Cepheo Advanced Vendor Catalog

User guide

January 2024

Version 1.4

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1 VERSION HISTORY

Date	Version	Author	Reviewers	Changes
01-04-2023	1.0	AVOLL		First Cepheo version
03-05-2023	1.1	GEEFT		Updated documentation according to - that the entity Vendor catalog product purchase prices (CatVendorProductCandidatePurchasePriceEntity) has been replaced with the new Advanced vendor catalog product purchase prices (PJMAVCCatVendorProductCandidatePurchasePriceEntity) Also updated documentation with new on from/to date from purchase price to sales price trade agreement, plus some more information on standard vendor catalog use of sales price margin which also can be used with Advanced Vendor Catalog.
14-06-2023	1.2	GEEFT		Added paragraph on workaround for possible import failure when the Category hierarchy is selected on the Vendor catalog and the dummy value in the xml file is not recognised in the import (setup of conversion from dummy value on data import project to Cateogory hierarchy)
15-08-2023	1.3	GEEFT		Added documentation for new field ‘Reference’, which also can be used to find correct vendor catalog if there are several active catalogs with same vendor when uploading file with use of web service.
18-01-2024	1.4	GEEFT		Added documentation for: • Popup that shows when processing data with open of Details on Catalog file history and filtering in the Catalog approval page. • New button ‘Approve(async)’ to run approve in async (when workflow is disabled).

2 INTRODUCTION

The Advanced Vendor catalog is an extension of standard Vendor Catalog to use for import process for product catalogs submitted from vendors. The Vendor can send or upload the details for products that the vendor supplies to your company.

With the use of automatically processing, the workflow approval can also be skipped to streamline the data exchange and updates from your vendors. The vendor catalog entities and functionality are extended with support for more product data details, updates of existing data for both purchase prices and purchase discounts with the use of extensive setup. The release and updates of products include template product setup on procurement categories, resulting in products ready for procurement immediately after import.

With use of Azure logic apps with starting point in the Azure samples, the files can be fetched and transformed to XML format supported by the Advanced vendor catalog and processed automatically to D365 using web services. See separate documentation for Azure samples.

3 LICENSE CONFIGURATION KEYS

System administration > Setup > Licensing > License Configuration >

New configuration keys:

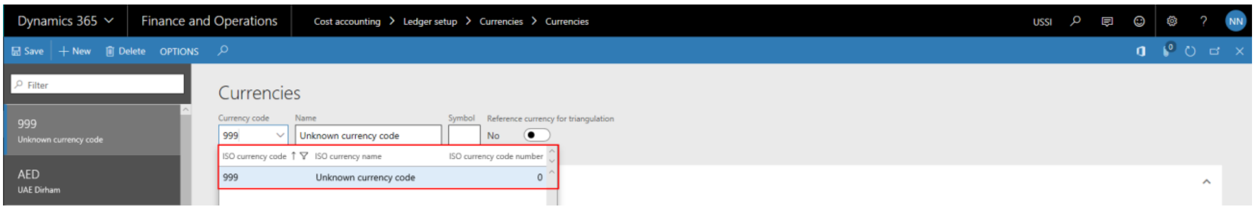
- **Cepheo Advanced Vendor Catalog** key has been added to activate the Advanced vendor catalog functionality.

4 SETUP

4.1 Unknown currency code

It might happen that a currency code from the initial files does not exist in D365. In this case, the standard vendor catalog upload process fails. There is an ability to set up an unknown currency code in D365 for the advanced vendor catalog.

1. Go to **General ledger > Currencies > Currencies**
2. Click **New**
3. In **Currency code**, type ‘999’ and select a standard ISO currency code from the **Currency code** drop down.


Dynamics 365
Finance and Operations
Cost accounting > Ledger setup > Currencies > Currencies
USSI
NN
Save
New
Delete
OPTIONS
Filter
999
Unknown currency code
AED
UAE Dirham

Currencies

Currency code	Name	Symbol	Reference currency for triangulation
999	Unknown currency code		No

ISO currency code	ISO currency name	ISO currency code number
999	Unknown currency code	0

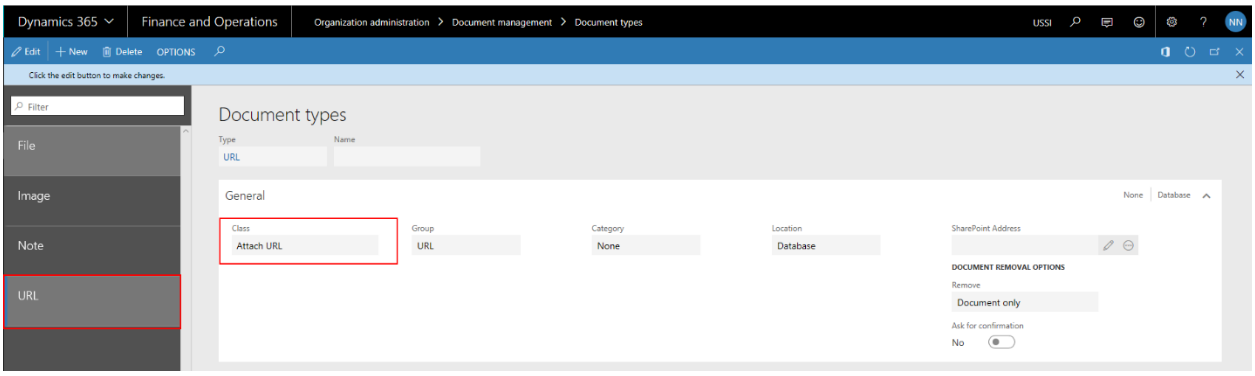
4.2 Document type URL

While releasing products, provided URLs from XML file can be added or updated to released products based on the appropriate setup from procurement category. Products can be released into multiple companies. So, the same document type should exist within all companies.

To ensure that a document type exists, follow the steps below.

1. Go to **Organization administration > Document management > Document types**
2. Create a new Attach URL document type if needed as shown below.

You can use the same URL document type for URL1 and URL2 from the XML file or create two Attach URL document types. For instance, URL1 and URL2.


Dynamics 365
Finance and Operations
Organization administration > Document management > Document types
USSI
NN
Edit
New
Delete
OPTIONS
Filter
File
Image
Note
URL
None
Database

Click the edit button to make changes.

Document types

Type: URL
Name:

General

Class: Attach URL
Group: URL
Category: None
Location: Database
SharePoint Address:

DOCUMENT REMOVAL OPTIONS

Remove: Document only
Ask for confirmation: No

4.3 Vendor catalog import parameters

Before using advanced vendor catalogs, make sure that all parameters are set up.

1. Go to **Procurement and sourcing > Setup > Vendors > Vendor catalog import parameters**

2. Enter maximum upload size 500 Mb
3. **Select unknown currency code ‘999’:** Drop-down to currencies. It might happen that a currency code from the initial files does not exist in D365. In this case, the standard vendor catalog upload process will fail. There is an ability to set up an unknown currency code “999” in D365 for advanced vendor catalogs. This value “999” should be added to the currencies list before.

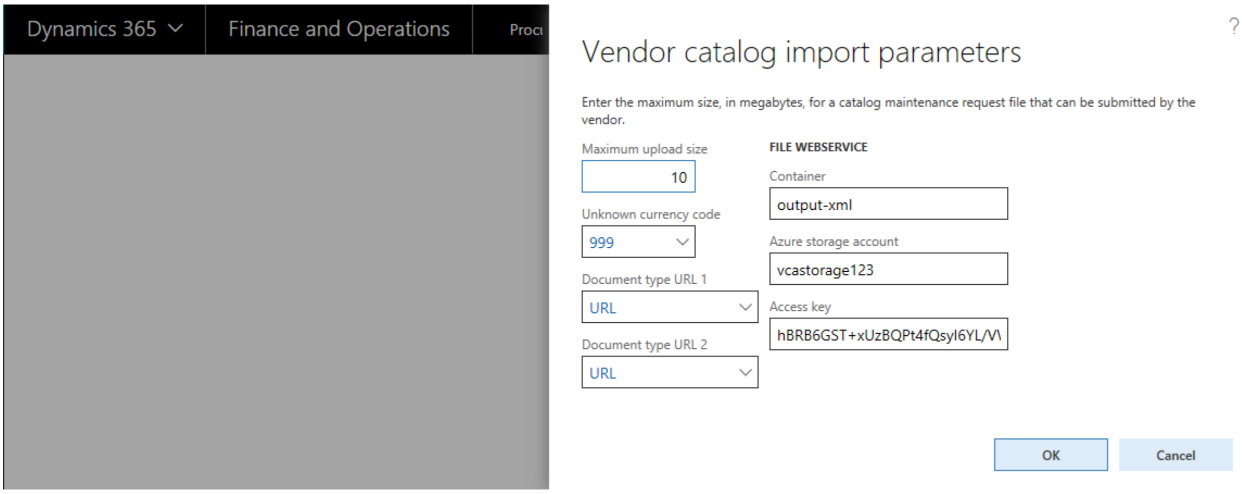
4. **Select Document type URL1 and URL2:** Drop-down to document types filtered by class “Attach URL.” It uses while releasing of approved products for the creation of an attachment with URL1 from XML file. This is a company-specific drop-down. The document type with the same name should exist within all companies in which products are going to be released.

   Note: You must change companies to select different Document type they have different name in the companies used with advanced vendor catalogs.

   File Webservice

   If you will use the webservice to import from Azure using the “Azure samples” or other Azure logic apps or other use of the webservice, then also fill inn following setup:

5. **Enter the ‘output-XML’ blob folder in the Container field:** To store blob container. By default, it is set up to “output-xml” in all azure logic apps.
6. **Enter Azure storage account:** To store an Azure storage account which uses for a connection to Microsoft Azure storage with blobs.
7. **Enter access key 1 from the Azure portal for the selected Azure storage account:** An access key for the selected Azure storage account.



Vendor catalog import parameters

Enter the maximum size, in megabytes, for a catalog maintenance request file that can be submitted by the vendor.

Maximum upload size: 10

Unknown currency code: 999

Document type URL 1: URL

Document type URL 2: URL

FILE WEBSERVICE

Container: output-xml

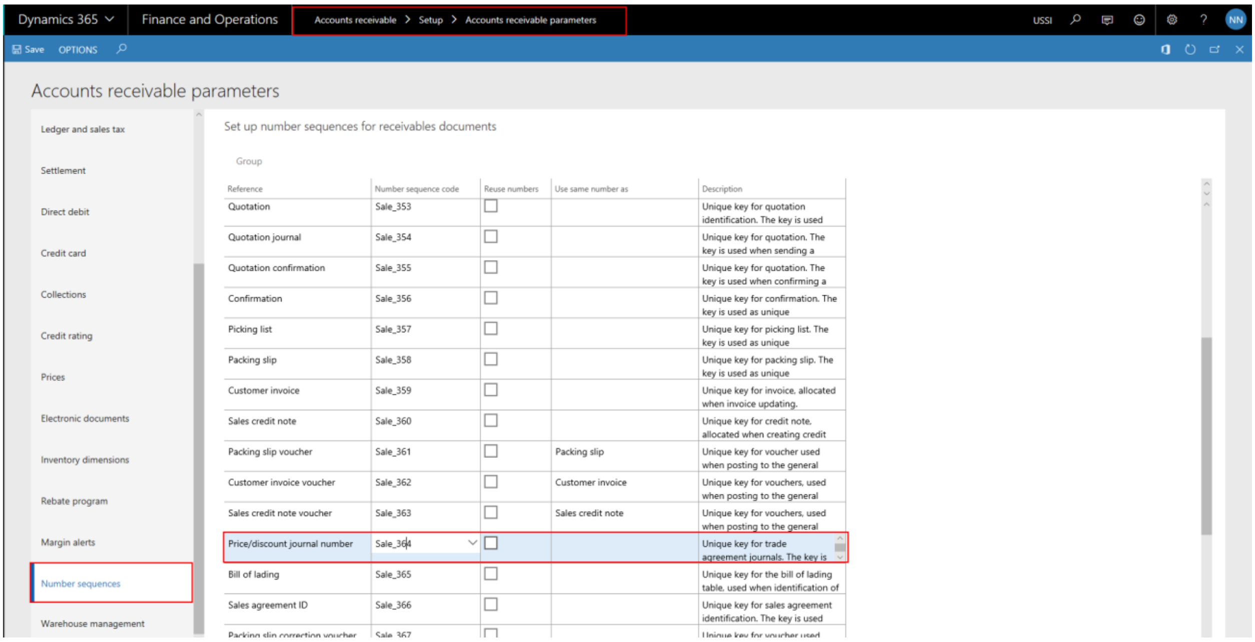
Azure storage account: vcastorage123

Access key: hBRB6GST+xUzBQPt4fQsyI6YL/V

4.4 Set up price/discount journal number sequence

While releasing products a new trade agreement journal is created for each released product. Ensure, that you have enough the Price/discount number sequence length for each company to update prices/discounts for a significant number of products.

1. Go to **Accounts receivable > Setup > Accounts receivable parameters**
2. Click **Number sequences**
3. Find **Price/discount journal number**
4. Right click on **Number sequence code** and select **View details**

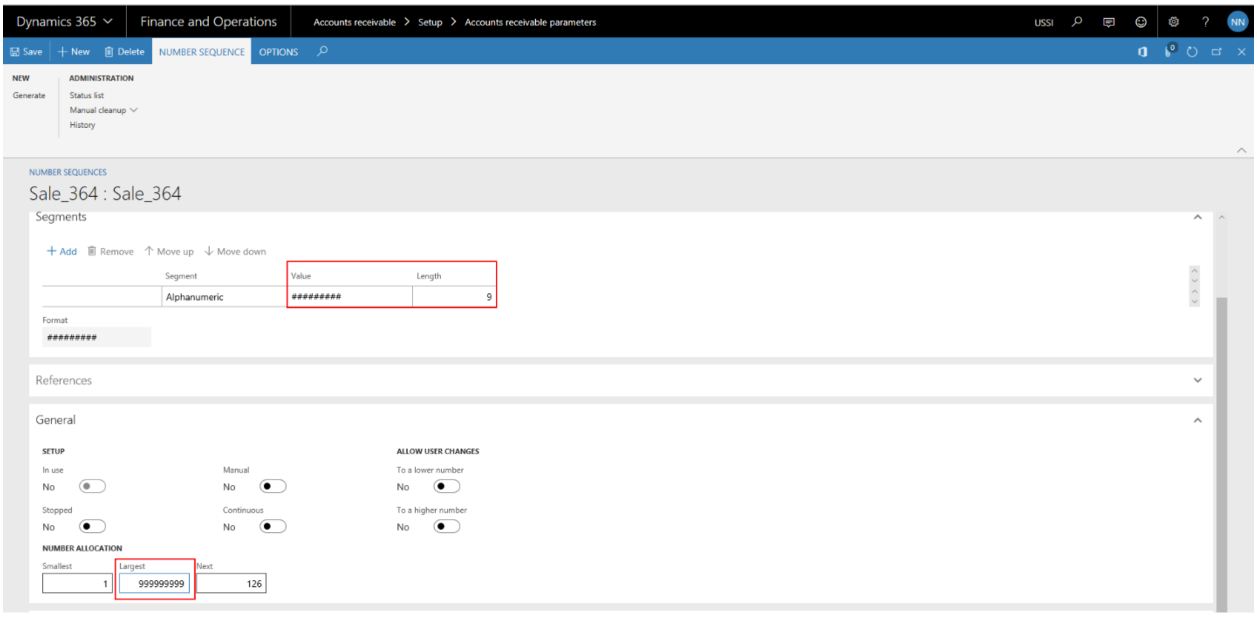

Dynamics 365
Finance and Operations
Accounts receivable > Setup > Accounts receivable parameters
USSI
NN
Save
OPTIONS
Ledger and sales tax
Settlement
Direct debit
Credit card
Collections
Credit rating
Prices
Electronic documents
Inventory dimensions
Rebate program
Margin alerts
Number sequences
Warehouse management
Group

Accounts receivable parameters

Set up number sequences for receivables documents

Reference	Number sequence code	Reuse numbers	Use same number as	Description
Quotation	Sale_353	☐		Unique key for quotation identification. The key is used
Quotation journal	Sale_354	☐		Unique key for quotation. The key is used when sending a
Quotation confirmation	Sale_355	☐		Unique key for quotation. The key is used when confirming a
Confirmation	Sale_356	☐		Unique key for confirmation. The key is used as unique
Picking list	Sale_357	☐		Unique key for picking list. The key is used as unique
Packing slip	Sale_358	☐		Unique key for packing slip. The key is used as unique
Customer invoice	Sale_359	☐		Unique key for invoice, allocated when invoice updating.
Sales credit note	Sale_360	☐		Unique key for credit note, allocated when creating credit
Packing slip voucher	Sale_361	☐	Packing slip	Unique key for voucher used when posting to the general
Customer invoice voucher	Sale_362	☐	Customer invoice	Unique key for vouchers, used when posting to the general
Sales credit note voucher	Sale_363	☐	Sales credit note	Unique key for vouchers, used when posting to the general
Price/discount journal number	Sale_364	☐		Unique key for trade agreement journals. The key is
Bill of lading	Sale_365	☐		Unique key for the bill of lading table, used when identification of
Sales agreement ID	Sale_366	☐		Unique key for sales agreement identification. The key is used
Packing slip correction voucher	Sale_367	☐		Unique key for voucher used

5. Change **Value** by adding # in the mask to have length 9
6. Change **Largest** to 999999999


Dynamics 365
Finance and Operations
Accounts receivable > Setup > Accounts receivable parameters
USSI
NN
Save
New
Delete
NUMBER SEQUENCE
OPTIONS
NEW
Generate
ADMINISTRATION
Status list
Manual cleanup
History
NUMBER SEQUENCES
Add
Remove
Move up
Move down
References

Sale_364 : Sale_364

Segments

Segment	Value	Length
Alphanumeric	#########	9

Format: #########

General

SETUP

In use: No

Stopped: No

Manual: No

Continuous: No

ALLOW USER CHANGES

To a lower number: No

To a higher number: No

NUMBER ALLOCATION

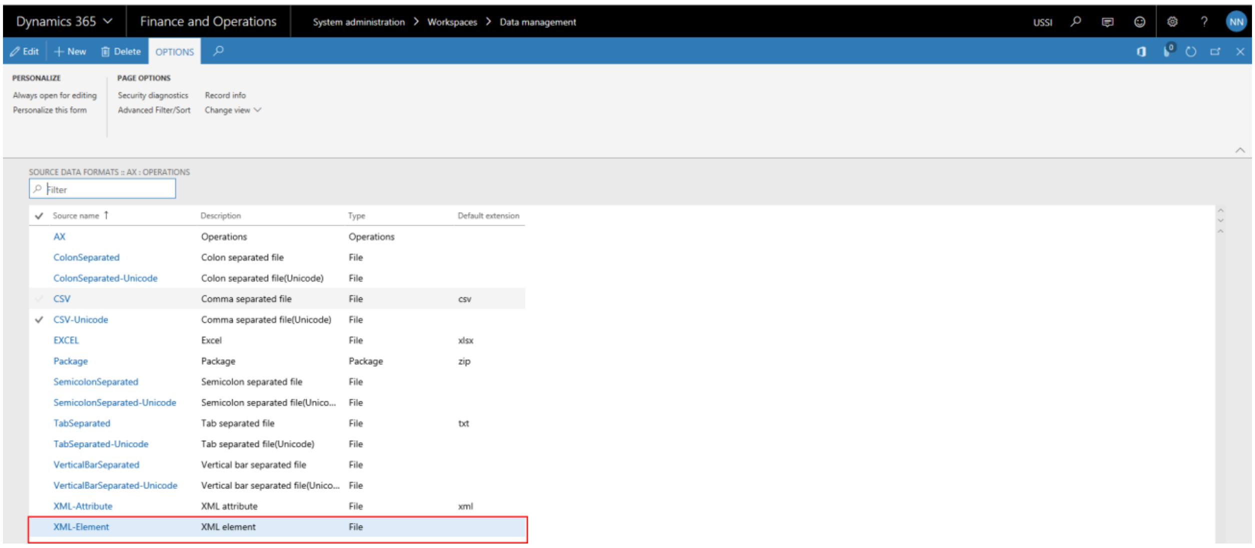
Smallest	Largest	Next
1	999999999	126

7. Repeat steps from 1-6 for each company if needed.

4.5 Configure XML data source format

Make sure that XML-Element file type exists in D365.

