

How to Import Customer Pricing Rules by using IO Import via Excel

[Version 1]

Hazel

[31/12/2020]



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Product : QNE Optimum

Version: 1.00

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REV. No	Nature of Change	Prepared By	Prepared Date	Reviewed & Approved by
1.0	How to Import Customer Pricing Rules by using IO Import via Excel	Hazel	31/12/2020	Weina

Amendment Record



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SCENARIO

How to Import Customer Pricing Rules by using IO Import via Excel. This method suitable for trading / wholesales industries that would like to update their promotion price list every month.

SOLUTION

1. Go to Sales > Customer Pricing Rules > Click "Search"

Customer Pricing Rules

Company
Apply To: Everyone

Stock
Apply To: All stocks

Validity
From:
To:

Quantity
Min Qty:

Pricing
Price Type: Custom
Currency: RM
Discount:
Margin By %: 0.00%

☒ Active

Description

2. We able to see all the pricing rules record here.

Price Group	Customer	Category	Stock Category	Stock Class	Stock Group	Stock	UOM	Ref Price	Ref Cost	Custom Price	Discou	Curren	Mar	Min Q	From	To	Active
RESELLER						AA	UNI...			2.0000		RM	0.0...				<input checked="" type="checkbox"/>
DEALER						TEBU	PACK	25.0000		22.0000		RM	0.0...				<input checked="" type="checkbox"/>
WHOLE...						PEPSI	UNI...	10.0000		9.0000		RM	0.0...				<input checked="" type="checkbox"/>
DEALER						cola	test	2.0000		2.0000		RM	0.0...				<input checked="" type="checkbox"/>
	700-C001					A	UNI...	10.0000		8.5000		RM	0.0...				<input checked="" type="checkbox"/>
WHOLE...						PEPSI	BOX	90.0000		80.0000		RM	0.0...				<input checked="" type="checkbox"/>
DEALER						cola	test	2.0000		1.8000		RM	0.0...				<input checked="" type="checkbox"/>
	700-D001					cola	UNI...	1.8000		1.2000		RM	0.0...				<input checked="" type="checkbox"/>
DEALER						TEBU	UNI...	3.0000		3.0000		RM	0.0...				<input checked="" type="checkbox"/>
						ASUS...	UNI...	280.00...	230.00...	10.0000		RM	0.0...				<input checked="" type="checkbox"/>
	700-D001					cola	UNI...	1.8000		2.0000		RM	0.0...				<input checked="" type="checkbox"/>
	700-C001					AAA	UNI...			1.2000		RM	0.0...				<input checked="" type="checkbox"/>
						CANO...	UNI...	390.00...	380.00...	200.0000		RM	0.0...				<input checked="" type="checkbox"/>
DEALER						cola	UNI...	1.8000		2.0000		RM	0.0...				<input checked="" type="checkbox"/>
						CANO...	UNI...	390.00...	380.00...	210.0000		RM	0.0...				<input checked="" type="checkbox"/>
	700-A999					ASUS...	UNI...	280.00...	230.00...	110.0000	10%	RM	0.0...				<input checked="" type="checkbox"/>
WHOLE...						PEPSI	UNI...	10.0000		10.0000		RM	0.0...				<input checked="" type="checkbox"/>
						ASUS...	UNI...	280.00...	230.00...	11.0000		RM	0.0...				<input checked="" type="checkbox"/>



