USER TRAINING GUIDE

Purchase Order Upload

How to create a Purchase Order by uploading a CSV file in WHIMS

DOCUMENT TITLE	**Purchase Order Upload — User Training Guide**
SYSTEM	**WHIMS — Warehouse & Inventory Management System**
VERSION	**1.0**
DATE	**24 July 2026**
COMPANY	**[Company Name]**
AUDIENCE	**Warehouse & Purchasing staff (no technical background required)**
PREPARED BY	**[Author / Department]**

For internal training use only. Screens and menu names refer to the WHIMS admin panel. Placeholders shown in square brackets [ ] should be replaced with your organisation's details.

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HOW TO USE THIS GUIDE

Read Sections 1–3 before your first upload. Keep Sections 6 (Common Errors) and 9 (Quick Checklist) open beside you while you work. Every screen is shown with a labelled picture so you can match what you see on your computer to the steps in this guide.

1. Introduction

1.1 What is the Purchase Order Upload feature?

The Purchase Order Upload feature lets you create a Purchase Order (PO) by uploading a single spreadsheet file, instead of typing every item in by hand.

A **Purchase Order** is the record of goods you are bringing into your warehouse. Normally you would add each product line one at a time. With this feature you prepare a simple list of products in a **CSV file** (a plain spreadsheet), upload it, and WHIMS creates the whole Purchase Order for you in one step — with every item already filled in.

> **IN PLAIN WORDS**
>
> You give WHIMS a list of parts in a file. WHIMS reads the file and builds a draft Purchase Order containing all those parts, ready for you to review, price, and finalise.

1.2 Why it is used

- Suppliers and internal teams often already have their product lists in a spreadsheet.
- Typing dozens or hundreds of parts one by one is slow and easy to get wrong.
- Uploading the list once is faster, more accurate, and repeatable.

1.3 Benefits of using the feature

Benefit	What it means for you
Saves time	Create a Purchase Order with hundreds of items in seconds instead of hours.
Fewer mistakes	The numbers come straight from your file, so there are no typing errors.
Automatic tidy-up	WHIMS automatically capitalises product codes, sums duplicate lines, and defaults empty quantities to 1.
Storage locations handled for you	If a shelf/bin location in your file does not exist yet in the chosen warehouse, WHIMS creates it automatically.
Safe by default	The upload creates a **Draft** only. Nothing affects your live stock until you review it and press *Commit*.

> **GOOD TO KNOW**
>
> Uploading a file never changes your stock levels on its own. It only creates a **draft** that you can check, price, and edit first. Stock is only updated when you deliberately **Commit** the Purchase Order later.

2. Prerequisites

Before you start, make sure you have the following ready.

2.1 Required access and permissions

- A valid WHIMS login (username and password).
- Access to the WHIMS admin panel and the **Purchase Orders** menu under the **Operations** group. Any signed-in user who can see this menu can create and upload a Purchase Order.

> **CAN'T SEE THE MENU?**
> If the **Purchase Orders** option does not appear in your left-hand menu, your account may not have access yet. Contact your WHIMS administrator to have it enabled.

2.2 Required file format

- The file **must be a CSV file** (file name ending in `.csv`).
- Excel workbooks (`.xlsx` / `.xls`) are **not** accepted. If your data is in Excel, use *File → Save As → CSV (Comma delimited)* first.
- The file must be **50 MB or smaller**.

2.3 Information to have ready before you begin

- **Which warehouse** the goods are going into.
- **The order date** (defaults to today, but you can change it).
- **Your product list** saved as a CSV with the columns in the correct order (see Section 3.2 and the Field Descriptions in Section 4).

> **START FROM THE SAMPLE FILE**
> WHIMS provides a ready-made example file, `sample_purchase_order.csv`, that already has the columns in the right order. The easiest way to avoid mistakes is to open that sample, replace the example rows with your own data, and save. Ask your administrator for a copy if you do not have one.

