

E sales@epass.software

Date	July 17, 2024
Subject	Mass PO Creation Utility

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Utilities: Mass PO Creation	. 5
Go to Purchasing > Utilities > Mass PO Creation	. 5
Review the purchase order	. 9



## 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.

Keyword mass po		
rchasing	Security Option Utilities: Mass PO Creation Utilities: Mass PO Creation - Reg Ship checkbox Utilities: Mass PO Creation - Diff Customers checkbox Utilities: Mass PO Creation - Receive To Loc checkbox Utilities: Mass PO Import Utilities: Mass PO Import	OK Cancel Select <u>A</u> l
	By default, these security options for the Mass PO Creation Utility are disabled.	D <u>e</u> select All <u>P</u> ower Use
		A <u>d</u> d Security



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Keyword mass po		Enable "Utilities: Creation	Mass PO ".
chasing	Security Option Utilities: Mass PO Creation Utilities: Mass PO Creation - Req Sh Utilities: Mass PO Creation - Diff Cus Utilities: Mass PO Creation - Receive Utilities: Mass PO Import Utilities: Mass PO Export	p checkbox tomers checkbox to Loc checkbox	OK Cancel Select <u>A</u> ll D <u>e</u> select <u>All</u> <u>Power Use</u> Add

### **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.



General Prin	itina Bir	n Lat	pels	Part Label	s	Discount Labels
			1			
Last PO Number	24288	7				OK
Bar Code Delimiter	[					
Default Item Quoted Cost	Last	-				Cancel
Default Model Quoted Cost	Original	-				
Order For Job Status	ORDER FOR		DRDER FO	OR DATE	I.	
Fully Received Job Status		וב				
	Only update onc	e AL	L invoices.	for the customer	r are rec	eived
Default Order Qty	[	1				
Req Delivery Date Caption	Req Ship Date					
🔲 Display PO Fully Receive	d	Г	Default Su	upplier Invoice O	n Returr	n Serial
🔽 Update Accounts Payab	e	◄	Auto Com	mit Invoices on F	Receivin	g Backorders
🔲 Auto Create A/P Invoice	during Costing	Г	Update In	voice Item Sellin	g Price	
🔲 Recalculate Item Prices		$\overline{\mathbf{v}}$	Order all C	)pen Lines in Re	commer	nded Backorders
🔽 Audit Trail			Default Br	anch Code on P	0-12 to	Current Branch
🔲 Auto Scroll PO Detail		☑	Allow Inva	alid Item/Models	in Trans	fer Requests
🔲 Warranty Claims		Г	Reserve o	on Receive		
🔲 Auto Satisfy Warranty Cl	aims on Return PO's	Г	Warning I	f Item Cost Chan	ges	
Backorder Items for Sam	e Location as Invoice	Г	Order for 1	Terminal Location	n	
🔽 Auto Split During Cost		Г	Update In	voice Item Local	tion on C	Order
Warning If Customer on I	Credit Hold	◄	Transfers	Default Batch N	umber	
🔲 Serial Type Required (no	tALL)	Γ	a different	ansrer Request w : location than or	vnen rec dered fo	eiving to r
		-	·····			



## **Utilities: Mass PO Creation**

#### Purchasing Item Inventory Serial Inventory Customer AR Tools Window Help 🖉 📥 IIII 🖏 🗐 🗐 🛤 📓 🧻 sos Maintenance b Print Print Receiving Document Сору РО O Order . R Receive . A Find PO's Select the spreadsheet. PO Export 3 🗃 Transfer Request Mass PO Creation • Map the fields to the spreadsheet. Import File Name [C:\Users\liza.anderson\OneDrive - R&D Business Systems\Sh.\_\_ Reports . ОK Import Type Models • Line To Start Processing Import ETA / RDD Cancel 5 Export ETA / RDD Click OK when you're Mass PO Import PO Group Column A Model Code Column G ready to run the import. Mass PO Export Supplier Code Column Quantity Column B H Customer (Packing Slip) Column Mass PO Creatio Serial Type Column C Req Ship Date Column E Reference Column J Receive Location (Y/N) Column BO Invoice # Column K These 3 check boxes indicate Receive To Location Code Column E when the PO creation should fail. They are controlled by the Do not allow different Reg Ship Date on the same PO 17 security options. Do not allow different Customer (Packing Slip) on the same PO Do not allow different Receive to Location on the same PO