1. Go to **System administration > Workspaces > Data management**
2. Click on the **Configure data source** tile
3. Click on the **source name** hyperlink

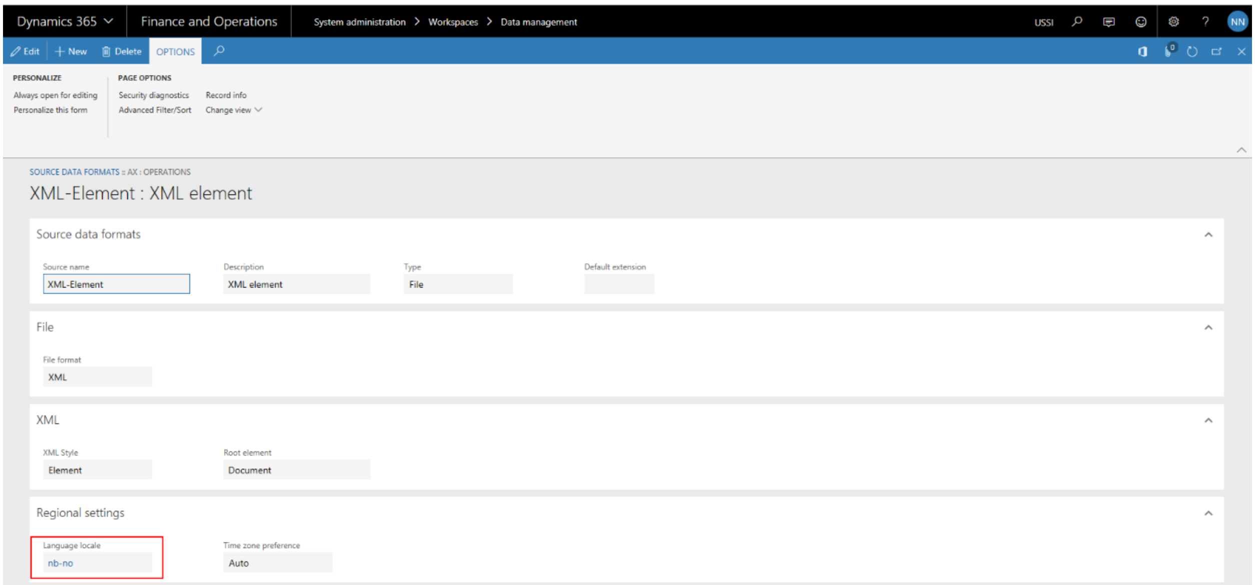

Dynamics 365
Finance and Operations
System administration > Workspaces > Data management
USSI
NN
Edit
New
Delete
OPTIONS
PERSONALIZE
Always open for editing
Personalize this form
PAGE OPTIONS
Security diagnostics
Advanced Filter/Sort
Record info
Change view

SOURCE DATA FORMATS :: AX : OPERATIONS

Filter

✓	Source name ↑	Description	Type	Default extension
	AX	Operations	Operations	
	ColonSeparated	Colon separated file	File	
	ColonSeparated-Unicode	Colon separated file(Unicode)	File	
	CSV	Comma separated file	File	csv
✓	CSV-Unicode	Comma separated file(Unicode)	File	
	EXCEL	Excel	File	xlsx
	Package	Package	Package	zip
	SemicolonSeparated	Semicolon separated file	File	
	SemicolonSeparated-Unicode	Semicolon separated file(Unico...	File	
	TabSeparated	Tab separated file	File	txt
	TabSeparated-Unicode	Tab separated file(Unicode)	File	
	VerticalBarSeparated	Vertical bar separated file	File	
	VerticalBarSeparated-Unicode	Vertical bar separated file(Unico...	File	
	XML-Attribute	XML attribute	File	xml
	XML-Element	XML element	File	

4. On the **Regional settings** tab, you can select an appropriate **language locale**. For instance, ‘nb-no’ if the date format in CSV file is ‘DD.MM.YYYY’. While running the Nelfo transformation, the date from the initial files are converted from the date format ‘YYYYMMDD’ to ‘YYYY-MM-DD’ in the resulted XML-file.


Dynamics 365
Finance and Operations
System administration > Workspaces > Data management
USSI
NN
Edit
New
Delete
OPTIONS
PERSONALIZE
Always open for editing
Personalize this form
PAGE OPTIONS
Security diagnostics
Advanced Filter/Sort
Record info
Change view

SOURCE DATA FORMATS :: AX : OPERATIONS

XML-Element : XML element

Source data formats

Source name: XML-Element
Description: XML element
Type: File
Default extension:

File

File format: XML

XML

XML Style: Element
Root element: Document

Regional settings

Language locale: nb-no
Time zone preference: Auto

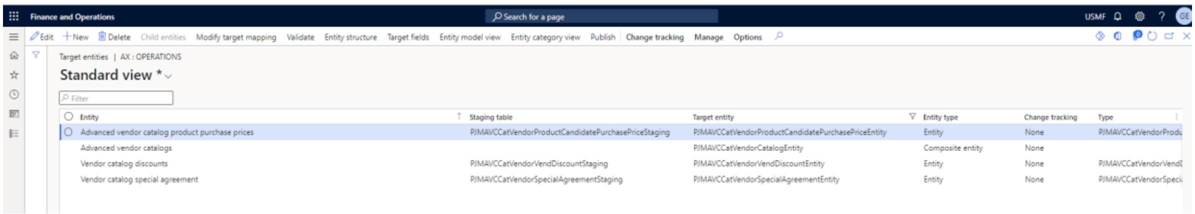
4.6 Set up advanced vendor catalog composite entity and its child entities

Before creating an advanced vendor catalog import project, make sure that a new **Advanced vendor catalog** composite entity exists, and mappings are generated for it and its child entities.

1. Go to **System administration > Workspaces > Data management**
2. Click on the **Framework parameters** tile
3. Select the **Entity settings** tab
4. Click **Refresh entity list**
5. Wait until entity list is refreshed.
6. Go to **System administration > Workspaces > Data management**

7. Click on the **Data entities** tile
8. Filter out target entities by the Target entity field starting with PJM

There are a new **Advanced vendor catalogs** composite entity and **Advanced vendor catalog product purchase prices**, **Vendor catalog discounts** and **Vendor catalog special agreement** entities.

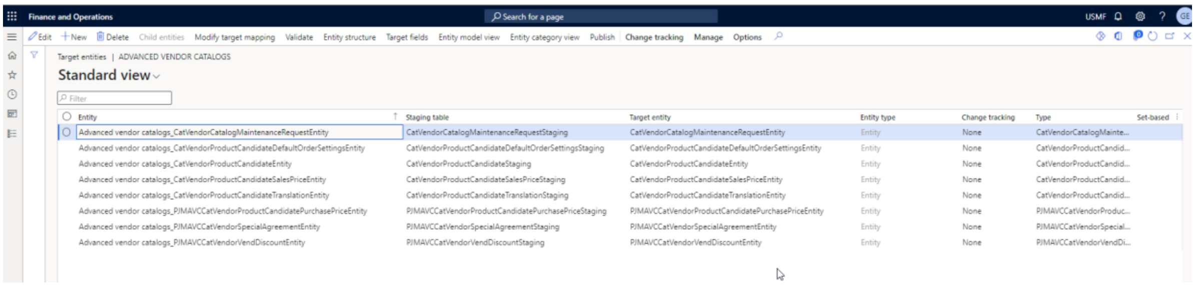

Finance and Operations
Search for a page
USMF
Edit
New
Delete
Child entities
Modify target mapping
Validate
Entity structure
Target fields
Entity model view
Entity category view
Publish
Change tracking
Manage
Options
Filter

Target entities | AX : OPERATIONS

Standard view *

Entity	Staging table	Target entity	Entity type	Change tracking	Type
Advanced vendor catalog product purchase prices	PJMAVCCatVendorProductCandidatePurchasePriceStaging	PJMAVCCatVendorProductCandidatePurchasePriceEntity	Entity	None	PJMAVCCatVendorProdu
Advanced vendor catalogs		PJMAVCCatVendorCatalogEntity	Composite entity	None	
Vendor catalog discounts	PJMAVCCatVendorVendDiscountStaging	PJMAVCCatVendorVendDiscountEntity	Entity	None	PJMAVCCatVendorVendI
Vendor catalog special agreement	PJMAVCCatVendorSpecialAgreementStaging	PJMAVCCatVendorSpecialAgreementEntity	Entity	None	PJMAVCCatVendorSpeci

9. Click on the **Child entities** button to see all child entities for the **Advanced vendor catalog composite** entity.

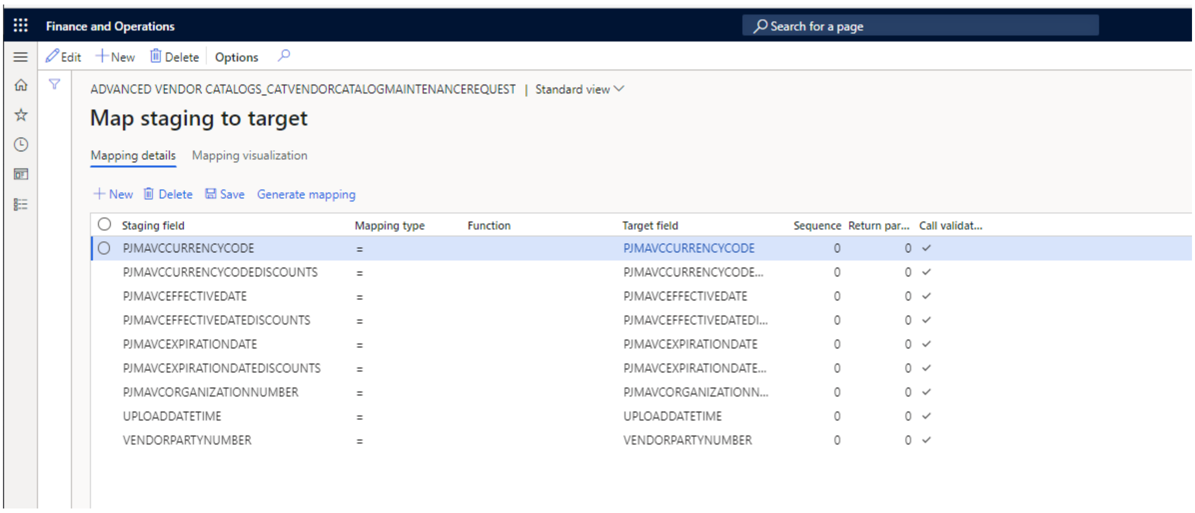

Finance and Operations
Search for a page
USMF
Edit
New
Delete
Child entities
Modify target mapping
Validate
Entity structure
Target fields
Entity model view
Entity category view
Publish
Change tracking
Manage
Options
Filter

Target entities | ADVANCED VENDOR CATALOGS

Standard view

Entity	Staging table	Target entity	Entity type	Change tracking	Type	Set-based
Advanced vendor catalogs_CatVendorCatalogMaintenanceRequestEntity	CatVendorCatalogMaintenanceRequestStaging	CatVendorCatalogMaintenanceRequestEntity	Entity	None	CatVendorCatalogMainte...	
Advanced vendor catalogs_CatVendorProductCandidateDefaultOrderSettingsEntity	CatVendorProductCandidateDefaultOrderSettingsStaging	CatVendorProductCandidateDefaultOrderSettingsEntity	Entity	None	CatVendorProductCandid...	
Advanced vendor catalogs_CatVendorProductCandidateEntity	CatVendorProductCandidateStaging	CatVendorProductCandidateEntity	Entity	None	CatVendorProductCandid...	
Advanced vendor catalogs_CatVendorProductCandidateSalesPriceEntity	CatVendorProductCandidateSalesPriceStaging	CatVendorProductCandidateSalesPriceEntity	Entity	None	CatVendorProductCandid...	
Advanced vendor catalogs_CatVendorProductCandidateTranslationEntity	CatVendorProductCandidateTranslationStaging	CatVendorProductCandidateTranslationEntity	Entity	None	CatVendorProductCandid...	
Advanced vendor catalogs_PJMAVCCatVendorProductCandidatePurchasePriceEntity	PJMAVCCatVendorProductCandidatePurchasePriceStaging	PJMAVCCatVendorProductCandidatePurchasePriceEntity	Entity	None	PJMAVCCatVendorProduc...	
Advanced vendor catalogs_PJMAVCCatVendorSpecialAgreementEntity	PJMAVCCatVendorSpecialAgreementStaging	PJMAVCCatVendorSpecialAgreementEntity	Entity	None	PJMAVCCatVendorSpecial...	
Advanced vendor catalogs_PJMAVCCatVendorVendDiscountEntity	PJMAVCCatVendorVendDiscountStaging	PJMAVCCatVendorVendDiscountEntity	Entity	None	PJMAVCCatVendorVendDi...	

10. Close the form.
11. Click on the **Modify target mapping** button for each child entity to ensure that all fields are mapped correctly.


Finance and Operations
Search for a page
Edit
New
Delete
Options
Mapping details
Mapping visualization
New
Delete
Save
Generate mapping

ADVANCED VENDOR CATALOGS_CATVENDORCATALOGMAINTENANCEREQUEST | Standard view

Map staging to target

Staging field	Mapping type	Function	Target field	Sequence	Return par...	Call validat...
PJMAVCCURRENCYCODE	=		PJMAVCCURRENCYCODE	0	0	✓
PJMAVCCURRENCYCODEDISCOUNTS	=		PJMAVCCURRENCYCODE...	0	0	✓
PJMAVCEFFECTIVEDATE	=		PJMAVCEFFECTIVEDATE	0	0	✓
PJMAVCEFFECTIVEDATEDISCOUNTS	=		PJMAVCEFFECTIVEDATEDI...	0	0	✓
PJMAVCEXPIRATIONDATE	=		PJMAVCEXPIRATIONDATE	0	0	✓
PJMAVCEXPIRATIONDATEDISCOUNTS	=		PJMAVCEXPIRATIONDATE...	0	0	✓
PJMAVCORGANIZATIONNUMBER	=		PJMAVCORGANIZATIONN...	0	0	✓
UPLOADDATETIME	=		UPLOADDATETIME	0	0	✓
VENDORPARTYNUMBER	=		VENDORPARTYNUMBER	0	0	✓

12. Click on the **Generate mapping** button to generate it automatically if needed.

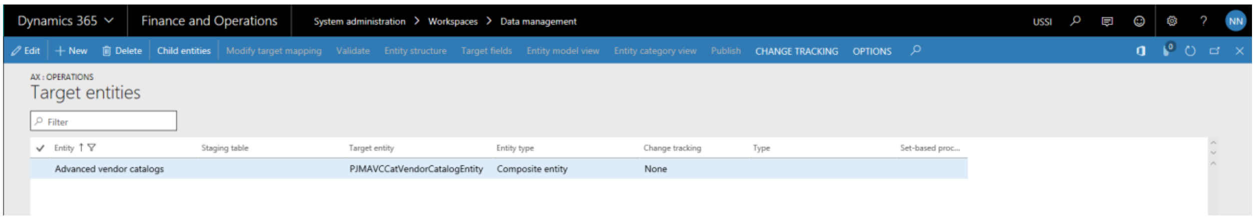
4.6.1 Advanced vendor catalogs entities

The following is the existing entities, where one has been replaced and two new entities have been added to it:

Is new?	Is updated ?	Entity	Target entity	Entity type
No	Yes	Vendor catalog maintenance requests	CatVendorCatalogMaintenanceRequestEntity	Entity
Yes	No	Vendor catalog discounts	PJMAVCCatVendorSpecialAgreementEntity	Entity
Yes	No	Vendor catalog special agreement	PJMAVCCatVendorVendDiscountEntity	Entity
No	Yes	Vendor catalog products	CatVendorProductCandidateEntity	Entity
Yes	Yes	Advanced vendor catalog product purchase prices	PJMAVCCatVendorProductCandidatePurchasePriceEntity	Entity
No	No	Vendor catalog product sale prices	CatVendorProductCandidateSalesPriceEntity	Entity
No	No	Vendor catalog product name and description translations	CatVendorProductCandidateTranslationEntity	Entity
No	No	Vendor catalog product purchase default order settings	CatVendorProductCandidateDefaultOrderSettings Entity	Entity

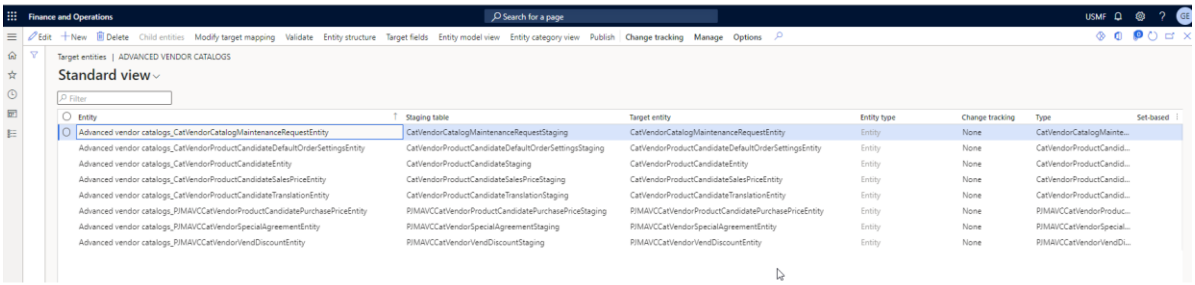
Some of the standard entities for vendor catalogs functionality have been updated with the new fields to import additional information.

To view them, on the dashboard, select the **Data Management** workspace, then click the **Data entities** tile.


Dynamics 365
Finance and Operations
System administration > Workspaces > Data management
USSI
NN
Edit
New
Delete
Child entities
Modify target mapping
Validate
Entity structure
Target fields
Entity model view
Entity category view
Publish
CHANGE TRACKING
OPTIONS
AX : OPERATIONS
Target entities
Filter

Entity	Staging table	Target entity	Entity type	Change tracking	Type	Set-based proc...
Advanced vendor catalogs		PJMAVCCatVendorCatalogEntity	Composite entity	None		

Click the **Child entities** button to review all the child entities for the new composite entity.


