PRICE/DISCOUNT IMPORT

A Pricing Import can be used to create new pricing records, delete pricing records, or update existing pricing records.

Auto build a layout

DMSi recommends creating a default pricing record import spreadsheet using existing pricing records. To do this access the Price/Discount Maintenance screen **Data Files>Price/Cost Updates>Price/Discount Maintenance**.

Using the Criteria tab, look for existing pricing records similar to the new records you wish to create. Click Search. In the Price/Discount tab, use the Export for Import icon to export the pricing records to Excel.



Agility will export the pricing records in a default layout to Excel. The reason to use the default layout is Agility will read the top row of the spreadsheet to automatically map your columns for importing purposes.

Next, fill out your spreadsheet. The second row is the name of the field that will be updated in Agility. The third row is the corresponding table name and field in the Agility database. Each pricing record will take up one row in the spreadsheet. If your pricing has multiple levels, you will need one row for each unique level.

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Once you have finished filling out your spreadsheet, save the file and upload it to the <u>hosted site</u>.

Access the Pricing Import Data Files>Price Cost Updates>Price Discount Import

In the Pricing Import screen, click on the Default Layout icon.



In the Build Path screen, click the Select a File icon. 👪

In the Select File screen, find the file you want to import, click it, then click Open.

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The file will pull back into the Build Path screen. Click OK.

The default layout has now been built. To update it, double click on the Default Layout Definition row or click on the Update Record icon.

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In the Definition field, clear the name Default Layout Definition and type in the name you would like to use for your Pricing Import layout. Click Save.

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Choose to Update Existing Record. Doing this will allow you to use the Default Layout again to auto map any new imports you may want to do in the future.

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To confirm the fields are mapped correctly, click on the tab corresponding to the tab in pricing maintenance that will be updated. Review the Field Name and Value.



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If changes need to be made, make them and Save. Then Click the red X in the top right of the screen to exit back to the Pricing Import screen.

Manually build a layout

If you just need to update a couple of fields for your pricing, it may be quicker to manually create an import layout for those few fields. In the Pricing Import screen, click the Add new record icon.

Type the name of your layout in the Definition field. Then, click on the Build a directory path icon.

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In the Build Path screen, click the Select a File icon. 👪

In the Select File screen, find the file you want to import, click it, then click Open.

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The file will pull back into the Build Path screen. Click OK.

You will need to manually map each field in the spreadsheet. Start on the Action tab and specify the number of header rows. If creating new pricing records, change the "Add records if date in file does not match existing related records" to Yes. You can also specify the branch you will be loading the pricing records into. Click on the Processing Branch Source and choose either Price/Discount Import Window or Value in Column. This allows you to import into one branch or multiple branches.

Action	All Records Price Discount	
Group	Field name	Value
Action	Number of Header Rows	5
Action	Add records if data in file does not match existing related records	No
Action	Allow Zero Discounts	No
Action	Delete Record if 'DELETE' in Column	Columo B
Action	Processing Branch Source	Value in Column
Action	Specify Branch Column	Price/Discount Import Window
		Value in Column

Next, click on the All Records tab. Click on the drop down arrow and choose the column in the spreadsheet that matches the field. Continue through all

fields you need to map. When finished with the All Records tab, move on to each additional tab, manually mapping each field to the corresponding column.

Group	Field name	Source	Value	4
All Records	Record Type	Value Specified	Price	17
All Records	Price Type	Value Specified	Customer	
Al Records	Cust ID or Price Group		Column D	-
All Records	Costomer Shipko		Colony P	
All Records	Record Selection	Value Specified	Price Code	7
All Records	Item Code or Price Code Major		Column G	
All Records	Price Code Minor		Column H	
All Records	Specify Date Range		No	1
All Records	Start Date			-
All Records	End Date			
All Records	Sale Type		Column A	
All Records	Price Option	Value Specified	Level	
Pricing Records	Discountable	Value Specified	Yes	
Pricing Records	Apply Rounding	Value Specified	No	1

When you have finished manually mapping all your fields, click the Save icon. Close out by clicking on the Red X in the top right corner of the screen.

Import pricing file

To import a file, open the Pricing Import screen. Click on the Definition ID that you want to use that matches your spreadsheet. If the Transaction file is correct, click the Process button in the bottom right of the screen.

To choose a different transaction file (like for re-using a layout with a new spreadsheet you wish to import), click the Select a file icon.

Find the file you wish to import, then click Open. To import this file, click the Process button in the bottom right of the screen.

When the import has completed and the file is loaded, an information box will open with the message "Process is complete. If there were issues with the import, a Pricing Import Audit will appear. The audit will show how many records were processed, created, updated, deleted, and failed. If there were failures, Agility displays with a column that explains the cause of the failure. There is also a column for Warnings, which explain what data in the import file may not match what is in Agility.

The audit report can be exported to Excel. Use the export file to make corrections and import the file back into Agility.

Data In		A									100			
Price Import Audit Review failures and warnings in the last two columns of this grid. Export grid data, make necessary changes and re-import the file. Information is not saved once the window is closed. Note: Warnings of invalid data will process using the existing or default value.														
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