Go	to	Purchasing	>	Utilities	>	Mass	PO	Creation
		i ai oliaoliig						<b>U</b> IUUUU

Mass PO Creation			
Import File Name C:\Users\liza.and	lerson\OneDrive - R&D Business Systems\Do	ОК	
Import Type Models	Line To Start Processing 2	Cancel	
PO Group Column A	Model Code Column G *		
Supplier Code Column B	* Quantity Column H *		
Serial Type Column	Customer (Packing Slip)		
Reg Ship Date Column	Reference Column J		
Receive Location (Y/N) Column	BO Invoice # Column K		
Receive To Location E	_		
Different Reg Ship Date	es Found	×	
Do not allow			
Do not allow Different Re	eq Ship Dates were found in POGroup: C, E ! This	al.	
and fix the o	data first?		
	OK Cance		If there are inconsistencies based o the 3 failure requirements, then the
			message will prompt the user to take



mport File Name	C:\Users\liz	a.anderson\(	OneDrive - R&D Business Syst	ems\Do_		OK
mport Type	Models	•	Line To Start Processing		2	Cancel
'O Group Column		A	Model Code Column	G	×	
upplier Code Colum	n	В	Quantity Column	Н	- ×	
erial Type Column		C	Customer (Packing Slip) Column	1		
Req Ship Date Column		F	Reference Column	J		
Receive Location (Y	/N) Column	D	BO Invoice # Column	K		
Receive To Location Code Column	1	E				
Differe	nt Received	d Location F	ound			X
Jo not allow	Differe PO will and fix	nt Received I not be imp the data fir	Location were found in PO orted. Would you like to co st?	Group: E ntinue o	! This r cancel	



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2										
	Mass PO Creatio	n						- • -		
	Import File Name	C:\Users\liz	a.anders	on\Or	neDrive - R&D Business Sys	tems\Do	I	OK		
	Import Type	Models	•		Line To Start Processing	2		Cancel		
	PO Group Column		A	1	Model Code Column	G	×			
	Supplier Code Colur	mn	В	×	Quantity Column	H	ж			
	Serial Type Column		C		Customer (Packing Slip) Column	I				
	Req Ship Date Colu	mn	F		Reference Column	J				
	Receive Location ()	r/N) Column	D	1	BO Invoice # Column	K				
	Receive To Locatio Code Column	m	E							
	Do not allow differer	nt Req Ship D	) ate on th	ie san	ne PO	$\overline{\lor}$				
	Do not allow differen	nt Customer (I	Packing (	Slip) o	n the same PO	$\overline{\checkmark}$				
	Do not allow differen	nt Receive to	Location	on th	ne same PO	$\checkmark$				
				F	Processing PO #2		-			
						SETTINGS			me	If you click OK on the error essages, it will still process the
									P	free.

				_	
			-		
		23			

mport Type Models	•	Line To Start Processing	2		Cancel
PO Group Column	A	Model Code Column	G	x	
Supplier Code Column	В .	Quantity Column	H	×	
Serial Type Column	C	Customer (Packing Slip) Column	1		
Req Ship Date Column	F	Reference Column	J		
Receive Location (Y/N) Column	D	BO Invoice # Column	K		
Receive To Location Code Column	E				
Do not allow different Reg Ship D	ate on the sa	ime PO	$\overline{\nabla}$		
Do not allow different Customer (F	Packing Slip)	on the same PO	M		
Do not allow different Receive to	V				