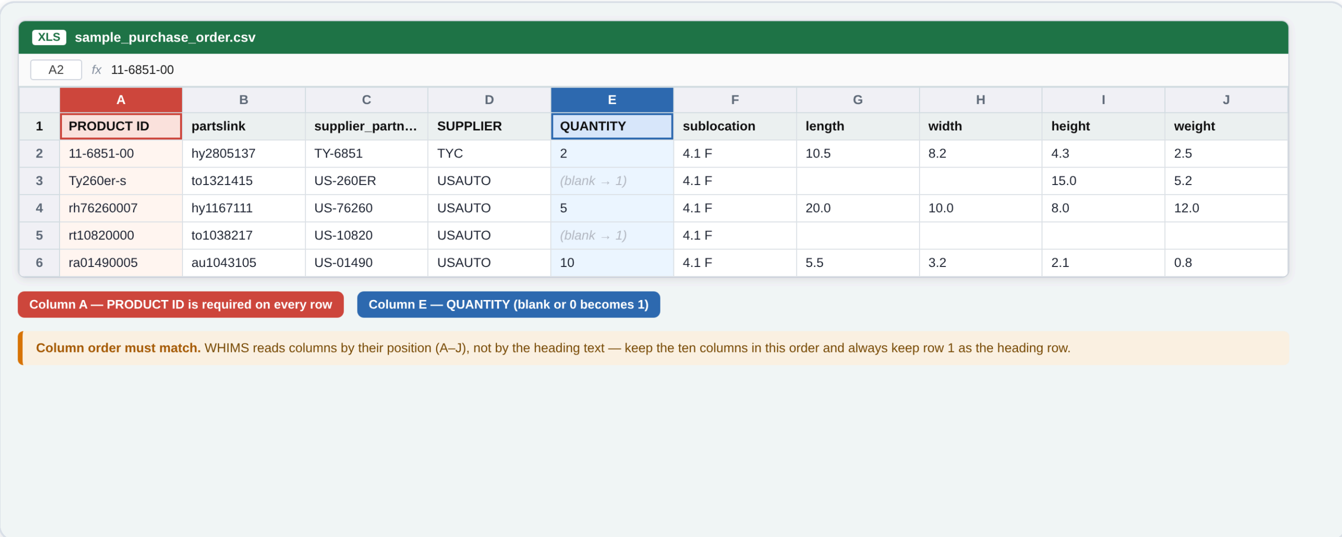
3. Step-by-Step User Guide

This section walks you through the whole process from logging in to confirming a finished upload.

3.1 Prepare your CSV file

Your file must have **ten columns in this exact order**. The first row is a heading row and is ignored by WHIMS — but keep it, because the *order* of the columns is what matters, not the heading text.

Column	Heading (example)	What goes in it
1	`PRODUCT ID`	The product / part number. **Required.**
2	`partslink`	Partslink reference (optional).
3	`supplier_partnumber`	The supplier's own part number (optional).
4	`SUPPLIER`	Supplier name or code, e.g. `TYC` (optional at upload).
5	`QUANTITY`	How many units. Blank or 0 becomes 1.
6	`sublocation`	Shelf/bin location code within the warehouse (optional).
7	`length`	Length (optional).
8	`width`	Width (optional).
9	`height`	Height (optional).
10	`weight`	Weight (optional).


XLS sample_purchase_order.csv

A2 fx 11-6851-00

	A	B	C	D	E	F	G	H	I	J
1	PRODUCT ID	partslink	supplier_partn...	SUPPLIER	QUANTITY	sublocation	length	width	height	weight
2	11-6851-00	hy2805137	TY-6851	TYC	2	4.1 F	10.5	8.2	4.3	2.5
3	Ty260er-s	to1321415	US-260ER	USAUTO	(blank → 1)	4.1 F			15.0	5.2
4	rh76260007	hy1167111	US-76260	USAUTO	5	4.1 F	20.0	10.0	8.0	12.0
5	rt10820000	to1038217	US-10820	USAUTO	(blank → 1)	4.1 F				
6	ra01490005	au1043105	US-01490	USAUTO	10	4.1 F	5.5	3.2	2.1	0.8

Figure 1. *The sample file (`sample_purchase_order.csv`) shown in a spreadsheet — columns in the required order, with **PRODUCT ID** (A) and **QUANTITY** (E) highlighted.*

> **IMPORTANT**
>
> **Do not include a price column.** Prices are not read from the file. Every item is imported with a price of 0, and you add prices afterwards on the review screen (Step 9) using the *Get Prices and Dimensions* button.

3.2 Log in and open the upload page

1. **Open WHIMS** in your web browser and sign in with your username and password.
2. **Find the menu.** On the left-hand side, look for the **Operations** group and click **Purchase Orders**.
3. **Open the create page.** On the Purchase Orders list, click the **New Purchase Order** button in the top-right corner. This opens the **Create Purchase Order** page, where you upload your file.
(The page address ends in `/admin/purchase-orders/create`.)

