

User Manual

Materials Control

Price Quote Export to MS Excel



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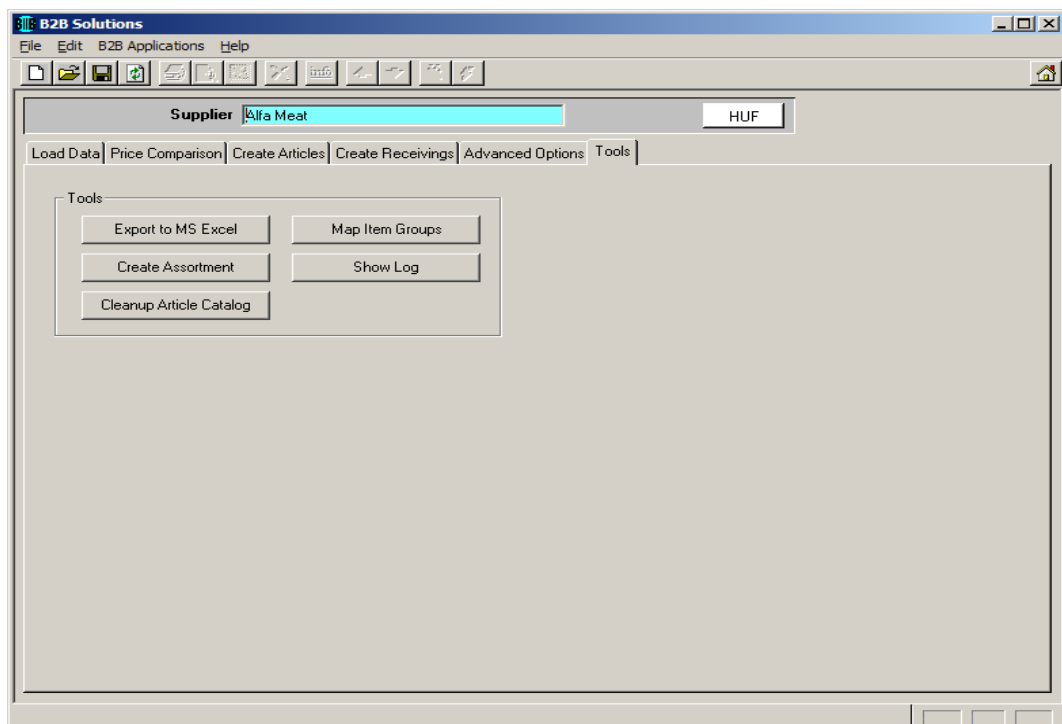
Introduction:

The price quote export / import module is an add on which can be used for information exchange with the supplier. It is the “small” version of a B2B interface. This will reduce the time for maintaining purchase prices without enabling the entire B2B IFC.

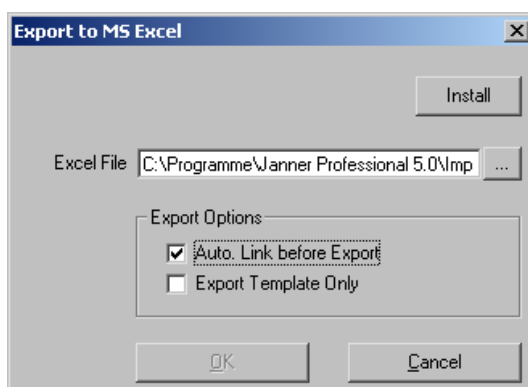
Workflow:

EXPORT OF PRICE QUOTES TO EXCEL:

To export the Price quotes to excel choose B2B Solutions from Purchasing Menu. Select Supplier and use tab “Tools”:



Klick on Export to MS Excel and the following Popup appears:



Select here the Path and file name for the export file and mark the “Auto. Link before export” Checkbox and confirm with OK.

The Excel Export is now available in the defined directoy and can be send to the Supplier. Supplier can fill out the “Price new” information and validation date for the price quote. The Validation date field in the Excel file need to be filled like your regional settings from Windows. (e.g. US 12/31/2004).

	A	B	C	D	E	F	G	H
	ID	Article Number	Article Name	Price new	Price old	Date from	Date to	Itemgroup
1								
2	99		Absolut Blue Vodka		3			
3	98		Absolut Blue Vodka		3			
4	97		Absolut Blue Vodka		3			
5	103		Absolut Citrom		3			
6	102		Absolut Citrom		3			
7	101		Absolut Citrom		3			
8	100		Absolut Citrom		3			
9	107		Absolut Kurrant		3			
10	106		Absolut Kurrant		3			
11	104		Absolut Mandarin		3			
12	105		Absolut Peppar Vodka		3			
13	45		Bärány comb, csontos		3			
14	43		Bärány comb, csontos, femur		3			
15	42		Bärány gerinc, helyi		3			
16	44		Bärány lábszár, csontos, fagyasztott		3			
17	46		Borkó egész		3			
18	35		Borkó Csont Húsos		3			
19	41		Borkó csontok, fagyasztott		3			
20	39		Borkó csülök, csontos		3			
21	34		Borkó karaj, csont nélkül		3			
22	40		Borkó lapocka		3			
23	38		Borkó máj		3			

IMPORT OF PRICE QUOTES FROM EXCEL:

To import the filled Excel File choose B2B Solution from Purchasing Menu. Choose the tab "Load Data", select Article Catalogue and set the path and filename to the Excel file and click on Button "Load".

