

xWD:

**Growing Distribution Sales with
Third Party Pricing Services**
(External Vendor Catalog)

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Inside The External Catalog

What is it?

- ▶ xWD functionality designed to work with Pricing Services provided by 3rd party vendors to maintain item information as well as costing information.

What does it do?

- ▶ The Catalog houses both stock and non stock item information and updates the items in the ERP automatically when the Catalog is updated



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How does it work?

- ▶ It utilizes an xTuple open source tool CSVimp, along with tables and functions to import updates into the xTuple ERP.
- ▶ It also maintains a “catalog” for non stock items and makes them accessible to Sales Order Entry, Quotes, and Purchase orders.
- ▶ When a non stock item is required, simply click on the “Vendor Catalog” in the upper right hand corner in any of the three, search for your item, and convert. (Demo)



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What Pricing Services do you support?

- ▶ We designed this for use with Trade Service Electrical and Trade Service Plumbing.
- ▶ We have also integrated XO lighting and are in the process of completing IDW pricing as well.

What if I don't use a Price Service?

- ▶ New in 4.2 – we have added a PS (price sheet) Provider. Custom providers can be setup to use Pricing Sheets provided by your vendors.



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PS Providers have a simplified table structure and import, with the maps you can import items having just a part number and cost if needed. The rest of the fields can be modified in the import maps to make them specific to just one vendor if needed.

Setup:

Products/Setup/External Vendor Catalog

(Demo)



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How do I run updates?

- ▶ System/Utilities/ Maintain CSV Atlas.
- ▶ On the Atlas side, open you map for import.
- ▶ On the CSV side open your file to import.
(Note: the default is to open a CSV, change to all files to open a TSV file).
- ▶ On the CSV import side, make sure your delimiter is set properly, and check “treat first row as header information”.
- ▶ Select import and start from the CSV tool menu. (Demo)



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What actually happens?

- ▶ Atlas, this a map of the target table (Pricesvc for TS data).
- ▶ This determines what field will be populated by what column in the CSV file. (See CSVImp for more information)
- ▶ PreSQL, this deletes everything from the target table and makes it ready to receive the imported data.
- ▶ Post SQL, this will have the operations that are run after your data has been imported into the target table (Pricesvc table for TS data).



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Functions used in Post SQL.

Notice in the TS data maps, PostSQL, you will find a statement like this:

```
select xwd.importPricesvc('TSE', 'U');
```

This will call the function importPricesvc with a couple of options.

'TSE' is your provider, only items in the Catalog with a provider of TSE will be updated. The 'U' stands for update.



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What item data is updated with External Catalog?

- ▶ Updating of the converted items in the ERP happens with a functions called “updatecatalog”.
- ▶ This is called by importpricesvc function. It updates the item data, itemsite, itemsrc and itemsrcp tables. The exact fields that are updated can be seen in that function or by using the Conversion Mapping Excel file that describes this in detail.
- ▶ Other Providers such as XO, IDW, and PS can have slightly different values depending on your needs. (Demo)



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