

VXL Template

Customer & Address Admin Ext

User Instruction

17/01/2023

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Version Control

Version	Date	Changed by	Comments
V1	12/14/22	N/A	N/A

1 Why VXL Templates?

In general, the purpose of a VXL template is to give our customers a good starting point in relation to data maintenance within a specific area in M3. A predefined VXL template can work for the customer exactly as it is but can also lack specific data or provide more data beyond what the customer maintains. The idea is that customers have the VXL template as a starting point and can themselves make the necessary small adjustments to make it perfect for their own needs.

2 What will it solve?

The purpose of this VXL template is to save time and cost on Customer & Address maintenance in M3.

3 How does it work?

This function has tasks for both export from M3 to Excel and Import from Excel back to M3.

Export from M3 to Excel

- You can export customer data from CRS610 in M3 to Excel, as well as export customers address data from OIS002 in M3 to Excel.

Import from Excel to M3

- You can add and update customer data from Excel to CRS610 in M3, as well as add, update and delete customers address data from Excel to OIS002 in M3.

4 Where can you find the VXL Template?

This template is installed in the Vince Template Company on the VXL server. The function is named "TEMPL_Customer_&_Address_Admin_Ext"

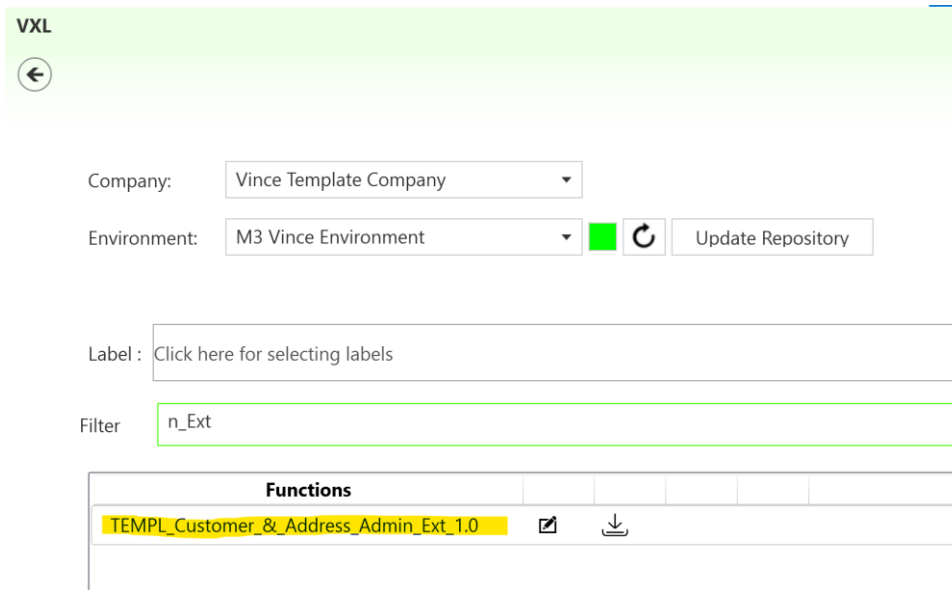
5 Recommendations

The template can be run and used as it is. If you want to make changes to the VXL template, we recommend that you copy the template to a new function and make your changes to this instead.

