Chapter 4.14: External Price Import

Introduction

This tool has been designed for companies that receive product pricing updates from suppliers or have hundreds (or thousands) of products that need to have the price adjusted. It allows you to update prices in RMA from a spreadsheet file.

There are two options available to you:

1. Update prices into the product master file
2. Update customer prices for default products

Either way you choose to use it, this module will save you many hours of time when you need to update your prices.

Overview

This document will guide you through the data preparation and daily processing involved when using the *External Price Import* utility. You do not need to make any changes within your RMA program in order to use this option.

This document it separated into the following sections:

▶ ***Desktop Requirements:*** Includes minimum RMA version information and any additional requirements to use this feature.

▶ ***External Price Import Screen:*** Introduces you to the *External Price Import* screen and defines all of the available fields.

▶ ***Desktop Preparation:*** Guides you through preparing your pricing data for import into RMA.

▶ ***Daily Processing:*** Guides you through importing your data into RMA to finalize the process.

Each section is covered in the order listed.

Desktop Requirements

The *External Price Import* option does not require any changes to your RMA program or configuration items. There are two key requirements in order to use this option:

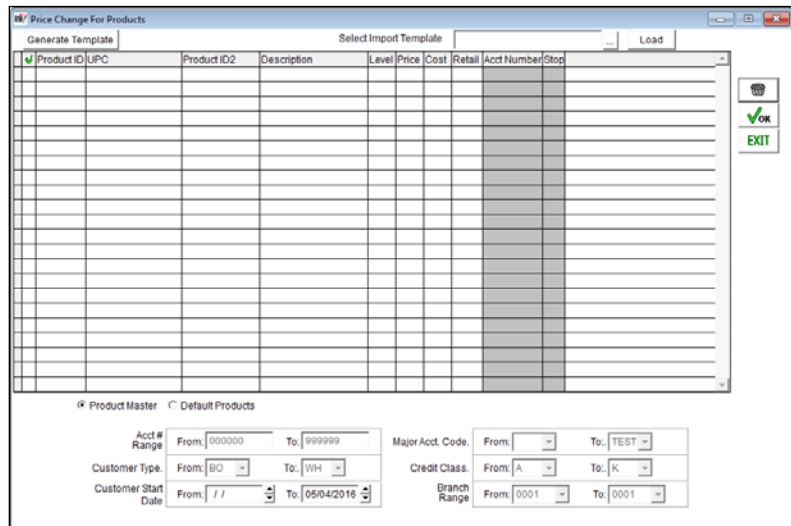1. Upgrade to RMA version 7.0.0 or higher.
2. Install Microsoft Excel.

Contact ARS to upgrade to the latest version of RMA if you do not meet the minimum version requirement. Additionally, any spreadsheet program will work as long as the file can be saved as type .XLS.

Continue to the next section to learn all of the available fields and options within the *External Price Import* screen.

External Price Import Screen

This section introduces you to all of the options available within the *External Price Import* screen.

The *External Price Import* screen can be accessed by navigating to *Tools > Global Changes > External Price Import Program*. Each field within the screen is defined below.

Fields:

Template: Select this option to generate a template file that can be used for importing price adjustments.

Select Import Template: Click the *Browse* key to select your import file.

Load: Select this key to import data from the selected template.

Table Fields:

Select/Deselect All: Select the ☑ icon to select/deselect all of the listed items.

Product ID: The product identification code assigned to the item.

UPC: The UPC code assigned to the item.

Product ID2: The *Secondary Charge Code* ID assigned to the item.

Description: The description assigned to the item.

> **NOTE:** Leave the description field blank if you do not wish to update the current description assigned to the item.

Level: The pricing level that you would like to modify with a price change.

> **NOTE:** Valid *Price Level* entries are 0-9 (with 0 representing the *Default* price level) and entering the letter 'A' — which will result in all price levels being updated with the new price.

Price: The selling price that will be assigned to the price level entered for the item.

Cost: The cost that will be assigned to the item.

Retail: The *Vendor Price* that will be assigned to the item.

Acct Number: The account number that will be updated with the new price within the *Default Products* screen.

> **NOTE:** Leaving this option blank while choosing the 'Default Products' update option on the screen will result in price updates on all accounts that contain the assigned item.

Stop: The stop number of the account that will be updated with the new price.

> **NOTE:** The first stop on an account should be entered as '00' on the spreadsheet or import screen (stop two is entered as '01', etc.). Additionally, leaving both the *Account Number* and *Stop Number* fields blank will result in price updates on all accounts that contain the item; however, leaving this field blank with the account number populated will only result in the first stop on the account being updated.

