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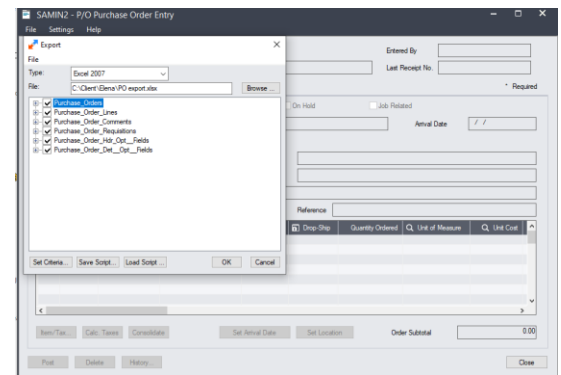
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## IMPORTING DATA TO PURCHASE ORDER (P/O)

Some customers track certain purchase transactions in an external application and need to bring that data into Sage 300 for further processing. Here's how to import data into the Sage 300 Purchase Order module using the built-in templates.

### Generating the Import Template

Sage 300 generates templates that enable you to import one or more entries into Purchase Order (P/O). Depending on your needs, these templates can be generated in a variety of formats such as Excel, CSV file, Access, ODBC, and XML. Following the template layout ensures that the data is structured and formatted in a way that Sage 300 will accept and minimizes potential errors.



### Follow these steps to generate the import template:

1. In **P/O Purchase Order Entry**, click **File > Export**.
2. In the **File Type** dropdown box, select the type of file you want to generate.
3. In the **File** field, specify the file name and location you want to save the template to.
4. Click the checkboxes to **select which fields** you want to include in your import template (note that some fields indicated in red are required and cannot be deselected).
5. Click **OK** to generate the import template which is saved to the location you specified earlier.

**NOTE:** you may also notice a **Save Script** button at the bottom of the screen. This option allows you to create a script containing these settings for importing and exporting records for future use.

### Importing Data to P/O

Open the template file that was generated above which can be found in the location you specified in step 3. Input your data into the appropriate fields within the template and when finished, go to **File > Import** in the **P/O Purchase Order Entry** screen. Choose the import file you created that now contains your data and click **OK**.

Sage Partner



### NOTE OF CAUTION!

Improperly importing data to Sage 300 can potentially damage your database. Always be sure to backup your system before starting any import routine and [CONTACT US](#) if you're unfamiliar with these functions and need assistance.

# QUICK TAKES: NEWS & UPDATES

## Collection of Sage 300 Customer Resources Online

Did you know that Sage offers a nice collection of customer resources that can help you supercharge Sage 300 and maximize your investment in technology?

The [Sage 300 Customer Resources](#) website features live webcasts that teach you about new features and latest releases. You'll also find a wealth of information, product brochures, and self-running demos that help you learn about add-on solutions - like document management, A/P automation, alerts & workflow, and more - that connect to Sage 300 and extend core functionality. You'll also find industry articles that teach you about cybersecurity, the cloud, and other key technology.

Plus, it serves as a handy portal to Sage 300 resources you probably use often such as Sage support, version release notes, community forums, training courses, and more.

[Visit the Sage 300 Customer Resources Portal](#)

## Sage Fixed Assets 2024.1 Now Available

Sage Fixed Assets 2024.1 is packed with key tax updates and smart new features to simplify asset management including:

- U.S. tax and depreciation calculation updates
- A new AI chatbot that delivers quick answers
- Save keystrokes with expanded default entries

Check out the [Sage Fixed Assets 2024.1 release notes](#) for full details on all enhancements and product fixes.



## Sage Member Masterclass Season 4 is Here

Some may recall that back in 2022, Sage launched season 1 of their “Member Masterclass” series featuring talks, articles, and advice from the world’s leading experts on the challenges and opportunities in world of business today.

Based on the success of these insightful sessions, Sage has recently announced availability of season 4. In this season, speakers delve into what it takes to survive and thrive in the face of constant, and sometimes, unpredictable change. Discussion topics include:

- How to navigate business growth
- How to build a leadership team
- How to lead people through organizational change
- Archive links to Seasons 1 - 3

Check out [Member Masterclass Season 4](#)

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