

# Custom Enhancement Outline

Customer, Affiliate and  
Vendor Contract  
Import

Prepared By: Tom Johnson & Luc  
Martel

*1 Place Alexis Nihon, Suite 800  
Montreal, QC H3Z 3B8  
Telephone: (514) 866-0001  
Fax: (514) 866-1805  
Email: [info@tecsys.com](mailto:info@tecsys.com)*

## Identification

Project No.: 22281 and 28979

Project Name: Customer, Affiliate and Vendor Contract Import

Done in Versions: 7.1.2.0000 and 10.2.1.0000

## Overview

ABC company currently receives or maintains Customer, Affiliate and Supplier contracts in an Excel spreadsheet that subsequently needs to be imported into Visual Streamline.

## Functionality Gating

Business Rule: Optional BR 82 Contract Details Import

User Rights: RTQACI Right to QA Contract Import

When active, this new functionality will appear:



## Setup

1. The contract header will need to be set up manually.
2. The contract pricing method may be specified in column AB (28) of the import file. If no method is specified, the default will be Actual Price.
3. The break method may be specified in column AC (29) of the import file. If no method is specified, the default will be Quantity Break.
4. The import spreadsheet must always match the layout of the provided template spreadsheet exactly. Optional columns may be left empty but the position of the columns must remain the same.
5. Basic validation will be performed as follows:
  - a. Customer, Affiliate or Supplier code must exist;
  - b. Product code and line must exist;
  - c. Contract header must exist;
  - d. Start and stop dates are valid (if provided on spreadsheet);
  - e. If multiple quantity breaks are included, they must appear in ascending order as is required when manually entering a contract;
  - f. If supplier contract links are included for rows of customer or affiliate contracts, the supplier contract must be pre-defined.

# Processing

When launched, the import routine shows the following dialogue:

Import Contract Details

This custom routine will import contract details based on specific criteria:

- The import text file must be tab-delimited as per a pre-determined layout

- Price and Break methods will default to 'Actual' and 'Quantity' if not specified

- The contract header must already be defined

- A test run must be performed prior to executing the import

- If the error handling method is 'Rollback' then the entire import will be undone when the first error is encountered. If the method is 'Skip' then only the records with errors will be omitted

Display

The error file will contain a list of errors encountered as a tab-delimited text file

Error Handling Method

Rollback

(Only applies to 'Import', not 'Test')

Source File

Error File

New import options as of release 10.2.1.0000 - View the layout for more information

Test

Import

Exit

Clicking the 

Display

 button will open a window that describes the layout of the import file:

Import File Layout

The tab-delimited file must have the following fields (in order):

Fields in blue are optional but placeholders must be present when required.

Column 1:

Contract Type (A/C/S)

Column 2:

Affiliate, Customer or Supplier Code

Column 3:

Contract ID

Column 4:

Start Date (YYYYMMDD)

Column 5:

End Date (YYYYMMDD)

Column 6:

Product Code

Column 7:

Product Line

Column 8:

Selling UOM (Type A or C ONLY)

Column 9:

Pricing UOM (Purchase UOM when Type S)

Column 10:

Quantity 1 (Leave <Blank> if using Level Pricing)

Column 11:

Price 1 (Method=A) or Percent 1 (All other Methods)

... optional additional breaks...

...Repeat to Quantity & Price/Percent 9 or leave <Blank>

Column 28:

Price Method (A/D/M/P/S/T <Blank>=A)

Column 29:

Break Method (Q/L <Blank>=Q)

Column 30:

Rebate Method (N/C/P <Blank>=N Type A or C ONLY)

Column 31:

Rebate Cost or Percent (Type A or C ONLY)

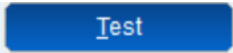
Column 32:

Supplier for Contract Link (Type A or C ONLY)

Column 33:

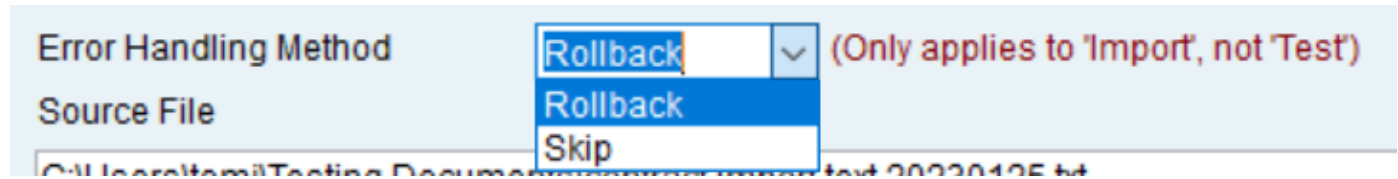
Contract for Contract Link (Type A or C ONLY)

Exit

When an import is run, the user is required to first run it as a . This process simulates the import and performs data validation but does not update the live database. After the test the program will display a message indicating the name of the error file (text) that was created. The user may then examine the file and determine if there are problems that need to be addressed in the source. The test function may be repeated as necessary.

Note that the error file is created even if no actual errors were encountered. In this case, the file will be empty.

After the test has been performed the  button will be enabled. The import may be performed even if errors were encountered. The behavior of the program in the event of an error is dependent on the **Error Handling Method** which was selected:



Error Handling Method: Rollback (Only applies to 'Import', not 'Test')

Source File: Rollback

Skip

If **Skip** is selected, the individual records containing the error is skipped but the valid records will still be updated.

If **Rollback** is selected, the entire import will be undone upon encountering an error.

## Limitations

No other functionality was addressed with this custom enhancement. Custom Enhancements are software changes completed for a client's specific requirements only and not developed for the base package. These changes were completed without consideration for features and business rules that the client did not use in order to minimize the cost of the project. Any missing functionality required to meet the business needs of future clients considering implementing this functionality will be considered a new custom enhancement and will be billable.

The import utility was written for the purpose of importing NEW contract details. It was not designed to update or overwrite existing contract records. As such, there is no inherent Export functionality to extract existing records for the purposes of modification and re-import.

If importing data from a spreadsheet, the sheet must first be re-saved as a tab-delimited text file.

There are 2 Excel documents that have been created to assist with creating an import spreadsheet. These are found in the same folder as this document and are named:

[CE 6240-PR500 contract FULL.xlsx](#)

[CE 6240-PR500 contract FULL with Lookup.xltx](#)

The 'lookup' version contains an embedded connection that will populate a second tab with a list of active products and their selling/pricing UOMs for the purpose of validation. Note that this connection string would need to be modified site-by-site to point to their local SQL Instance and the applicable company database.

This custom import requires a large amount of space in SQL backup transaction logs. You need to be sure you have enough space available to handle the growth required or risk filling the disk which could cause system outages. This is amplified for sites running e-commerce due to replication data growth, and could also be affected when running other integrations like WMS, Payroc, EDI, etc. When this happens, the log size needs to be reduced to recover the space when not in use, which means shutting down all SQL jobs and having all users off the system while it is done which can take some time. If performed by Tecsys this is considered a billable service.

It would be best to take precautions to mitigate any risk when running this in your live environment:

- Run outside of business hours.
- Increase disk size where logs are stored after evaluating growth required.

- Do in small batches after determine growth size and limits. At one site we found that 10,000 records imported adds 150 GB to logs, but yours maybe different. Then wait the length of time the Backup logs are set to commit (TBD) before doing another batch to prevent further growth.
- Move backup log files to another drive that is different from Streamline DB.
- Have a plan in case of failure.