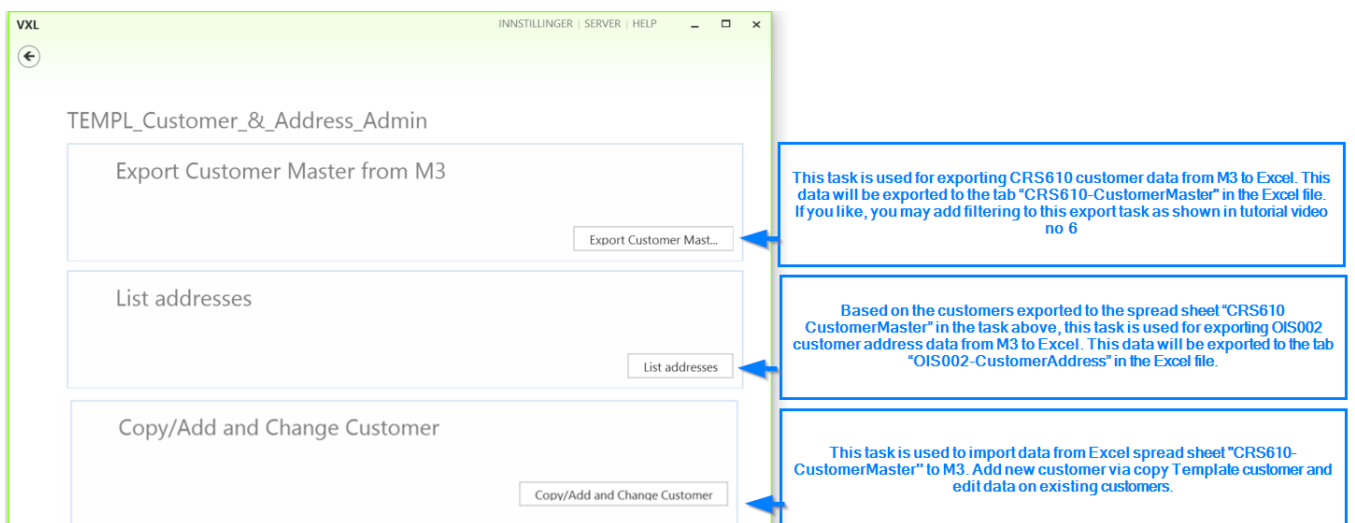
This VXL template has not been tested in depth by Vince so we recommend testing this thoroughly in the M3 test environment before this is lifted to the M3 production environment.

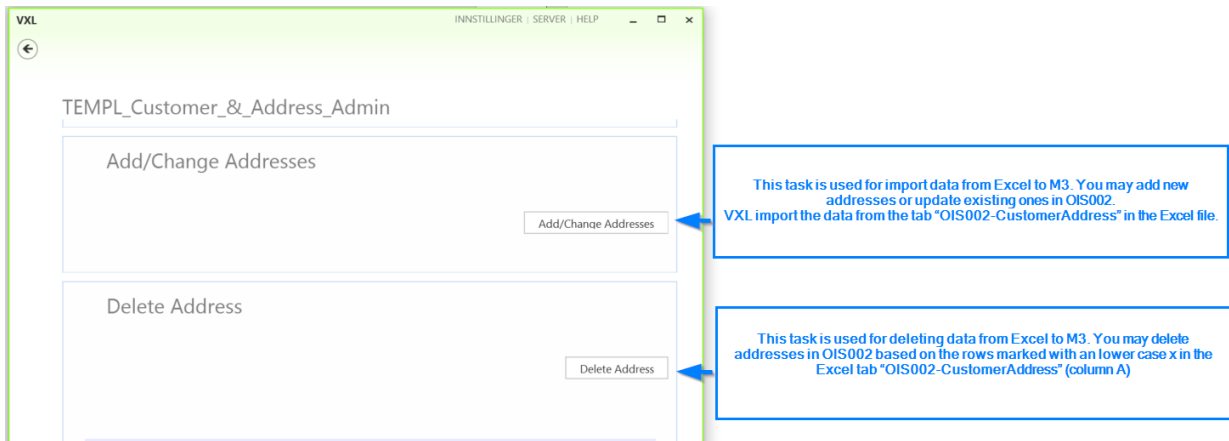
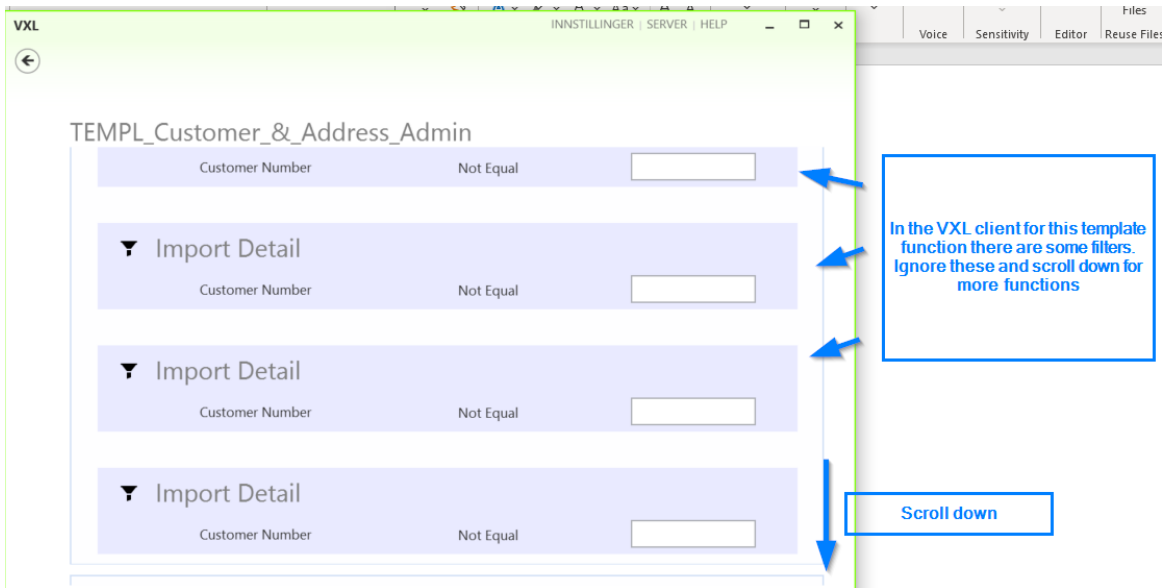
6 The VXL Client

