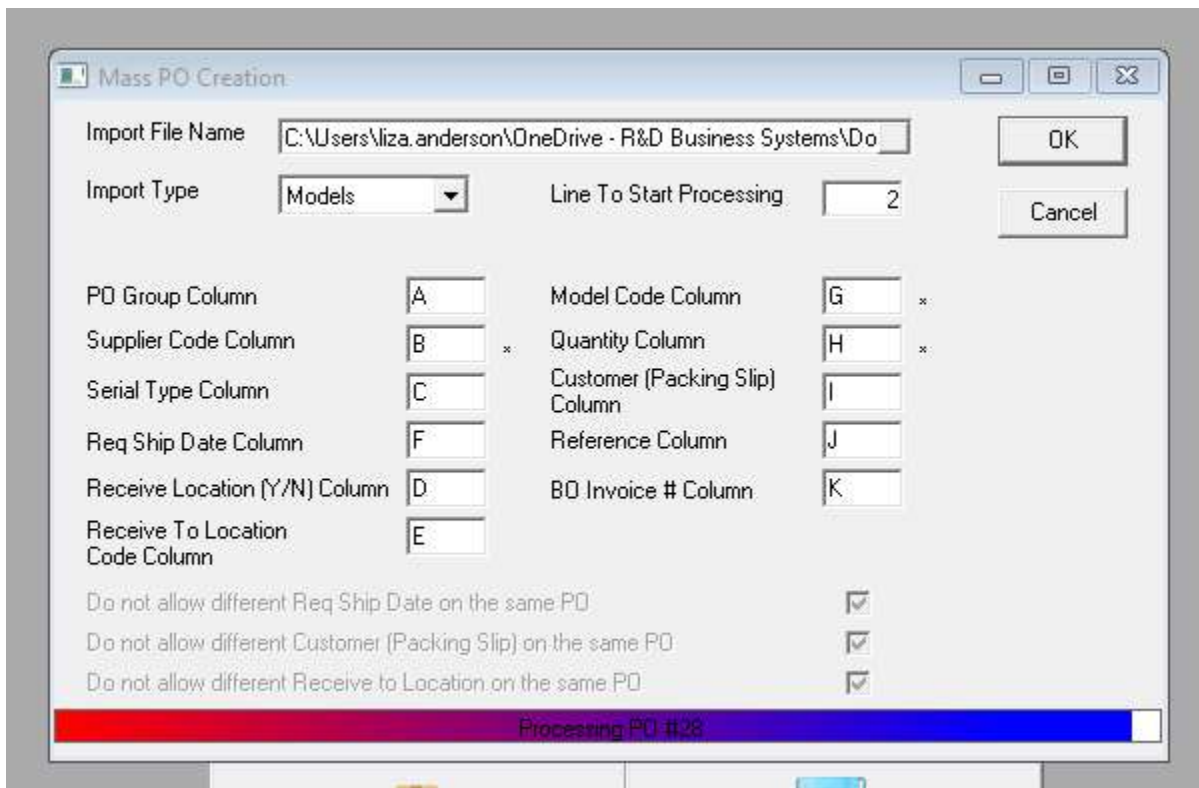
4. These 3 check boxes indicate when the PO creation should fail. They are controlled by the security options.

5. If there are inconsistencies based on the 3 failure requirements, then the message will prompt the user to take action.





If you click OK on the error messages, it will still process the purchase orders that are error free.



Andersons Richmond

Mass PO Creation

Once the utility is complete, you will receive a report. This report will show failed and created purchase orders.

System Dat 9/8/2024

System Time 8:13:07PM

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PO Grou	Supplier Code	SerialType	Rcvd Loc	Rcvd To Loc	Req Ship Date	Item /Model Code	QTY	Packing Slip	BO Invoice #
---------	---------------	------------	----------	-------------	---------------	------------------	-----	--------------	--------------

Message : Model Code is not exist.

Message : Model Code is not exist.

A	BSH RE	MULTIFAMILY	9WH		5/1/2025	AR403722	5	6043256326	
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Message : PO number RS81 has been successfully added.

B	EZFLO	MULTIFAMILY	9WH		5/1/2025	48372	5	6043256326	
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Message : PO number 10 has been successfully added.

C	PANA RE	MULTIFAMILY	9WH		5/1/2025	NNST785S	5	6043256326	
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Message : Do not allow different Req Ship Date in the same PO Group C.