Finance and Operations
Search for a page
USMF
GE
Edit
New
Delete
Child entities
Modify target mapping
Validate
Entity structure
Target fields
Entity model view
Entity category view
Publish
Change tracking
Manage
Options
Target entities | ADVANCED VENDOR CATALOGS
Standard view
Filter

Entity	Staging table	Target entity	Entity type	Change tracking	Type	Set-based
Advanced vendor catalogs_CatVendorCatalogMaintenanceRequestEntity	CatVendorCatalogMaintenanceRequestStaging	CatVendorCatalogMaintenanceRequestEntity	Entity	None	CatVendorCatalogMainte...	
Advanced vendor catalogs_CatVendorProductCandidateDefaultOrderSettingsEntity	CatVendorProductCandidateDefaultOrderSettingsStaging	CatVendorProductCandidateDefaultOrderSettingsEntity	Entity	None	CatVendorProductCandid...	
Advanced vendor catalogs_CatVendorProductCandidateEntity	CatVendorProductCandidateStaging	CatVendorProductCandidateEntity	Entity	None	CatVendorProductCandid...	
Advanced vendor catalogs_CatVendorProductCandidateSalesPriceEntity	CatVendorProductCandidateSalesPriceStaging	CatVendorProductCandidateSalesPriceEntity	Entity	None	CatVendorProductCandid...	
Advanced vendor catalogs_CatVendorProductCandidateTranslationEntity	CatVendorProductCandidateTranslationStaging	CatVendorProductCandidateTranslationEntity	Entity	None	CatVendorProductCandid...	
Advanced vendor catalogs_PJMAVCCatVendorProductCandidatePurchasePriceEntity	PJMAVCCatVendorProductCandidatePurchasePriceStaging	PJMAVCCatVendorProductCandidatePurchasePriceEntity	Entity	None	PJMAVCCatVendorProduc...	
Advanced vendor catalogs_PJMAVCCatVendorSpecialAgreementEntity	PJMAVCCatVendorSpecialAgreementStaging	PJMAVCCatVendorSpecialAgreementEntity	Entity	None	PJMAVCCatVendorSpecial...	
Advanced vendor catalogs_PJMAVCCatVendorVendDiscountEntity	PJMAVCCatVendorVendDiscountStaging	PJMAVCCatVendorVendDiscountEntity	Entity	None	PJMAVCCatVendorVendDi...	

Open the excel file “Advanced vendor catalog entities.xlsx” for detailed information for the advanced vendor catalog entities and information about mandatory fields in the staging and target tables. Notice that all fields which are mandatory for the staging tables are mandatory for the XML file.

4.7 Set up advanced vendor catalog import project

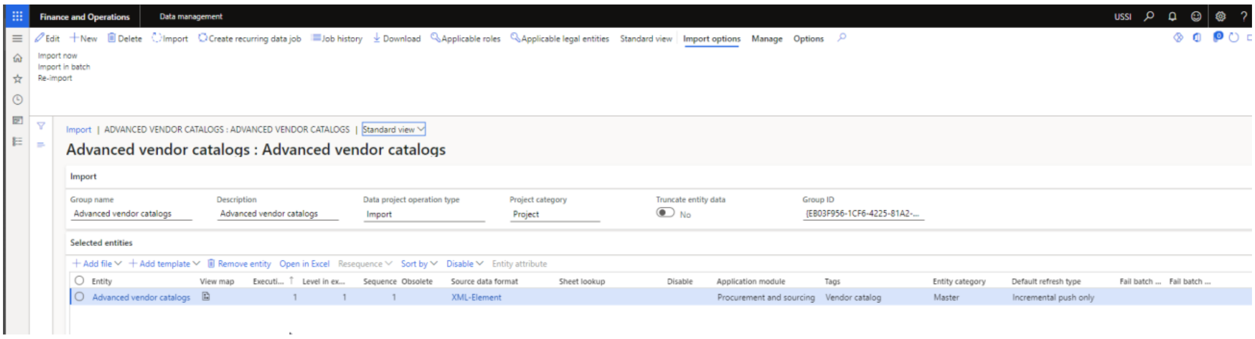
Before starting to work with advanced vendor catalogs, the **Advanced vendor catalogs** import project must exist.

1. Go to **System administration > Workspaces > Data management**
2. Click on the **Import** tile
3. Type **Group name** = **Advanced vendor catalogs**
4. Type **Description** = Advanced vendor catalogs. Notice that the project name should be the same as the **Advanced vendor catalogs** composite entity name.
5. In the **Source data format** list, select **XML-Element**
6. In the **Entity name** list, select **Advanced vendor catalogs**
7. Click the **Upload and add** button to upload example XML file.

   The info log appears that entity mappings have completed successfully.

   The import data project for the Advanced vendor catalogs composite entity has been created.

8. Select the **Advanced vendor catalogs** import project tile
9. Click **Load project**
10. Click **View map**

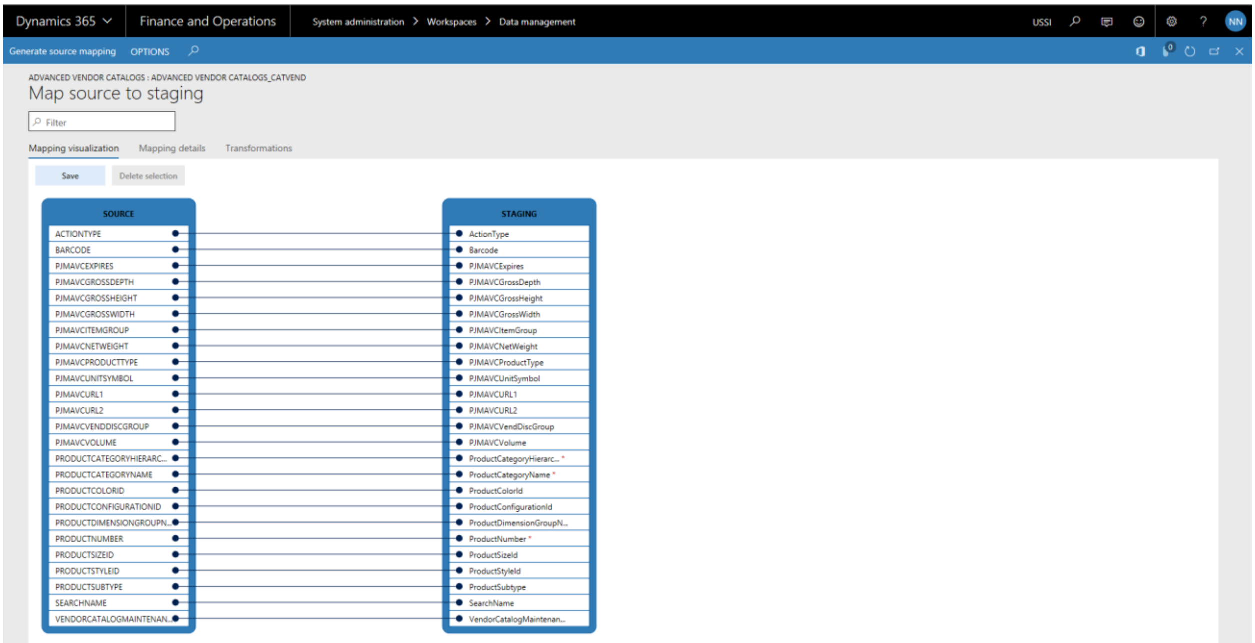

Finance and Operations
Data management
USSI
Edit
New
Delete
Import
Create recurring data job
Job history
Download
Applicable roles
Applicable legal entities
Standard view
Import options
Manage
Options
Import now
Import in batch
Re-import
Import | ADVANCED VENDOR CATALOGS : ADVANCED VENDOR CATALOGS | Standard view
Import
Selected entities
Add file
Add template
Remove entity
Open in Excel
Resequence
Sort by
Disable
Entity attribute

Advanced vendor catalogs : Advanced vendor catalogs

Group name	Description	Data project operation type	Project category	Truncate entity data	Group ID
Advanced vendor catalogs	Advanced vendor catalogs	Import	Project	No	{EB03F956-1CF6-4225-81A2-...

○	Entity	View map	Executi...	Level in ex...	Sequence	Obsolete	Source data format	Sheet lookup	Disable	Application module	Tags	Entity category	Default refresh type	Fail batch ...	Fail batch ...
○	Advanced vendor catalogs		1	1	1		XML-Element			Procurement and sourcing	Vendor catalog	Master	Incremental push only		

11. Select a child entity on the left side of the form and click **View map** to make sure that all fields are correct mapped automatically.
12. On the **Mapping visualization** tab, you can review the mapping


Dynamics 365
Finance and Operations
System administration > Workspaces > Data management
USSI
NN
Generate source mapping
OPTIONS
Filter
Mapping visualization
Mapping details
Transformations
Save
Delete selection

ADVANCED VENDOR CATALOGS : ADVANCED VENDOR CATALOGS_CATVEND

Map source to staging

SOURCE	STAGING
ACTIONTYPE	ActionType
BARCODE	Barcode
PJMAVCEXPIRES	PJMAVCExpires
PJMAVCGROSSDEPTH	PJMAVCGrossDepth
PJMAVCGROSSHEIGHT	PJMAVCGrossHeight
PJMAVCGROSSWIDTH	PJMAVCGrossWidth
PJMAVCITEMGROUP	PJMAVCItemGroup
PJMAVCNETWEIGHT	PJMAVCNetWeight
PJMAVCPRODUCTTYPE	PJMAVCProductType
PJMAVCUNITSYMBOL	PJMAVCUnitSymbol
PJMAVCURL1	PJMAVCURL1
PJMAVCURL2	PJMAVCURL2
PJMAVCVENDDISCGROUP	PJMAVCVendDiscGroup
PJMAVCVOLUME	PJMAVCVolume
PRODUCTCATEGORYHIERARC...	ProductCategoryHierarc... *
PRODUCTCATEGORYNAME	ProductCategoryName *
PRODUCTCOLORID	ProductColorId
PRODUCTCONFIGURATIONID	ProductConfigurationId
PRODUCTDIMENSIONGROUPN...	ProductDimensionGroupN...
PRODUCTNUMBER	ProductNumber *
PRODUCTSIZEID	ProductSizeId
PRODUCTSTYLEID	ProductStyleId
PRODUCTSUBTYPE	ProductSubtype
SEARCHNAME	SearchName
VENDORCATALOGMAINTENAN...	VendorCatalogMaintenan...

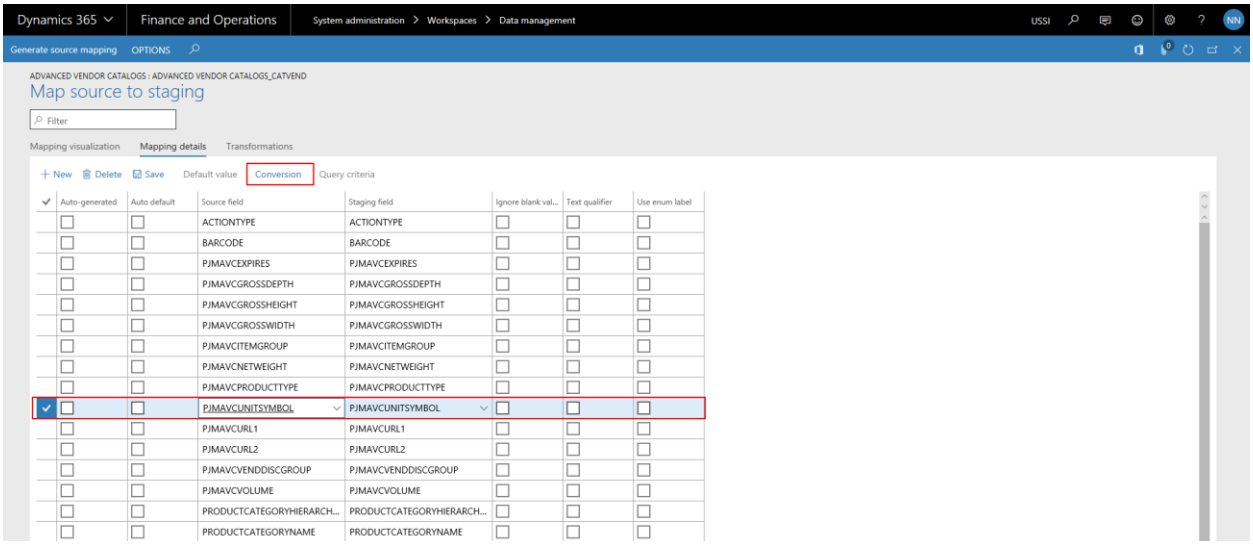
13. Repeat steps from 10 to 11 for each child entity.

4.8 Set up unit conversion

It is possible to use units from import files which differ from existing units in D365. In this case, to make sure that an upload file does not fail, the conversion should be set up for the following entities and their unit fields:

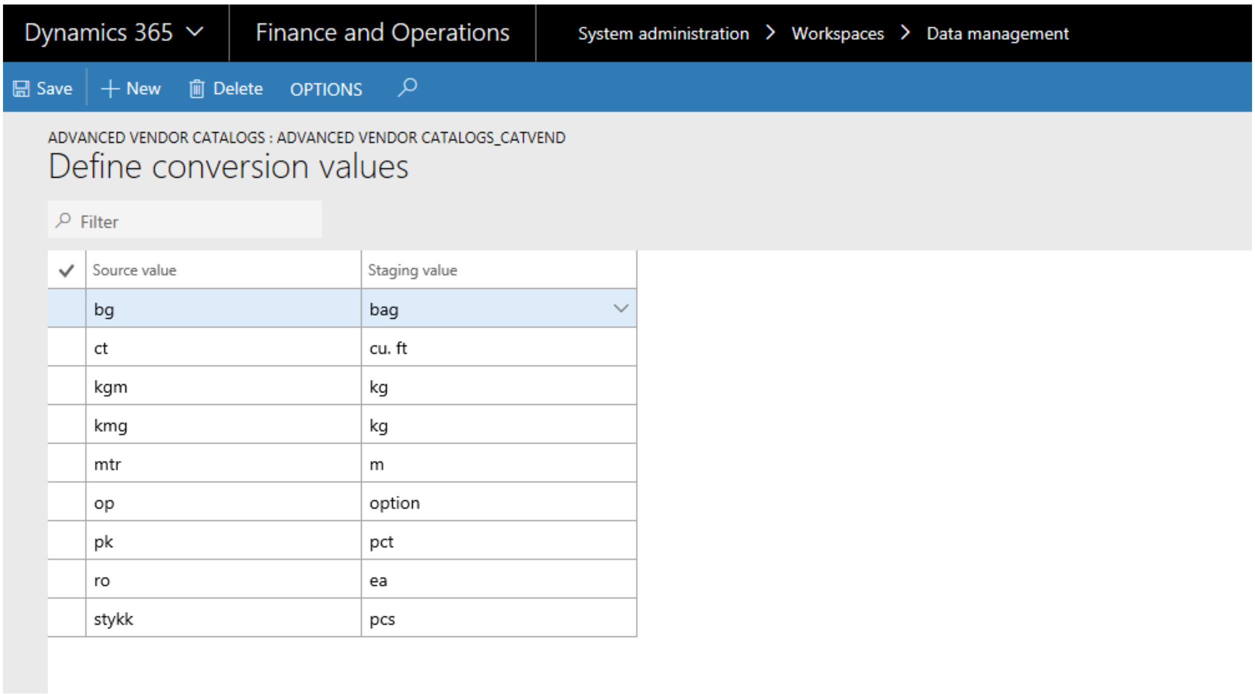
Entity	**Field**
CatVendorProductCandidateEntity	PJMAVCUnitSymbol
PJMAVCCatVendorProductCandidatePurchasePriceEntity	UnitSymbol
CatVendorProductCandidateSalesPriceEntity	UnitSymbol
CatVendorProductCandidateDefaultOrderSettingsEntity	UnitSymbol

1. Go to **System administration > Workspaces > Data management**
2. Select the **Advanced vendor catalogs** import project tile
3. Click **Load project**
4. Click **View map**
5. Select the **Mapping details** tab
6. Find one of the mentioned unit field above and click **Conversion**


Dynamics 365
Finance and Operations
System administration > Workspaces > Data management
USSI
NN
Generate source mapping
OPTIONS
ADVANCED VENDOR CATALOGS : ADVANCED VENDOR CATALOGS_CATVEND
Map source to staging
Filter
Mapping visualization
Mapping details
Transformations
+ New
Delete
Save
Default value
Conversion
Query criteria

✓	Auto-generated	Auto default	Source field	Staging field	Ignore blank val...	Text qualifier	Use enum label
	☐	☐	ACTIONTYPE	ACTIONTYPE	☐	☐	☐
	☐	☐	BARCODE	BARCODE	☐	☐	☐
	☐	☐	PJMAVCEXPIRES	PJMAVCEXPIRES	☐	☐	☐
	☐	☐	PJMAVCGROSSDEPTH	PJMAVCGROSSDEPTH	☐	☐	☐
	☐	☐	PJMAVCGROSSHEIGHT	PJMAVCGROSSHEIGHT	☐	☐	☐
	☐	☐	PJMAVCGROSSWIDTH	PJMAVCGROSSWIDTH	☐	☐	☐
	☐	☐	PJMAVCITEMGROUP	PJMAVCITEMGROUP	☐	☐	☐
	☐	☐	PJMAVCNETWEIGHT	PJMAVCNETWEIGHT	☐	☐	☐
	☐	☐	PJMAVCPRODUCTTYPE	PJMAVCPRODUCTTYPE	☐	☐	☐
✓	☐	☐	PJMAVCUNITSYMBOL	PJMAVCUNITSYMBOL	☐	☐	☐
	☐	☐	PJMAVCURL1	PJMAVCURL1	☐	☐	☐
	☐	☐	PJMAVCURL2	PJMAVCURL2	☐	☐	☐
	☐	☐	PJMAVCVENDDISCGROUP	PJMAVCVENDDISCGROUP	☐	☐	☐
	☐	☐	PJMAVCVOLUME	PJMAVCVOLUME	☐	☐	☐
	☐	☐	PRODUCTCATEGORYHIERARCH...	PRODUCTCATEGORYHIERARCH...	☐	☐	☐
	☐	☐	PRODUCTCATEGORYNAME	PRODUCTCATEGORYNAME	☐	☐	☐

7. Add all needed unit conversions between units from an initial file and units from D365 as below.



ADVANCED VENDOR CATALOGS : ADVANCED VENDOR CATALOGS_CATVEND

Define conversion values

Source value	Staging value
bg	bag
ct	cu. ft
kgm	kg
kmg	kg
mtr	m
op	option
pk	pct
ro	ea
stykk	pcs

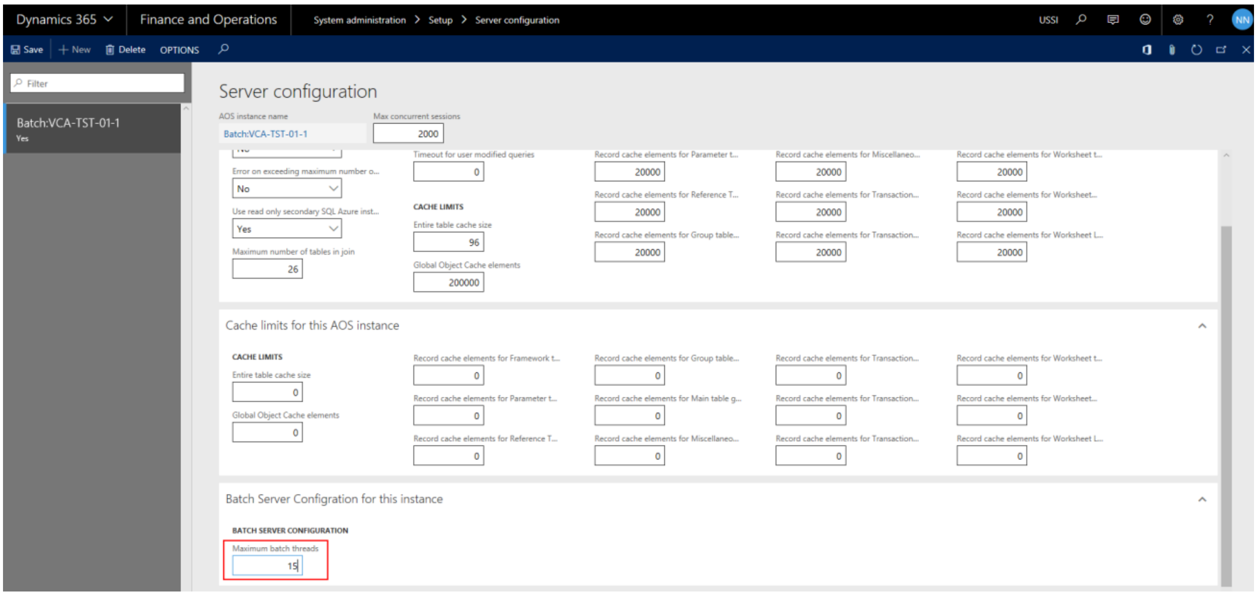
8. Repeat steps from 4 to 7 for each mentioned entity and the unit symbol fields from the table above.