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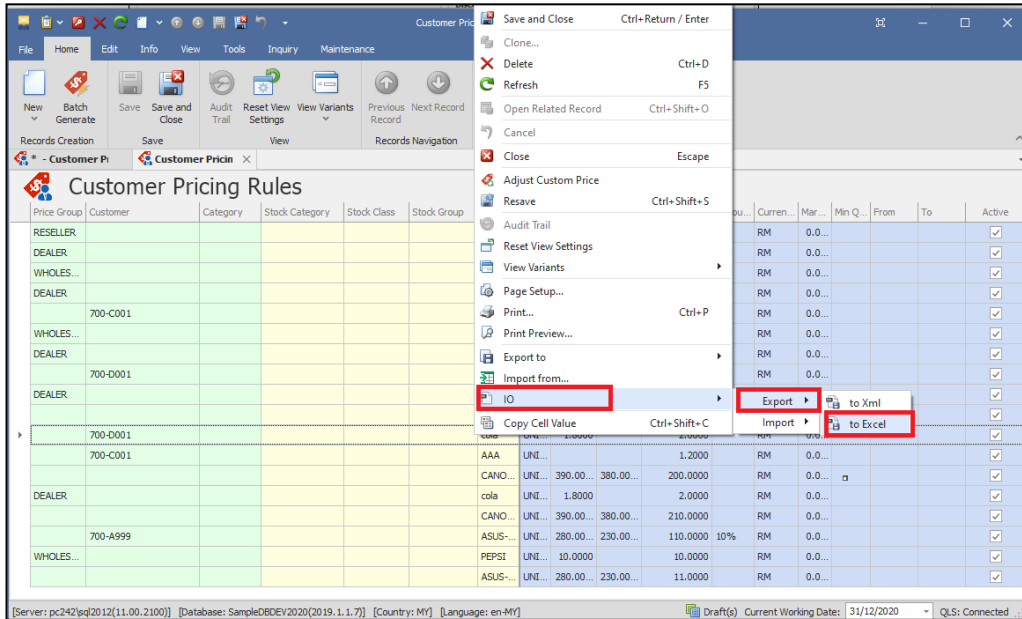
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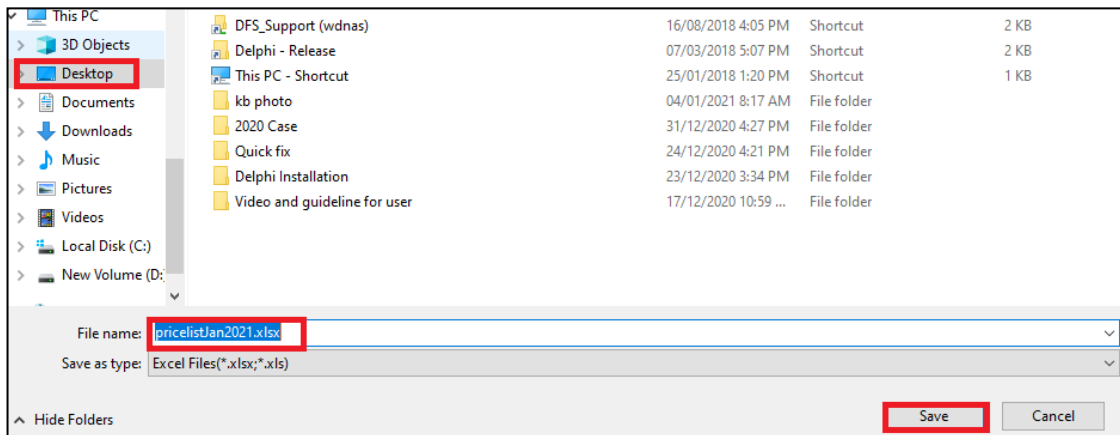
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3. Now we press CTRL+A on keyboard in order to select all the record and IO Export to excel.



4. Choose where u want to save the excel file. File name "pricelistJan2021"



5. Then we amend the custom price / discount as per the updated price list.

PriceGroup	Debtor	DebtorCategory	StockCategory	StockGroup	StockClass	Stock	UOM	CustomPrice	Discount	MarginRate	Currency	MinQty	ValidDateFrom	ValidDateTo	Description
RESELLER					AA	UNIT(S)		2.00		0.00	RM	0.00			
DEALER					TEBU	PACK		22.00		0.00	RM	0.00			
WHOLESALE					PEPSI	UNIT(S)		9.00		0.00	RM	0.00			
DEALER					cola	test		2.00		0.00	RM	0.00			
	700-C001				A	UNIT(S)		8.50		0.00	RM	0.00			
WHOLESALE					PEPSI	BOX		80.00		0.00	RM	0.00			
DEALER					cola	test		1.80		0.00	RM	0.00			
	700-D001				cola	UNIT(S)		1.20		0.00	RM	0.00			
DEALER					TEBU	UNIT(S)		3.00		0.00	RM	0.00			
	700-D001				ASUS-MB	UNITS		10.00		0.00	RM	0.00			
	700-D001				cola	UNIT(S)		2.00		0.00	RM	0.00			
	700-C001				AAA	UNIT(S)		1.20		0.00	RM	0.00			
DEALER					CANON4310SP	UNITS		200.00		0.00	RM	0.00			
					cola	UNIT(S)		2.00		0.00	RM	0.00			
					CANON4310SP	UNITS		210.00		0.00	RM	0.00			
	700-A999				ASUS-EX	UNITS		110.00	10%	0.00	RM	0.00			
WHOLESALE					PEPSI	UNIT(S)		10.00		0.00	RM	0.00			
					ASUS-MB	UNITS		11.00		0.00	RM	0.00			