The screenshot shows the 'B2B Solutions' application window. The 'Supplier' field is set to 'Alfa Meat' and the currency is 'HUF'. The 'Load Data' tab is active, and the 'Article Catalog' option is checked. Under 'Article Catalog', the 'Interface' is set to 'Excel file'. The 'Path' is 'D:' and the 'File(s)' is 'itest.xls'. There are checkboxes for 'Compare and update Prices' and 'Create new Articles/Price Quotes' under the 'After loading' section. The 'Delivery Notes' section is unchecked. At the bottom, there are 'Load' and 'Save Configuration' buttons.

Depending on if the supplier has filled the validation Date in the Excel file a date selection popup will appear where the valid date range can be entered for these price Quotes. If it is filled for all articles no Date selection Popup will come up.

	A	B	C	D	E	F	G
	Description	Created	User	Application	Valid from	Valid to	Supplier
2	Price Quotes (B2B)	27-10-2004	Admin	Materials Control	28.10.2004	29.10.2004	Alfa Meat
3							
4							
5							
6							
7							
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27							
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34							

If the Validation date is entered per item and not all lines are filled the Popup will appear and the entered date will be used for the not filled records in the Excel sheet

	A	B	C	D	E	F	G	H
	ID	Article Number	Article Name	Price new	Price old	Date from	Date to	Itemgroup
2	161		Absolut Chili	3	3	28.10.2004	29.10.2004	
3	160		Absolut Citrom	3	1	28.10.2004	29.10.2004	
4	159		Absolut Citrom	3				
5								
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Last option for validation date is to overwrite them, even if the supplier entered a date range. In the Advanced Options tab of B2B module you can set date range to override.

Now the new Price information and Validation date is read from the system and can be checked in the Price Comparison Tab. Here you get Information about existing Price quote and new price information from your supplier. With Accept Prices and save you can update your existing Price quotes. (see also B2B user Manual for this).

B2B Solutions

File Edit B2B Applications Help

Supplier: Alfa Meat HUF

Load Data Price Comparison Create Articles Create Receivings Advanced Options Tools

Sorted by Supplier;

Accept Prices Save

Sup. Article	Article	Artic	Unit	Sup. Unit	Sup.	Sup.	E/D	DPQ	Price/Unit	Sup. Pri	Sup. Valid from	Sup. Valid to	Sup. Disc	Discour	2nd Discount	2
Absolut Blue Vodka	Absolut Blue Vodka	Doboz 1.5l	Doboz 1.5l				<input checked="" type="checkbox"/>	<input type="checkbox"/>	3,000	4,000	22.10.2004	30.10.2004	0,00%	0,00%		
Absolut Blue Vodka	Absolut Blue Vodka	Úveg 0.5l	Úveg 0.5l				<input checked="" type="checkbox"/>	<input type="checkbox"/>	3,000	4,000	22.10.2004	30.10.2004	0,00%	0,00%		
Absolut Blue Vodka	Absolut Blue Vodka	Úveg 1.0l	Úveg 1.0l				<input checked="" type="checkbox"/>	<input type="checkbox"/>	3,000	4,000	22.10.2004	30.10.2004	0,00%	0,00%		
Absolut Citrom	Absolut Citrom	Kanna 1.6l	Kanna 1.6l				<input checked="" type="checkbox"/>	<input type="checkbox"/>	3,000	4,000	22.10.2004	30.10.2004	0,00%	0,00%		
Absolut Citrom	Absolut Citrom	Ballon 19l	Ballon 19l				<input checked="" type="checkbox"/>	<input type="checkbox"/>	3,000	4,000	22.10.2004	30.10.2004	0,00%	0,00%		
Absolut Citrom	Absolut Citrom	Úveg 0.33l	Úveg 0.33l				<input checked="" type="checkbox"/>	<input type="checkbox"/>	3,000	4,000	22.10.2004	30.10.2004	0,00%	0,00%		
Absolut Citrom	Absolut Citrom	Liter	Liter				<input checked="" type="checkbox"/>	<input type="checkbox"/>	3,000	4,000	22.10.2004	30.10.2004	0,00%	0,00%		
Absolut Kurrant	Absolut Kurrant	Kanna 10l	Kanna 10l				<input checked="" type="checkbox"/>	<input type="checkbox"/>	3,000	4,000	22.10.2004	30.10.2004	0,00%	0,00%		
Absolut Kurrant	Absolut Kurrant	Liter	Liter				<input checked="" type="checkbox"/>	<input type="checkbox"/>	3,000	4,000	22.10.2004	30.10.2004	0,00%	0,00%		
Absolut Mandarin	Absolut Mandarin	Liter	Liter				<input checked="" type="checkbox"/>	<input type="checkbox"/>	3,000	4,000	22.10.2004	30.10.2004	0,00%	0,00%		
Absolut Peppar Vodka	Absolut Peppar Vodka	Liter	Liter				<input checked="" type="checkbox"/>	<input type="checkbox"/>	3,000	4,000	22.10.2004	30.10.2004	0,00%	0,00%		
Bárános csontos	Bárános csontos	Kilogramm	Kilogramm				<input checked="" type="checkbox"/>	<input type="checkbox"/>	3,000	4,000	22.10.2004	30.10.2004	0,00%	0,00%		

Type	Sup. Article	Sup. Article No.	Listed	Sup. Price	Sup. Unit	Sup. QTY/BU	Sup. Unit	Sup. BU	Barcode
	MUG WHITE ABBEY	181320	<input type="checkbox"/>	4,000	Each		Each		
	MUG, 12OZ LOGO	179380	<input type="checkbox"/>	4,000	Each		Each		
	MUG, 12OZ LOGO	179380	<input type="checkbox"/>	4,000	Csomag 1000 db		Csomag 1000 db		

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Show all Articles Search Pattern