In the VXL client you will find your new template "TEMPL_Customer_&_Address_Admin_Ext"



When you open the function as shown below, it contains various tasks for export and import.

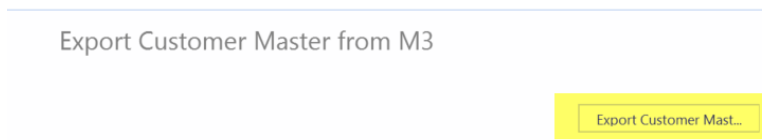




7 Example - How to run the VXL template

7.1 Export CRS610 Customer data from M3 to Excel

Click the button "Export Customer Master", give the Excel-file a name and store it.



The customers will be exported to the excel tab "CRS610- - CustomerMaster" as shown below.

The customer master contains many fields, in this Excel sheet a "grouping" with color is made to visualize what kind of customer data the column represents, as shown below.

Company	Division	Customer Template	Customer Number	Customer name	Customer status	Customer type	Language	Customer address 1	Customer address 2
CONO	DIVI	CUTM	CUNO	CUNM	STAT	CUTP	LNCD	CUA1	CUA2
600			PWN01	PWN Name	20	2	GB	PWN Address Line 1	Retail Head Office
600			PWN02	Retail Customer	20	2	GB	PWN2 Address Line 1	Retail Head Office
600			RKTEST123	Espen Johnsen d	20	0	GB	.宁波北仑江友机械有限	Customer 1 Address
600			SANB007	Espen Johnsen d	20	0	GB	Furulia 13131	Customer 1 Address

Organization number 1	Organization number 2	Currency	VAT code	VAT rate
CORG	COR2	CUCD	VTCD	VRNC
ORGY10001	ORG2Y10001	USD	0	
ORGY10001	ORG2Y10001	USD	0	
ORGY00001	ORG2Y00001	NOK	0	
ORGY00001	ORG2Y00001	NOK	0	

Customer order type	Service model	Charge model	Term of delivery	Delivery method	Warehouse
ORTP	EXCD	CHSY	TEDL	MODL	WHLO
M01			CIF	003	001
M01			CIF	003	001
A01			FOB	003	B01
A01			CIF	003	001
A01			CIF	003	001

Rental price list table	Rental discount model	Rental payment terms	Rental salesperson	Assignment
RPLT	RDIS	RTEP	RSMC	ASGN

Service manager	Technician	Service order type	Price list	SO F
SRES	TECH	SOTP	PRS1	SO F

