

VXL Template

OIS060 – Blanket Agreement Admin

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 OIS060 - Customer Blanket Agreement.

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 Blanket Agreement Lines from OIS061 from M3 to Excel, as well as export Blanket Agreement Line Prices from OIS062 in M3 to Excel.

Import from Excel to M3

- You can add, update and delete Blanket Agreement Line data from Excel to OIS061 in M3, as well as add, update and delete Blanket Agreement Line Prices from Excel to OIS062 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_OIS060_Customer_Blanket_Agr_Admin"

5 Recommendations

- If you have activated Superior Groups for you blanket agreement that allows you to maintain prices based on the selection fields and priority, you need to unhide the columns between D and H in the Excel template. Then start value field 1, 2 and 3 will be displayed.
- The template can be ran and used as it is but If you would like to do any changes to it we recommend that you copy it and do the changes on the copied function.
- 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_OIS060_Customer_Blanket_Agr_Admin"

VXL

←

Company:

Environment:

Label:

Filter:

Functions	
TEMPL_OIS060_Customer_Blanket_Agr_Admin_1.0	

6.1 Export and Import tasks

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

<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <p>Export Agreement Lines</p> <p>Customer number <input type="text"/> Blanket agreement number <input type="text"/></p> <p>From date <input type="text" value="Select a date"/> Priority <input type="text"/></p> <p style="text-align: right;"><input type="button" value="Export Agreement Lin..."/></p> </div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <p>Export Price Lines</p> <p style="text-align: right;"><input type="button" value="Export Price Lines"/></p> </div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <p>Add/Upd/Delete Agreement Lines</p> <p style="text-align: right;"><input type="button" value="Add/Upd/Delete Agreement Lines"/></p> <div style="background-color: #e0e0ff; padding: 5px; margin-top: 5px;"> <p>▼ Import Detail</p> <p>Set x to delete Equal <input type="text" value="x"/></p> </div> </div> <div style="border: 1px solid #ccc; padding: 5px;"> <p>Add/Upd/Delete Price Lines</p> <p style="text-align: right;"><input type="button" value="Add/Upd/Delete Price Lines"/></p> <div style="background-color: #e0e0ff; padding: 5px; margin-top: 5px;"> <p>▼ Import Detail</p> <p>Set x to delete Equal <input type="text" value="x"/></p> </div> </div>	<p>← This task is used for exporting OIS061 blanket line data from M3 to Excel. This data will be exported to the tab "AgreementLines" in the Excel file.</p> <p>← Based on the blanket agreement lines exported to the spreadsheet "AgreementLines" in the task above, this task is used for exporting OIS062 price line data from M3 to Excel. This data will be exported to the tab "Prices" in the Excel file.</p> <p>← This task is used for import data from Excel to M3. You may add new agreement lines, update existing agreement lines and delete agreement lines from Excel to OIS061 in M3. VXL import the data from the tab "AgreementLines" in the Excel file.</p> <p>← This task is used for import data from Excel to M3. You may add new agreement line prices, update existing agreement line prices and delete agreement line prices from Excel to OIS062 in M3. VXL import the data from the tab "Prices" in the Excel file.</p>
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7 Example - How to run the VXL template

7.1 Export OIS061 Blanket Agreement Line data from M3 to Excel

- o Mandatory - Enter Customer number in the field "Customer number"
- o Mandatory - Enter Blanket agreement number in the field "Blanket agreement number"
- o Mandatory - Enter the Blanket Agreement headers start date in the field "From date"
- o Only when using Superior Groups - Enter the Priority
- o Then click the button "Export Agreement Lines", give the Excel-file a name and store it.

Export Agreement Lines

Customer number

From date

Blanket agreement number

Priority

The Blanket Agreement Lines will then be exported to the excel tab "AgreementLines" as shown below.

Customer number	Agreement No	Item Number	Priority	Line Valid From	Line Valid To	Agreed prices	Sales price UoM	Customer	Price list	Supplier	Purchase agr no	Agreed qty	Minimum qty	Maximum qty	Normal call-off
VAB0001	0006	MM-ITM-001		3/5/2021	8/15/2021	1	EA					1000	10	1000	100
VAB0001	0006	MM-ITM-002		6/1/2021	8/15/2021	1	EA					0	0	0	0
VAB0001	0006	MM-ITM-003		6/1/2021	8/15/2021	1	EA					0	0	0	0

If you are only going to work with maintain OIS061 - Blanket Agreement Lines (and not OIS062 Line Prices), you may jump directly to chapter 7.3 below to learn how to import OIS061 Blanket Agreement Line data changes back to M3.

