1.10.1.1 Price List Maintenance Data Loader User Guide

1.10.1.1 Price List Maintenance User Guide

Thank you for your interest in 32 Soft's productivity solutions for QAD. You are on the path to improved data management and productivity.

This User Guide will show you how to set up and use the 1.10.1.1 Price List Maintenance Data Loader.

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DATA LOADERS

We have dozens of
DATA LOADERS
for every major QAD process

Master Data & Inventory

Distribution & Supply Chain

Finance

Production

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1.10.1.1 Price List Maintenance User Guide

Set Up

1. Open up the Loader and check that correct database is set up. Click on the [SETUP] button to open the window and highlight the correct database. Click on [SELECT] when done.
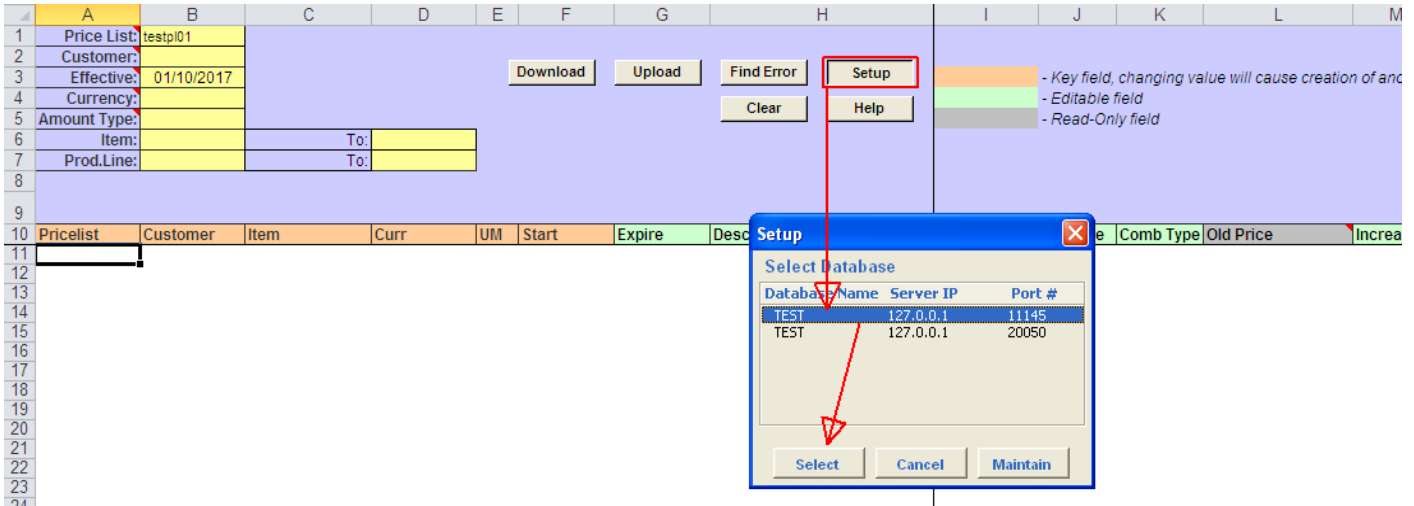

- Pop Up Window will be displayed showing available databases from which to select.
- Highlight the desired database and click on the [SELECT] button
- Message will be displayed showing database selected. Click [OK] to continue.
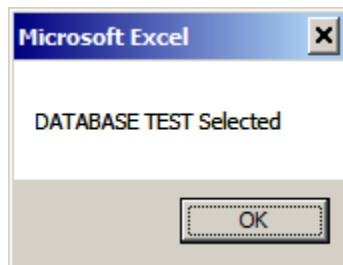
Price List Maintenance

1. You can use this Loader to maintain existing price list records by entering in the search criteria in the yellow highlighted fields.
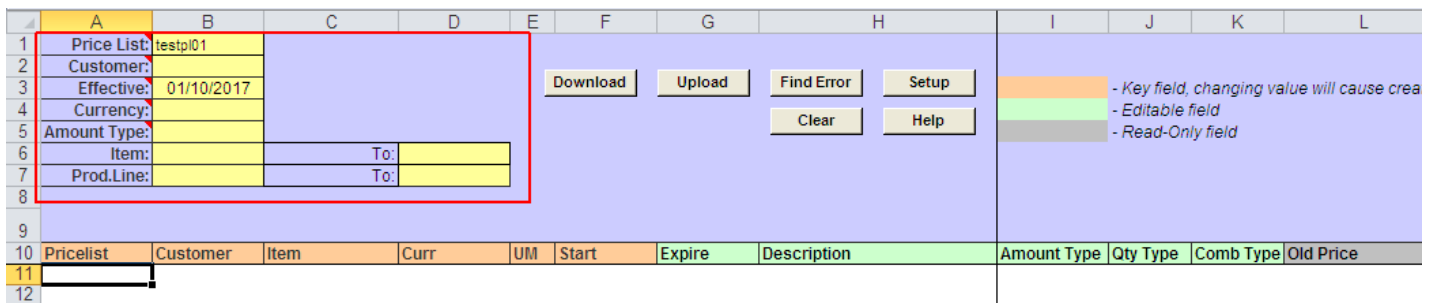
Search parameters are available for the following fields:

