

# VXL Template

# OISO60 – Blanket Agreement Admin

User Instruction 17/01/2023

vince

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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 OISO60 - 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 OISO61 from M3 to Excel, as well as export Blanket Agreement Line Prices from OISO62 in M3 to Excel.

Import from Excel to M3

 You can add, update and delete Blanket Agreement Line data from Excel to OISO61 in M3, as well as add, update and delete Blanket Agreement Line Prices from Excel to OISO62 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\_OISO60\_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.	_01S060_	Customer.	_Blanket_	_Agr_Admin"
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Compar	ny:	Vince Template Company			
Environ	ment:	M3 Vince Environment	Ç	Update Repository	
Label :	Click he	re for selecting labels			
	ois				
Filter	015				
		Functions			
TEM	PL_OIS0	60_Customer_Blanket_Agr_Admin_1.0	Ľ	$\checkmark$	

# 6.1 Export and Import tasks

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

Export Agreement Lines	
Customer number     Blanket agreement number       From date     Select a date 15       Priority	This task is used for exporting OISO61 blanket line data from M3 to Excel. This data will be exported to the tab "AgrementLines" in the Excel file.
Export Price Lines	Based on the blanket agreement lines exported to the spread sheet "AgrementLines" in the task above, this task is used for exporting OISO62 price line data from M3 to Excel. This data will
Add/Upd/Delete Agreement Lines           Add/Upd/Delete Agreement Lines	<ul> <li>be exported to the tab "Prices" in the Excel file.</li> <li>This task is used for import data from Excel to M3. You may add ne agreement lines, update existing agreement lines and delete</li> </ul>
▼ Import Detail Set x to delete Equal X	agreement lines from Excel to OISO61 in M3. VXL import the data from the tab"AgreementLines" in the Excel file
Add/Upd/Delete Price Lines           Add/Upd/Delete Price Lines	This task is used for import data from Excel to M3. You may add new agreement line prices, update existing agreement line price and delete agreement line prices from Excel to OISO62 in M3.
Import Detail     Set x to delete Equal     X	VXL import the data from the tab "Prices" in the Excel file.

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#### 7 Example - How to run the VXL template

#### 7.1 Export OISO61 Blanket Agreement Line data from M3 to Excel

- Mandatory Enter Customer number in the field "Customer number"
- 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
- Then click the button "Export Agreement Lines", give the Excel-file a name and store it.

Export Agree	ment Lines		
Customer number	VAB0001	Blanket agreement number	0006
From date	3/5/2021	Priority	
			Export Agreement Lin

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

1	A	В	С	D	Н	1	J	К	L	M	N	0	P	Q	R	S	T
1	🔽 vir	nce	OIS060 - Cu	stomer Blanl	ket Agreement	Admin											
3	Agreement Type:		Responsible:	KINJAN	Customers Order no	: 224477											
4	Description:		Status:		Currency:												
5	Start date:	20210305	Valid to:		Agreed Quantity:	0.000000											
6																	
7																	NAQT
8	Set x to delete	Customer number	Agreement No	Item Number	Priority	Line Valid From	Line Valid To	<ul> <li>Agreed prices</li> </ul>	Sales price UoM 🔫	Customer -	Price list	Supplier	Purchase agr no	Agreed qty 🔫	Minimum qty 💌	Maximum qty 💌 I	Normal call-off 🔫
9		VAB0001	0006	MM-ITM-001		3/5/2021	8/15/2021	1	1 EA					1000	10	1000	100
10		VAB0001	0006	MM-ITM-001		6/1/2021	8/15/2021	1	1 EA					1000	10	1000	200
11		VAB0001	0006	MM-ITM-002		6/1/2021	8/15/2021	1	1 EA					0	0	0	0
12		VAB0001	0006	MM-ITM-003		6/1/2021	8/15/2021	1	1 EA					0	0	0	0
13																	

If you are only going to work with maintain OISO61 - Blanket Agreement Lines (and not OISO62 Line Prices), you may jump directly to chapter 7.3 below to learn how to import OISO61 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"

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

Export Price Lines	
	Export Price Lines
	Export Price Lines

The OISO62 price lines will then be exported to the excel tab "Prices" as shown below.

	А	В	С	D	Н	1	J	К	L	M	N
1	🚺 Vir	nce	OIS060 - Cı	istomer Blanke	et Agreement A	dmin					
3	Agreement Type:	CB1	Responsible:	KINJAN	Customers Order no	: 224477					
4	Description:	TEST	Status:	20	Currency:	USD					
5	Start date:	20210305	Valid to:	20211231	Agreed Quantity:	0.000000					
6											
7								SAPR		DIPC	DIPR
8	Set x to delete	<ul> <li>Customer number</li> </ul>	<ul> <li>Agreement No</li> </ul>	Item Number	Priority Y	Start Date 👻	Lowest qty limit 💌	Sales price 💌	Sales price quantity	Discount	Discount Amount per unit 💌
9		VAB0001	0006	MM-ITM-001		3/5/2021	1.00	20		0 (	0 0
10		VAB0001	0006	MM-ITM-001		3/5/2021	10.00	12		0 (	0 0
11		VAB0001	0006	MM-ITM-002		6/1/2021	1.00	20	1	0 (	0 0
12		VAB0001	0006	MM-ITM-002		6/1/2021	10.00	20	1	0 5	5 0
13		VAB0001	0006	MM-ITM-002		6/1/2021	100.00	20	1	0 14	4 0
14		VAB0001	0006	MM-ITM-003		6/1/2021	1.00	158		0 (	) 8
15		VAB0001	0006	MM-ITM-003		6/1/2021	10.00	158		0 (	0 10
16		VAB0001	0006	MM-ITM-003		6/1/2021	200.00	158		0 (	) 16
17											
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 OISO61 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.