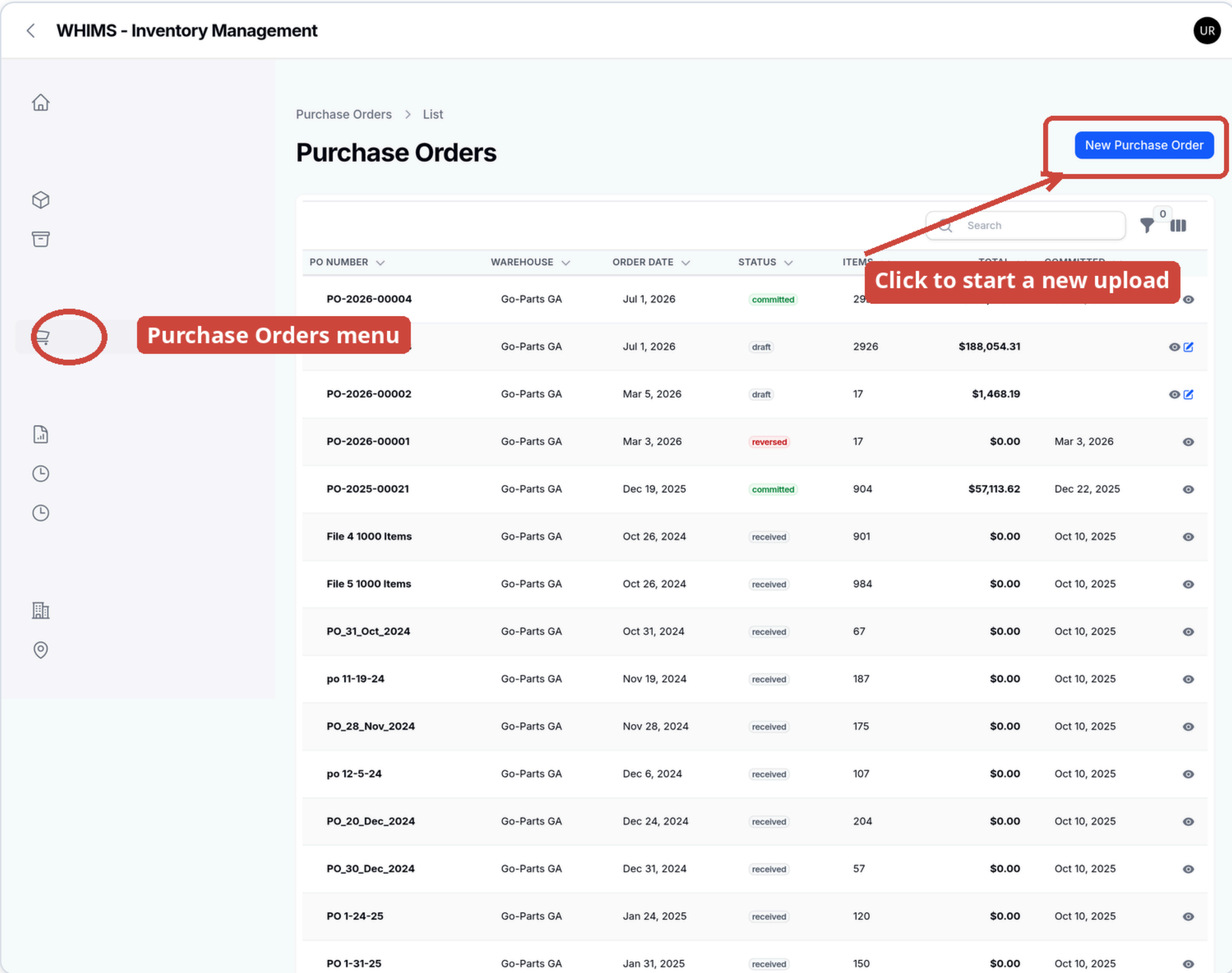


Figure 2. *The Purchase Orders list. Click* ***New Purchase Order*** *(top-right) to open the upload page.*

3.3 Understanding the Create Purchase Order screen

The page has one section called **Purchase Order Details** with a small set of fields:

- **PO Number** — filled in automatically; you cannot type here.
- **Warehouse** — choose where the goods are going. **Required.**
- **Order Date** — the date of the order (today by default). **Required.**
- **Import CSV File** — where you upload your file. **Required.**
- **Notes** — free text for any comments (optional).