Criteria Fields:

Product Master/Default Products: Select the radio button that corresponds to the option you would like to use when updating prices:

▶ ***Product Master:*** Updates prices within the product file when importing records.

▶ ***Default Products:*** Updates *Default Products* prices within *Customer Information* when importing records.

> **NOTE:** The options below are only available after selecting the *Default Products* update method.

Acct# Range: Enter the *Account Number* range that will be included in the price update.

Customer Type: Select the *Customer Type* range that will be included in the price update.

Customer Start Date: Enter the customer start date that will be included in the price update.

Major Account Code: Select the *Major Account* range that will be included in the price update.

Credit Class: Select the *Credit Class* range that will be included in the price update.

Branch Range: Select the *Branch ID* range that will be included in the price update.
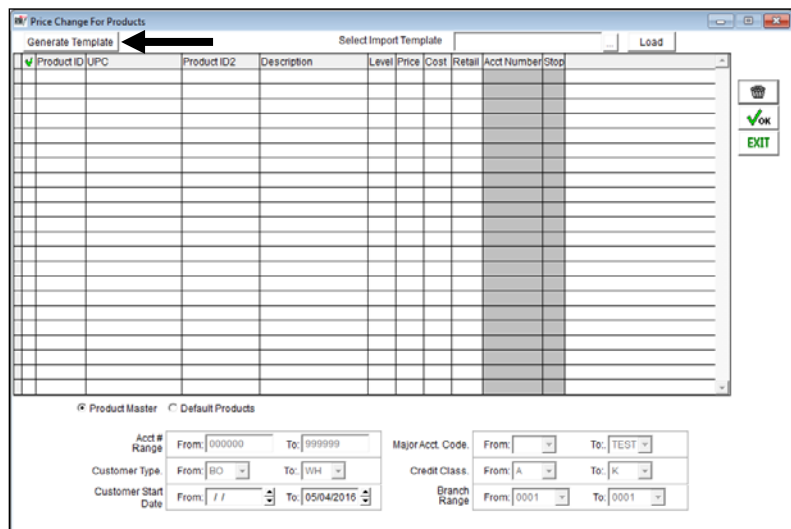
Desktop Preparation

In order to import your pricing data successfully, you will need to generate a template file from within the *External Price Import* screen that will be used to enter your data.

This section will guide you through generating a template and teach you how to properly format your data for import.

Generating a Template File

To generate a new template file, navigate to *Tools > Global Changes > External Price Import Program* and select the 'Generate Template' button:

An Excel spreadsheet file will be automatically opened on your screen:

The field headings correspond to the definitions provided in the previous section (see *Table Fields*):

▶ productcode (Product ID)

▶ upcode (UPC Code)

▶ secondaryproductcode (Secondary Product ID)

▶ productdescription (Product Description)

▶ pricelevel_0_a (Product Price Level)

▶ productprice (Product Price)

▶ productcost (Product Cost)

▶ vendingprice (Retail Price)

▶ accountnumber (Account Number)

▶ stopnumber (Account Stop Number)

> **NOTE:** Refer to the previous section (see *Table Fields*) for definitions of each item and formatting specifications.

Formatting Cells

When using a spreadsheet program such as Microsoft Excel, you will need to properly format cells that contain special characters, such as the case below, which includes leading zeroes in a product code ID (098) — by default, leading zeroes are removed when a cell is formatted as numeric.

Product 098 is entered in the graphic below; in order for the preceding zero to remain in the cell, an apostrophe (') is entered before the number (e.g., '098). Repeat this process for any data that contains preceding zeroes.

Required Fields

Since you may not be updating all of the fields available within the template file, here is a list of the required fields within the spreadsheet:

▶ ***Product Code***

▶ ***Product Price***

▶ ***Product Price Level*** (required on *Products Master* option only.)

All other fields are optional and apply to your specific needs. Please ensure that you have entered all of the required fields prior to the import step covered in *Daily Processing*.

Product Master or Default Products?

Prior to importing data, you will need to choose the type of import you will be performing: *Product Master* or *Default Products*.

Enter the item in the spreadsheet once if you are updating the *Product Charge Code* price. If you are updating assigned *Default Products* in various accounts, add a separate line for each account within the spreadsheet.

> **NOTE**: You do not need to enter multiple lines per item when choosing the *Default Products* import option if you are updating a single price for all customers (refer to the *Blank Account Numbers* section below).

Blank Account Numbers

If you will be using the *Default Products* import option to update customer prices, you can use one of the following formatting options to update your accounts:

▶ ***Account Numbers/Stop fields Populated:*** Enter account and stop numbers within each field to update the accounts accordingly.

▶ ***Account Numbers/Stop fields Blank:*** Leave the account and stop number fields blank to add the same price to each account within the defined criteria.