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## Andersons Richmond

Mass PO Creation

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

Models Added Models Rejected

System Dat 9/8/2024		3/2024		System 1	Time 8:13:07P				Page 1	
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 n	ot exist.							
	Message :	Model Code is n	ot exist.							
4	BSH RE	MULTIFAMILY		9WH	5/1/2025	AR403722	5	6043256326		
	Message :	PO number RS8	1 has bee	n successfu	lly added.					
	EZFLO	MULTIFAMILY		9WH	5/1/2025	48372	5	6043256326		
	Message :	PO number 10 h	as been s	uccessfully a	added.					
	PANA RE	MULTIFAMILY		9WH	5/1/2025	NNST785S	5	6043256326		
	Message :	Do not allow diffe	erent Req	Ship Date in	the same PO Group	DC.				
	PANA RE	MULTIFAMILY		9WH	5/2/2025	NNTK72LS	5	6043256326		
	Message :	Do not allow diffe	erent Req	Ship Date in	the same PO Group	DC.				
	PANA RE	MULTIFAMILY		9WH	5/3/2025	NNST765S	5	6043256326		
	Message :	Do not allow diffe	erent Req	Ship Date in	the same PO Group	DC.				
	SAMS RE	MULTIFAMILY		9WH	5/1/2025	RL1505SBASR	5	6043256326		
	Message :	PO number RS8	2 has bee	n successfu	lly added.					
	SAMS RE	MULTIFAMILY		9WH	5/1/2025	DW80B7070US	5	6043256326		
	Message :	PO number RS8	2 has bee	n successfu	lly added.					
	SAMS RE	MULTIFAMILY		9WH	5/1/2025	RF23A9071SR	5	6043256326		
	Message :	PO number RS8	2 has bee	n successfu	lly added.					
	SAMS RE	MULTIFAMILY		9WH	5/1/2025	NE63A6511SS	5	6043256326		
	Message :	PO number RS8	2 has bee	n successfu	lly added.					
	WHIRL RE	MULTIFAMILY		9WH	5/1/2025	WFW560CHW	5	6043256326		
	Message :	Do not allow diffe	erent Rece	eive to Locati	on in the same PO (	Group E.				
	WHIRL RE	MULTIFAMILY		1WH	5/1/2025	YWED5620HW	5	6043256326		
	Message :	Do not allow diffe	erent Rece	eive to Locati	on in the same PO (	Group E.				
	WHIRL RE	MULTIFAMILY		1WH	5/1/2025	W10869845	5	6043256326		
	Message :	Do not allow diffe	erent Rece	eive to Locati	on in the same PO (	Group E.				
								PO's Added		
								PO's Rejected		



earch For       By PD # Matching Equal       Search         AND For       By Supplier       Matching Equal       Search         3: Supplier       Total Ordered       PD #       Supplier       Matching Equal       Search         3: Supplier       Total Ordered       PD #       Supplier       Matching Equal       Image: State of the	earch For By PO # Matching Equal Search AND For By Supplier Matching Equal Search 3 Supplier Total Ordered PO # Supplier Buver Beterence # Supp Inv # Packing Slip # BO Inv # "Stated Ordered Received Costed 15318.75 R582 SAMS RE Lize Anders 1520.00 R581 B5H RE Lize Anders 152.25 10 EZFLO Lize Anders 09/08/24 52.25 10 EZFLO Lize Anders OS/08/24 09/08/24	earch Options		<ul> <li>Click here to</li> </ul>	make this you	ır default Sea	irch ——							
AND For By Supplier Matching Equal Supplier Total Ordered PO # Supplier Buver Reference # Supp Inv # Packing Slip # BO Inv # *Started Ordered Received Costed 15318.75 RS82 SAMS RE Liza Anders 1520.00 RS81 BSH RE Liza Anders 52.25 10 EZFLO Liza Anders Supplier Ogy08/24 The Purchasing Maintenance screen will show all the purchase orders that were created.	AND For By Supplier Matching Equal  Supplier Buyer Reference # Supp Inv # Packing Slip # 80 Inv # *Stated Ordered Received Costed Supplier	earch For	Ву	P0 #	Matching	Equal	•	Search						
B- Supplier U  Total Ordered PO # Supplier Buver Reference # Suppliny # Packing Slip # BO Inv # *Stated Ordered Received Costed 15318.75 R582 SAMS RE Liza Anders 09/08/24 09/	B- Supplier B- Su	AND - For	By	Supplier	▼ Matching	Equal	<u> </u>							
The Purchasing Maintenance screen will show all the purchase orders that were created.	The Purchasing Maintenance screen will show all the purchase orders that were created.	- Supplier	rdered PO # 318.75 520.00 52.25	Supplier RS82 SAMS RE RS81 BSH RE 10 EZFLO	Buyer Liza Ander Liza Ander Liza Ander	Reference #	Supp Inv #	Packing Slip #	BO Inv # 1 (	<u>Started</u> 09/08/24 09/08/24	)rdered	Received	Costed	
						19	1	1	(	19/08/24				