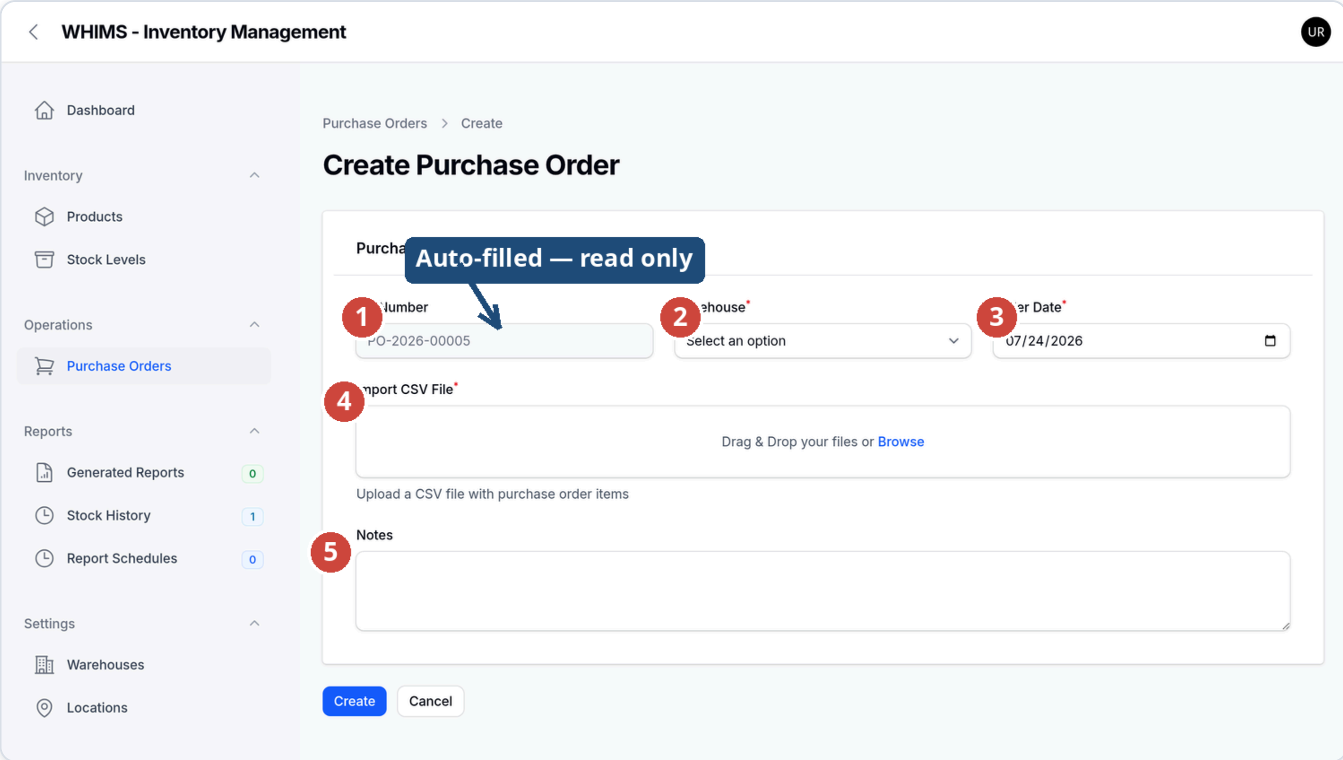


Figure 3. *The Create Purchase Order form. The five fields are numbered to match the list above;* ***1 PO Number*** *is auto-filled and read-only.*

3.4 Fill in the fields

1. **Leave PO Number as-is.** WHIMS generates it for you in the form `PO-2026-00001`. It is greyed out on purpose.
2. **Select the Warehouse.** Click the Warehouse box and choose the correct warehouse from the list. You can type to search. **This choice decides which shelf/bin locations your `sublocation` column will be matched to**, so pick carefully.
3. **Check the Order Date.** It defaults to today. Click it to change if needed.
4. **(Optional) Add Notes.** Type any comment you want stored with this Purchase Order.

3.5 Select / upload the file

1. **Click the Import CSV File box** (or drag your file onto it).
2. **Choose your `.csv` file** from your computer and confirm.
3. **Wait for the file name to appear** under the upload box. This confirms the file is attached.