I	J
accountnumber	stopnumber

> **NOTE:** By leaving the *Account/Stop Number* fields blank you will not need to enter multiple lines per product since only one price will be added to all accounts that qualify.

Refer to the *External Price Import Screen* section at the beginning of this document for further information on formatting rules within each field.

Daily Processing – Desktop

This section will guide you through importing price updates into RMA. You should carefully follow each step to ensure success.

After you have added all of your data in the template file and saved the information, navigate to *Tools > Global Changes > External Price Import Program* and follow the steps below.

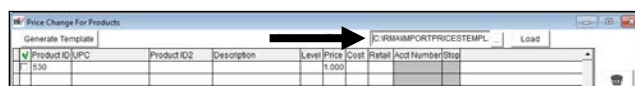> **NOTE:** Save and close your template file prior to continuing.

1. Select the **Browse** icon next to the *Select Import Template* field and navigate to your spreadsheet file:
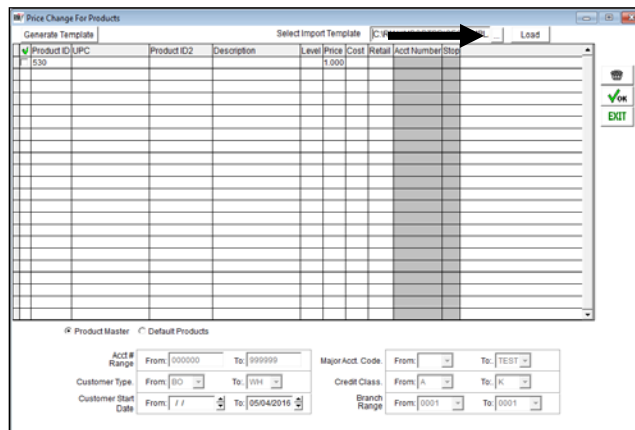
2. Double-click on the spreadsheet file to select it:
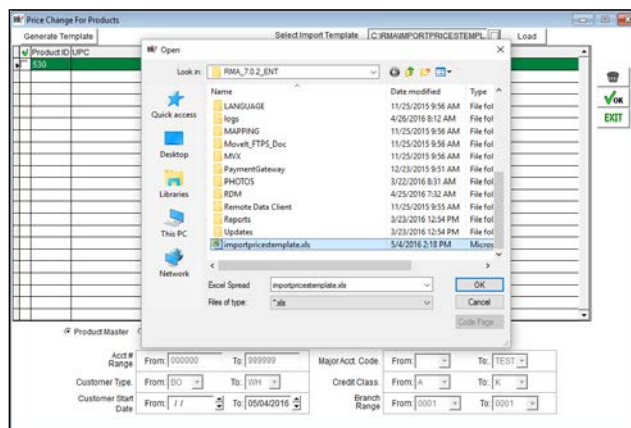
3. The file should now be listed within the *Select Import Template* window:

4. Click on the **Load** icon next to the *Select Import Template* window; The data will be immediately displayed within the main window:
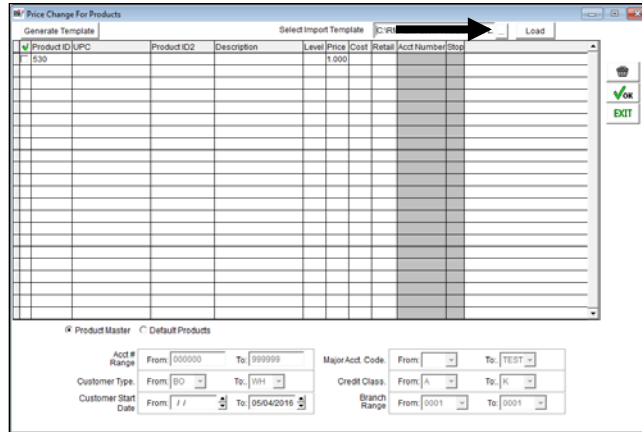

5. Click the **Select All/Deselect All** option on the screen to select all records to import. Optionally, you can individually select each record by manually placing a checkmark to the left of each product code.
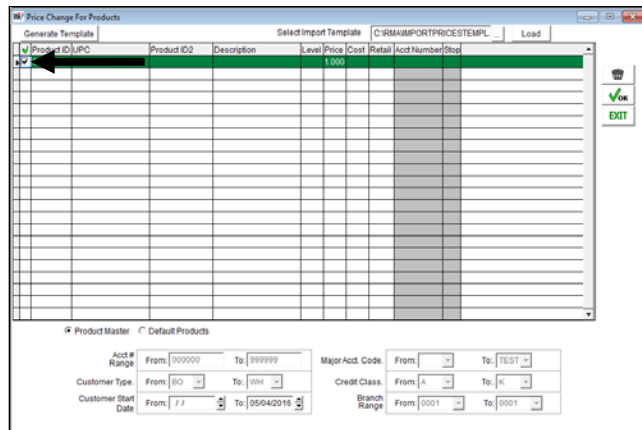

