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VXL Template

Supplier & Address Admin

User Instruction

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Table of Content

Version Control

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

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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 Supplier & 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
- o You can export supplier data from CRS620/CRS624 from M3 to Excel, as well as export suppliers' address data from CRS622 in M3 to Excel.

Import from Excel to M3
- o You can add and update supplier data from Excel to CRS620/CRS624 in M3, as well as add, update and delete suppliers' address data from Excel to CRS622 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_Supplier_&_Address_Admin"
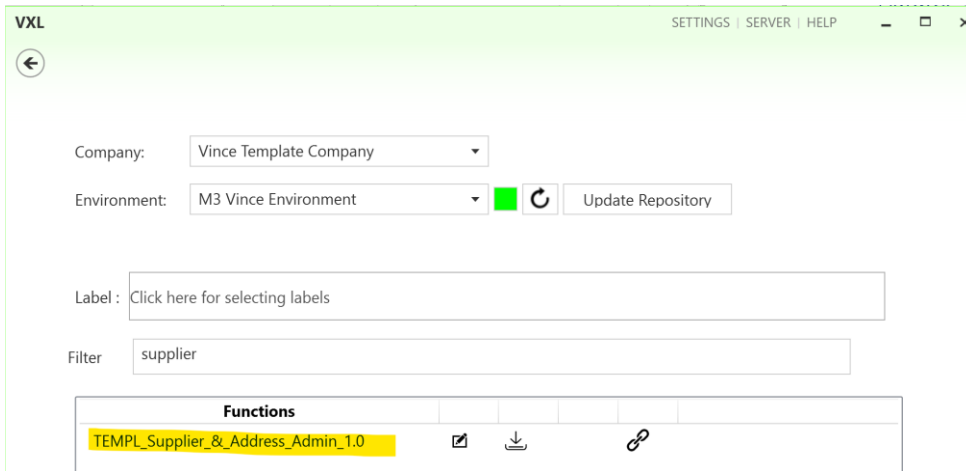
5 Recommendations

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.

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6 The VXL Client

In the VXL client you will find your new template **"TEMPL_Supplier_&_Address_Admin"**

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

Export Suppliers from M3

This task is used for exporting CRS620/624 supplier data from M3 to Excel. This data will be exported to the tab "CRS620-624 Supplier" in the Excel file.
If you like, you may add additional filtering to this export task as shown in tutorial video no 6.

List Addresses from Suppliers

Based on the suppliers exported to the spread sheet "CRS620-624 Supplier" in the task above, this task is used for exporting CRS622 supplier address data from M3 to Excel.

Add/Upd Suppliers

This task is used for import data from Excel to M3. You may add new suppliers or update existing suppliers in CRS620/624.
VXL import the data from the tab"CRS620-624 Supplier" in the Excel file.

Add/Upd Address

This task is used for import data from Excel to M3. You may add new addresses or update existing ones in CRS622.
VXL import the data from the tab "CRS622-Address" in the Excel file.

Delete Address

This task is used for deleting data from Excel to M3. You may delete addresses in CRS622 based on the rows marked with an lower case x in the Excel tab "CRS622-Address" (column A)
VXL import the data from the tab "CRS622-Address" in the Excel file.

7 Example - How to run the VXL template

7.1 Export CRS620/CRS624 supplier data from M3 to Excel

- o Enter From supplier number in the field "FromSupplier"
- o Enter To supplier number in the field "ToSupplier"
- o Then click the button "Export Suppliers", give the Excel-file a name and store it.

The supplier numbers From and To, and all supplier numbers in between, will then be exported to the excel tab "CRS620-624 Supplier" as shown below.

The supplier data with a blue heading is representing data from CRS620....

...and if you scroll to the right, data with orange heading is representing CRS624.
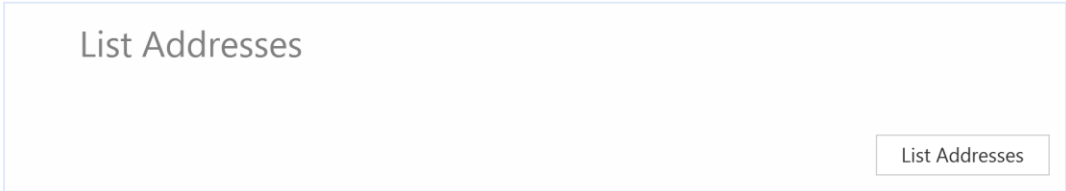

If you are only going to work with CRS620/CRS624 supplier data (and not supplier address data), you may jump directly to chapter 7.3 below to learn how to import CRS620/CRS624 supplier data changes back to M3.

7.2 Export CRS622 supplier address data from M3 to Excel

Run this task if you want to export and work with CRS622 Supplier addresses in Excel. It requires that you first have exported the suppliers to the tab "CRS620-624 Supplier" and saved/closed the excel file as described in chapter 7.1

When running this task only the addresses from the suppliers in the tab "CRS620-624 Supplier" will be exported to the excel tab "CRS622-Address"

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

The suppliers addresses will then be exported to the excel tab "CRS620-624 Supplier" as shown below.

7.3 Import updated and new suppliers from Excel to M3

Run this task if you want to import (add and update) the changed CRS620/624 supplier data from the excel tab "CRS620-624 Supplier".