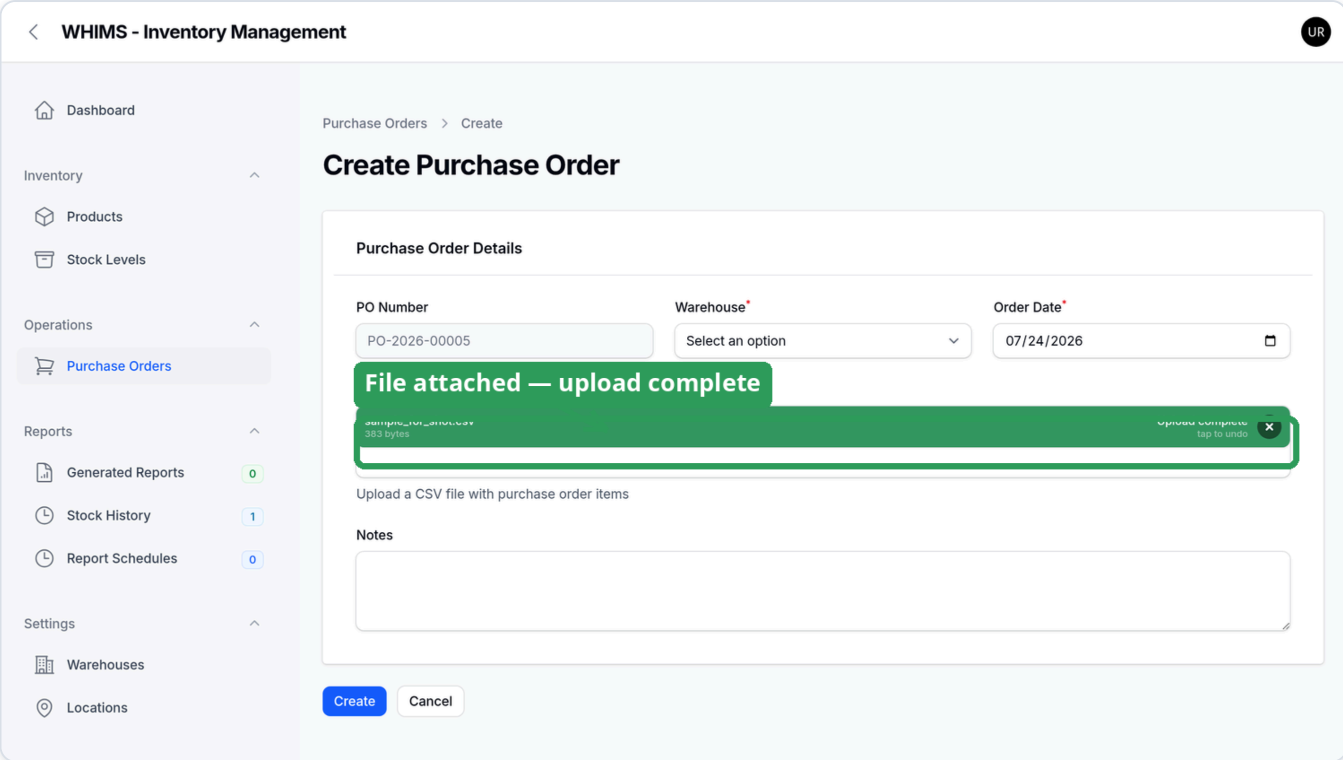


Figure 4. *The file is attached when its name and an **Upload complete** bar appear in the box.*

> **TIP**
>
> The helper text under the box reads *"Upload a CSV file with purchase order items."* Only CSV files can be selected. If your file will not attach, it is probably in the wrong format (see Section 5).

3.6 Start the upload

1. **Review your entries** — Warehouse, Order Date, and the attached file.

2. **Click the *Create* button** at the bottom of the form. This starts the upload and creates the Purchase Order.

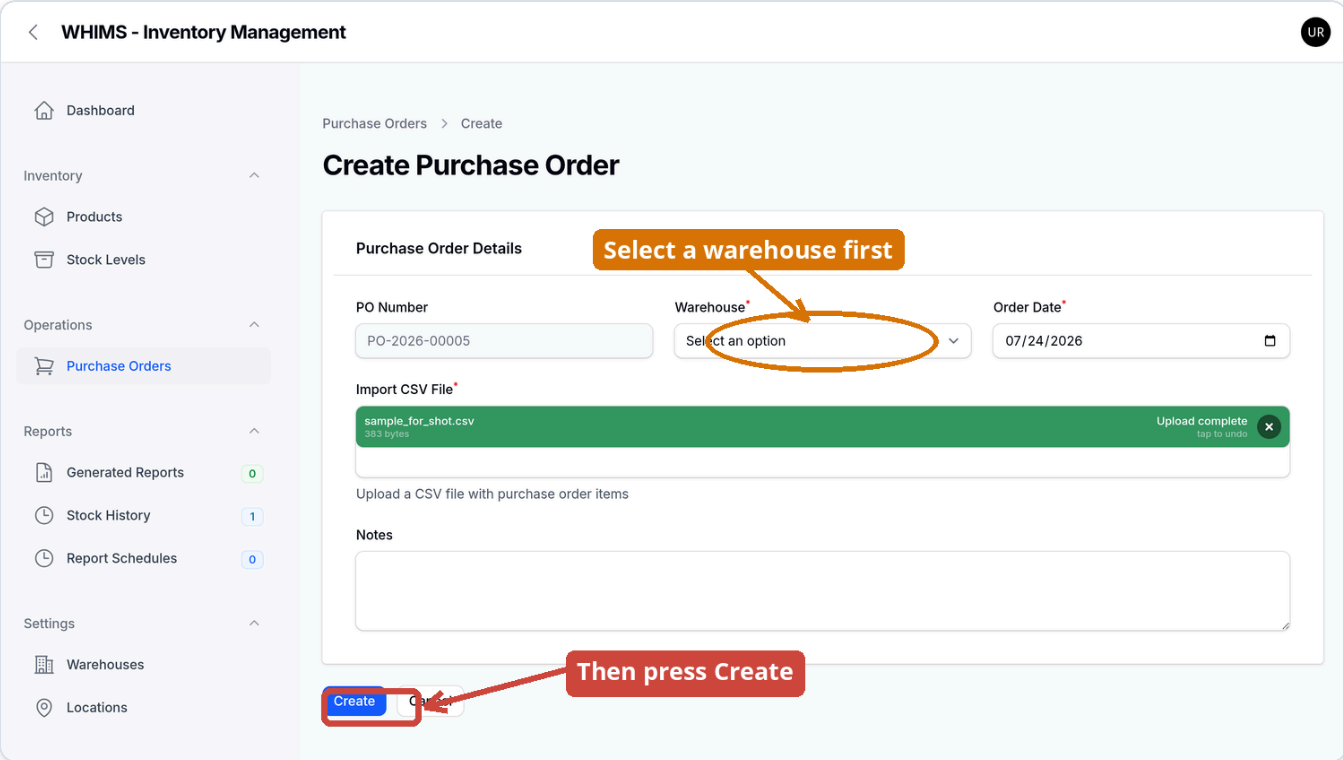


Figure 5. *Make sure a **Warehouse** is selected, then press **Create** at the bottom to begin the upload.*

3.7 Monitoring progress

The file is processed immediately (there is no separate progress bar). For a large file it may take a few seconds while WHIMS reads every row. Wait until the page finishes loading — do not click *Create* twice.

