

How to Handle Large Purchase Orders in Acumatica

Hi everyone. I'm Cailee Hanson with SVA Consulting, and in this video, I'll walk through a specific purchase order example, assuming we have a multi-line P.O. So we may have some more tedious examples of purchase orders where there's many, many lines on a specific purchase order. And then there's a couple of tools I'll highlight in today's video within Acumatica to show how we might make this process a little bit easier. So to start, I'm going to go to my purchasing module, and I'm going to go ahead and create a new purchase order, and I'll go ahead and create this for just a generic Ulta Ace vendor, and then I can go ahead and start adding in line items. So as we've seen before, we can go ahead and manually add in each line item on a row-by-row basis, and I could type in a specific inventory item and then go ahead and enter in that quantity. So that is always an option, but when we have multiple, multiple lines on a purchase order, that can be a little bit tedious. So we'll walk through some examples of how we might make that process easier when we're adding multiple items at once.

So I'm going to go ahead and just exit out of this row, and we'll kind of start from scratch here. So the first option I'll walk through is this Add Items button. I'll go ahead and click that, and once I do, we'll see that view is a little bit different. So instead of searching by inventory ID each time and adding those in line by line, I could go ahead and press this Add Items button, and what this will do is really give me a breakdown list of all of those inventory items. And then I can also have filters on those so I can see things like specific items within an item class, within a specific warehouse, etc.

So here I have my inventory lookup, and then you'll also see this checkbox that says only vendors items. So that's currently checked. So in this case, it's going to only give me options to add items that are those vendor's items. I'm going to make this a little bit bigger so we can see what that looks like, or I can uncheck it. So if I don't want that checked, it can just show me any items that I can purchase from this vendor, any items in the system.

So I'll go ahead and leave that unchecked for now, since we have a little bit more example in here, that way, and what I can do on this screen is really I can check a lot at once. So I can check this button at the top to say I want everything on this list view, or I can do kind of a one-by-one basis, just multi select those as well. So both of those options are available. Just going to unselect all of those and then, like we talked about as well, we can start to add different filters. So if we know I only purchase consumer or retail goods from this vendor, I can start to filter by my item classes. So how I have items in my system classified can be helpful in terms of filtering this down and making this process a little bit easier.

So I'll go ahead and filter by that specific item class, and then I'm just going to check all of these, and then I can go through and kind of similar to an Excel sheet, I can go in and select the quantity and use my keyboard to kind of make that process easier as well. So maybe I want 10 of these, 50 of these, 20, 30, 40, and so on and so

forth. So I'll just go ahead and add these in, Again, a little bit faster than if I were to go in and add line by line items. So I'll go ahead and do that, and then I'll say, add and close.

And once I do that, it's just going to populate all those in and then you'll notice that it's also finding things like the unit cost within my system as well. So there's a couple that don't have it right in this environment, but it is going to match it to the unit cost I have set up on the item itself or on the vendor, both scenarios. So that's kind of scenario 1, is that Add Items button, and that will give us filtering criteria. We can see just vendor specific items. And then we can go in and kind of put in that order quantity using our keyboard, perhaps. And then we can go ahead and add and close, and that might make that entry process a little bit easier. So that's the first scenario.

Next I'll walk through the second scenario. I'm just going to click add a new record here. We won't save that previous one. And this next option is really going to be upload from Excel, so I may have a file for this specific vendor, maybe a little bit of limited information. So maybe I just have a SKU in the order quantity that I want, and I could go ahead and upload that to enter that in on this purchase order. So I'll use that same vendor, and where that comes into play is this little icon at the bottom. So this says load records from a file, and what it's going to do is it's going to allow me to choose a file within my desktop in this example. So what I'm going to do is import this large P.O. upload. I'm going to go ahead and click Upload.

Before I do that, we'll just show you what that looks like so we can get a sense for that template itself. So here's my large P.O. upload. This is what I just selected. In here we have just an inventory ID. I may or may not want to have that description in here, that would be optional, but here I have it in this list, and then I just have my order quantity, right? So this might be multiple lines. In my example, it's 30, but it could be 1,000, it could be 5,000, whatever you have as that quantity, you can have all of those within an Excel sheet like this. And then we can go ahead and just upload that, and I'll take a look at what that looks like now.