6. Example: Price for Stock AA has been increased from RM 2 to RM 2.20

PriceGroup	Debtor	DebtorCategory	StockCategory	StockGroup	StockClass	Stock	UOM	CustomPrice	Discount	MarginRate	Currency	MinQty	ValidDateFrom
RESELLER					AA	UNIT(S)		2.20		0.00	RM	0.00	
DEALER					TEBU	PACK		23.00		0.00	RM	0.00	
WHOLESALE					PEPSI	UNIT(S)		10.00		0.00	RM	0.00	
DEALER					cola	test		2.20		0.00	RM	0.00	
WHOLESALE	700-C001				A	UNIT(S)		8.80		0.00	RM	0.00	
DEALER					PEPSI	BOX		82.00		0.00	RM	0.00	
DEALER	700-D001				cola	test		2.10		0.00	RM	0.00	
DEALER					cola	UNIT(S)		1.30		0.00	RM	0.00	
DEALER					TEBU	UNIT(S)		3.20		0.00	RM	0.00	
					ASUS-MB	UNITS		11.00		0.00	RM	0.00	
	700-D001				cola	UNIT(S)		3.00		0.00	RM	0.00	
	700-C001				AAA	UNIT(S)		1.50		0.00	RM	0.00	
					CANON4310SP	UNITS		205.00		0.00	RM	0.00	
DEALER					cola	UNIT(S)		2.30		0.00	RM	0.00	
					CANON4310SP	UNITS		212.00		0.00	RM	0.00	
	700-A999				ASUS-EX	UNITS		112.00	10%	0.00	RM	0.00	
WHOLESALE					PEPSI	UNIT(S)		10.50		0.00	RM	0.00	
					ASUS-MB	UNITS		11.50		0.00	RM	0.00	

7. Go back to Customer Pricing Rules > Ctrl + A to select all > Click "Delete"

Price Group	Customer	Category	Stock Category	Stock Class	Stock Group	Stock	UOM	Ref Price	Ref Cost	Custom Price	Discou...	Curren...	Mar...	Min Q...	From	To	Active
RESELLER						AA	UNIT...			2.0000		RM	0.0...				<input checked="" type="checkbox"/>
DEALER										22.0000		RM	0.0...				<input checked="" type="checkbox"/>
WHOLESALE										9.0000		RM	0.0...				<input checked="" type="checkbox"/>
DEALER										2.0000		RM	0.0...				<input checked="" type="checkbox"/>
WHOLESALE	700-C001									8.5000		RM	0.0...				<input checked="" type="checkbox"/>
WHOLESALE										80.0000		RM	0.0...				<input checked="" type="checkbox"/>
DEALER										1.8000		RM	0.0...				<input checked="" type="checkbox"/>
DEALER	700-D001									1.2000		RM	0.0...				<input checked="" type="checkbox"/>
DEALER										3.0000		RM	0.0...				<input checked="" type="checkbox"/>
DEALER										10.0000		RM	0.0...				<input checked="" type="checkbox"/>
	700-D001									2.0000		RM	0.0...				<input checked="" type="checkbox"/>
	700-C001									1.2000		RM	0.0...				<input checked="" type="checkbox"/>
										200.0000		RM	0.0...				<input checked="" type="checkbox"/>
DEALER										2.0000		RM	0.0...				<input checked="" type="checkbox"/>
										210.0000		RM	0.0...				<input checked="" type="checkbox"/>
	700-A999									110.0000	10%	RM	0.0...				<input checked="" type="checkbox"/>
										10.0000		RM	0.0...				<input checked="" type="checkbox"/>
WHOLESALE										11.0000		RM	0.0...				<input checked="" type="checkbox"/>