> **PLEASE WAIT**
>
> If your file has many thousands of rows, give it a few seconds. Clicking *Create* repeatedly could create duplicate Purchase Orders.

3.8 Reviewing the result

When the upload succeeds you will see a green confirmation message and be taken to the new Purchase Order's **View** page:

- **Message:** "Purchase Order Created" — *"PO PO-2026-00001 created as draft. You can now review and edit items."*
- The Purchase Order opens in **Draft** status with every item from your file listed.
- All prices show as 0 at this stage — this is normal.

3.9 Confirming a successful upload & what to do next

After the draft is created, finish the Purchase Order using the buttons at the top of the View page:

1. **Check the item list** matches your file (row count and product codes).
2. **Click *Get Prices and Dimensions*** to fill in buy prices and sizes automatically. Confirm the pop-up.
- **(Optional) Click *Save Draft*** if you edited any items by hand.

4 **Click *Commit Purchase Order*** when everything looks correct. Read and confirm the pop-up. **This is the step that updates your stock levels** and finalises the PO (status becomes *Committed*).

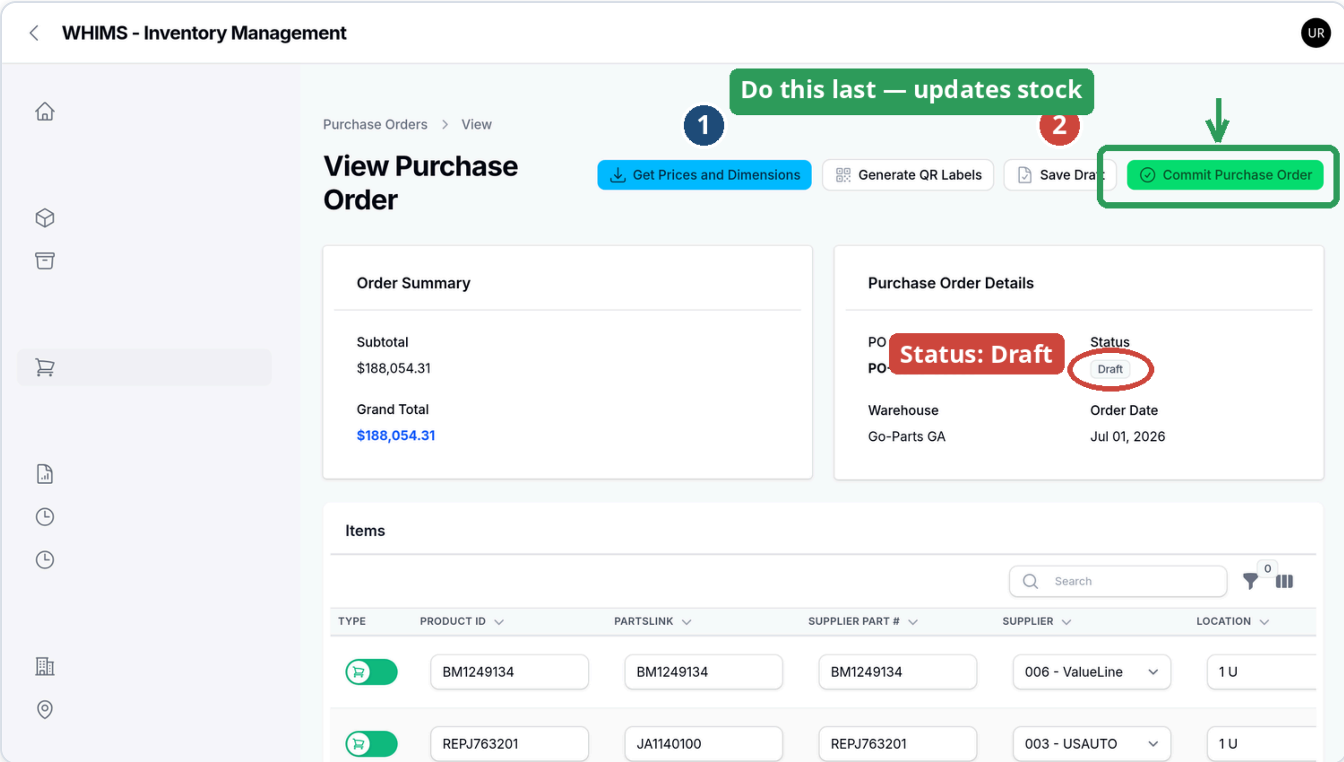


Figure 6. *The Draft Purchase Order View page. Use **Get Prices and Dimensions (1)**, optionally **Save Draft (2)**, then **Commit Purchase Order** last.*

WARNING — COMMIT IS THE POINT OF NO RETURN

Uploading and reviewing is completely safe. **Committing** creates products (if needed) and changes real stock levels. Only commit once you are sure the items and prices are correct. If you must undo a committed PO, use *Rollback Purchase Order* and provide a reason — but it is far better to check carefully before committing.