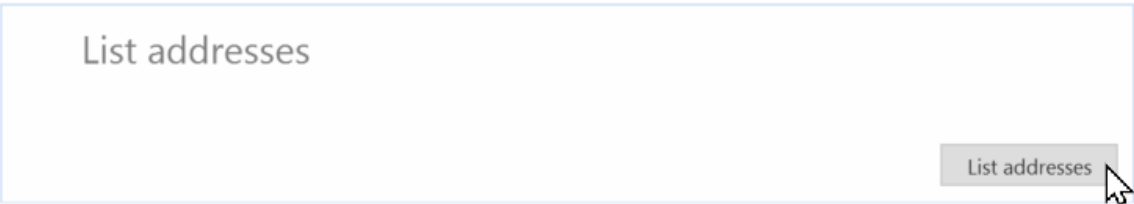
If you are only going to work with CRS610 customer data (and not customer address data), you may jump directly to chapter 7.3 below to learn how to import CRS610 customer data changes back to M3.

7.2 Export OIS002 customer address data from M3 to Excel

Run this task if you want to export and work with OIS002 customer addresses in Excel. It requires that you first have exported the customers to the tab "CRS610- CustomerMaster" and saved/closed the Excel file.

When running this task only the addresses from the customers in the tab "CRS610- CustomerMaster" will be exported to the excel tab "OIS002-CustomerAddress"

Click the button "List Addresses" and select the excel file you stored in chapter 7.1



The customer addresses will then be exported to the excel tab "OIS002-CustomerAddress" as shown below.

A screenshot of an Excel spreadsheet. The title bar reads "CRS610 / OIS002 Customer Master Address Update". The spreadsheet has columns for Company, Division, Customer number, Customer name, Address type, Address number, Customer address 1, Customer address 2, and Customer address 3. The data includes rows for Minneapolis and Rochester delivery addresses and address lines. The active tab is "OIS002-CustomerAddress".

	Company	Division	Customer number	Customer name	Address type	Address number	Customer address 1	Customer address 2	Customer address 3
107	600		MM023	Minneapolis Delivery Ad 1	MI1		Minneapolis Address Line 1	Minneapolis Address Line 2	Minneapolis MN ZIP
108	600		MM023	Rochester Delivery Addr 1	RO1		Rochester Address Line 1	Rochester Address Line 2	Rochester MN ZIP
109	600		MM023	St Paul Delivery Address 1	ST1		St Paul Address Line 1	St Paul Address Line 2	St Paul MN ZIP
110	600		MM024	Minneapolis Delivery Ad 1	MI1		Minneapolis Address Line 1	Minneapolis Address Line 2	Minneapolis MN ZIP
111	600		MM024	Rochester Delivery Addr 1	RO1		Rochester Address Line 1	Rochester Address Line 2	Rochester MN ZIP
112	600		MM024	St Paul Delivery Address 1	ST1		St Paul Address Line 1	St Paul Address Line 2	St Paul MN ZIP

7.3 Import updated and new customer data from Excel to M3

This task has two variants, update existing customers and adding new customers, they can be run at the same time/task.

Run this task if you want to import updated CRS610 customer data from the excel tab "CRS610- CustomerMaster".

In this template we have included many fields from CRS610. When updating existing customer any field from column F is possible to update back to M3. Keep in mind that every field has its normal M3 limitations when it comes to formatting rules (character, numeric, decimals, field length etc.). Some fields also requires that the value exists in a specific table in M3. All fields will automatically be validated by the API transactions. If there are any errors in the format you will get a message from the API, more about this later in this documentation.