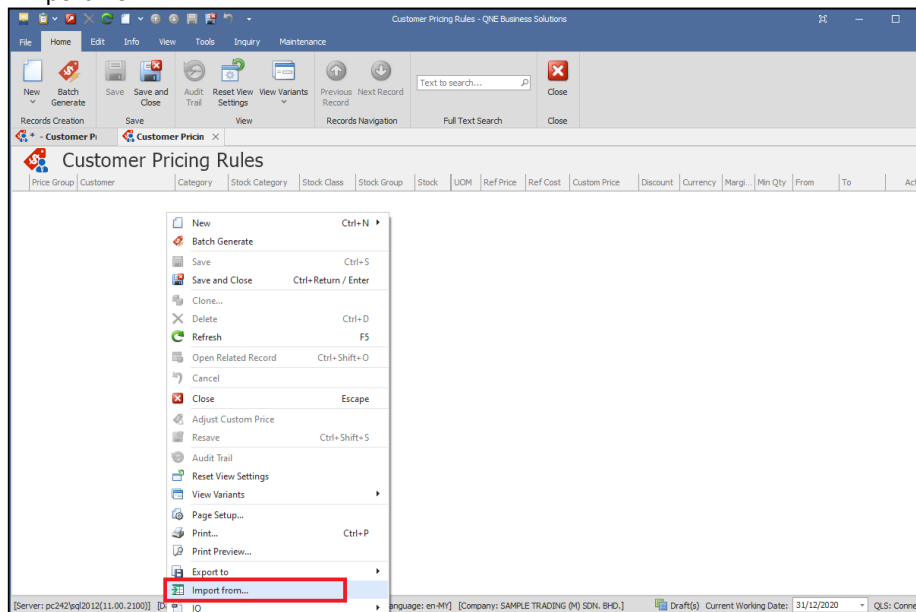
8. Click "Yes"

Price Group	Customer	Category	Stock Category	Stock Class	Stock Group	Stock	UOM	Ref Price	Ref Cost	Custom Price	Discou...	Curren...	Mar...	Min Q...	From	To	Active
RESELLER						TEBU	PACK	25.0000		22.0000							<input checked="" type="checkbox"/>
WHOLESALE						PEPSI	UNIT...	10.0000		9.0000							<input checked="" type="checkbox"/>

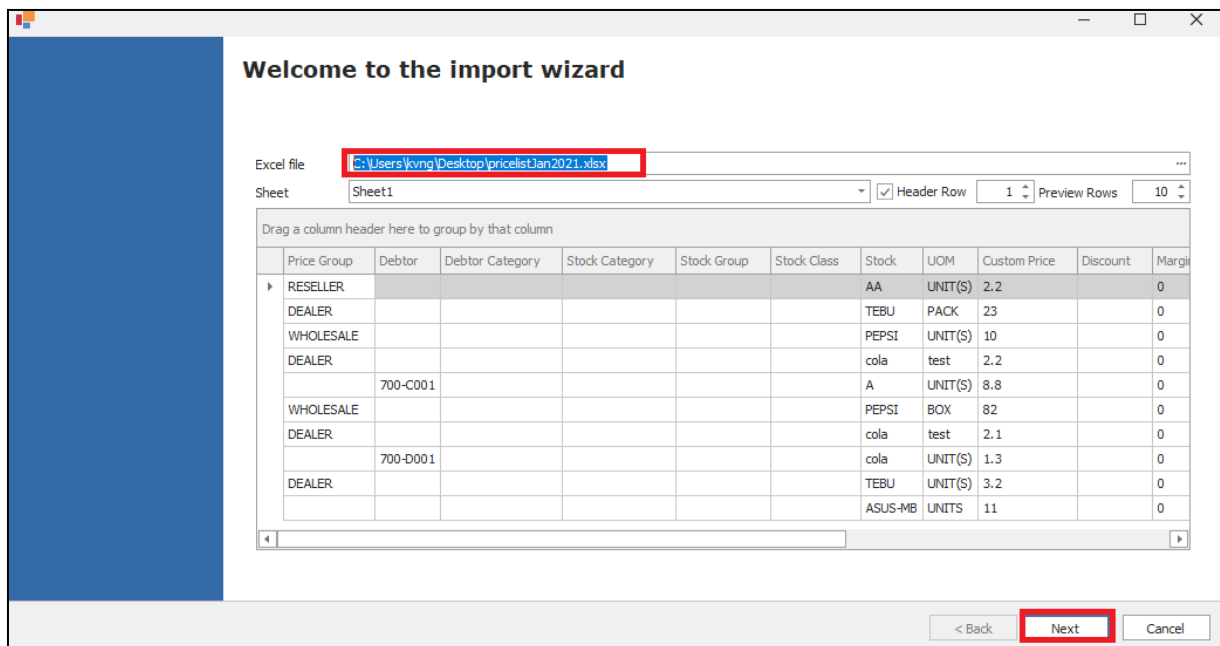
Delete

You are about to delete the selected record(s). Do you want to proceed?