1	А	В	С	D	н	1	J	к	L	м	N	0	Р	Q	R	S	T
1	🔽 vi	nce	OIS060 - Cu	stomer Blan	ket Agreement	Admin											
3	Agreement Type		Responsible:	KINJAN	Customers Order no	224477											
4	Description:		Status:		Currency:												
5	Start date:	20210305	Valid to:		Agreed Quantity:	0.000000											
6																	
7																	NAGT
8	Ste also delette	< Customer number 💌	Agreement No 👻	Item Number	Priority	Line Valid From	Line Valid To	<ul> <li>Agreed prices</li> </ul>	<ul> <li>Sales price UoM</li> </ul>	- Customer	· Price list	Supplier	<ul> <li>Purchase agr n</li> </ul>	Agreed qty -	Minimum qty 💌	Maximum qty 🔫	Normal call-off
9	0	VAB0001	0006	MM-ITM-001		3/5/2021	8/15/2021		1 EA					1000	50	1000	200
10	>(x)	VAB0001	0006	MM-ITM-001		6/1/2021	8/15/2021		1 EA					1000	10	1000	200
11	-10	VAB0001	0006	MM-ITM-002		6/1/2021	8/15/2021		1 EA					0	0	0	0
12		VAB0001	0006	MM-ITM-003		6/1/2021	8/15/2021		1 EA					0	0	0	0
13		VAB0001	0006	MM-ITM-004		6/1/2021	8/15/2021		1 EA					2000	100	2000	500
14		VAB0001	0006	MM-ITM-005		6/1/2021	8/15/2021		1 EA					5000	100	2000	500
15				And the Contraction of the		10.007.00.050									1000		

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 Agreem	ent Lines	
		Add/Upd/Delete Agreement Lines
▼ Import Detail		
Set x to delete	Equal	x

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:

- o 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 OISO61.
- The four rows from 9-12 is ok since this is lines which did exist in OISO61 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 OISO61.
- The two rows 13 and 14 is ok since this is lines which did not exist in OISO61 before.
- o Column AF, "DelCustBlkAgrLn" is OK on row 6 that we marked for deletion.

AC	AD		AE	AF
			RESPONSE	
	OISO60MI	OISOGOM	1	OISOGOMI
_			·	
TOTAL	UpdCustBlkAgrLn	AddCust	' BlkAgrLn	DelCustBlkAgrLn
TOTAL ) <mark>OK</mark>	UpdCustBlkAgrLn OK	AddCustE	BlkAgrLn The record already exists	DelCustBlkAgrLn
TOTAL ) OK ) OK	✓ UpdCustBlkAgrLn OK OK	AddCuste NOK NOK	BlkAgrLn The record already exists The record already exists	DelCustBlkAgrLn
TOTAL ) OK ) OK ) OK	✓ UpdCustBlkAgrLn OK OK OK	AddCust NOK NOK NOK	BlkAgrLn The record already exists The record already exists The record already exists The record already exists	OElCustBlkAgrLn ▼
TOTAL ) OK ) OK ) OK ) OK	✓ UpdCustBlkAgrLn OK OK OK OK OK	AddCuste NOK NOK NOK NOK	BlkAgrLn The record already exists The record already exists The record already exists The record already exists The record already exists	OElCustBlkAgrLn
TOTAL ) OK ) OK ) OK ) OK ) OK	▼ UpdCustBlkAgrLn OK OK OK OK OK NOK Record doe	AddCuste NOK NOK NOK NOK es not OK	BlkAgrLn The record already exists The record already exists The record already exists The record already exists	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 OISO61.

🗮 Menu	Start		OIS061 Cust Blanket Agreement. Open Lines							×					
ACTIONS -	OPTION	S <del>-</del>	RELATE	о 👻 тоо	LS 🗕	🕀		ø	හ ම	(0)	¢	ë	(1)		
Customer			VAB0001	Þ	Janne D	)emo									
BI agreement r	าด		0006	•	TEST										
Valid from			210305 📋			Valid to						211231	211231 📋		
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> MM-ITM-0	01 2	10305	EA	1000.0	000	1000.0	000		0.0000			50.0000	1000.0000	200.0000	
> MM-ITM-0	02 2	10601	EA												
> MM-ITM-0	03 2	10601	EA												
> MM-ITM-0	04 2	10601	EA	2	000	2	2000					100	2000	500	
> MM-ITM-0	05 2	10601	EA	5	000	5	000					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 OISO62 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:

- o Rows 10, 12 and 13 have been updated with a new "Discount" in Excel.
- o 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.