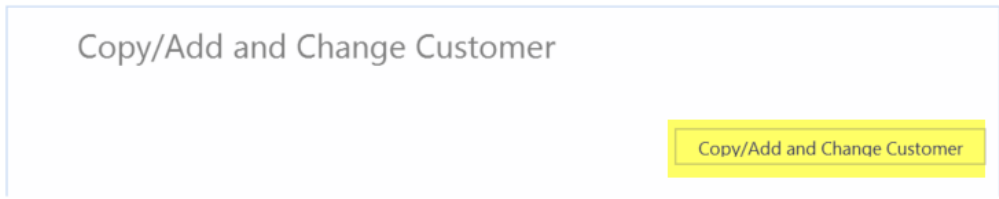
Company	Division	Customer Template	Customer Number	Customer name	Customer status	Customer type	Language	Customer address 1	Customer address 2	Customer address 3
CONO	DIVI	CUTM	CUNO	CUNM	STAT	CUTP	LNCD	CUA1	CUA2	CUA3
600			Y10008	Retail Customer Michigan Branch	20	0	GB	Retail Customer Michigan Branch	Retail Customer Michigan Branch	Detroit MI ZIP
600			Y30001	Agent / Commission Receiver	20	1	GB	Street/P.O. Box	Street/P.O. Box, County	St Paul MN ZIP
600			Y40001	Customer with Prio 1 & Address Check	20	0	GB	Customer 1 Address	Customer 1 Address	St Paul MN ZIP
600			Y40002	New Customer name	20	0	GB	Customer 1 Address	Customer 1 Address	St Paul MN ZIP
600			Y40003	Test Customer2	20	0	GB	Customer 1 Address	Customer 1 Address	St Paul MN ZIP
600			Y40004	Test Customer3	20	0	GB	Customer 1 Address	Customer 1 Address	St Paul MN ZIP
600			NEW12345	Retail Customer Midelfart	20	0	DK	Bakerstreet 4	Customer Address Line 2	Denmark ZIP
600			NEW12346	Retail Customer København	20	0	DK	Mainstreet 2	Customer Address Line 2	Denmark ZIP

If you like to import new customers from the Excel sheet to M3 you need to add the data for the new customer on a new row in the Excel sheet tab CRS610-CustomerMaster. NB! It is also required to enter a Customer Template number on this row in column D as shown here. NB! If the Customer template number has customer addresses in M3(OIS002) these will also be copied.

Company	Division	Customer Template	Customer Number	Customer name	Customer status	Customer type	Language	Customer address 1	Customer address 2	Customer address 3	Customer address 4	Postal code	City	County
CONO	DIVI	CUTM	CUNO	CUNM	STAT	CUTP	LNCD	CUA1	CUA2	CUA3	CUA4	PCNO	TOWN	FRCO
600			Y10008	Retail Customer Michigan Branch	20	0	GB	Retail Customer Michigan Branch	Customer Michigan Branch Address Line 2	Detroit MI ZIP		United States	ZIP	Detroit
600			Y30001	Agent / Commission Receiver	20	1	GB	Street/P.O. Box	Street/P.O. Box, County	St Paul MN ZIP		United States	ZIP	St Paul
600			Y40001	Customer with Prio 1 & Address Check	20	0	GB	Changed this Address	Customer 1 Address Line 1	St Paul MN ZIP		United States	ZIP	St Paul
600			Y40002	New Customer name	20	0	GB	Customer 1 Address	Customer 1 Address Line 1	St Paul MN ZIP		United States	ZIP	St Paul
600			Y40003	Test Customer2	20	0	GB	Customer 1 Address	Customer 1 Address Line 1	St Paul MN ZIP		United States	ZIP	St Paul
600			Y40004	Test Customer3	20	0	GB	Customer 1 Address	Customer 1 Address Line 1	St Paul MN ZIP		United States	ZIP	St Paul
600			Y10008	NEW12345	20	0	DK	Bakerstreet 4	Customer Address Line 2			Denmark	ZIP	Midelfart
600			Y10008	NEW12346	20	0	DK	Mainstreet 2	Customer Address Line 2			Denmark	ZIP	København

Now it's time to import the data to M3.

- Make sure that your edited Excel file is saved and closed.
- Click the button "Copy/Add and Change Customer" and select the edited excel file you want to import.