4.9 Set up a maximum batch threads

There is a new **Multithreading** slider on the **Upload file** form, the **Release approved products** form in vendor catalogs which allows running the approve of products, the release of approved products in a multithreading mode. It means that the batch tasks are created based on the parameter below. Notice: when this parameter is checked on the **Upload file** form it means that the approval of products runs in a multithreading mode. If a total number of products in XML file is less than maximum batch threads then despite turning on the **Multithreading** option, it performs in an asynchronous mode without the creation of batch tasks.

To use this option, it requires to set up maximum batch threads on the standard **Server configuration** form.

1. Go to **System administration > Setup > Server configuration**
2. On the **Batch Server Configuration for instance** tab, enter a value in the **Maximum batch threads** field.


Dynamics 365
Finance and Operations
System administration > Setup > Server configuration
USSI
NN
Save
New
Delete
OPTIONS
Filter

Batch:VCA-TST-01-1
Yes

Server configuration

AOS instance name: Batch:VCA-TST-01-1
Max concurrent sessions: 2000

Error on exceeding maximum number o...: No
Use read only secondary SQL Azure inst...: Yes
Maximum number of tables in join: 26
Timeout for user modified queries: 0

CACHE LIMITS

Entire table cache size: 96
Global Object Cache elements: 200000
Record cache elements for Parameter t...: 20000
Record cache elements for Reference T...: 20000
Record cache elements for Group table...: 20000
Record cache elements for Miscellaneo...: 20000
Record cache elements for Transaction...: 20000
Record cache elements for Transaction...: 20000
Record cache elements for Worksheet t...: 20000
Record cache elements for Worksheet...: 20000
Record cache elements for Worksheet L...: 20000

Cache limits for this AOS instance

CACHE LIMITS

Entire table cache size: 0
Global Object Cache elements: 0
Record cache elements for Framework t...: 0
Record cache elements for Parameter t...: 0
Record cache elements for Reference T...: 0
Record cache elements for Group table...: 0
Record cache elements for Main table g...: 0
Record cache elements for Miscellaneo...: 0
Record cache elements for Transaction...: 0
Record cache elements for Transaction...: 0
Record cache elements for Transaction...: 0
Record cache elements for Worksheet t...: 0
Record cache elements for Worksheet...: 0
Record cache elements for Worksheet L...: 0

Batch Server Configration for this instance

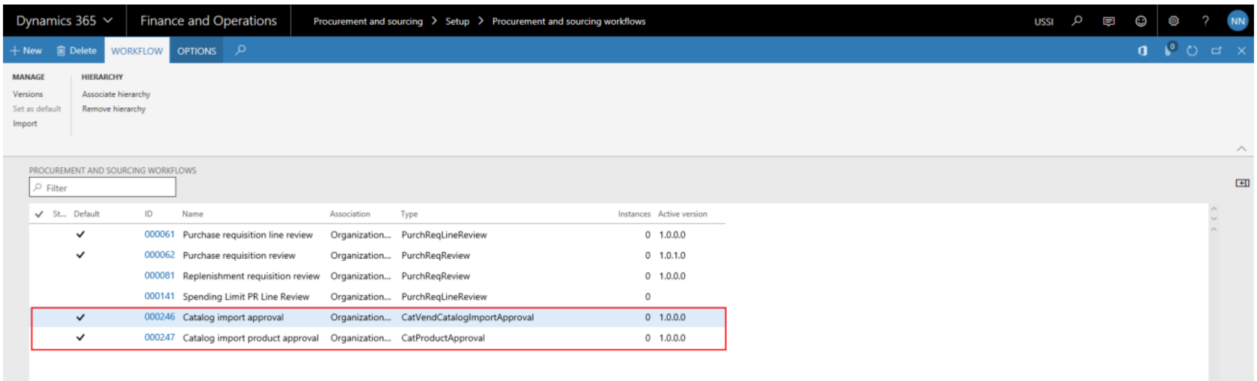
BATCH SERVER CONFIGURATION

Maximum batch threads: 15

4.10 Set up workflows

In standard, the **Catalog import approval** and the **Catalog import product approval** workflows must exist to start working with vendor catalogs. For advanced vendor catalogs you can also select to disable the workflows, see how in chapter below “Vendor catalogs”.

1. Go to **Procurement and sourcing > Setup > Procurement and sourcing workflows**
2. You can import workflows from files and make changes to them if needed.


Dynamics 365
Finance and Operations
Procurement and sourcing > Setup > Procurement and sourcing workflows
USSI
NN
New
Delete
WORKFLOW
OPTIONS
MANAGE
Versions
Set as default
Import
HIERARCHY
Associate hierarchy
Remove hierarchy
Filter

PROCUREMENT AND SOURCING WORKFLOWS

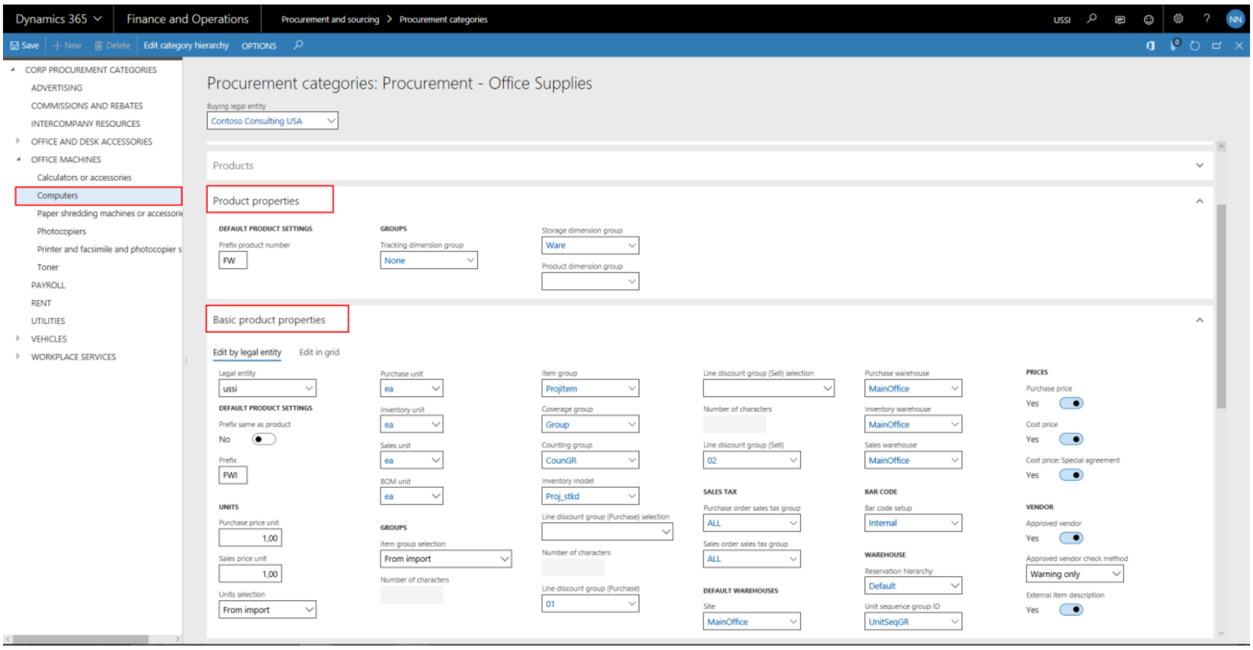
✓	St...	Default	ID	Name	Association	Type	Instances	Active version
		✓	000061	Purchase requisition line review	Organization...	PurchReqLineReview	0	1.0.0.0
		✓	000062	Purchase requisition review	Organization...	PurchReqReview	0	1.0.1.0
			000081	Replenishment requisition review	Organization...	PurchReqReview	0	1.0.0.0
			000141	Spending Limit PR Line Review	Organization...	PurchReqLineReview	0	
		✓	000246	Catalog import approval	Organization...	CatVendCatalogImportApproval	0	1.0.0.0
		✓	000247	Catalog import product approval	Organization...	CatProductApproval	0	1.0.0.0

5 PROCUREMENT CATEGORIES

5.1 Basic setup

A procurement category is used to default values on released products while releasing new products or updating existing released products from advanced vendor catalogs. To set up these parameters follow the steps below:

1. Go to **Procurement and sourcing > … > Procurement categories**
2. Select a category on the left side
3. On the **Product properties** tab, you can default values and parameters which are used when products are created while approving new products from advanced vendor catalogs
4. On the **Basic product properties** tab, you can default values and parameters which are used while releasing new products from advanced vendor catalogs. You must set up values and parameters for each legal entity if there are more than one is going to be used while releasing products.


Dynamics 365
Finance and Operations
Procurement and sourcing > Procurement categories
USSI
Save
New
Delete
Edit category hierarchy
OPTIONS
NN
CORP PROCUREMENT CATEGORIES
ADVERTISING
COMMISSIONS AND REBATES
INTERCOMPANY RESOURCES
OFFICE AND DESK ACCESSORIES
OFFICE MACHINES
Calculators or accessories
Computers
Paper shredding machines or accessorie
Photocopiers
Printer and facsimile and photocopier s
Toner
PAYROLL
RENT
UTILITIES
VEHICLES
WORKPLACE SERVICES
Products
Edit by legal entity
Edit in grid

Procurement categories: Procurement - Office Supplies

Buying legal entity: Contoso Consulting USA

Product properties

DEFAULT PRODUCT SETTINGS
Prefix product number: FW

GROUPS
Tracking dimension group: None
Storage dimension group: Ware
Product dimension group:

Basic product properties

Legal entity: ussi

DEFAULT PRODUCT SETTINGS
Prefix same as product: No
Prefix: FWI

UNITS
Purchase price unit: 1,00
Sales price unit: 1,00
Units selection: From import
Purchase unit: ea
Inventory unit: ea
Sales unit: ea
BOM unit: ea

GROUPS
Item group selection: From import
Number of characters:
Item group: ProjItem
Coverage group: Group
Counting group: CounGR
Inventory model: Proj_stkd
Line discount group (Purchase) selection:
Number of characters:
Line discount group (Purchase): 01
Line discount group (Sell) selection:
Number of characters:
Line discount group (Sell): 02

SALES TAX
Purchase order sales tax group: ALL
Sales order sales tax group: ALL

DEFAULT WAREHOUSES
Site: MainOffice
Purchase warehouse: MainOffice
Inventory warehouse: MainOffice
Sales warehouse: MainOffice

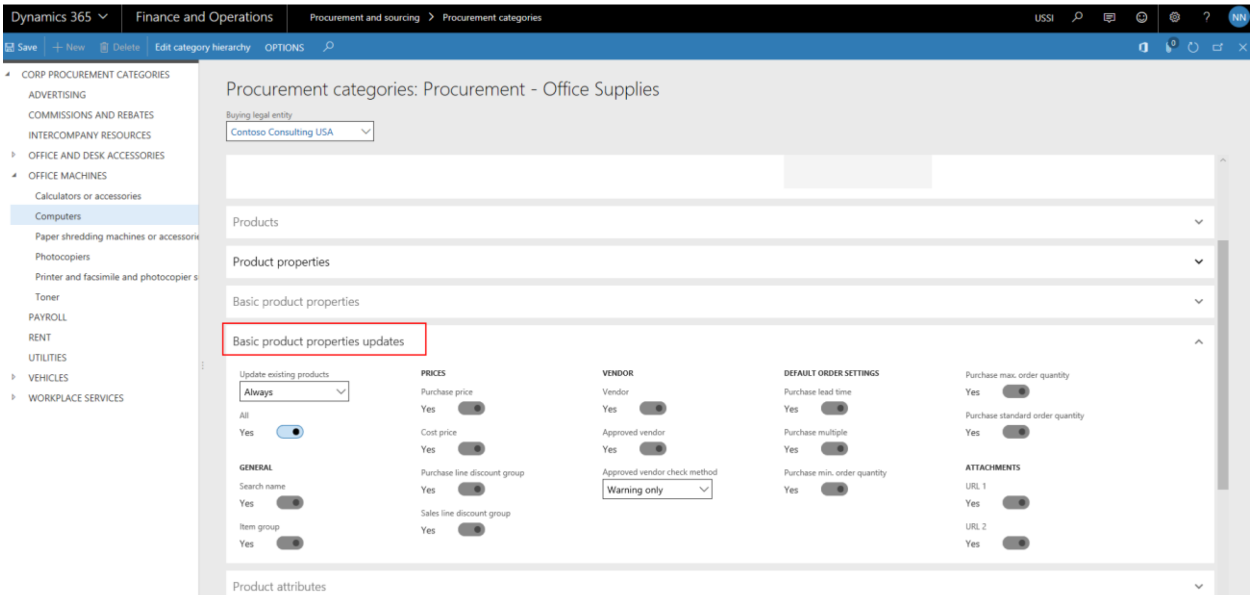
BAR CODE
Bar code setup: Internal

WAREHOUSE
Reservation hierarchy: Default
Unit sequence group ID: UnitSeqGR

PRICES
Purchase price: Yes
Cost price: Yes
Cost price: Special agreement: Yes

VENDOR
Approved vendor: Yes
Approved vendor check method: Warning only
External item description: Yes

5. Repeat the previous step for each legal entity if needed, by selecting a legal entity in the **Legal entity** field on the **Basic product properties** tab.
6. On the **Basic product properties updates** tab, you can default parameters which are used while updating released products from advanced vendor catalogs.


Dynamics 365
Finance and Operations
Procurement and sourcing > Procurement categories
USSI
NN
Save
New
Delete
Edit category hierarchy
OPTIONS
CORP PROCUREMENT CATEGORIES
ADVERTISING
COMMISSIONS AND REBATES
INTERCOMPANY RESOURCES
OFFICE AND DESK ACCESSORIES
OFFICE MACHINES
Calculators or accessories
Computers
Paper shredding machines or accessori
Photocopiers
Printer and facsimile and photocopier s
Toner
PAYROLL
RENT
UTILITIES
VEHICLES
WORKPLACE SERVICES
Products
Product properties
Basic product properties
Basic product properties updates
Product attributes

Procurement categories: Procurement - Office Supplies

Buying legal entity: Contoso Consulting USA

Update existing products: Always

All: Yes

GENERAL

Search name: Yes

Item group: Yes

PRICES

Purchase price: Yes

Cost price: Yes

Purchase line discount group: Yes

Sales line discount group: Yes

VENDOR

Vendor: Yes

Approved vendor: Yes

Approved vendor check method: Warning only

DEFAULT ORDER SETTINGS

Purchase lead time: Yes

Purchase multiple: Yes

Purchase min. order quantity: Yes

Purchase max. order quantity: Yes

Purchase standard order quantity: Yes

ATTACHMENTS

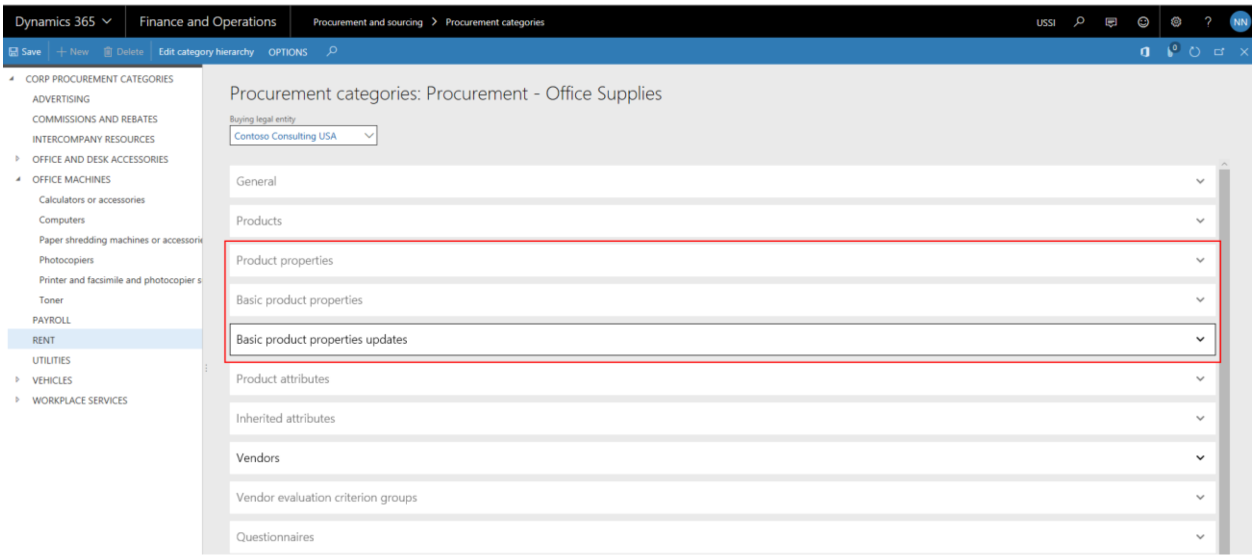
URL 1: Yes

URL 2: Yes

7. Repeat the previous step for each buying legal entity if needed, by selecting a legal entity in the **Buying legal entity** field on top of the **Procurement category** form.
8. Repeat steps from 2 to 8 for each category used in the XML file or a category selected for advanced vendor catalogs.