9. Next, we going to import the updated price list from excel. Right click from the blank space and click “Import from”



10. Select the excel file “pricelistJan2021” and click “Next”





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11. Click "Guess Mapping" and "Import"

Import Mapping
Define the columns mapping

☐ Use existing ☒ Create column Mapping

Guess Mapping Reset Mapping

Drag a column header here to group by that column

Column	Row 1	Row 2	Row 3	Row 4	Row 5	Row 6	Row 7	Row 8	Row 9	Row 10	Map To
PriceGroup	RESELLER	DEALER	WHOLESALE	DEALER		WHOLESALE	DEALER		DEALER		PriceGroup
Debtor					700-C001				700-D001		Debtor
DebtorCate...											DebtorCategory
StockCate...											StockCategory
StockGroup											StockGroup
StockClass											StockClass
Stock	AA	TEBU	PEPSI	cola	A	PEPSI	cola	cola	TEBU	ASUS-MB	Stock
UOM	UNIT(S)	PACK	UNIT(S)	test	UNIT(S)	BOX	test	UNIT(S)	UNIT(S)	UNITS	UOM
CustomPrice	2.2	23	10	2.2	8.8	82	2.1	1.3	3.2	11	CustomPrice
Discount											Discount
MarginRate	0	0	0	0	0	0	0	0	0	0	MarginRate

< Back **Import** Cancel

12. Click "Finish" if u see the result is SUCCESS


Completing the wizard

Drag a column header here to group by that column

Time	Action	Info	Result
04/01/2021	Commit Changes	Committing changes to database...	PROCESSING
04/01/2021	Commit Changes	Committed	SUCCESS

< Back **Finish** Cancel

13. After imported, then we can see the update price list here.



Customer Pricing Rules

Price Group	Customer	Category	Stock Category	Stock Class	Stock Group	St... ▲	UOM	Ref Price	Ref Cost	Custom Price	Discount	Currency	Margi...	Min Qty	From	To	Active
	700-C001					A	UNI...	10.0000		8.8000		RM	0.00%				<input checked="" type="checkbox"/>
RESELLER						AA	UNI...			2.2000		RM	0.00%				<input checked="" type="checkbox"/>
	700-C001					AAA	UNI...			1.5000		RM	0.00%				<input checked="" type="checkbox"/>
	700-A999					ASUS-...	UNITS	280.0000	230.0000	112.0000	10%	RM	0.00%				<input checked="" type="checkbox"/>
						ASUS-...	UNITS	280.0000	230.0000	11.0000		RM	0.00%				<input checked="" type="checkbox"/>
						ASUS-...	UNITS	280.0000	230.0000	11.5000		RM	0.00%				<input checked="" type="checkbox"/>
						CANO...	UNITS	390.0000	380.0000	205.0000		RM	0.00%				<input checked="" type="checkbox"/>
						CANO...	UNITS	390.0000	380.0000	212.0000		RM	0.00%				<input checked="" type="checkbox"/>
	700-D001					cola	UNI...	1.8000		1.3000		RM	0.00%				<input checked="" type="checkbox"/>
DEALER						cola	test	2.0000		2.2000		RM	0.00%				<input checked="" type="checkbox"/>
DEALER						cola	test	2.0000		2.1000		RM	0.00%				<input checked="" type="checkbox"/>
	700-D001					cola	UNI...	1.8000		3.0000		RM	0.00%				<input checked="" type="checkbox"/>
DEALER						cola	UNI...	1.8000		2.3000		RM	0.00%				<input checked="" type="checkbox"/>
WHOLE...						PEPSI	UNI...	10.0000		10.5000		RM	0.00%				<input checked="" type="checkbox"/>
WHOLE...						PEPSI	UNI...	10.0000		10.0000		RM	0.00%				<input checked="" type="checkbox"/>
WHOLE...						PEPSI	BOX	90.0000		82.0000		RM	0.00%				<input checked="" type="checkbox"/>
DEALER						TEBU	UNI...	3.0000		3.2000		RM	0.00%				<input checked="" type="checkbox"/>
DEALER						TEBU	PACK	25.0000		23.0000		RM	0.00%				<input checked="" type="checkbox"/>

DONE 😊