

# VXL Template

## Purchase 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 purchase agreement 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 PPS101 – Agreement Lines from M3 to Excel

Import from Excel to M3

- You can import agreement line data from Excel back to PPS101 Lines in M3.
  - Import updated agreement lines from Excel to M3
  - Import new agreement lines from Excel to M3
- It does not matter if the data you import is modified data from the export, or if you enter the data manually into the Excel sheet before the import.

## 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\_Purchase\_Agreement\_Admin"

## 5 Recommendations


- The template can be ran and used as it is but the PPS100 – Purchase Price program handles maintenance of prices per Group Id and it has four start value fields (OBV1, OBV2, OBV3 and OBV4) which can represent different data depending on the setup made in the CRS746 Purchase Agreement selection fields.  
For example, if you maintain agreement lines at Item level, then you have a Group Id that only uses field OBV1 for Item numbers, and therefore has no need to use or display the other fields (OBV2, OBV3 or OBV4) in the Excel sheet.  
This means that one should edit the Excel Template in this function so that the field OBV1 is named as "Item number" in excel to make the user experience better for the end user.

- If you would like to do any changes to the template 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\_Purchase\_Agreement\_Admin"

Company:

Environment:  

Label:

Filter:

Functions			
TEMPL_Purchase_Agreement_Admin_1.0			

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

### 6.1 Export and Import Tasks

The VXL function contains the following tasks for export/import between M3 and Excel

**Export to Excel**

Supplier number  ... Agreement number

← This task is used for exporting PPS101 - Agreement Lines data from M3 to Excel.

**Add/Update Agreement Lines**

← This task is used for importing PPS101 - Agreement Lines data from Excel to M3. You may add new agreement lines or update existing agreement lines in PPS101.

## 7 Example - How to run the VXL template

### 7.1 Export PPS101 – Agreement Line data from M3 to Excel

- Enter the Supplier id in the field "Supplier number". This field is mandatory.
- Enter the Agreement no in the field "Agreement number". This field is mandatory.
- Then click the button "Export to Excel", give the Excel-file a name and store it.

### Export to Excel

Supplier number  ... Agreement number

The agreement lines will then be exported to the excel file as shown below.

Notice that columns A, B, C and D have column names "Start value 1, 2, 3 and 4".

Also notice that in this case the Start Value 1 represents the Item number because this is how the Group id 20 (column I) is set up.,

The next chapter 7.2 describes how change and work with the exported data in Excel and how to import it back to M3.

Start value 1	Start value 2	Start value 3	Start value 4	Item description	Group id	Valid from	Valid to	Status agreement line	Current Purchase price	Currency	Purchase price quantity	New Purchase Price
MTT-ITM-01				High Definition Colorbase 1 Z1	20	1/1/2020	20		270.6 USD		0	
MTT-ITM-02				High Definition Colorbase 2 Z2	20	1/1/2020	20		270.6 USD		0	
MTT-ITM-03				High Definition Colorbase 3 Z3	20	1/1/2020	20		270.6 USD		0	
MTT-ITM-04				Med Definition Colorbase 1 M1	20	1/1/2020	20		270.6 USD		0	
MTT-ITM-05				Med Definition Colorbase 2 M2	20	1/1/2020	20		270.6 USD		0	

## 7.2 Import agreement line data from Excel to M3

Run this task if you want to import (add and update) the maintained agreement line data from Excel to M3. We have done the following changes to the data from the export in chapter 7.1:

- In Column AD, "New Purchase Price", we have raised the price on all the existing price lines with 20 % by using a formula in excel referring to the existing line prices in column K. Example:  $=K11*1.2$  for row 11 and then copied this for row 12, 13, 14 and 15.
- We have also added a couple of new agreement lines (rows 16 and 17) and added a manual price for these two in column AD.

By doing this change to the excel data, we will trigger both Update (rows 11 to 15) on existing agreement lines, and Add (row 16 and 17) of new agreement lines in M3.

OBV1	OBV2	OBV3	OBV4	ITDS	GRPI	FVDT	UVDT	SAGL	PUPR	CUCD	PUCD	PUPR
Start value 1	Start value 2	Start value 3	Start value 4	Item description	Group Id	Valid from	Valid to	Status agreement line	Current Purchase price	Currency	Purchase price quantity	New Purchase Price
MTT-ITM-01				High Definition Colorbase 1 Z1	20	1/1/2020	20		270.6 USD	0		324.72
MTT-ITM-02				High Definition Colorbase 2 Z2	20	1/1/2020	20		270.6 USD	0		324.72
MTT-ITM-03				High Definition Colorbase 3 Z3	20	1/1/2020	20		270.6 USD	0		324.72
MTT-ITM-04				Med Definition Colorbase 1 M1	20	1/1/2020	20		270.6 USD	0		324.72
MTT-ITM-05				Med Definition Colorbase 2 M2	20	1/1/2020	20		270.6 USD	0		324.72
MTT-ITM-06					20	1/1/2020	20					1000
MTT-ITM-07					20	1/1/2020	20					2000

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

Add/Update Agreement Lines

Add/Update Agreement Lines

When the import is done the Excel file will automatically 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 AJ "Total" say that everything is OK.
- Column AK, "AddAgrLine" failed in row 11 to 15 with an error message.. This is not a problem since it is not possible to add agreement lines that already exists in M3, so this is correct.
- The rows 16 and 17 in column AK is OK since this is two new agreement lines did not exist in M3 before.
- The Column AL (UpdAgrLine) is ok on all the existing lines (11-15), but has no response for the new price lines (16-17) since a rule in the configurator is set not to run this API if the AddAgrLine transaction is OK.

	AJ	AK	AL
	<b>RESPONSE</b>		
	TOTAL	PPS100MI AddAgrLine	PPS100MI UpdAgrLine
24.72	OK	NOK A record has been entered by user NILPAL0	OK
24.72	OK	NOK A record has been entered by user NILPAL0	OK
24.72	OK	NOK A record has been entered by user NILPAL0	OK
24.72	OK	NOK A record has been entered by user NILPAL0	OK
24.72	OK	NOK A record has been entered by user NILPAL0	OK
1000	OK	OK	
2000	OK	OK	

If we check the data in M3 we see that the existing lines have been updated and we also have two new lines imported.

Agreement no	VIN-AGR	Supplier Agreement Prices					
Supplier	MTT-001	Paint factories Inc.					
Group ID	20 Item	Purch price dt					
Valid from	200101	Agreement prio					
Currency	USD	50					
<input type="button" value="Apply"/>							
Item number	Str dt	Purch price	Prqty	Setup price	Disc 3	Agreed qty	Purch qty
	200101						
MTT-ITM-01	200101	324.72		0.00			6
MTT-ITM-02	200101	324.72		0.00			14
MTT-ITM-03	200101	324.72		0.00			15
MTT-ITM-04	200101	324.72		0.00			12
MTT-ITM-05	200101	324.72		0.00			13369
MTT-ITM-06	200101	1000.00		0.00		0.00	0.00
MTT-ITM-07	200101	2000.00		0.00			