The standard **Procurement categories** form has been enhanced with the following additional tabs to have the ability to set up the parameters on procurement categories for a legal entity while the creation of products or releasing approved products from advanced vendor catalogs:

- **Product properties**
- **Basic product properties**
- **Basic product properties updates**

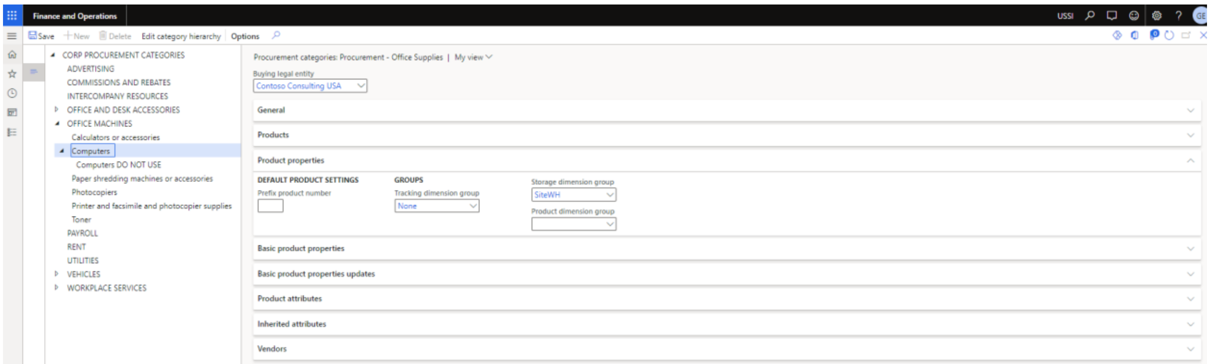

Dynamics 365
Finance and Operations
Procurement and sourcing > Procurement categories
USSI
NN
Save
New
Delete
Edit category hierarchy
OPTIONS
CORP PROCUREMENT CATEGORIES
ADVERTISING
COMMISSIONS AND REBATES
INTERCOMPANY RESOURCES
OFFICE AND DESK ACCESSORIES
OFFICE MACHINES
Calculators or accessories
Computers
Paper shredding machines or accessori
Photocopiers
Printer and facsimile and photocopier s
Toner
PAYROLL
RENT
UTILITIES
VEHICLES
WORKPLACE SERVICES
General
Products
Product properties
Basic product properties
Basic product properties updates
Product attributes
Inherited attributes
Vendors
Vendor evaluation criterion groups
Questionnaires

Procurement categories: Procurement - Office Supplies

Buying legal entity: Contoso Consulting USA

5.2 Product properties

On the **Product properties** tab the following fields have been added to set up parameters on procurement categories while the creation of products from advanced vendor catalogs. Notice that products create while an approval of products. The parameters on this tab are cross-company.


Finance and Operations
Save
New
Delete
Edit category hierarchy
Options
CORP PROCUREMENT CATEGORIES
ADVERTISING
COMMISSIONS AND REBATES
INTERCOMPANY RESOURCES
OFFICE AND DESK ACCESSORIES
OFFICE MACHINES
Calculators or accessories
Computers
Computers DO NOT USE
Paper shredding machines or accessories
Photocopiers
Printer and facsimile and photocopier supplies
Toner
PAYROLL
RENT
UTILITIES
VEHICLES
WORKPLACE SERVICES
General
Products
Product properties
Basic product properties
Basic product properties updates
Product attributes
Inherited attributes
Vendors

Procurement categories: Procurement - Office Supplies | My view

Buying legal entity: Contoso Consulting USA

DEFAULT PRODUCT SETTINGS

Prefix product number:

GROUPS

Tracking dimension group: None

Storage dimension group: SiteWH

Product dimension group:

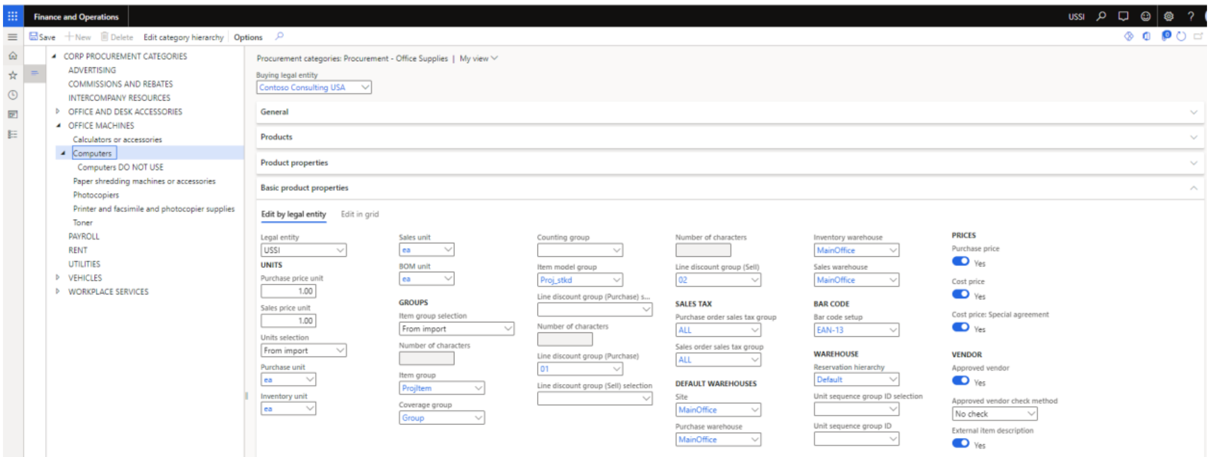
- **Prefix product number.** Alphanumeric. Length 3. A prefix for product numbers. Used in both creation of new products by approval and search for products on update and delete. It is also used on released products.
- **Tracking dimension group.** To default tracking dimension group on new released products in all legal entities during the first release of products. Notice that it is not updated on existing released products in the further releases of products from vendor catalogs so it is important to fill in it if it needs to be used.
- **Storage dimension group.** To default a storage dimension group on new released products in all legal entities during the first release of products. Notice that it is not updated on existing released products in the further releases of products from vendor catalogs so it is important to fill in it if it needs to be used.
- **Product dimension group.** To default a product dimension group on new released products in all legal entities during the first release of products. Notice that it is not updated on existing released products in the further releases of products from vendor catalogs so it is important to fill in it if it needs to be used.

5.3 Basic product properties

On the **Basic product properties** tab the following fields have been added to set up parameters on procurement categories while the first release of approved products from advanced vendor catalogs. The parameters on this tab are a company-specific.

There are two additional tabs on it

- **Edit by legal entity.** To set the parameters on procurement categories for the selected legal entity in the **Legal entity** field.
- **Edit in grid.** To set up the parameters based on the selected field group in the **Property group** field across all legal entities.


Finance and Operations
Save
New
Delete
Edit category hierarchy
Options
CORP PROCUREMENT CATEGORIES
ADVERTISING
COMMISSIONS AND REBATES
INTERCOMPANY RESOURCES
OFFICE AND DESK ACCESSORIES
OFFICE MACHINES
Calculators or accessories
Computers
Computers DO NOT USE
Paper shredding machines or accessories
Photocopiers
Printer and facsimile and photocopier supplies
Toner
PAYROLL
RENT
UTILITIES
VEHICLES
WORKPLACE SERVICES
General
Products
Product properties
Basic product properties
Edit by legal entity
Edit in grid

Procurement categories: Procurement - Office Supplies | My view

Buying legal entity: Contoso Consulting USA

Legal entity: USSI

UNITS

Purchase price unit: 1.00

Sales price unit: 1.00

Units selection: From import

Purchase unit: ea

Inventory unit: ea

Sales unit: ea

BOM unit: ea

GROUPS

Item group selection: From import

Number of characters:

Item group: ProjItem

Coverage group: Group

Counting group:

Item model group: Proj_stkd

Line discount group (Purchase) s...:

Number of characters:

Line discount group (Purchase): 01

Line discount group (Sell) selection:

Number of characters:

Line discount group (Sell): 02

SALES TAX

Purchase order sales tax group: ALL

Sales order sales tax group: ALL

DEFAULT WAREHOUSES

Site: MainOffice

Purchase warehouse: MainOffice

Inventory warehouse: MainOffice

Sales warehouse: MainOffice

BAR CODE

Bar code setup: EAN-13

WAREHOUSE

Reservation hierarchy: Default

Unit sequence group ID selection:

Unit sequence group ID:

PRICES

Purchase price: Yes

Cost price: Yes

Cost price: Special agreement: Yes

VENDOR

Approved vendor: Yes

Approved vendor check method: No check

External item description: Yes

The **Edit by legal entity** tab:

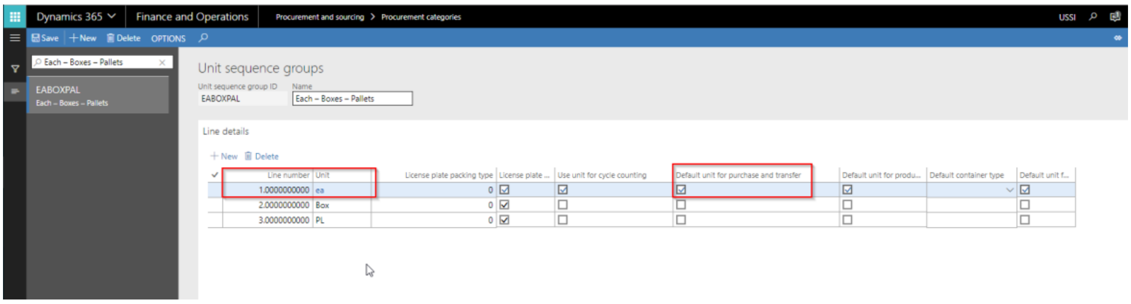
- **Legal entity.** Drop-down to legal entities.
- **Units**

  - **Purchase price unit.** To default a purchase price unit on new released products. (same as in Retail product hierarchy, the Basic product properties tab).
  - **Sales price unit.** To default a sales price unit on new released products. (same as in Retail product hierarchy, the Basic product properties tab).
  - **Units selection.** To select how to insert units on new released products.
    - **Blank.** To insert all units on new released products from procurement category setup (the unit fields below).
    - **From import.** To insert a value from the Unit field on the All products tab of the Catalog approval page form in Inventory unit, Purchase unit, and Sales unit, BOM unit on new released products. If the Unit field is blank, then insert all units on new released products from procurement category setup.
  - **Purchase unit.** Drop-down to units. To insert a purchase unit on new released products. (same as in Retail product hierarchy, the Basic product properties tab).
  - **Inventory unit.** Drop-down to units. To insert an inventory unit on new released products. (same as in Retail product hierarchy, the Basic product properties tab).
  - **Sales unit.** Drop-down to units. To insert a sales unit on new released products. (same as in Retail product hierarchy, the Basic product properties tab).
  - **BOM unit.** Drop-down to units. To insert a BOM unit on new released products. (same as in Retail product hierarchy, the Basic product properties tab).
- **Groups**
  - **Item group selection.** To select how to insert item groups on new released products.
    - **Blank.** To insert an item group on new released products from procurement category setup (the Item group field below).
    - **From import.** To insert an item group from XML file (CatVendorProductCandidateEntity.PJMAVCITEMGROUP). If it is blank, then insert item group on new released products from procurement category setup.
    - **From vendor discount group.** To insert an item group on new released products based on the vendor discount group from XML file (CatVendorProductCandidateEntity. PJMAVCITEMGROUP). This field is not shown by default, but it can be added to the All products tab of the Catalog approval page form by using personalization. The Number of characters parameter uses to define what number of characters should be used from the start of vendor discount group to create a new item group with ID if it does not exist in D365. Otherwise, an existing item group uses. Notice: If the Separate discount import option is checked on a vendor catalog then a description from a vendor discount group uses as an item group description. Otherwise, ID inserts as an item group description.
    - **From Product number.** To insert item groups on new released products based on product numbers from an XML file. The Number of characters parameter uses to define what number of characters should be used from the start of product number to create a new item group with ID if it does not exist in D365. Otherwise, an existing item group uses.
  - **Number of characters.** To define a number of characters for an item group. Acceptable values are in the range 1 - 10.
  - **Item group.** Drop-down to item groups. To insert an item group on new released products. (same as in Retail product hierarchy, the Basic product properties tab).
  - **Coverage group.** Drop-down to coverage groups. To insert a coverage group on new released products. (same as in Retail product hierarchy, the Basic product properties tab).
  - **Counting group.** Drop-down to counting groups. To insert a counting group on new released products. (same as in Retail product hierarchy, the Basic product properties tab).
  - **Inventory model.** Drop-down to inventory models. To insert an inventory model on new released products. (same as in Retail product hierarchy, the Basic product properties tab).
  - **Line discount group (Purchase) selection**. To select how to insert purchase item line discount groups on new released products.
    - **Blank.** To insert a purchase item line discount group on new released products from procurement category setup (the Line discount group (Purchase) field below).
    - **From vendor discount group.** To insert a purchase item line discount group on new released products based on a vendor discount group from XML file. The Number of characters parameter uses to define what number of characters should be used from the start of vendor discount group to create a new item line discount group with ID and ID also as a description of an item line discount group if it does not exist in D365. Otherwise, an existing item line discount group uses.

        - **From Product number.** To insert item groups on new released products based on product numbers from an XML file. The Number of characters parameter uses to define what number of characters should be used from the start of product number to create a new item group with ID and ID also as a description of an item line discount group if it does not exist in D365. Otherwise, an existing item group uses.
    - **Number of characters.** To define a number of characters for a purchase item line discount group. Acceptable values are in the range 1 - 10.
    - **Line discount group (Purchase)**. Drop-down to item line discount groups. To insert a purchase item line discount group on new released products.
    - **Line discount group (Sell) selection.** To select how to insert sales item line discount groups on new released products.
        - **Blank.** To insert a sales item line discount group on new released products from procurement category setup (the Line discount group (Sell) field below).
        - **From vendor discount group.** To insert a sales item line discount group on new released products based on a vendor discount group from XML file. The Number of characters parameter uses to define what number of characters should be used from the start of vendor discount group to create a new item line discount group with ID and ID also as a description of an item line discount group if it does not exist in D365. Otherwise, an existing item line discount group uses.
        - **From Product number.** To insert item groups on new released products based on product numbers from an XML file. The Number of characters parameter uses to define what number of characters should be used from the start of product number to create a new item group with ID and ID also as a description of an item line discount group if it does not exist in D365. Otherwise, an existing item group uses.
    - **Number of characters.** To define a number of characters for a purchase item line discount group. Acceptable values are in the range 1 - 10.
    - **Line discount group (Sell).** Drop-down to item line discount groups. To insert a sales item line discount group on new released products.
- **Sales tax**
    - **Purchase order sales tax group.** Drop-down to item sales groups. To insert a purchase order sales tax group on new released products (same as in Retail product hierarchy, the Basic product properties tab).
    - **Sales order sales tax group.** Drop-down to item sales groups. To insert a sales order sales tax group on new released products (same as in Retail product hierarchy, the Basic product properties tab).
- **Default warehouses**
    - **Site.** Drop-down to sites. To insert a site on new released products (same as in Retail product hierarchy, the Basic product properties tab).
    - **Purchase warehouse.** Drop-down to warehouses. To insert a default purchase warehouse on new released products on the Default order settings form (same as in Retail product hierarchy, the Basic product properties tab).
    - **Inventory warehouse.** Drop-down to warehouses. To insert a default inventory warehouse on new released products on the Default order settings form (same as in Retail product hierarchy, the Basic product properties tab).
    - **Sales warehouse.** Drop-down to warehouses. To insert a default sales warehouse on new released products on the Default order settings form (same as in Retail product hierarchy, the Basic product properties tab).
- **Bar code**
    - **Bar code setup.** Drop-down to bar code setups. To insert a bar code setup on new released products (same as in Retail product hierarchy, the Basic product properties tab).
- **Warehouse**
    - **Reservation hierarchy.** Drop-down to inventory reservation hierarchies. To insert a reservation hierarchy on new released products. (same as in Retail product hierarchy, the Basic product properties tab).
    - **Unit sequence group ID selection.** Dropdown to select if the unit in from import should be used to find "Unit sequence group ID". Select "From import" if you want to use the import value, or else keep it blank and the value in "**Unit sequence group ID."** will be used.
      If you select "From import", then you should have minimum setup of Unit sequence group ID's in the legal entity for each imported unit. The "Unit sequence group ID" for each unit should have one line with the corresponding imported unit, and checkmark on "Default unit for purchase and transfer". The search for "Unit sequence group ID" will search in the groups and find the first group which have imported unit

as the lowest "Line number" and checkmark on "Default unit for purchase and transfer". *Note: This parameter is used together with parameter "Unit selection" and value "From import", which is setup to use imported units and not specified on the category. If you use specified units on the category, you should have this field blank and select a "Unit sequence group ID" in next field which correspond with the selected "Inventory unit".*

Screenshot example of Unit sequence group ID with more units, where the lowest Unit is Ea and it is also a checkmark in "Default unit for purchase and transfer". If you import Ea from the vendor, then this Unit sequence group ID will be inserted on the released product. *Note: If you have other Unit sequence group ID which also have equal first line, then the first found will be used.*



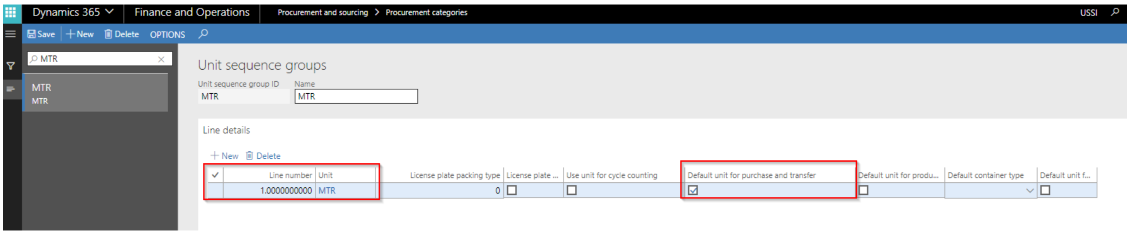
Unit sequence groups

Unit sequence group ID: EABOXPAL
Name: Each – Boxes – Pallets

Line details

Line number	Unit	License plate packing type	License plate ...	Use unit for cycle counting	Default unit for purchase and transfer	Default unit for produ...	Default container type	Default unit f...
1.0000000000	ea	0	☑	☑	☑	☑		☑
2.0000000000	Box	0	☑	☐	☐	☐		☐
3.0000000000	PL	0	☑	☐	☐	☐		☐

Another screenshot example of a Unit sequence group ID with only one line. This is example of minimum setup for each unit imported from vendor.