4. Field Descriptions

4.1 Fields on the upload screen

Field	Purpose	Mandatory?	Example	Rules
PO Number	Unique reference for the Purchase Order.	AUTO	`PO-2026-00001`	Generated automatically; read-only.
Warehouse	Which warehouse the goods go into; controls location matching.	YES	`Main Warehouse`	Must pick one from the list. Searchable.
Order Date	The date of the purchase order.	YES	`24/07/2026`	Defaults to today; any valid date allowed.
Import CSV File	The file containing your list of items.	YES	`july_order.csv`	CSV only; max 50 MB (see Section 5).
Notes	Any comments to store with the PO.	NO	`Restock – TYC brake pads`	Free text.

4.2 Columns inside the CSV file

#	Field	Purpose	Mandatory?	Example	Rules
1	**PRODUCT ID**	The part/product number.	YES	`11-6851-00`	Row is skipped if empty. Saved in UPPERCASE.
2	partslink	Partslink reference.	NO	`hy2805137`	Saved in UPPERCASE.
3	supplier_partnumber	Supplier's part number.	NO	`TY-6851`	Saved in UPPERCASE.
4	SUPPLIER	Supplier name/code.	NO*	`TYC`	Optional at upload; needed before commit (see Section 5).
5	QUANTITY	Units ordered.	NO	`2`	Blank or 0 becomes 1.
6	sublocation	Shelf/bin location code.	NO	`4.1 F`	Matched within the chosen warehouse; created if missing.
7	length	Item length.	NO	`10.5`	Number; blank allowed.
8	width	Item width.	NO	`8.2`	Number; blank allowed.
9	height	Item height.	NO	`4.3`	Number; blank allowed.
10	weight	Item weight.	NO	`2.5`	Number; blank allowed.

* SUPPLIER is not required to upload, but a valid supplier is required later before you can *Commit* the Purchase Order.

5. Validation Rules

5.1 Accepted file types

- CSV files only (`.csv` — comma-separated plain text).
- Excel files (`.xlsx`, `.xls`) are not accepted — save as CSV first.

5.2 File size limit

- Maximum file size: **50 MB**. Larger files are rejected.

5.3 Required columns and order

- The file is read **by column position**, not by heading name. Keep the ten columns in the order shown in Section 3.1 / 4.2.
- The first row is treated as a heading and ignored — always keep one heading row.
- **Column 1 (PRODUCT ID) must have a value** on every data row. Rows with an empty PRODUCT ID are silently skipped.

5.4 Mandatory fields (on screen)

- **Warehouse**, **Order Date**, and **Import CSV File** must all be filled in before the *Create* button will work.

5.5 Checks that happen later (before Commit)

Some checks only run when you press **Commit Purchase Order** on the review page:

- **Valid supplier codes.** Every item must map to a recognised supplier code. If any do not, WHIMS shows an "Invalid Supplier Codes" message listing the products, and blocks the commit.
- **Prices present.** Every non-return item must have a price greater than 0. If any are still 0, WHIMS shows a "Missing Prices" message listing the products, and blocks the commit. Use *Get Prices and Dimensions* to fill these in.

5.6 Common validation messages

Message	Meaning
"The Import CSV File field is required."	You pressed Create without attaching a file.
"The Warehouse field is required."	No warehouse was selected.
File will not attach / rejected	The file is not a CSV, or is bigger than 50 MB.
"Invalid Supplier Codes"	One or more items have a supplier that isn't recognised (checked at commit).
"Missing Prices"	One or more items still have a price of 0 (checked at commit).

5.7 How to correct validation errors

- **Wrong file type / too big:** re-save as CSV and/or split into smaller files.

- **Missing warehouse or date:** fill them in, then press Create again.
- **Invalid supplier:** correct the SUPPLIER value for the listed products (in the file, or by editing the draft), then commit again.
- **Missing prices:** click *Get Prices and Dimensions*, or type prices in manually and *Save Draft*, then commit again.

