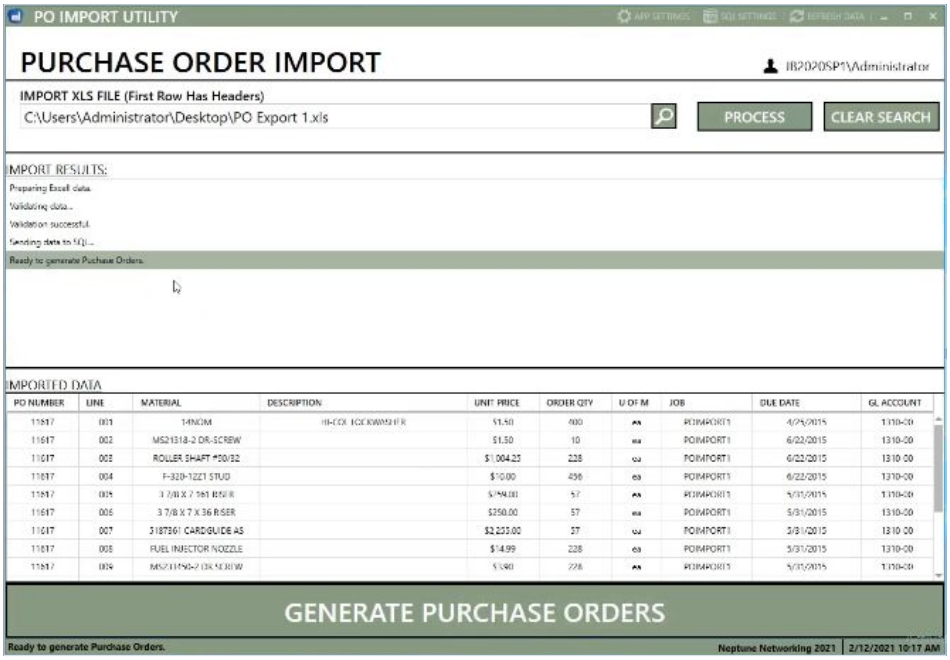
JOBBOSS SOLUTIONS

PO Import

Turn purchasing spreadsheets into JobBOSS purchase orders.

Neptune PO Import turns a prepared Excel worksheet into vendor purchase orders in JobBOSS. Create new orders, organize rows into the orders you need and add lines to existing POs through one repeatable purchasing workflow.



PO Import in the recorded demonstration. The current release also includes a PO GROUP column.

Keep purchasing work moving

- **Reduce repeated entry.** Prepare purchasing rows in Excel, validate the file and generate the orders in JobBOSS.
- **Organize each order deliberately.** Combine related rows under one PO, create separate orders or append to an existing order.
- **Connect purchases to jobs.** Link imported items to existing jobs when your purchasing process calls for it.

For buyers, purchasing administrators and operations teams working with structured purchasing lists.

CAPABILITIES

Build the orders your team needs

Control order grouping, line detail and job links from one template.

Capability	What your team can do
New purchase orders	Use automatic PO numbers or supply a specific new PO number.
Grouping from Excel	Give related rows the same PO_Group label to create one automatically numbered order per group.
Additional PO lines	Add new lines to an existing PO while keeping the existing lines.
Automatic line numbers	Leave Line blank to assign separate line numbers within each new order.
Useful purchasing detail	Include line descriptions, extended instructions, quantities and due dates.
Materials and job links	Use existing material codes or miscellaneous items; optionally link purchases to existing jobs.



The application separates file processing and review from the action that generates purchase orders.

A practical fit for spreadsheet-driven purchasing

Use a consistent template for prepared buying lists, repeated purchasing requirements or purchasing data assembled outside JobBOSS. Keep the grouping and item detail in the worksheet, then review the resulting orders in your familiar JobBOSS purchasing screens.

PO Import supports vendor purchasing. Optional job links connect the purchasing lines to jobs that already exist in JobBOSS.

WORKFLOW AND LEARNING

Equip the team to run the process

Keep the overview, operating guide, blank template and recording together.

1. **Prepare the workbook**
   Use the current 13-column Excel template. Enter valid vendor and item codes and choose which rows belong on each order.

2. **Process and review**
   Select the workbook and click PROCESS. Review the validation messages and imported-data preview.

3. **Generate purchase orders**
   Click GENERATE PURCHASE ORDERS when the staged rows are ready. This creates new orders or appends lines to specified existing orders.

4. **Confirm in JobBOSS**
   Open the resulting orders and check the vendor, line detail, quantities, dates and any job links.

Training and reference resources

Illustrated Training Guide
Neptune-PO-Import-Training.pdf covers the first import, all 13 template fields, grouping, existing-PO additions, verification and common questions.

Current blank Excel template
Start with Neptune PO Import - Blank Template.xls supplied by Neptune. The companion customer reference explains the template and its defaults.

Watch the Purchase Order Utility demonstration

See the utility and resulting JobBOSS purchase orders in a short recorded demonstration. The recording shows an earlier application layout; use the current guide and template for grouping.

Talk with Neptune

Discuss your purchasing workflow, obtain the current template and arrange training or configuration assistance.

Neptune Networking Inc. | Revision 2026-11-05