7.2 Export OIS062 Agreement Price Line data from M3 to Excel

Run this task if you want to export and work with Agreement Price Lines in Excel. It requires that you first have exported the Blanket agreement lines to the tab "AgreementLines" and saved/closed the excel file as described in chapter 7.1

When running this task only the prices from the agreement lines in the tab "AgreementLines" will be exported to the excel tab "Prices"

- o Click the button "Export Price Lines" and select the excel file you stored in chapter 7.1



The OIS062 price lines will then be exported to the excel tab "Prices" as shown below.

	A	B	C	D	H	I	J	K	L	M	N
1	 OIS060 - Customer Blanket Agreement Admin										
2	Agreement Type: CB1		Responsible: KINJAN		Customers Order no: 224477						
3	Description: TEST		Status: 20		Currency: USD						
4	Start date: 20210305		Valid to: 20211231		Agreed Quantity: 0.000000						
5											
6											
7											
8	Set x to delete	CUNO	AGNO	OBV1	PREX	STDT	QTYL	SAPR	SACD	DIPC	DIPR
9		Customer number	Agreement No	Item Number	Priority	Start Date	Lowest qty limit	Sales price	Sales price quantity	Discount	Discount Amount per unit
10		VAB0001	0006	MM-ITM-001		3/5/2021	1.00	20	0	0	0
11		VAB0001	0006	MM-ITM-001		3/5/2021	10.00	12	0	0	0
12		VAB0001	0006	MM-ITM-002		6/1/2021	1.00	20	10	0	0
13		VAB0001	0006	MM-ITM-002		6/1/2021	10.00	20	10	5	0
14		VAB0001	0006	MM-ITM-002		6/1/2021	100.00	20	10	14	0
15		VAB0001	0006	MM-ITM-003		6/1/2021	1.00	158	0	0	8
16		VAB0001	0006	MM-ITM-003		6/1/2021	10.00	158	0	0	10
17		VAB0001	0006	MM-ITM-003		6/1/2021	200.00	158	0	0	16
18											
19											

7.3 Import Upd, New and deleted OIS061 Agreement Lines from Excel to M3

Run this task if you want to import (add, update and delete) the changed OIS061 agreement line data from the excel tab "AgreementLines".

Before we do the import, we need to maintain our lines in Excel (ref export data from cap 7.1).

As you can see from the screen dump below, the row 9 has got updated "Minimum qty" and "Normal call-off". And row 7 is marked for deletion (x) in column A.

We have also added a couple of new lines in rows 13 and 14.

By doing this change to the excel data we will trigger both add, update and delete on these lines in M3.

CUSTOMER	AGREEMENT NO.	ITEM NUMBER	PRIORITY	LINE VALID FROM	LINE VALID TO	AGREED PRICES	SALES PRICE UoM	CUSTOMER	PRICE LIST	SUPPLIER	PURCHASE AGR NO.	AGREED QTY	MINIMUM QTY	MAXIMUM QTY	NORMAL CALL-OFF
VAB0001	0006	MM-ITM-001		6/1/2021	8/15/2021		1	EA				1000	10	1000	200
VAB0001	0006	MM-ITM-002		6/1/2021	8/15/2021		1	EA				0	0	0	0
VAB0004	0006	MM-ITM-003		6/1/2021	8/15/2021		1	EA				0	0	0	0
VAB0001	0006	MM-ITM-004		6/1/2021	8/15/2021		1	EA				2000	100	2000	500
VAB0001	0006	MM-ITM-005		6/1/2021	8/15/2021		1	EA				5000	100	2000	500

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/Upd/Delete Agreement Lines" and select the excel file you want to import.

Add/Upd/Delete Agreement Lines

Add/Upd/Delete Agreement Lines

Import Detail

Set x to delete Equal

When the import 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:

- Column AC "Total" say that everything is OK.
- Column AD, "UpdCustBlkAgrLn" failed in row 13 and 14 with an error message saying that the Agreement Line does not exists. This is not a problem since it is not possible to update an Agreement Line that does not exists in OIS061.
- The four rows from 9-12 is ok since this is lines which did exist in OIS061 before.
- Column AE, "AddCustBlkAgrLn" failed in rows 9 to 12 with an error message saying that the Agreement Lines already exists. This is not a problem since it is not possible to add an Agreement Line that already exist in OIS061.
- The two rows 13 and 14 is ok since this is lines which did not exist in OIS061 before.
- Column AF, "DelCustBlkAgrLn" is OK on row 6 that we marked for deletion.