6. Common Errors and Solutions

Error message / symptom	Cause	Resolution
File will not attach in the Import CSV File box	File is not a CSV (e.g. an Excel `.xlsx`), or larger than 50 MB.	Open in Excel/Sheets → Save As → CSV (Comma delimited). Split very large lists into smaller files.
"The Import CSV File field is required."	Create was pressed before a file was attached.	Attach the CSV, confirm the file name shows, then press Create.
"The Warehouse field is required."	No warehouse selected.	Select the correct warehouse and press Create.
Fewer items appear than rows in my file	Rows with an empty PRODUCT ID (column 1) are skipped automatically.	Make sure every data row has a value in column 1, then re-upload.
Items landed in the wrong shelf/bin, or a new location appeared	The `sublocation` code didn't exist in the chosen warehouse, so it was created; or the wrong warehouse was selected.	Check you picked the right warehouse. Correct location codes in the file and re-upload if needed.
Quantities show as 1 when I expected more	Quantity was blank or 0 in the file, so it defaulted to 1.	Put the correct number in the QUANTITY column and re-upload.
Two lines for the same part merged into one	Duplicate PRODUCT ID + same location rows are combined and their quantities summed.	This is expected. Use different locations if they must stay separate.
All prices are 0 after upload	Prices are never read from the file — this is normal at upload.	On the View page click *Get Prices and Dimensions*, or enter prices manually before committing.
"Invalid Supplier Codes" when committing	One or more items' supplier is not a recognised code.	Fix the SUPPLIER value for the listed products, save, and commit again.
"Missing Prices" when committing	Some items still have a price of 0.	Fetch or enter prices for the listed products, save, and commit again.
"Error creating purchase order"	The file could not be read (e.g. corrupted or not really a CSV).	Re-open and re-save the file as CSV; check it opens correctly, then re-upload. Nothing was saved, so it is safe to retry.

7. Frequently Asked Questions (FAQ)

Q: Does uploading a file change my stock straight away?

A: No. Uploading only creates a **draft**. Stock changes only when you press *Commit Purchase Order* on the review page.

Q: Can I upload an Excel (.xlsx) file?

A: No. Only CSV files are accepted. In Excel choose *File → Save As → CSV (Comma delimited)* and upload the resulting `.csv`.

Q: Do the column headings have to be spelled exactly?

A: No — WHIMS reads columns by their **position**, not their names. What matters is that the ten columns are in the correct order. Keep one heading row at the top.

Q: Why do I have to leave prices out of the file?

A: Prices are not imported from the file. WHIMS fills them in afterwards from its own data when you click *Get Prices and Dimensions*, so your file stays simple.

Q: What is the biggest file I can upload?

A: 50 MB. If your list is larger, split it into several smaller CSV files.

Q: What happens if a row has no PRODUCT ID?

A: That row is skipped. Every item you want imported must have a value in column 1.

Q: What if the same part appears twice in my file?

A: If two rows have the same PRODUCT ID *and* the same location, WHIMS combines them and adds the quantities together.

Q: The location code in my file doesn't exist yet — is that a problem?

A: No. WHIMS will create that location automatically inside the warehouse you selected. Just make sure you chose the right warehouse.

Q: I made a mistake — can I undo it?

A: Before committing: just delete or re-create the draft. After committing: use *Rollback Purchase Order* and enter a reason, which reverses the stock changes.

Q: I can't see the Purchase Orders menu. What do I do?

A: Your account may not have access. Contact your WHIMS administrator.

8. Best Practices

- **Start from the sample file.** Copy `sample_purchase_order.csv` and replace the rows — the columns are already in the correct order.
- **Always keep the heading row** and never reorder the columns.
- **Fill in every PRODUCT ID.** Blank ones are dropped silently.
- **Double-check the warehouse** before pressing Create — it decides where items are stored.
- **Do not add a price column.** Prices are added later automatically.
- **Clean your data first:** remove stray blank rows and check quantities are real numbers.
- **Keep files reasonably sized.** Split very large lists to stay well under 50 MB.
- **Review before committing.** Check the item count and prices — committing changes live stock.
- **Press Create only once** and wait, to avoid duplicate Purchase Orders.
- **Keep a copy of your CSV** until the Purchase Order is committed, in case you need to re-upload.

> **GOLDEN RULE**
>
> Correct columns in the right order + right warehouse + review before commit = a smooth, error-free upload.

9. Summary & Quick Checklist

9.1 The process at a glance

1. **Prepare** your CSV (10 columns, correct order, PRODUCT ID filled in).
2. **Open** Operations → Purchase Orders → Create.
3. **Select** the Warehouse and check the Order Date.
4. **Attach** your CSV file and wait for the file name to show.
5. **Click Create** — WHIMS builds a draft Purchase Order.
6. **Review** the draft; click *Get Prices and Dimensions*.
7. **Commit** the Purchase Order to finalise it and update stock.

9.2 Pre-upload checklist

- [ ] File is saved as `.csv` and is under 50 MB.
- [ ] Ten columns are in the correct order, with one heading row.
- [ ] Every data row has a PRODUCT ID in column 1.
- [ ] Quantities are correct (blank/0 will become 1).
- [ ] No price column is included.
- [ ] I know which warehouse the goods belong to.

9.3 After-upload checklist

- [ ] I saw the green "Purchase Order Created" message.
- [ ] The item count matches my file.
- [ ] Prices were fetched (no items left at 0).
- [ ] Suppliers are valid for every item.
- [ ] I reviewed everything, then pressed *Commit Purchase Order*.

> **NEED HELP?**
> If you get stuck, note the exact message on screen and the file you used, and contact your WHIMS administrator or the [IT / Support contact]. Because uploads create a draft only, it is always safe to try again.

End of document · Purchase Order Upload — User Training Guide · Version 1.0 · 24 July 2026 · [Company Name]