Unit sequence groups

Unit sequence group ID: MTR
Name: MTR

Line details

Line number	Unit	License plate packing type	License plate ...	Use unit for cycle counting	Default unit for purchase and transfer	Default unit for produ...	Default container type	Default unit f...
1.0000000000	MTR	0	☐	☐	☑	☐		☐

  - **Unit sequence group ID.** Drop-down to unit sequence group IDs. To insert a unit sequence group ID on new released products. (same as in Retail product hierarchy, the Basic product properties tab).
- **Prices**
  - **Purchase price.** Select to insert purchase price on released products based on a price quantity. If a currency on products in vendor catalog is different from a company currency, a currency exchange rate on an effective date is used. If there exists no currency exchange rate on an effective date, a purchase price is inserted based on a prior date. If no exchange rate exists, a purchase price could not be updated, and a message is added to the Event log form.
  - **Cost price.** Select to insert a cost price on released products. If there exist discounts in vendor catalog, then this is subtracted from the purchase price and inserted as a cost price. If no discount exists, then a cost price is inserted with a purchase price. If the Cost price: Special agreement parameter is selected, then a special agreement is used to calculate the cost price instead of the standard purchase price. If a currency on a product in vendor catalogs is different from a company currency, a currency exchange rate on an effective date is used. If there exists no currency exchange rate on an effective date, the purchase price will not be inserted.
  - **Cost price: Special agreement.** Select to use the special agreement to calculate the cost price instead of the standard purchase price.

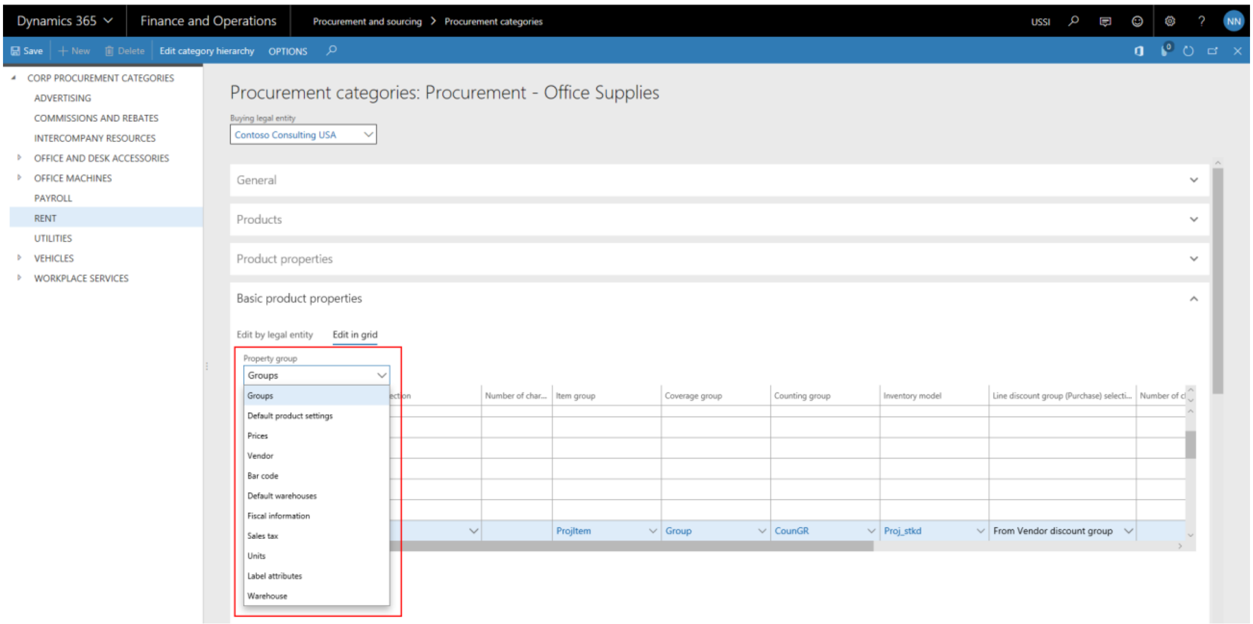
Note: If there are several records for purchase price with same product (for example different from/to qty), then the price from the first record will be used as purchase price on the released product.

- **Vendor**
  - **Approved vendor.** Select to insert a vendor as an approved vendor for released products.
  - **Approved vendor check method.** Drop-down to the standard Approved vendor check method list with possible values: No check, Warning only, Not allowed (same as on released products). To insert an approved vendor check method on new released products.

- **External item description.** Select to insert a vendor product number, a name, and a description in external item descriptions with *Party code type*: Table, *Vendor Relation*: Vendor catalog vendor, *External item number*: Vendor product number, *Description*: Product name, *External item text:* Product description.

The **Edit in grid** tab:

In the **Property group** drop-down, select an appropriate group field to see parameters across all legal entity.

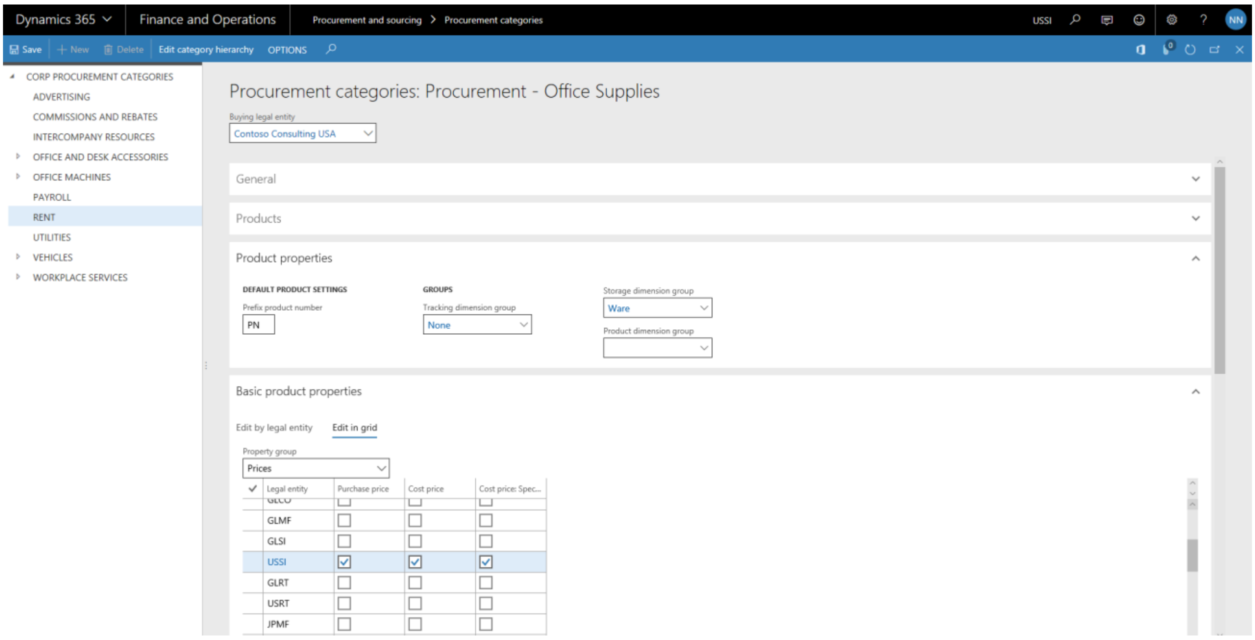

Dynamics 365
Finance and Operations
Procurement and sourcing > Procurement categories
USSI
NN
Save
New
Delete
Edit category hierarchy
OPTIONS
CORP PROCUREMENT CATEGORIES
ADVERTISING
COMMISSIONS AND REBATES
INTERCOMPANY RESOURCES
OFFICE AND DESK ACCESSORIES
OFFICE MACHINES
PAYROLL
RENT
UTILITIES
VEHICLES
WORKPLACE SERVICES
General
Products
Product properties
Basic product properties
Edit by legal entity
Edit in grid
Groups
Default product settings
Prices
Vendor
Bar code
Default warehouses
Fiscal information
Sales tax
Units
Label attributes
Warehouse

Procurement categories: Procurement - Office Supplies

Buying legal entity: Contoso Consulting USA

Property group: Groups

Number of char...	Item group	Coverage group	Counting group	Inventory model	Line discount group (Purchase) selecti...
	ProjItem	Group	CounGR	Proj_stkd	From Vendor discount group


Dynamics 365
Finance and Operations
Procurement and sourcing > Procurement categories
USSI
NN
Save
New
Delete
Edit category hierarchy
OPTIONS
CORP PROCUREMENT CATEGORIES
ADVERTISING
COMMISSIONS AND REBATES
INTERCOMPANY RESOURCES
OFFICE AND DESK ACCESSORIES
OFFICE MACHINES
PAYROLL
RENT
UTILITIES
VEHICLES
WORKPLACE SERVICES
General
Products
Product properties
Basic product properties
Edit by legal entity
Edit in grid

Procurement categories: Procurement - Office Supplies

Buying legal entity: Contoso Consulting USA

DEFAULT PRODUCT SETTINGS
Prefix product number: PN

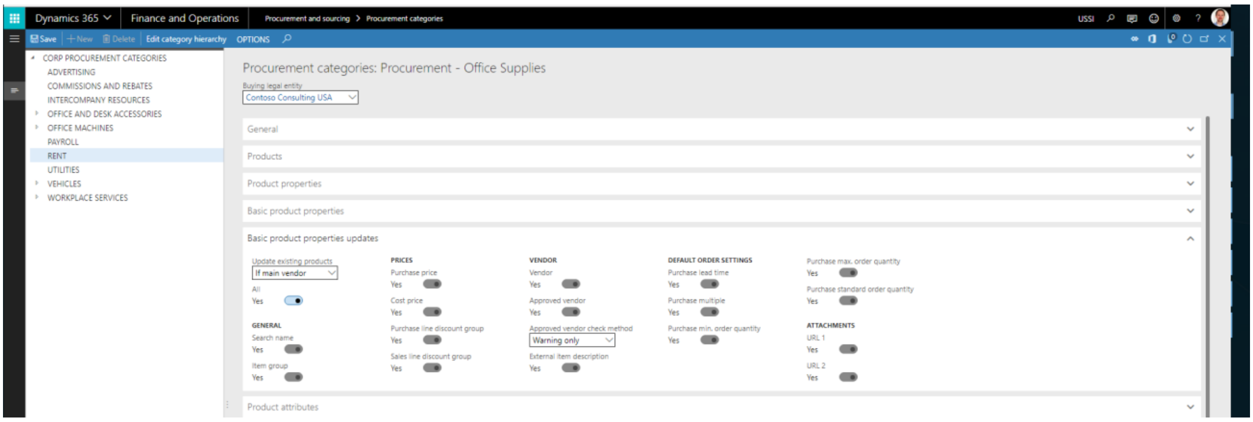
GROUPS
Tracking dimension group: None
Storage dimension group: Ware
Product dimension group:

Property group: Prices

Legal entity	Purchase price	Cost price	Cost price: Spec...
GLCO	☐	☐	☐
GLMF	☐	☐	☐
GLSI	☐	☐	☐
USSI	☑	☑	☑
GLRT	☐	☐	☐
USRT	☐	☐	☐
JPMF	☐	☐	☐

5.4 Basic product properties updates

On the **Basic product properties updates** tab the following fields have been added to set up parameters on procurement categories while the update of existing released products from advanced vendor catalogs. The parameters on this tab are a company-specific. Select a value in the **Buying legal entity** field on top of the form to set up the parameters for a specific company.


Dynamics 365
Finance and Operations
Procurement and sourcing > Procurement categories
USSI
Save
New
Delete
Edit category hierarchy
OPTIONS
CORP PROCUREMENT CATEGORIES
ADVERTISING
COMMISSIONS AND REBATES
INTERCOMPANY RESOURCES
OFFICE AND DESK ACCESSORIES
OFFICE MACHINES
PAYROLL
RENT
UTILITIES
VEHICLES
WORKPLACE SERVICES
Procurement categories: Procurement - Office Supplies
General
Products
Product properties
Basic product properties
Basic product properties updates
Product attributes

Buying legal entity
Contoso Consulting USA

Update existing products
If main vendor
All
Yes

GENERAL
Search name
Yes
Item group
Yes

PRICES
Purchase price
Yes
Cost price
Yes
Purchase line discount group
Yes
Sales line discount group
Yes

VENDOR
Vendor
Yes
Approved vendor
Yes
Approved vendor check method
Warning only
External item description
Yes

DEFAULT ORDER SETTINGS
Purchase lead time
Yes
Purchase multiple
Yes
Purchase min. order quantity
Yes

Purchase max. order quantity
Yes
Purchase standard order quantity
Yes

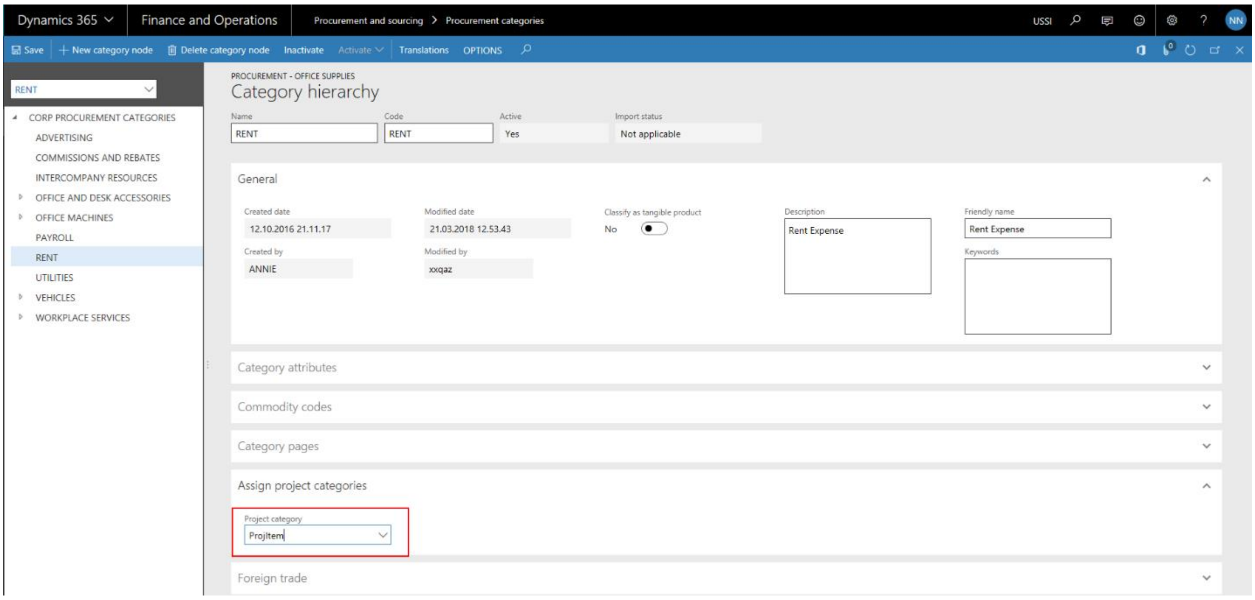
ATTACHMENTS
URL 1
Yes
URL 2
Yes

- **Update existing products.** Select how to handle existing products in vendor catalogs. Drop-down with the values:
  - **Never.** No update information on released products. If it is selected, all remaining parameters are turned off automatically and not active.
  - **Always.** Always update information based on the selected sliders below on released products.
  - **If main vendor.** Only released products which have the current vendor on the vendor catalog as a main vendor are updated based on the selected sliders below.
- **All.**
- **General**
  - **Search name.** To force update of search name on released products when there exists local searchname on the released product.
  - **Item group.** To update an item group on released products.
- **Prices**
  - **Purchase price.** To update a purchase price on released products.
  - **Cost price.** To update a cost price on released products.
  - **Purchase line discount group.** To update a purchase item line discount on released products.
  - **Sales line discount group.** To update a sales item line discount on released products.
- **Vendor**
  - **Vendor.** To update a main vendor on released products. The Vendor field on the Purchase tab.
  - **Approved vendor.** To update an approved vendor list on released products.
  - **Approved vendor check method.** To update an approved vendor check method on released products.
  - **External item description.** To update external item description with changes in product name and description
- **Default order settings**
  - **Purchase lead time.** To update a purchase lead time on released products on the Default order settings form.
  - **Purchase multiple.** To update a purchase multiple on released products on the Default order settings form.
  - **Purchase min. order quantity.** To update a purchase min. order quantity on released products on the Default order settings form.
  - **Purchase max. order quantity.** To update a purchase max. order quantity on released products on the Default order settings form.
  - **Purchase standard order quantity.** To update a purchase standard order quantity on released products on the Default order settings form.
- **Attachments**
  - **URL 1.** To update the created attachment for URL 1 from XML file on released products.
  - **URL 2.** To update the created attachment for URL 2 from XML file on released products.

5.5 Project category

There is an additional standard form to select additional parameters on procurement categories. To open it, click the **Edit category hierarchy** button on the top of the **Procurement categories** form. On the **Assign**

project categories tab, select a project category with transaction type ‘Item’ in the **Project category** field to insert or update a project category on new or existing released products.


Dynamics 365
Finance and Operations
Procurement and sourcing > Procurement categories
USSI
NN
Save
New category node
Delete category node
Inactivate
Activate
Translations
OPTIONS
RENT
CORP PROCUREMENT CATEGORIES
ADVERTISING
COMMISSIONS AND REBATES
INTERCOMPANY RESOURCES
OFFICE AND DESK ACCESSORIES
OFFICE MACHINES
PAYROLL
RENT
UTILITIES
VEHICLES
WORKPLACE SERVICES
General
Category attributes
Commodity codes
Category pages
Assign project categories
Foreign trade

PROCUREMENT - OFFICE SUPPLIES
Category hierarchy

Name: RENT
Code: RENT
Active: Yes
Import status: Not applicable

Created date: 12.10.2016 21.11.17
Modified date: 21.03.2018 12.53.43
Classify as tangible product: No
Description: Rent Expense
Friendly name: Rent Expense
Keywords:
Created by: ANNIE
Modified by: xxqaz

Project category: ProjItem

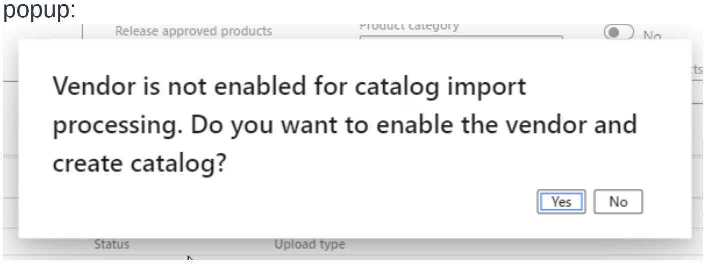
6 VENDOR CATALOGS

6.1 Create new vendor catalog

1. Go to **Procurement and sourcing > Catalogs > Vendor catalogs**
2. Click **New**
3. Search and select the vendor in field **Vendor**
   Note: The dropdown is showing all vendors in all companies through the global address book

4. Enter a name for the vendor catalog in **Name**
   Note: You must have unique names of the vendor catalogs

5. Click **Save**
6. If the vendor has not been enabled before for vendor catalog, you must answer yes in the the following popup:

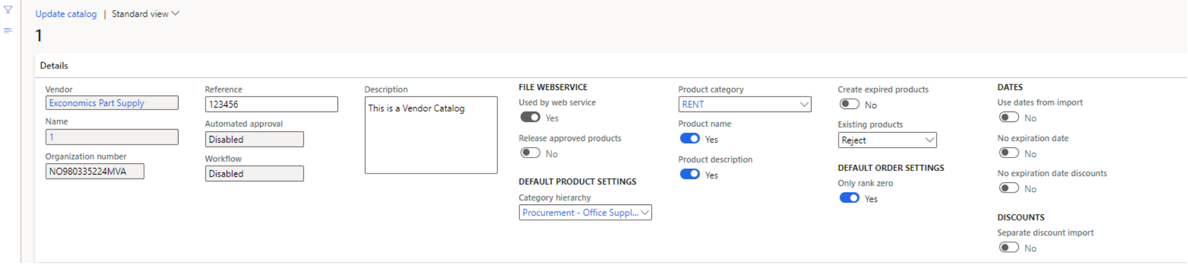


Vendor is not enabled for catalog import processing. Do you want to enable the vendor and create catalog?