1	А	В	С	D	н	I.	J	к	L	М	Ν
1	vir 🔰	nce	OIS060 - Cu	stomer Blanke	t Agreement /	Admin					
3	Agreement Type:	CB1	Responsible:	KINJAN	Customers Order n	o: 224477					
4	Description:	TEST	Status:	20	Currency:	USD					
5	Start date:	20210305	Valid to:	20211231	Agreed Quantity:	0.000000					
6											
7			AGNO					SAPR	SACD		
8	Set x to delete	Customer number	Agreement No	🕆 Item Number 🛛 👻	Priority	<ul> <li>Start Date</li> </ul>	Lowest qty limit 🔻	Sales price 🔻 S	ales price quantity 🔽	Discount 🔻	Discount Amount per unit 👱
9		VAB0001	0006	MM-ITM-001		3/5/2021	1.00	20	0	0	
10		VAB0001	0006	MM-ITM-001		3/5/2021	10.00	12	0	5	
11		VAB0001	0006	MM-ITM-002		6/1/2021	1.00	20	10	0	
12		VAB0001	0006	MM-ITM-002		6/1/2021	10.00	20	10	7	
13	N	VAB0001	0006	MM-ITM-002		6/1/2021	100.00	20	10	<mark>16</mark>	
14	N.	VAB0001	0006	MM-ITM-003		6/1/2021	1.00	158	0		1
15	7	VAB0001	0006	MM-ITM-003		6/1/2021	10.00	158	0		1:
16	U,	VAB0001	0006	MM-ITM-003		6/1/2021	200.00	158	0		10
17	/	VAB0001	0006	MM-ITM-004		6/1/2021	10.00	158	0	11	
18		VAB0001	0006	MM-ITM-004		6/1/2021	200.00	158	0	16	
19		VAB0001	0006	MM-ITM-005		6/1/2021	10.00	158	0		23
20		VAB0001	0006	MM-ITM-005		6/1/2021	200.00	158	0		3
21	· · · · ·										
22											



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

- Make sure that your Excel file is saved and closed.
- Click the button "Add/Upd/Delete Price Lines" and select the excel file you want to import.

Add/Upd/Delete Price Lir	nes	
		Add/Upd/Delete Price Lines
▼ Import Detail		
Set x to delete	Equal	x

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 Z "Total" say that everything is OK.
- Column AA, "UpdAgrLnPrice" failed in rows 17 to 20 with an error message saying that the Record does not exists. This is not a problem since it is not possible to update a price line that does not exists in OISO62.
- The four rows from 9-16 is ok since this is lines which did exist in OISO61 before.
- Column AB, "AddAgrLnPrice" shows nothing in rows 9 to 12. This is not a problem since this is a rule we have set in VXL that this API shall not run if the UpdAgrLnPrice API ran successfully.
- The four rows 17 to 20 is OK since this is lines which did not exist in OISO62 before and was now added.
- Column AD, "DelAgrLnPrice" is OK on row 16 that we marked for deletion.



If we check the data in OISO62 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 OISO62.

ACTIONS - O	PTIONS -	RELATED - T	00LS -	± = /	0 0	
Customer		VAB0001	Janne Demo	)		
BI agreement no		0006	TEST			
Line valid from		210305 🛗			L	in
Status		20-Final	*			
Item number	1	MM-ITM-001	ITE	M 01		
Net price used					C	u
Bonus gen		2-Generat and pa	ay 💌		C	0
Unit of measure		EA			S	al
Quantity	Price	Spqty	Disc	Disc/unit		
1.0000	20.0000		0.00			
10.0000	12.0000		5.00			
		The late of the la	10020		رن م	
Customer		VAB0001	Janne De	emo		
BI agreement no		0006	TEST			
Line valid from		210601 📋				Line valid t
Status		20-Final	*			
Item number		MM-ITM-004	i	tem 0014565	456456456	4534asd65
Net price used						Currency
Bonus gen		2-Generat and	pay 💌			Commis ge
Unit of measure		EA				Sales price
Quantity	Price	e Spqty	Disc	Disc/	unit	
10	158.000	0	11.00			
200	158.000	0	16.00			
			0.00			

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BI agreement n	0	0006	TEST	
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Status		20-Final	*	
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Net price used				
Bonus gen		2-Generat and	pay 👻	
Unit of measure	3	EA		
Quantit	y Price	Spqty	Disc	Disc/unit
	1 20.0000	10	0.00	
	0 20.0000	10	7.00	
1	20.0000			
1	0 20.0000	10	16.00	

Customer		VABUUUT	Jaime	Del	10	
BI agreement no		0006	TEST			
Line valid from		210601 📋				Lin
Status		20-Final		Ŧ		
Item number		MM-ITM-005	5	IT	EM 05	
Net price used						Cu
Bonus gen		2-Generat a	ind pay	•		Co
Unit of measure		EA				Sa
Quantity	Price	Spqt	ty Dis	ic	Disc/unit	
10	158.0000		0.0	00	23.0000	
200	158.0000		0.0	0	35.0000	
			0.0	00		