C	PANA RE	MULTIFAMILY	9WH		5/2/2025	NNTK72LS	5	6043256326	
---	---------	-------------	-----	--	----------	----------	---	------------	--

Message : Do not allow different Req Ship Date in the same PO Group C.

C	PANA RE	MULTIFAMILY	9WH		5/3/2025	NNST765S	5	6043256326	
---	---------	-------------	-----	--	----------	----------	---	------------	--

Message : Do not allow different Req Ship Date in the same PO Group C.

D	SAMS RE	MULTIFAMILY	9WH		5/1/2025	RL1505SBASR	5	6043256326	
---	---------	-------------	-----	--	----------	-------------	---	------------	--

Message : PO number RS82 has been successfully added.

D	SAMS RE	MULTIFAMILY	9WH		5/1/2025	DW80B7070US	5	6043256326	
---	---------	-------------	-----	--	----------	-------------	---	------------	--

Message : PO number RS82 has been successfully added.

D	SAMS RE	MULTIFAMILY	9WH		5/1/2025	RF23A9071SR	5	6043256326	
---	---------	-------------	-----	--	----------	-------------	---	------------	--

Message : PO number RS82 has been successfully added.

D	SAMS RE	MULTIFAMILY	9WH		5/1/2025	NE63A6511SS	5	6043256326	
---	---------	-------------	-----	--	----------	-------------	---	------------	--

Message : PO number RS82 has been successfully added.

E	WHIRL RE	MULTIFAMILY	9WH		5/1/2025	WFW560CHW	5	6043256326	
---	----------	-------------	-----	--	----------	-----------	---	------------	--

Message : Do not allow different Receive to Location in the same PO Group E.

E	WHIRL RE	MULTIFAMILY	1WH		5/1/2025	YWED5620HW	5	6043256326	
---	----------	-------------	-----	--	----------	------------	---	------------	--

Message : Do not allow different Receive to Location in the same PO Group E.

E	WHIRL RE	MULTIFAMILY	1WH		5/1/2025	W10869845	5	6043256326	
---	----------	-------------	-----	--	----------	-----------	---	------------	--

Message : Do not allow different Receive to Location in the same PO Group E.

PO's Added	3
PO's Rejected	2
Models Added	6
Models Rejected	8

Purchasing

Search Options: [Click here to make this your default Search](#)

Search For: [] By: PO # Matching: Equal Search

AND For: [] By: Supplier Matching: Equal

Supplier	Total Ordered	PO #	Supplier	Buyer	Reference #	Supp Inv #	Packing Slip #	BO Inv #	* Started	Ordered	Received	Costed
	15318.75	RS82	SAMS RE	Liza Anders					09/08/24			
	1520.00	RS81	BSH RE	Liza Anders					09/08/24			
	52.25	10	EZFLO	Liza Anders					09/08/24			

The Purchasing Maintenance screen will show all the purchase orders that were created.

Record Count: 3

Detail Review Add Edit Delete Excel Split Exit

Review the purchase order

Edit PO Header RS82

Supplier: SAMS RE, Samsung Electronics, 55 Standish Court, Mississauga, ON L5R 4B2

Buyer: Liza Anderson

Min Order: 0.00, Total Ordered: 15,318.75, Total Costed: 0.00

Supplier Note: []

Ship Via: []

Confirmations: Confirmed [] 00/00/00, Authorized [] 00/00/00, Received [] 00/00/00, Paid [] 00/00/00

Receive to Location Code: 9WH, Receive to Location []

Floor Plan: [], Floor Plan Days: 0, Cost Factor: 1.0000

Req Ship Date: 5/1/2025, Effective: 00/00/00, Stated: 9/8/2024, Ordered: 00/00/00, Received: 00/00/00, Costed: 00/00/00, Finished: 00/00/00, Created: 9/8/2024, User: L

Order Only: PO # RS82 - Review Model

Type	Rel	Item/Model Code	Description	Ordered	Amount	Received	Sug	Status	BO Inv #	R
Model		RL1505SBASR	28 BOTTOM MOUNT, SS	5	4,298.75	0	0	0		C
Model		DW8087070US	24 DISHWASHER, 42 DBA, SS	5	2,778.75	0	0	0		C
Model		RF23A9071SR	36 4 DOOR FRIDGE, SS	5	4,298.75	0	0	0		C
Model		NE6346511SS	30 ELECTRIC RANGE, CONVEC...	5	3,942.50	0	0	0		C

