

Purchase Order Import Setup

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Purchase Orders can be imported into SGA. The import format must be in place before you can import data into SGA.

Setup > Imports > Purchase Order Imports

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

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

Setup

Payment Vendor ID: Payment vendor.

Skip rows with zero quantity: If quantity is used then all rows with a quantity not specified or zero will be skipped.

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

Relative Account: Compares the account or alias from the source file to the account number or alias listing, or compares the account from the source file to 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. "From Column" is the column name or number in the file being imported, depending on if 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 at the time of PO's are imported.

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 what vendor to import into
Address ID	No	If not specified, PRIMARY is used
Date	No	If not specified, today's date will be used

Column Name	Required	Comments
Payment Vendor ID	No	
Item#	No	
Quantity	No	
Unit Price	Yes	
Unit Price Code	No	
Account	Yes	Must be formatted exactly like the SGA account#
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	

Menu to import is: **Daily > Purchase Order Entry > Import**