AC	AD	AE	AF
RESPONSE			
	OIS060MI	OIS060MI	OIS060MI
TOTAL	UpdCustBlkAgrLn	AddCustBlkAgrLn	DelCustBlkAgrLn
OK	OK	NOK The record already exists	
OK	OK	NOK The record already exists	OK
OK	OK	NOK The record already exists	
OK	OK	NOK The record already exists	
OK	NOK Record does not	OK	
OK	NOK Record does not	OK	

If we check the data in M3 we see that the rows we updated ha got new data, the rows we added are in place and the row we deleted is gone from OIS061.

Item number	Str dt	U/M	Agreed qty	Remain c/o	Resrvd qty	Last	Min qty	Max qty	Normal cal
MM-ITM-001	210305	EA	1000.0000	1000.0000	0.0000		50.0000	1000.0000	200.0000
MM-ITM-002	210601	EA							
MM-ITM-003	210601	EA							
MM-ITM-004	210601	EA	2000	2000			100	2000	500
MM-ITM-005	210601	EA	5000	5000			100	2000	500

7.4 Import Upd, new and deleted OIS062 Price Lines from Excel to M3

Run this task if you want to import (add, update and delete) the changed OIS062 Price line data from the excel tab "Prices".

Before we do the import, we need to maintain our price lines in Excel (ref export data from cap 7.2).

As you can see from the screen dump below:

- Rows 10, 12 and 13 have been updated with a new "Discount" in Excel.
- Rows 14 and 15 have been updated with a new "Discount Amount per unit".
- Row 16 is marked for deletion (x) in column A.
- We have also added four new lines in row 17 to 20.

By doing this change to the excel data we will trigger both add, update and delete on these lines in M3.

Set x to delete	CUNO	AGNO	ORV1	PREX	STDT	QTYL	SAPR	SACD	DIPC	DIPR
	VAB0001	0006	MM-ITM-001		3/5/2021	1.00	20	0	0	
	VAB0001	0006	MM-ITM-001		3/5/2021	10.00	12	0	5	
	VAB0001	0006	MM-ITM-002		6/1/2021	1.00	20	10	0	
	VAB0001	0006	MM-ITM-002		6/1/2021	10.00	20	10	7	
	VAB0001	0006	MM-ITM-002		6/1/2021	100.00	20	10	16	
	VAB0001	0006	MM-ITM-003		6/1/2021	1.00	158	0	0	11
	VAB0001	0006	MM-ITM-003		6/1/2021	10.00	158	0	0	13
x	VAB0001	0006	MM-ITM-003		6/1/2021	200.00	158	0	0	16
	VAB0001	0006	MM-ITM-004		6/1/2021	10.00	158	0	11	
	VAB0001	0006	MM-ITM-004		6/1/2021	200.00	158	0	16	
	VAB0001	0006	MM-ITM-005		6/1/2021	10.00	158	0	0	23
	VAB0001	0006	MM-ITM-005		6/1/2021	200.00	158	0	0	35

If we check the data in OIS062 in M3 we see that the rows we updated ha got new data, the rows we added are in place and the row we deleted is gone from OIS062.

Customer: VAB0001 Janne Demo
 BI agreement no: 0006 TEST
 Line valid from: 210305
 Status: 20-Final
 Item number: MM-ITM-001 ITEM 01
 Net price used:
 Bonus gen: 2-Generat and pay
 Unit of measure: EA

Quantity	Price	Spqty	Disc	Disc/unit
1.0000	20.0000		0.00	
10.0000	12.0000		5.00	

Customer: VAB0001 Janne Demo
 BI agreement no: 0006 TEST
 Line valid from: 210601
 Status: 20-Final
 Item number: MM-ITM-002 Item 0014565456456456
 Net price used:
 Bonus gen: 2-Generat and pay
 Unit of measure: EA

Quantity	Price	Spqty	Disc	Disc/unit
1	20.0000	10	0.00	
10	20.0000	10	7.00	
100	20.0000	10	16.00	
			0.00	

Customer: VAB0001 Janne Demo
 BI agreement no: 0006 TEST
 Line valid from: 210601
 Status: 20-Final
 Item number: MM-ITM-004 Item 00145654564564564534asd65
 Net price used:
 Bonus gen: 2-Generat and pay
 Unit of measure: EA

Quantity	Price	Spqty	Disc	Disc/unit
10	158.0000		11.00	
200	158.0000		16.00	
			0.00	

Customer: VAB0001 Janne Demo
 BI agreement no: 0006 TEST
 Line valid from: 210601
 Status: 20-Final
 Item number: MM-ITM-005 ITEM 05
 Net price used:
 Bonus gen: 2-Generat and pay
 Unit of measure: EA

Quantity	Price	Spqty	Disc	Disc/unit
10	158.0000		0.00	23.0000
200	158.0000		0.00	35.0000
			0.00	