6. Select the type of price import you would like to perform; select either **Product Master** or **Default Products** below the displayed import data:

7. If you have selected the *Default Products* option, you will need to define the account criteria displayed on the bottom of the screen to ensure that the proper accounts are updated:
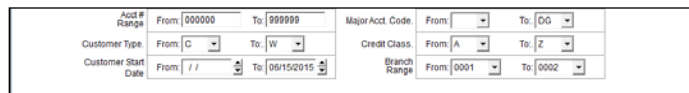
8. After all criteria has been defined, select the **OK** key to import the data and update the prices:
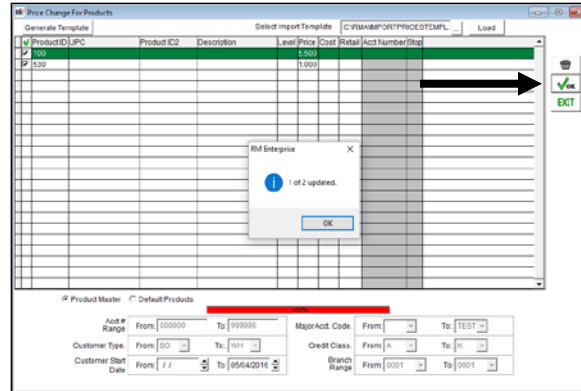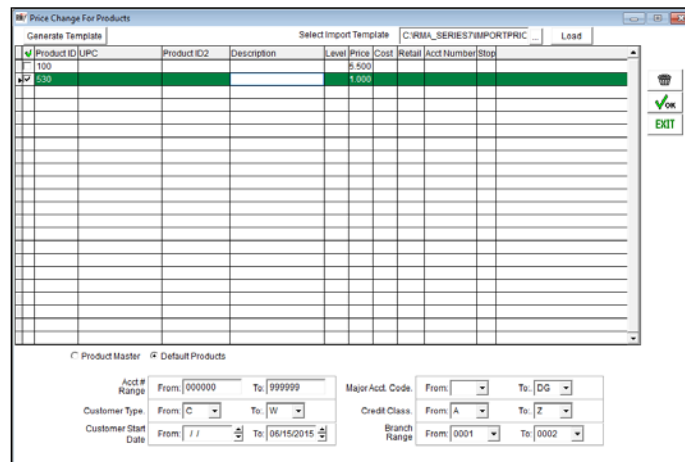
9. Click **OK** on the import confirmation screen to complete the process.

Additional Options

There are a couple of additional options that you can use prior to importing data to assist with price updates.

Manual Editing

You can make manual edits of the imported data by clicking within any field on the screen and typing the desired information:

Import Data Problems

If the system reports that not all records were updated, such as the screen below, you can access a 'results' spreadsheet created during every import in the system:

In this case, only 4 out of 5 records were successfully imported:
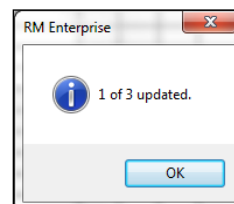
Navigate to the 'root' folder of your RMA program and you will find an import template file identified by the date and time of the import:

Opening this file will identify the product that was not updated by displaying 'False' within the 'sel' field:

	A	B	C	D	E
1	sel	prod_id	upc	prod_altid	prod_desc
2	TRUE	015			
3	TRUE	308	123456	5 LB ICE	5 LB ICE
4	FALSE	309			
5	TRUE	310			
6	TRUE	315			
7					

You will need to identify the problem and attempt to import the record again.

Summary

The *External Price Import* feature is a powerful addition to our pricing options in RMA. As new pricing methods are adopted within each business, we will continue to enhance our software to work for you. If you have any questions regarding this feature or its usage, please contact Advantage Route Systems.

Advantage Route Systems, Inc.

3201 Liberty Square Parkway

Turlock, CA 95380 USA

Phone: 1.209.632.1122

Web Site: www.AdvantageRS.com

Email: info@AdvantageRS.com

Warning

All information in this document and the on-line help system, as well as the software to which it pertains, is proprietary material of Advantage Route Systems, Inc. and is subject to a Route Manager license and non-disclosure agreement. Neither the software nor the documentation may be reproduced in any manner without the prior written permission of Advantage Route Systems, Inc.

Series 7: Version Date, May 18, 2016