- Price List - enter existing pricelist name to filter by that specific pricelist. If blank, all pricelists will be downloaded
- Customer – enter in specific customer number or leave blank to download all
- Effective – enter effective date of the pricelist
- Currency – enter specific currency to filter or leave blank to download all
- Amount Type – enter the Amount type of the pricelist or leave blank to download all
- Item From and Item To – enter range or item numbers to search or leave blank to download all
- Prod. Line From and Item To – enter range or Product Line to search or leave blank to download all

2. Once Search parameters are entered, select the [DOWNLOAD] button.

- When Action buttons are selected for the first time, a pop-up window will be displayed for user log in. User ID is validated against QAD. Use your QAD user ID and password.
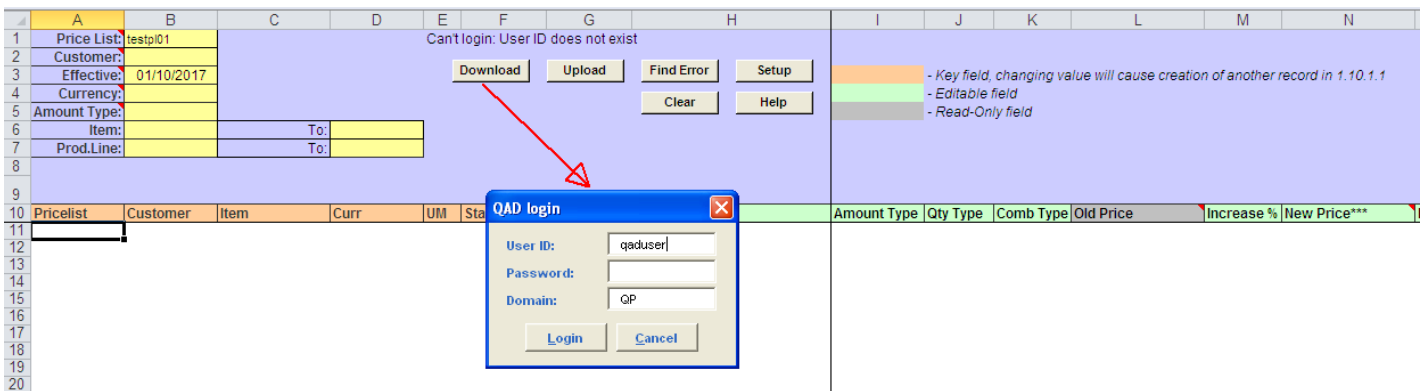
- Enter QAD User ID, Password and Domain
- Select [LOGIN] button to continue.

Please note: if credentials are incorrect or the user is not authorized to use transactions in menu 1.10.1.1 in QAD, the database connection will not be established and the QAD login window will reappear.

3. The Data Loader will display data based on the search criteria. A message will indicate whether or not the download was successful:

- Columns highlighted in orange (see legend) are key fields
- Columns highlighted in green are writable.
- Columns highlighted in grey are read-only.

4. You can edit data in any of the columns with green header. When you have finished editing the fields, select the [UPLOAD] button to send all the changes to QAD. A status window will be displayed showing the status of the upload.

- LOADED SUCCESSFULLY message means all the data was uploaded into QAD successfully.
- If the status window displays a different message, please read the Error Checking section of this document.

Increasing Price by Percentage

1. You can easily increase prices by a percentage across the board in this Data Loader. The current price will be displayed when the records are downloaded in the 'Old Price' column. Enter the percentage you would like to increase the prices in the column 'Increase %'. Then, select the [UPLOAD] button.

2. The NEW PRICE column will automatically calculate the new price based on the data entered in the "Increase %" column. Select the [UPLOAD] button to upload the data to QAD. The status of the upload will be displayed in pop up window with a message.