## Review the purchase order

B Edit PO	D Header RS82					B Order C	Inly: PO #	RS82 - Review	v Model						
	Supplier	Ship To	Documents	Ť.	Notepad	Type	Rel Ite	m/Model Code	Description	ADUNT SS	Ordered	Amount I	Received	Sug Status	BO Inv # R
P0 #	RS82	Buyer Liza	Anderson			Model Model Model	D'\ RF NE	V80B7070US 23A9071SR 63A6511SS	24 DISHWASH 36 4 DOOR FF 30 ELECTRIC	HER, 42 DBA, SS HDGE, SS RANGE, CONVEC.	5 . 5	2,778.75 4,298.75 3,942.50	0 0 0	0 0 0 0 0	C C C
Serial Type	MULTIFAMILY  Min Order 0.00	Samsung Electronics 55 Standish Court Mississauga, ON L5R 482 Contacts: Anna Disance (00E)	Sinopoli, ora 6077		<u>Q</u> K <u>C</u> ancel		Item	γ	N	lodel	γ <u> </u>	Comment	<u> </u>		Freight
	Total Ordered 15,318.75 Total Costed 0.00	Phone: (303)	813-5077,	ज ज	Detail Allow BO Invoice to Attach Released	Model SKU List Price		1505SBASR 0.00	[28 <u>QOH</u> 43 <u>Reserved</u>	BOTTOM MOUNT <u>QOO</u> 26 <u>S</u>	SS erial #	Location	Received 0		Minimum Order 0.00 Total Ordered 15,318.75
	Supplier Note			Req Ship Date	5/1/2025	Average I Last Cost Original C	Cost	1,298.32 1,298.32 1,298.32	Ordered Received Prev Receive		Order Exclusi	we		Select All	Received 0.00 Total Received 0.00
	Confirmations Confirmed Authorized Received		00/00/00	Started Starte		Landed C Standard Quoted C Discounts	iost   Cost   ost   i	0.00 1,298.32 859.75 0.02	Total Receive Location Features Reference	ed 0 VH 9WH Receive to	Released	Req Ship Date As of 9/8/202 Serial Type BO Invoice # of 9/8/2024	9  5/1/20 4 □ RS MULT	D Confirmed	Total Costed 0.00 Costed 0.00 Refresh
	Paid Receive to Location Code Floor Plan	9w/H	Note: This Rec	Created [s	3/8/2024	Unit Cost Factor Serial	Cancel	0.00 1.0000 Balance	Ext Unit Cost Ext Factored	Cost	0.00 0.00 E <u>s</u> it	Packing Slip # Supplier Invoid	60432	56326 tes Freig	Pieces / Points 20 / 200 ht Header
	Floor Plan Days Cost Factor	0	PO Header is Location	populated from the P	based on the O Detail.						~				



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