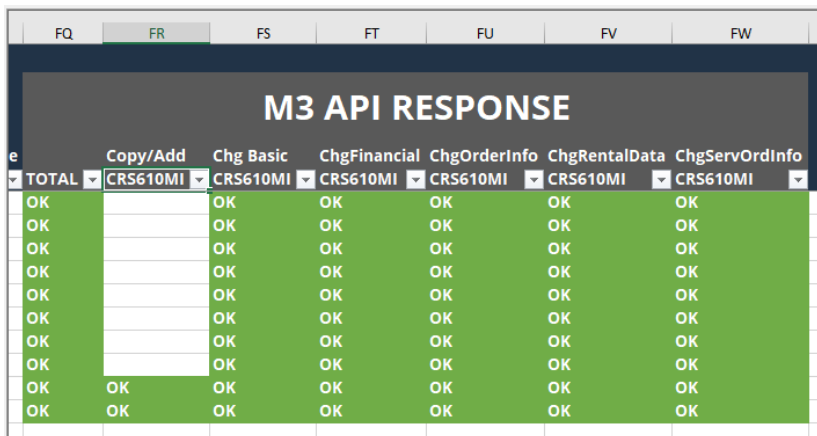
When the import is done the Excel file will open.

Scroll all the way to the right in the spreadsheet to look at the API responses.

As we see from the screen dump below:

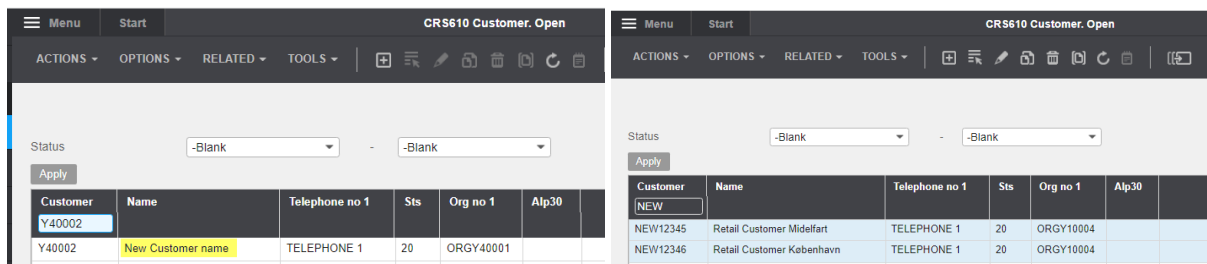
- Column FQ "Total" states that everything is OK.
- Column FR, "Copy/Add" has respons OK on the two last rows, they were the new customer lines added.

To maintain all customer data in CRS610 several API transactions are needed. You see the result of every API transaction in column FS-FW.



	FQ	FR	FS	FT	FU	FV	FW
	M3 API RESPONSE						
	Copy/Add	Chg Basic	ChgFinancial	ChgOrderInfo	ChgRentalData	ChgServOrdInfo	
	TOTAL	CRS610MI	CRS610MI	CRS610MI	CRS610MI	CRS610MI	CRS610MI
	OK		OK	OK	OK	OK	OK
	OK		OK	OK	OK	OK	OK
	OK		OK	OK	OK	OK	OK
	OK		OK	OK	OK	OK	OK
	OK		OK	OK	OK	OK	OK
	OK		OK	OK	OK	OK	OK
	OK		OK	OK	OK	OK	OK
	OK	OK	OK	OK	OK	OK	OK
	OK	OK	OK	OK	OK	OK	OK

If we check the data in M3 we see that customer Y40002 has got the new name and the two new customers are created.



Customer	Name	Telephone no 1	Sts	Org no 1	Alp30
Y40002	New Customer name	TELEPHONE 1	20	ORGY40001	

Customer	Name	Telephone no 1	Sts	Org no 1	Alp30
NEW					
NEW12345	Retail Customer Midelfart	TELEPHONE 1	20	ORGY10004	
NEW12346	Retail Customer Kabenhavn	TELEPHONE 1	20	ORGY10004	

7.4 Import updated and new customer addresses from Excel to M3

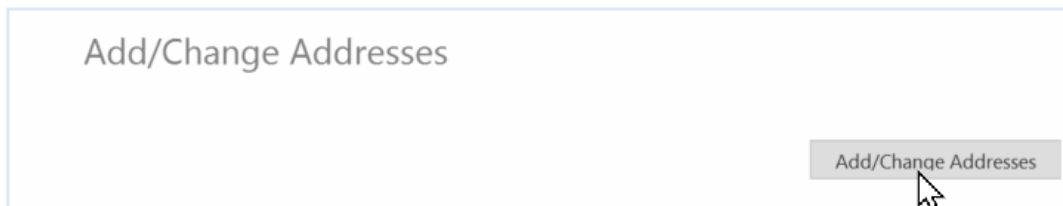
Run this task if you want to import (add and update) the changed OIS002 customer address data from the Excel tab "OIS002-CustomerAddress".