Item: RL1505SBASR, Model: 28 BOTTOM MOUNT, SS

SKU: [], QOH: 43, QOO: 26, Serial #: [], Location: [], Invoice: [], Received: 00/00/00

List Price: 0.00, Reserved: 14, Average Cost: 1,298.32, Ordered: 5, Last Cost: 1,298.32, Received: 0, Original Cost: 1,298.32, Prev Received: 0, Landed Cost: 0.00, Total Received: 0, Standard Cost: 1,298.32, Quoted Cost: 859.75, Discounts: 0.00, Unit Cost: 0.00, Ext Unit Cost: 0.00, Factor: 1.0000, Ext Factored Cost: 0.00

Location: 9WH, Receive to Loc []

Req Ship Date: 5/1/2025, As of 9/8/2024, RSD Confirmed []

Serial Type: MULTIFAMILY, BO Invoice #: [], Reference: C20240830, As of 9/8/2024, Packing Slip #: 6043256326, Supplier Invoice #: []

Minimum Order: 0.00, Total Ordered: 15,318.75, Received: 0.00, Total Received: 0.00, Costed: 0.00, Total Costed: 0.00, Refresh []

Pieces / Points: 20 / 200

Note: This Receive To Location on the PO Header is populated based on the Location from the PO Detail.

Review Project DUNDARAVE VILLAGE, Alair Homes - Dundarave Village

Project

Code: DUNDARAVE VILLAGE

Description: Alair Homes - Dundarave Village

Customer: 6043256326

Address 1: 5860 Falcon Road

Address 2:

City: West Vancouver

State: BC

Zip Code: V7W 1S3

Contact: Chris Stark

Phone 1: 9WH

Phone 2: MULTI

Status: OPEN Completed

Start Date: 8/30/2024

End Date: 8/29/2025

Details

Line Type	Code	Description	Time / Qty
Model	RL1505SBASR	28 BOTTOM MOUNT, SS	166
Model	wPw560CHW	27 FRONT LOAD WASHER, WH	166
Model	YwED5620HW	7.4 CU FT, FRONT LOAD DRYER, WH	166
Model	w10869845	STACKING KIT	166
Model	NNS1785S	1.6 CU FT COUNTERTOP MICROWAVE S	166

Item: Model RL1505SBASR 28 BOTTOM MOUNT, SS

Misc: MSPIECE35 166 Delivery - Piece Charge \$35

Qty: 166

Cost: 859.75

Price: 992.75 Reference: C20240830

Order Only: PO # RS82 - Review Model

Type	Rel	Item/Model Code	Description	Ordered	Amount	Received	Sug	Status	BO Inv #	R
Model		RL1505SBASR	28 BOTTOM MOUNT, SS	5	4,298.75	0	0	0		C
Model		DW8087070US	24 DISHWASHER, 42 DBA, SS	5	2,778.75	0	0	0		C
Model		RF23A9071SR	36 4 DOOR FRIDGE, SS	5	4,298.75	0	0	0		C
Model		NE63A6511SS	30 ELECTRIC RANGE, CONVEC...	5	3,942.50	0	0	0		C

Item: Model RL1505SBASR 28 BOTTOM MOUNT, SS

SKU: 00H 43 000 26

List Price: 0.00 Reserved: 14

Average Cost: 1,298.32 Ordered: 5

Last Cost: 1,298.32 Received: 0

Original Cost: 1,298.32 Prev Received: 0

Landed Cost: 0.00 Total Received: 0

Standard Cost: 1,298.32 Location: 9WH

Quoted Cost: 859.75

Discounts: 0.00

Unit Cost: 0.00

Factor: 1.0000

Features: BO Invoice # 6043256326

Reference: C20240830

Ext Unit Cost: 0.00

Ext Factored Cost: 0.00

Req Ship Date: 5/1/2025

As of: 9/8/2024

RSD Confirmed:

Serial Type: MULTIFAMILY

Packing Slip # 6043256326

Supplier Invoice #

Minimum Order: 0.00

Total Ordered: 15,318.75

Received: 0.00

Total Received: 0.00

Costed: 0.00

Total Costed: 0.00

Pieces / Points: 20 / 200

When there is a customer in the Packing Slip # field, EPASS will look at the Project for the model and get the cost.

