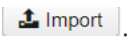
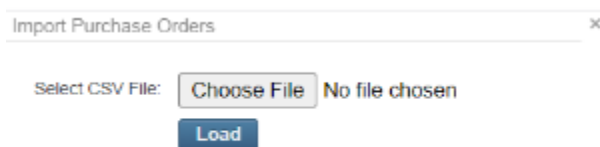


## Import Purchase Orders

The Import Purchase Orders option may be used to import Purchase Orders from a spreadsheet (CSV format). Please refer to the [Purchase Order Import Criteria](#) for further details on the CSV file format. We've also provided a template spreadsheet for districts to use. Any rules pertaining to Purchase Orders will also be applied when importing purchase orders.

1. From the Transaction menu select "Purchase Orders"
2. To import a CSV file, click on .
3. Click on "Choose File", browse for the file (.CSV) and click "Open" or select the file by double-clicking on the file name.
4. The selected filename will be visible to verify the system is ready to Load the proper file.
5. Click on "Load" to process the chosen file and post the transactions.



6. A message box will appear showing the number of Records Loaded and the Number of Errors.

7. An output file named "USASLOADERR.CSV" will be created containing the number of records loaded or records with errors.

a. If there are records that did not load, the file will contain only those records that did not load successfully and will provide error messages explaining why.

b. If there were no errors, the file will say "No errors. Records loaded: #" where # is the number of records successfully loaded

8. If an error occurs, open the output CSV file, make the necessary corrections, and re-import the corrected output file.

## Purchase Order Import Criteria

Please use the [template spreadsheet](#) containing the fields in the proper format (listed in the table below). If you are not using the template spreadsheet and instead you are creating a spreadsheet of your own, the field names on the spreadsheet must *exactly match* the Field names listed below. The field names are not case sensitive, but must be entered exactly as shown below making sure to include the spaces between words. (i.e PO NUMBER and po number are both acceptable, but POnumber causes an error.) PO # and Vendor # also can be PO Number or Vendor Number. Please note, the fields specified below as "**Required field**" are the only fields that must appear in the spreadsheet. All other fields are optional.

Since CSV files use the comma character to separate columns, data fields that contain commas will be wrapped with double quotation marks when imported into the Redesign. For example, if Athletic helmets, pads, and protective gear was entered on the CSV file for the PO Item Description, it will import as "Athletic helmets, pads, and protective gear"

Description  
 "Athletic helmets, pads, and protective gear"

Field	Format	Definition
PO Number PO #	Maximum of 8 digits.	If left blank, the PO number will be automatically assigned.
Date	Acceptable formats as used in UI can utilize '/' slashes or '-' hyphens or numbers only (no delimiter).  MMDDYYYY MM/DD/YYYY MM-DD-YYYY	Enter purchase order date or if left blank, the system will default to current date.
Vendor Number or Vendor #	Valid vendor number.	Vendor must be active. Will be Multi-Vendor Purchase Order if left blank. Specifies the vendor the goods/services are being ordered from.
Description	Maximum length is 3000 characters.	Description in PO Header that may be used for any special instructions, detail or description associated with the purchase order as a whole.
Deliver By Date	Acceptable formats as used in UI can utilize '/' slashes or '-' hyphens or numbers only (no delimiter).  MMDDYYYY MM/DD/YYYY MM-DD-YYYY	Optional field for the Date the Purchase Order items are being requested to be delivered.
Terms	Maximum length is 3000 characters.	Optional field for any special terms for the purchase order.

Attention	Maximum length is 3000 characters.	Optional field for individual's name the goods/services are being ordered from.
Source	Maximum length is 3000 characters.	Optional field for requisition number.
Summary	Maximum length is 3000 characters.	Optional field for description of the entire purchase order as a whole.
Item Number	Number.	<b>Required field.</b> This is the item number or line number for PO item with first item starting with 1.
Item Description	Maximum length is 3000 characters.	Description of the PO item being ordered.
Units	Number.	Type of unit being ordered. (i.e. box, carton)
Quantity	Number up to Max = 99999.999	<b>Required field.</b> Number of items to be ordered.
Unit Price	Must be a number. Cannot use \$.	<b>Required field.</b> Dollar amount per unit for the items being ordered. Enter dollars, decimal point and cents only.
Reference Number	Must be a number.	<b>Required field.</b> Detailed number for each item being charged an account number. This will always match the Item Number unless it is a split item.
Charge Quantity	Number up to Max = 99999.999	<b>Only required when splitting items.</b> Quantity for item being charged.
Charge Unit Price	Number up to Max = 9999999999999999.9999	<b>Only required when splitting items.</b> Unit Price of item being charged.
Full Account Code	Must be formatted with the hyphen as the delimiter as in the UI. (i.e. 001-2421-512-0000-000000-000-00-000)	<b>Required field.</b> The Account used must be an expenditure account.