So I'll close out of this. We'll get back into Acumatica. And so I selected that file, remember, and now there's a couple of settings. So in this case, I have a mode, so that says, upload, update existing or I could also insert all records. So I'll show you both examples. We're going to start by inserting all those records. There's nothing in here yet. We want all of those brought in. So I'll go ahead and click Insert All Records and click OK. And what this is going to take me through is it's just going to match the column names within my Excel spreadsheet to the property names in Acumatica. So if they have the matching names, it's going to find that automatically. Otherwise, something like a description. Maybe I just want to match that, so that would be equivalent to the line description in Acumatica. I'll click, OK, give it a second, and what it's going to do is bring that all in, right? So it found those inventory IDs, populated that in with additional information that lives within Acumatica. It brought in those order quantities that I had in my Excel sheet as well, and then it brought in those unit costs based on what exists within Acumatica right now. So brought those in all for me. I didn't have to enter those in one by one. So definitely a popular tool that we might use when managing multiple, multiple lines within a

single purchase order. So that looks good. I'm going to go up ahead and press Save, and that would do the work for me, right? It brought that in.

Now let's say, Okay, I want to make some changes, I could obviously go in and make some changes here. Maybe I want to order 20 instead, I can go ahead and click save. So I always have the option to update that within here. Otherwise, if I had multiple changes, for example, I could go ahead and re-upload it and remember that option to insert all or update existing, that's where that would come into play as well. So I'm going to go back into my Excel sheet and assume, okay, we might want some changes. Maybe those quantities were wrong. So I'm going to go ahead update this and so maybe these kind of last items here, I only want 50 of all of them. So I can just update those within my Excel sheet. It's going to auto save this. Just going to exit out. We'll go back into Acumatica, and I'll click this icon again, load records from a file, choose that same file. Upload. In this case, I'm going to keep it to update existing. We just want to update that existing list with any changes that may have occurred. And again, I can match this to my line description. Press OK. We'll see that order total change. It updated those quantities at the bottom based on what I updated in the Excel sheet, all for me. So I didn't have to kind of go in and manually make any changes within Acumatica, I could update that Excel sheet, just re-import it, and again, it will override those values based on that upload settings. So pretty straightforward there. That's kind of option two in terms of making that process a little bit easier on the entry side.

And then the last option I'll walk through, which can be a convenient tool as well, is the concept of the copy/paste, and then the copy/paste and template feature. So on every transaction within Acumatica, not just on the purchase order side, we have the option to copy and then we could paste it. So let's say this was another purchase order that I wanted to create. I can go ahead and copy it from an existing one, paste it into a new one, and again, no reentry needed there. It just populates that automatically. And then again, maybe my order quantity is changing, so I could go ahead and make some changes and just go ahead and save it. So that's kind of a nifty tool.

And then the last one can be, you know, this happens on a regular basis. Maybe I'm ordering from the vendor on a monthly basis, a quarterly basis. We do always still have those two options I just walked through, right the add items and the import from Excel. Now both of those will still be available, but if it's more frequent, I may want to save this as a template. So what I can do here, again, this is not just on the purchase order side, but across all transactions within Acumatica. But I can save this as a template. I can give it a description, and it might just be monthly Alta Ace P.O. I'm going to save it. Now when I go ahead and create a new purchase order, I have that showing up here, right? Monthly Alta Ace purchase order. Can go ahead and bring it in. Give it a second to load. Make sure we save that correctly. Refresh this quickly, and what that will do is it's going to paste it all in from that template.

And again, this can be a convenient tool if you have multiple lines within your purchase order. There we go. We saw it copied, copied and saved it as a template. And then I can populate that in. Again, I can change it

again. If those quantities are changing on a monthly basis, for example, or whatever that cadence may be, I can just save that, readjust those quantities, and then I can go ahead and proceed with that process. So I know managing multiple, multiple lines in a purchase order can be a little bit tedious, but there are tools within Acumatica that can help make that process easier, that add items a button, that upload from Excel. You can, kind of upload all of them, and then you can also make changes in Excel, re-upload that and insert those changes, and then this last option of the copy and paste, as well as the saving as template and then pasting it as a template to use, kind of as a starting point.

So again, all of those options are available within Acumatica. I hope this was a helpful video, but definitely feel free to reach out to us if you want more information, clarity, or want to set up a meeting to walk through this a little bit more detail. Thank you.