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Purchase Order Import Setup

Settings > Purchase Order > Purchase Order Imports

Purchase Orders can be imported into SGA. However, the import format must be in place before importing data.

Name: The name that will be displayed as the name of the import.

General: See import connections for help setting up a connection to import files.

Setup

Payment Vendor ID: Payment vendor.

Skip rows with zero quantity: If quantity is used, all rows with an amount that is not specified or zero will be skipped.

Skip rows with unit price: If checked, all rows with a unit price that is not specified or zero will be skipped.

Relative Account: This compares the account or alias from the source file to the account number, alias listing, or a specified cross-reference format.

Default Approval Group: The approval group/table with which all POs resulting from the import will be associated.

Columns

Add lines for each column you wish to import. The **From Column** is the column name or number in the imported file, depending on whether you reference columns by name or number.

Choose the **To Column** to map it to.

Accounting Period is not a column definition, but will be designated when importing POs.

The available columns are:

Column Name	Required	Comments
Requested By	No	The person requesting the PO.
Vendor ID	No	This is the only way to identify which vendor to import into.

Column Name	Required	Comments
Address ID	No	If not specified, **PRIMARY** is used.
Date	No	If not specified, today's date will be used.
Payment Vendor ID	No	
Item#	No	
Quantity	No	
Unit Price	Yes	
Unit Price Code	No	
Account	Yes	It must be formatted exactly like the SGA account number.
Object Type	No	
Object	No	
Comments	No	
Ship To Name	No	
Ship To Address	No	
Description	No	
Received Status	No	
Payment Card ID	No	
Group ID	Yes	
Approval Table	No	
Delegate User	No	
Approval Due Date	No	

The **Menu** to import is *Daily > Purchase Order Entry > Import.*