   You will upon clicking Yes get a message saying that the vendor has been successfully configured for catalog import processing, which means also that the vendor is approved in all companies where it exists (if linked through global address book)

7. See next steps in coming chapters for remaining setup

6.2 Details



1

Details

Vendor: Exconomics Part Supply
Name: 1
Organization number: NO980335224MVA
Reference: 123456
Automated approval: Disabled
Workflow: Disabled
Description: This is a Vendor Catalog

FILE WEBSERVICE
Used by web service: Yes
Release approved products: No

DEFAULT PRODUCT SETTINGS
Category hierarchy: Procurement - Office Suppl...
Product category: RENT
Product name: Yes
Product description: Yes
Create expired products: No
Existing products: Reject

DEFAULT ORDER SETTINGS
Only rank zero: Yes

DATES
Use dates from import: No
No expiration date: No
No expiration date discounts: No

DISCOUNTS
Separate discount import: No

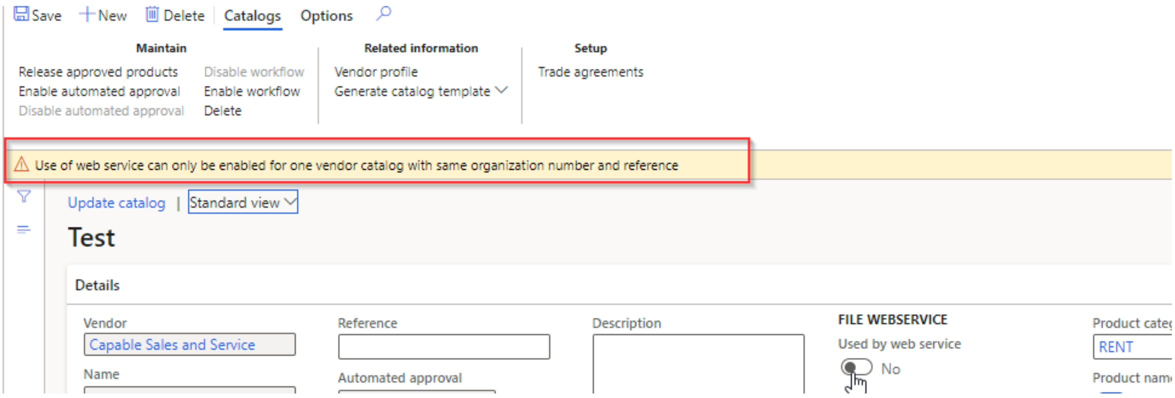
- **Organization number:** Displays organization number for the selected party name in the Vendor field. Also used together with Use by webservice to find the correct catalog to upload file for.
- **Reference:** Reference number, for example vendor reference, contract ID or similar. Also used together with Use by webservice to find the correct catalog to upload file for.
- **Automated approval:** Displays status of automated approval – disabled or enabled
- **Workflow:** Displays status of workflow – disabled or enabled
- **Description:** You can enter extra description for the vendor catalog

File webservice

- **Used by web service:** Select the vendor catalog to use with web service.
  Can only be set to Yes if there are not any other vendor catalogs with organization number and reference.

  If you try to check two vendor catalogs with same organization number and reference, then an info log

web service can only be enabled for one vendor catalog with same organization number and reference”.
See more details in own chapter for the webservice below.


Save
New
Delete
Catalogs
Options
Maintain
Release approved products
Enable automated approval
Disable automated approval
Disable workflow
Enable workflow
Delete
Related information
Vendor profile
Generate catalog template
Setup
Trade agreements
Update catalog
Standard view
Details
FILE WEBSERVICE

Use of web service can only be enabled for one vendor catalog with same organization number and reference

Test

Vendor: Capable Sales and Service

Name

Reference

Automated approval

Description

Used by web service: No

Product categ: RENT

Product nam

Note:

- Vendor catalogs with “Is deleted” = Yes are not considered during this verification.
- The field can only be edited with clicking on “Update catalog button”
- The **Upload type:** “Add updated to the existing vendor catalog” will be used with use of webservice.
- The “Procurement category hierarchy” option will aways be used on the upload of files through webservice.

- **Release approved products:** Select to automatic release approved products with use of web service. Only editable if “Used by webservice” is set to Yes. See below for more details on release of products. ***Note:*** This will only be run if “Automated approval” = Enabled and “Workflow” is Disabled

Default product settings

- **Category hierarchy:** Drop-down to category hierarchies with the following category hierarchy types: *Procurement category hierarchy, Commodity code hierarchy, Retail vendor product hierarchy.*

  Note: Select hierarchy type of Procurement category hierarchy only

  To define a default category hierarchy during vendor catalog import. If a category hierarchy is empty in the XML file, then it requires to select it in this field. Otherwise, the upload of a file will fail.

- **Product category:** To define a default product category during vendor catalog import. If a product category is empty in XML file, then it requires to select it in this field. Otherwise, the upload of file will fail.

  Note: all used product categories in the XML file or the selected value in this field, should be added to the approved procurement categories for created vendors in all legal entities. Or else the upload of file will fail.

  Note: If ’Category hierarchy’ got a dummy value in the xml file and also selected on the Vendor Catalog, we have experienced in some cases that the import will fail. If this occurs, then there must be added a conversion to the ‘Advanced Vendor Catalogs’ import project in Data management from the dummy value to the value of the Category hierarchy.

- **Product name:** Select to update a product name on existing products.

- **Product description:** Select to update a product description on existing products.

- **Create expired products:** To create expired products.
    - **No:** Products which are marked as expired in an XML file and they do not exist in D365 are rejected while uploading a file. However, if products have been released previously and marked to be expired in XML file, then an expiration date for an appropriate vendor in the Approved vendor list is populated by an effective date and if it is the main vendor on released products, then it is cleaned up. In this case, other fields are not updated for released products and trade agreements are not created or updated.
      Note: If you import with both workflow and automated approval disabled, then you will see that the the product will get status "Submitted" upon upload of file. When "Create expired products" are set to No, then upon approval the status will be set to "Rejected".

    - **Yes:** Products which are marked as expired in XML file are approved and created in D365 if they do not exist. Such products are released but no records are inserted or updated in the Approved vendor list for new or existing released products. Trade agreements are created only during the first release of approved products and there is no update on other fields for the next release.

- **Existing products:** Select how to manage existing products that has not been created with Vendor Catalogs: If you select 'Reject', then these products will automatically get status Rejected, meaning you can then select to approve the products to update existing products, exclude them for further imports or leave them as Rejected to get same status on next import. If you select 'Standard', then new products with a postfix will be created on approval and later released to companies instead of updating the existing products.

  Note: 'Reject' can only be used if "Workflow" = Disabled
  Note: If you have prefix on procurement category, then this is also used in the search for existing products.

Default order settings

- **Only rank zero:** To create default order settings only with rank zero during the first release of approved products and default Site and Warehouse from a procurement category setup on it. Otherwise, there two records are created in default order settings for released products. One record with rank zero, another with rank 10, where Site and Warehouse are defaulted from a procurement category setup.

Dates

- **Use dates from import:** Select to use dates from import file for Effective and Expiration date, in this case, the dates selected in the Upload file form are not used and imported from the XML file. If there are no dates on header or line in the import file, then the dates from Upload file will be used. ***Note:*** The field can only be edited with clicking on "Update catalog button"

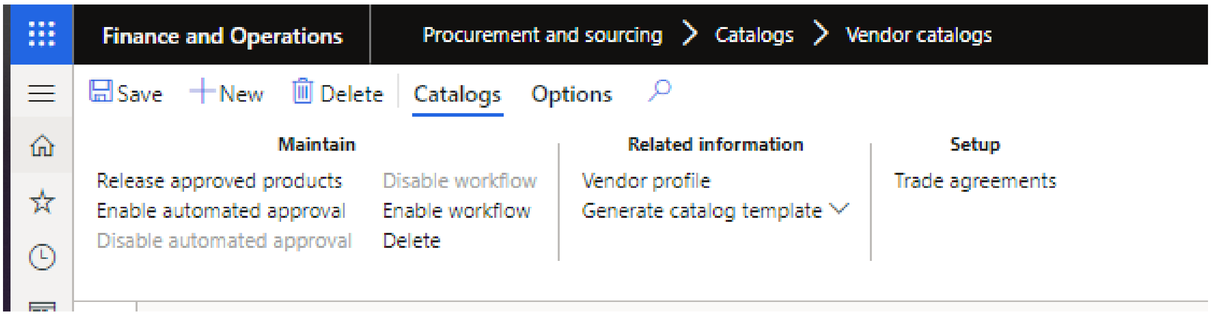
- **No expiration date:** To set Expiration date to Never. Only accessible with the Use dates from import option selected. The vendor can send new catalog files per month with expiration date end on month, and with this parameter there can be flexibility to still get valid prices on purchase orders if you have not been able to import the catalog file for next month.
  Note: "No expiration date" is used for both Purchase price and Purchase discount if "Separate discount import" = No.

- **No expiration date discounts.** To set Expiration date discounts to Never. Only accessible with the Use dates from import option selected.
  Note: "No expiration date discounts" is only used together with "Separate discount import" = Yes.

Discounts

- **Separate discount import.**: Select to use discounts from the import of discount groups. If not selected the discount imported per product is used.
  Note: The field can only be edited with clicking on “Update catalog button”

6.3 Buttons


Finance and Operations
Procurement and sourcing
Catalogs
Vendor catalogs
Save
New
Delete
Catalogs
Options
Maintain
Release approved products
Enable automated approval
Disable automated approval
Disable workflow
Enable workflow
Delete
Related information
Vendor profile
Generate catalog template
Setup
Trade agreements

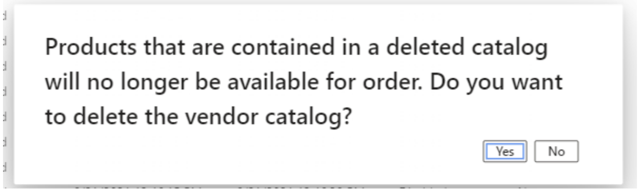
6.3.1 Maintain

- **Release approved products:** Release approved products, see more details on this below in this documentation.
- **Enable automated approval:** Click to enable automated approval, meaning that all products upon upload of catalog file will be automatically approved. This also means that the products also will be created/updated automatically.
- **Disable automated approval:** Click to disable automated approval, meaning that products must be approved to release/update products and trade agreements. If “Workflow” = Enabled, then the products will through the “Catalog import product approval” workflow to be approved or rejected. If “Workflow” = Disabled, then the products must be approved or rejected using buttons in the “Catalog approval” form.
- **Disable workflow:** Click to disable workflows. Use this if you want to upload the vendor catalogs files without using the workflows and use buttons in in the “Catalog approval” form to approve/reject products instead. If you have catalog files with a larger number of products, then this will speed up the import process not having to go through products approval workflow for every single product. You can also with disabled workflow use the automatic ‘Reject’ functionality for existing products that have been created without importing the products with vendor catalogs.

  Note: Workflow will be triggered if you delete a catalog (even if workflow is set as disabled)

- **Enable workflow:** Click to enable workflows. Use this if you want to use the standard workflow to approve/reject products. If you have catalog files with a larger number of products, then using workflows will slow down the import process with having to go through products approval workflow for every single product. You cannot with disabled workflow use the automatic ‘Reject’ functionality for existing products that have been created without importing the products with vendor catalogs.

- **Delete:** With click on ‘Delete’ you get a popup asking if you want to continue with delete of the catalog:



Products that are contained in a deleted catalog will no longer be available for order. Do you want to delete the vendor catalog?

  - If you select ‘Yes’, then following will happen:
    - If you have approved products in the current vendor catalog, then a ‘Delete’ action will automatically run for all approved products.
    - This results in that the approved products will be set to ‘IsDeleted’ = Yes in table CatVendorApprovedProduct
    - If you have any released products from the previously approved products, then the released products will be set to “Stopped” on Purchase and Sales in Default order settings.
    - The vendor catalog will be set “Is deleted” = Yes on the vendor catalogs list page

Note: If you import the same product again in another vendor catalog and approve the product, then the approved product will be set to ‘IsDeleted’ = No in table CatVendorApprovedProduct and on the released product “Stopped” on Purchase and Sales in Default order settings is also removed.

Note: Workflow will be triggered if you delete a catalog (even if workflow is set as disabled)

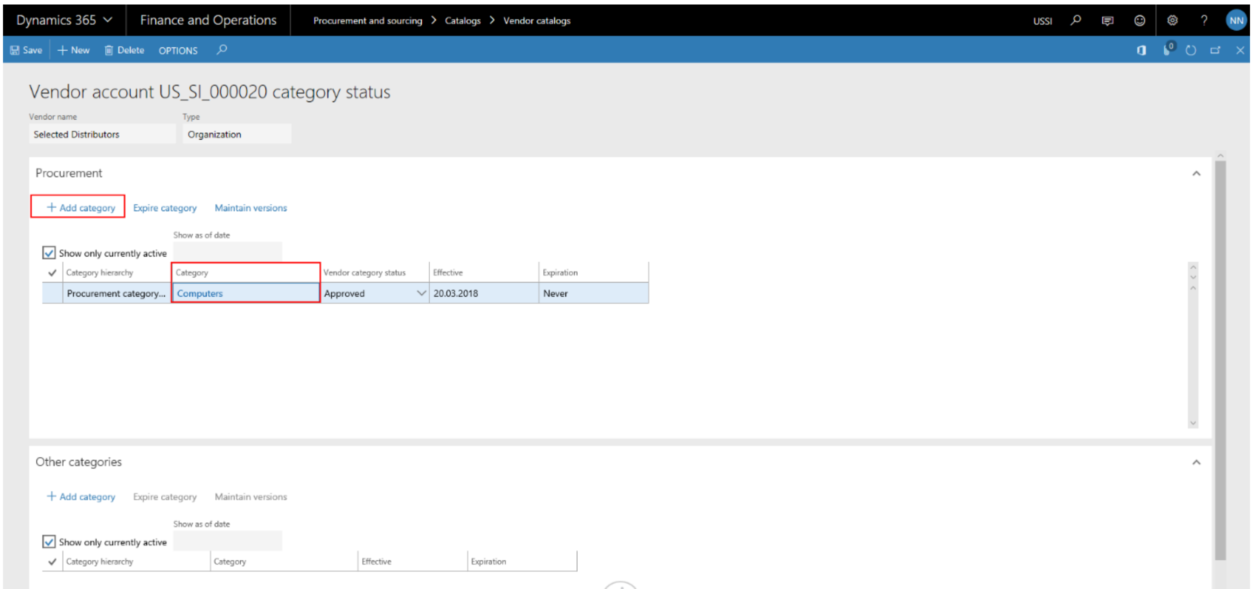
6.3.2 Related information

- **Vendor profile**: go to vendor details for in the current legal entity. You can do following two vendor catalog related actions from the vendor: Add procurement categories and enable/disable catalog import for the vendor, see subchapters below for details.
- **Generate catalog template: *Do not use this template***, use instead the example XML files for Advanced Vendor catalog

6.3.2.1 Add categories to approved vendor categories

Used categories in vendor catalogs or XML files should be added to approved vendor categories. Otherwise, the upload file process fails.

1. On the Catalogs tab, click **Vendor profile** in the **Related information** group to open vendor details form
2. On the **General** tab, click **Categories** in the **Set up** group
3. Click **Add category** on the **Procurement** tab and select from the **Category** drop-down the desired category


Dynamics 365
Finance and Operations
Procurement and sourcing > Catalogs > Vendor catalogs
USSI
NN
Save
New
Delete
OPTIONS
+ Add category
Expire category
Maintain versions
Show as of date
Other categories
+ Add category
Expire category
Maintain versions
Show as of date

Vendor account US_SI_000020 category status

Vendor name: Selected Distributors

Type: Organization

Procurement

☑ Show only currently active

✓	Category hierarchy	Category	Vendor category status	Effective	Expiration
	Procurement category...	Computers	Approved	20.03.2018	Never

Other categories

☑ Show only currently active

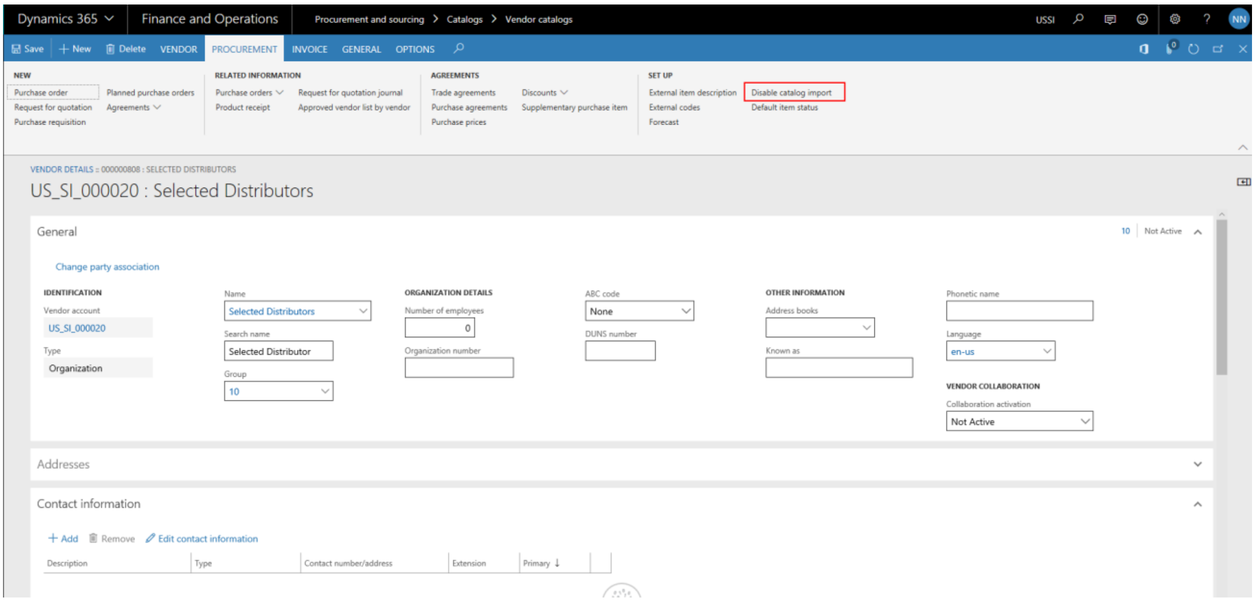
✓	Category hierarchy	Category	Effective	Expiration