Note: Price List change has been updated in Price List Maintenance screen in QAD (1.10.1.1)
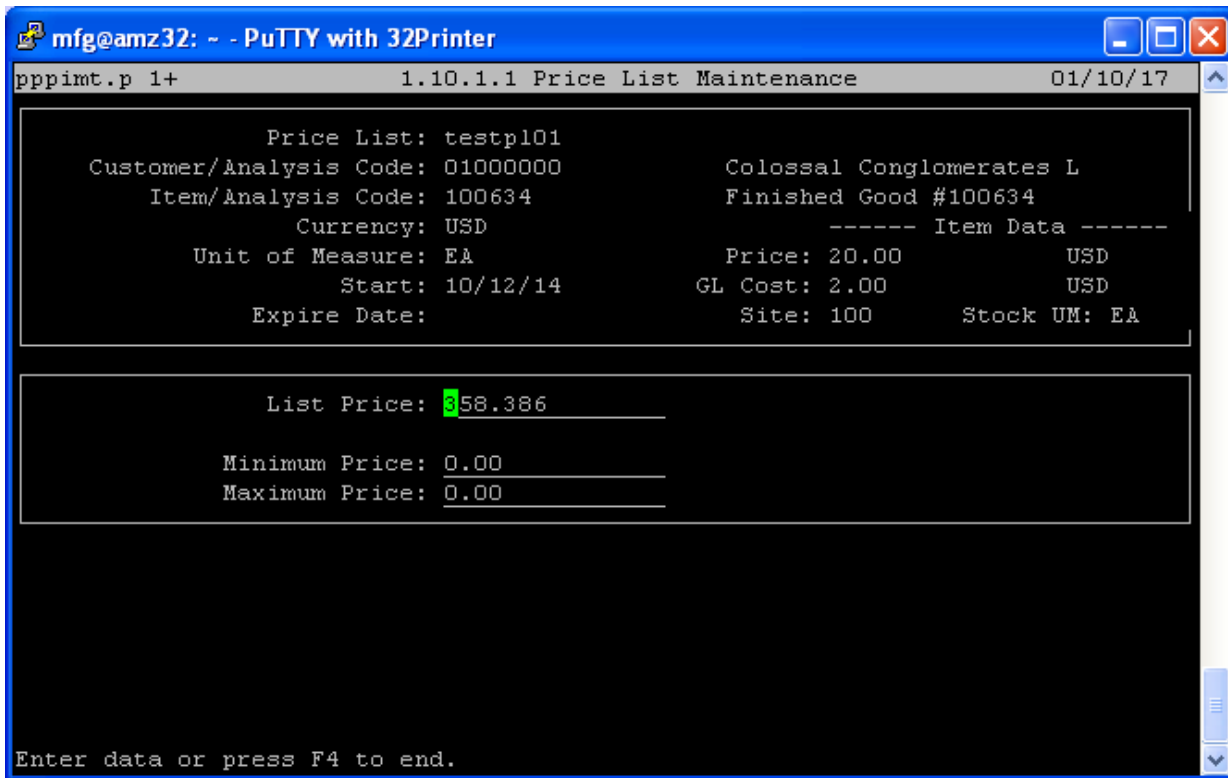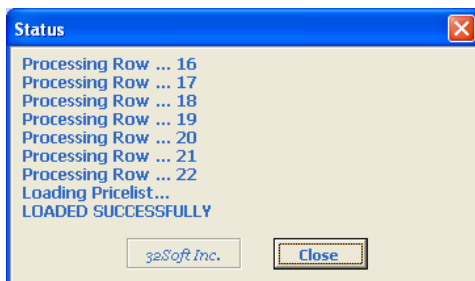
New Price List Creation

1. You can easily create a new Price List in the Price List Maintenance Data Loader. To create a new price list, leave the search criteria fields blank and enter data in the columns outlined in red below.

2. When data entered and review complete, select the [UPLOAD] button. A status window appears indicating whether the upload is successful or not.

Verifying QAD Data

1. You can verify that the data has been entered correctly in Price List Maintenance (1.10.1.1) by running a report or inquiry against the specific price list.

2. Alternatively, they can verify by specifying the price list in the search parameters in the Data Loader.

Error Checking

1. When you upload to QAD, a pop-up window will indicate the status of the upload. If there is an error, the cell with the error will be highlighted in red. If you hover over the cell, the reason for the error will be displayed.

- You can use the [Find Error] button to navigate between cells with errors.
- You must correct the error before uploading again. If there is error in one cell, no records will be uploaded.

Have Questions? Contact Us.

Now that you know everything is set-up correctly, you are on your way to a more productive QAD experience with Data Loaders! Thank you for your interest.

If you have any questions or need additional help, please do not hesitate to contact us.