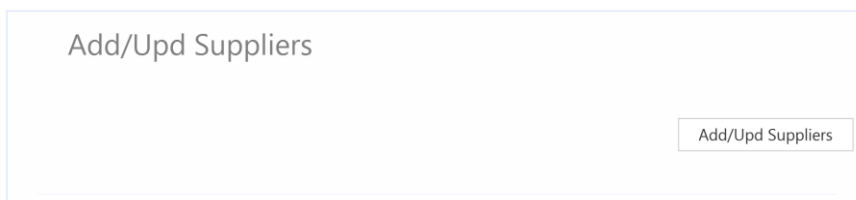As you can see from the screen dump below:

o The supplier's name is changed on the existing supplier in row 5.

o And row 7 seven is copied and pasted into two new rows (8 and 9) where new supplier numbers are entered and the supplier name, Telephone number 1 and 2 and organization number is changed.

By doing this change to the excel data we will trigger both update and add of these suppliers in M3.

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

o Make sure that your edited Excel file is closed.
o Click the button "Add/Upd Suppliers" 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 spread sheet to look at the API responses.

As we see from the screen dump below:

o Column CZ "Total" say that everything is OK.

o Column DA, "AddSupplier" failed in the rows 5, 6 and 7 with an error message saying that the Supplier already exists. This is not a problem since it is not possible to add an Supplier that already exists in M3.

o The two last rows 8 and 9 in column DA is ok since this is two new suppliers which did not exist in M3 before.

o Column DB, "UpdSupplier" is OK on the for rows 5, 6 and 7 which is existing suppliers. The new suppliers in row 8 and 9 have not got any message since the AddSupplier transaction is OK (rule set in the configurator)

If we check the data in M3 we see that supplier Y40001 has an update in the Supplier name and we also have two new suppliers imported (Y40003C1 and Y40003C2).

7.4 Import updated and new supplier addresses from Excel to M3

Run this task if you want to import (add and update) the changed CRS622 supplier address data from the excel tab "CRS622-Address".

As you can see from the screen dump below:

o The Addressline1 and Addressline2 is changed on the existing address in row 10.

o And row 10 is also copied and pasted into two new rows (11 and 12) where new supplier numbers are entered and the Addressline1 is changed, Addressline2, 3 and 4 are removed and we have a new city, postal code and country.
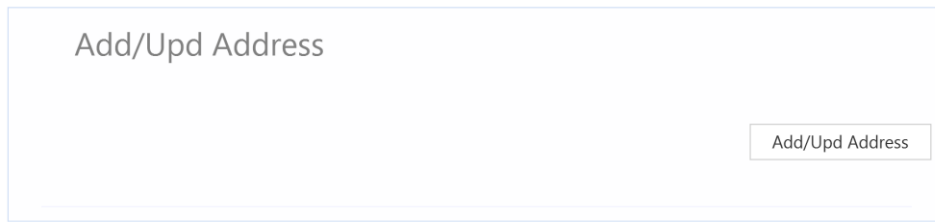
By doing this change to the excel data we will trigger both update and add of these addresses in M3.

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

o   Make sure that your Excel file is closed.
o   Click the button "Add/Upd Address" and select the excel file you want to import.

Add/Upd Address

Add/Upd Address

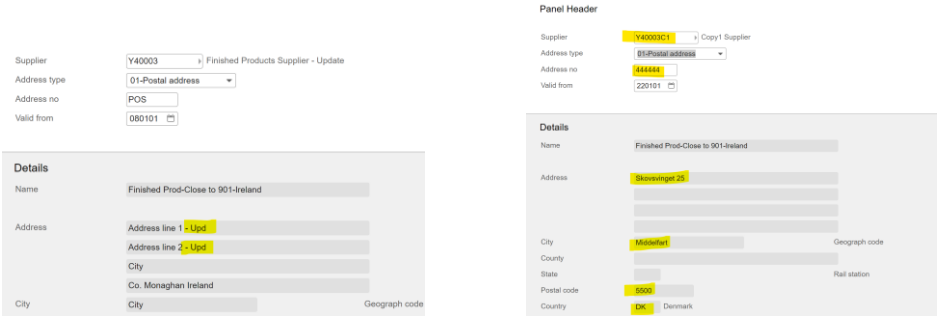When the import is done the Excel file will open.

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 AH "Total" say that everything is OK.

o   Column AJ, "AddAddress" failed in the rows 5 to 10 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.

o   The two last rows 11 and 12 in column AJ is ok since this is two new addresses which did not exist in M3 before.

o   Column AK, "UpdAddress" is OK on the for rows 5 to 10 which is existing addresses. The new addresses in row 11 and 12 have not got any message since the AddAddress transaction is OK (rule set in the configurator).

X	Y		AH		AI		AJ		AK		AL	
							Response					
Geographical code	Supplier´s address reference				CRS620MI		CRS620MI		CRS620MI		CRS620MI	
GEOC	SADR		Total		LstAddresses		AddAddress		UpdAddress		DelAddress	
0			OK				The record already exists		OK			
0			OK				The record already exists		OK			
0			OK				The record already exists		OK			
0			OK				The record already exists		OK			
0			OK				The record already exists		OK			
0			OK				The record already exists		OK			
0			OK				OK					
0			OK				OK					

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If we check the data in M3 we see that supplier Y40003 has an update in the Address line 1 and 2 and we also have two new suppliers imported (Y40003C1 and Y40003C2).

7.5 Delete supplier addresses from Excel to M3

Run this task if you want to delete CRS622 supplier address data in M3 from the excel tab "CRS622-Address".

As you can see from the screen dump below, rows number 11 and 12 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.

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 up.

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 AH "Total" say that everything is OK for the two lines marked for deletion.
- o Column AL, "DelAddress" is also OK for the two rows marked for deletion which means that this deletion was successful.

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