You can copy lines and edit relevant data. Both edit existing lines and adding new lines will work with the same task at the same time. Vince Excel will use the excel data and will trigger both update and add of these addresses in M3.

Company	Division	Customer number	Customer name	Address type	Address number	Customer address 1	Customer address 2	Customer address 3	Customer address 4
CONO	DIVI	CUNO	CUNM	ADRT	ADID	CUA1	CUA2	CUA3	CUA4
600		Y40004	Minneapolis Delivery Address	1	M11	Minneapolis Address Line 1	Minneapolis Address Line 2	Minneapolis MN ZIP	United States
600		Y40004	Rochester Delivery Address	1	R01	Rochester Address Line 1	Rochester Address Line 2	Rochester MN ZIP	United States
600		Y40004	St Paul Delivery Address	1	ST1	St Paul Address Line 1	CHANGE THIS FOR DEMO	ST Paul MN ZIP	United States
600		NEW12345	Retail Customer Midelfart	1	M1	Bakerstreet 4	Midelfart Address Line 2		Denmark
600		NEW12346	Retail Customer Kabenhavn	1	K1	Mainstreet 2	Kabenhavn Address Line 2		Denmark

Now it's time to import the data to M3.

- Make sure that your edited Excel file is saved and closed.
- Click the button "Add/Change Addresses" and select the edited excel file you want to import.



When the import is done the Excel file will open.

Scroll all the way to the right in the spreadsheet to look at the API responses.

As we see from the screen dump below:

- Column BD "Total" say that everything is OK.
- Column BE, "AddAddress" failed in some rows with an error message saying that the record already exists. This is not a problem since it is not possible to add a address that already exists in M3. The two last rows in column BE is OK since these are two new addresses which did not exist in M3 before.
- Column BF, "ChgAddress" is OK on the for the first rows which is existing addresses. The new addresses in the two last rows have not got any message since the AddAddress transaction is OK (rule set in the VXL configurator).
- Column BC got an OK when listing the existing addresses in earlier task.

M3 API Response							
Expand		AddAddress		ChgAddress		DeleteAddress	
▼ OIS002MI	▼ TOTAL	▼ CRS610MI		▼ CRS610MI	▼ CRS610		
OK	OK	NOK	Address number MI1 already exists	OK			
OK	OK	NOK	Address number RO1 already exists	OK			
OK	OK	NOK	Address number ST1 already exists	OK			
OK	OK	NOK	Address number MI1 already exists	OK			
OK	OK	NOK	Address number RO1 already exists	OK			
OK	OK	NOK	Address number ST1 already exists	OK			
OK	OK	NOK	Address number MI1 already exists	OK			
OK	OK	NOK	Address number RO1 already exists	OK			
OK	OK	NOK	Address number ST1 already exists	OK			
	OK	OK					
	OK	OK					

7.5 Delete customer addresses from Excel to M3

Run this task if you want to delete OIS002 customer address data in M3 from the excel tab "OIS002-CustomerAddress".

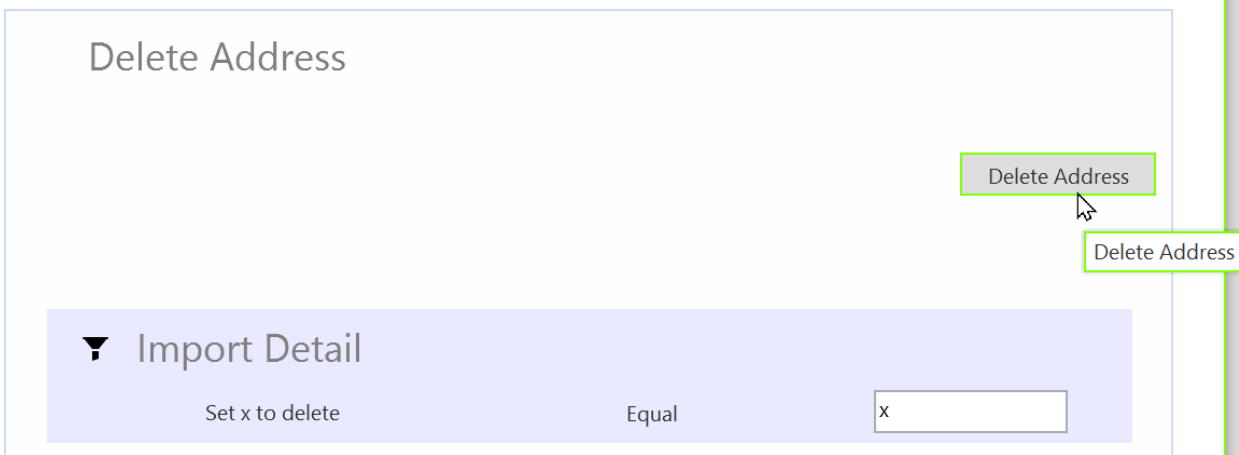
As you can see from the screen dump below, row number from 425 to 428 are marked with a lower case x in column A "Set x to delete"

By doing this, these two lines will be deleted in M3 when this Excel file is imported with the task "Delete Address".

vincē CRS610 / OIS002 Customer Master Address							
Set x to delete	Company	Division	Customer number	Customer name	Address type	Address number	Customer address 1
▼	▼ CONO	▼ DIVI	▼ CUNO	▼ CUNM	▼ ADRT	▼ ADID	▼ CUA1
419	600		Y40001	St Paul Delivery Address 1		ST1	St Paul Address Line 1
420	600		Y40002	Minneapolis Delivery Ad 1		MI1	Minneapolis Address Li
421	600		Y40002	Rochester Delivery Addr 1		RO1	Rochester Address Line
422	600		Y40002	St Paul Delivery Address 1		ST1	St Paul Address Line 1
423	600		Y40003	Minneapolis Delivery Ad 1		MI1	Minneapolis Address Li
424	600		Y40003	Rochester Delivery Addr 1		RO1	Rochester Address Line
425 x	600		Y40003	St Paul Delivery Address 1		ST1	St Paul Address Line 1
426 x	600		Y40004	Minneapolis Delivery Ad 1		MI1	Minneapolis Address Li
427 x	600		Y40004	Rochester Delivery Addr 1		RO1	Rochester Address Line
428 x	600		Y40004	St Paul Delivery Address 1		ST1	St Paul Address Line 1
429	600		Z00001	Template generic addre:1		Z01	Street
430							

Now it's time to delete these rows in M3.

- o Make sure that your "old" API responses are deleted in the Excel and that the Excel file is closed.
- o Click the button "Delete Address" and select the excel file you want to import.



When the delete is done the Excel file will open.

Scroll all the way to the right in the spread sheet to look at the API responses.

As we see from the screen dump below:

- o Column BD "Total" say that everything is OK for the four lines marked for deletion.
- o Column BG, "DeleteAddress" is also OK for the four rows marked for deletion which means that this deletion was successful.
- o The OK in column BC, Expand is from an earlier task "ListAddresses"

	AU	AV	BC	BD	BE	BF	BG
1	M3 API Response						
2							
3	County	Priority	Expand	AddAddress	ChgAddress	DeleteAddress	
4	TXCO	PRIO	OIS002MI	TOTAL	CRS610MI	CRS610MI	CRS610
419		0	OK				
420		0	OK				
421		0	OK				
422		0	OK				
423		0	OK				
424		0	OK				
425		0	OK	OK			OK
426		0	OK	OK			OK
427		0	OK	OK			OK
428		0	OK	OK			OK
429		0	OK				
430							