4. Repeat step 3 for other categories if needed
5. Save the form

6.3.2.2 Enable/disable vendors for catalog import processing

It is possible to enable a vendor for catalog import processing from vendor catalog details form

1. On the **Procurement** tab, in the **Set up** group
2. Click **Disable/Enable catalog import** if needed


Dynamics 365
Finance and Operations
Procurement and sourcing > Catalogs > Vendor catalogs
USSI
NN
Save
New
Delete
VENDOR
PROCUREMENT
INVOICE
GENERAL
OPTIONS
NEW
Purchase order
Planned purchase orders
Request for quotation
Agreements
Purchase requisition
RELATED INFORMATION
Purchase orders
Request for quotation journal
Product receipt
Approved vendor list by vendor
AGREEMENTS
Trade agreements
Discounts
Purchase agreements
Supplementary purchase item
Purchase prices
SET UP
External item description
Disable catalog import
External codes
Default item status
Forecast
Change party association
Addresses
+ Add
Remove
Edit contact information

VENDOR DETAILS :: 000000808 : SELECTED DISTRIBUTORS

US_SI_000020 : Selected Distributors

General — 10 | Not Active

IDENTIFICATION
Vendor account: US_SI_000020
Type: Organization

Name: Selected Distributors
Search name: Selected Distributor
Group: 10

ORGANIZATION DETAILS
Number of employees: 0
Organization number:

ABC code: None
DUNS number:

OTHER INFORMATION
Address books:
Known as:

Phonetic name:
Language: en-us

VENDOR COLLABORATION
Collaboration activation: Not Active

Contact information

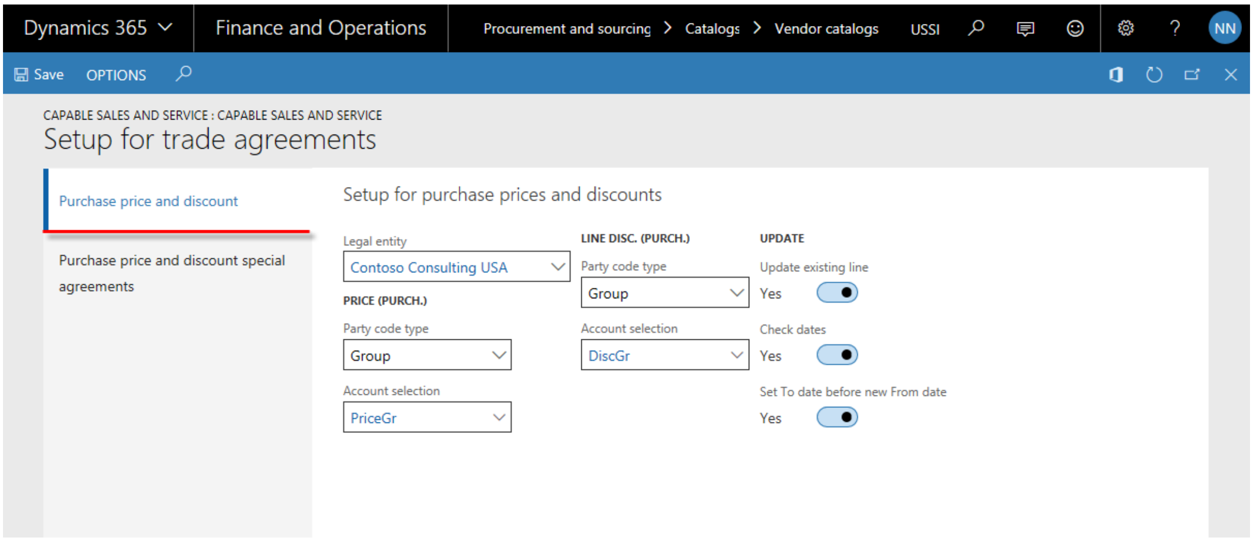
Description	Type	Contact number/address	Extension	Primary ↓

6.3.3 Setup

Trade agreements: Use to set up how purchase price and discount trade agreements and purchase price and discount special agreement should be created or updated while releasing of approved products within each legal entity.

On the **Setup for trade agreements** form, there are two tabs:

- **Purchase price and discount.** To set up parameters for the creation or update of trade agreements for the purchase price and discount.


Dynamics 365
Finance and Operations
Procurement and sourcing > Catalogs > Vendor catalogs
USSI
NN
Save
OPTIONS
CAPABLE SALES AND SERVICE : CAPABLE SALES AND SERVICE
Setup for trade agreements
Purchase price and discount
Purchase price and discount special agreements

Setup for purchase prices and discounts

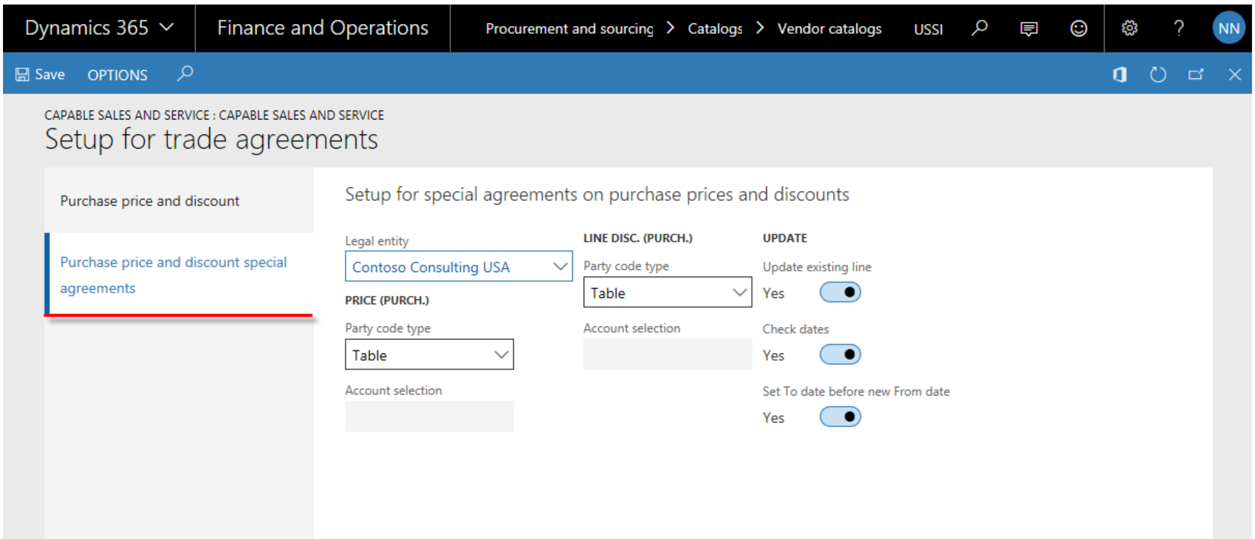
Legal entity: Contoso Consulting USA

PRICE (PURCH.)
Party code type: Group
Account selection: PriceGr

LINE DISC. (PURCH.)
Party code type: Group
Account selection: DiscGr

UPDATE
Update existing line: Yes
Check dates: Yes
Set To date before new From date: Yes

- **Purchase price and discount special agreements.** To set up parameters for the creation or update of trade agreements for the purchase price and discount special agreements. ***Note:*** This setup/tab is only used if “Separate discount import” is set to Yes (meaning use of discounts from discount group and special agreements from separate file), see recommended setup in subchapter below.


Dynamics 365
Finance and Operations
Procurement and sourcing > Catalogs > Vendor catalogs
USSI
NN
Save
OPTIONS
CAPABLE SALES AND SERVICE : CAPABLE SALES AND SERVICE
Setup for trade agreements
Purchase price and discount
Purchase price and discount special agreements

Setup for special agreements on purchase prices and discounts

Legal entity: Contoso Consulting USA

PRICE (PURCH.)
Party code type: Table
Account selection:

LINE DISC. (PURCH.)
Party code type: Table
Account selection:

UPDATE
Update existing line: Yes
Check dates: Yes
Set To date before new From date: Yes

The same fields and field groups are presented on these two tabs:

- **Legal entity.** Drop-down to legal entities.
- **Price (purch.)**
  - **Party code type.** Possible values: 'Table', 'Group' and 'All' (as in Trade agreement journal).
  - **Account selection.** Non-editable if ‘Table’ or ‘All’ selected in the **Party code type** field. Otherwise, it is editable and mandatory. Drop-down on vendor price groups (as in Trade agreement journal).
- **Line disc. (purch.)**
  - **Party code type.** Possible values: 'Table', 'Group' and 'All' (as in Trade agreement journal).

  - **Account selection.** Non-editable if ‘Table’ or ‘All’ selected in the **Party code type** field. Otherwise, it is editable and mandatory. Drop-down on vendor line discount groups (as in Trade agreement journal).
- **Update**
  - **Update existing line.** Select to search for an existing trade agreement line with the match on setup and imported data. If it matches, the existing line is updated with new price/discount and dates.
  - **Check dates.** Only active if the **Update existing line** slider is Yes. Select to include dates in the match for an existing trade agreement line. If dates in import differ from dates on existing line, then a new line is created instead of updating existing line.
  - **Set To date before new from date.** If status on the purchase price or line discount is ‘New’ and there exists trade agreement lines with the match on setup and imported data, then the day before imported From date is updated on To date on existing lines.

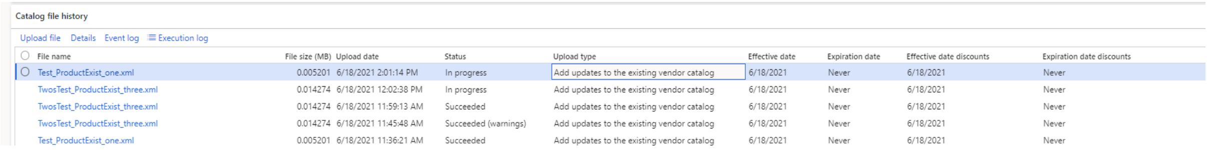
6.3.3.1 Separate discount import

Recommended trade agreement setup if “Separate discount import” is set to Yes (this in order that the special agreements shall have higher priority in the price search than the list prices):

Purchase price and discount

- Price (purch.)
  - Party code type: **Group**
  - Account selection: **<Group created before import and selected on Vendor>**
- Group: Line disc. (purch.)
  - Party code type: **Group**
  - Account selection: **<Group created before import and selected on Vendor>**
  - Product code type: **Table**
- Update
  - Update existing line: **Yes**
  - Check dates: **Yes**
  - Set To date before new From date: **Yes**
- Special agreements
  - Price (purch.)
    - Party code type: **Table**
  - Group: Line disc. (purch.)
    - Party code type: **Table**
    - Product code type: **Table**
  - Update
    - Update existing line: **Yes**
    - Check dates: **Yes**
    - Set To date before new From date: **Yes**

6.4 Catalog file history

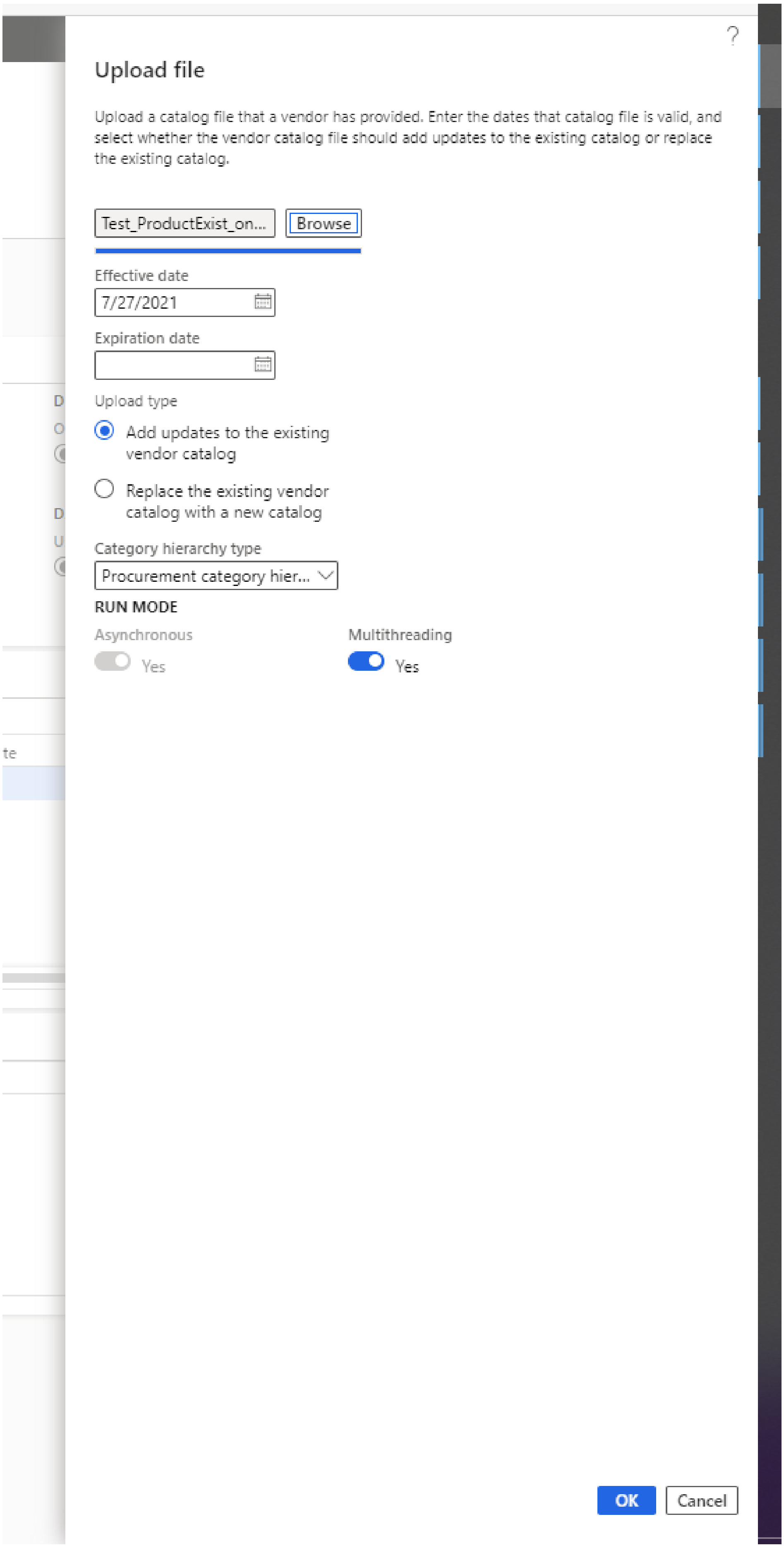

Catalog file history

○	File name	File size (MB)	Upload date	Status	Upload type	Effective date	Expiration date	Effective date discounts	Expiration date discounts
○	Test_ProductExist_one.xml	0.005201	6/18/2021 2:01:14 PM	In progress	Add updates to the existing vendor catalog	6/18/2021	Never	6/18/2021	Never
	TwosTest_ProductExist_three.xml	0.014274	6/18/2021 12:02:38 PM	In progress	Add updates to the existing vendor catalog	6/18/2021	Never	6/18/2021	Never
	TwosTest_ProductExist_three.xml	0.014274	6/18/2021 11:59:13 AM	Succeeded	Add updates to the existing vendor catalog	6/18/2021	Never	6/18/2021	Never
	TwosTest_ProductExist_three.xml	0.014274	6/18/2021 11:45:48 AM	Succeeded (warnings)	Add updates to the existing vendor catalog	6/18/2021	Never	6/18/2021	Never
	Test_ProductExist_one.xml	0.005201	6/18/2021 11:36:21 AM	Succeeded	Add updates to the existing vendor catalog	6/18/2021	Never	6/18/2021	Never

6.4.1 Upload file

If the vendor catalog file is not imported with web service, then you can manually upload the file in the vendor catalog by clicking on button **Upload file**. If the vendor catalog file is imported with webservice, then a new record will appear in Catalog file history automatically when the file is pushed into D365.

Click on Upload file if you want to upload manually a Advanced Vendor Catalogs XML file, and a popup will open on right side of the screen:



Upload file

Upload a catalog file that a vendor has provided. Enter the dates that catalog file is valid, and select whether the vendor catalog file should add updates to the existing catalog or replace the existing catalog.

Test_ProductExist_on... Browse

Effective date: 7/27/2021

Expiration date:

Upload type

● Add updates to the existing vendor catalog

○ Replace the existing vendor catalog with a new catalog

Category hierarchy type: Procurement category hier...

RUN MODE

Asynchronous: Yes

Multithreading: Yes

- Click on **Browse** to select file to upload and validate
- Select dates to use in import
  Note: The dates will be used according to the setup on the vendor catalog
- Select **Upload type:**
  - **Add updates to the existing vendor catalog:** Select this option to update the existing vendor catalog, meaning either create new products to the vendor catalog or update existing products in the vendor catalog.
  - **Replace the existing vendor catalog with a new catalog:** Select this option to replace the existing vendor catalog, meaning following will happen:
    - If an existing approved product in the vendor catalog file exists from before in current vendor catalog, then the product will be updated when approved
    - If an existing approved product in the vendor catalog file do not exists from before in current vendor catalog, then following will happen to these products:
      - The approved products will be set to ‘IsDeleted’ = Yes in table CatVendorApprovedProduct
      - If you have any released products from these previously approved products, then the released products will be set to “Stopped” on Purhase and Sales in Default order settings.

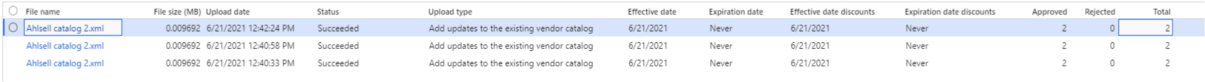
      Note: If you import the same product again in another vendor catalog and approve the product, then the approved product will be set to ‘IsDeleted’ = No in table CatVendorApprovedProduct and on the released product “Stopped” on Purhase and Sales in Default order settings is also removed.

    Note: You cannot use the upload type “Replace the existing vendor catalog with a new catalog” with use of webservice, then the upload type “Add updates to the existing vendor catalog” is automatically used.
- Select **Category hierarchy type**: Select “Procurement category hierarchy”, ***the other types are not supported with Advanced Vendor Catalogs***
  Note: With use of webservice, the “Procurement category hierarchy” option will aways be used.
- Select options for **Run mode:**
  - **Asynchronous:** This option allows to run an upload of a file and approve of products in an asynchronous mode, and a user will not have to click the OK button to wait until the process is finished. It means once a user clicks the OK button the form is closed, and a new record is created in the New status on the Catalog file history tab. After finishing the process, a message “File <name of a file> upload completed” is shown.
  - **Multithreading**: This option allows to run an upload of a file and approve of products in a multithreading mode. It means once a user clicks the OK button the form is closed, and a new record is created in the New status on the Catalog file history tab. In this case, batch tasks are created based on the maximum batch threads on the Server configuration form in the System administration module. In the standard, batch tasks always run in an asynchronous mode. So, if this option is checked, the Asynchronous slider is turned on automatically and not accessible for editing. However, if the number of approved products is less than the maximum batch threads, then the process runs in an asynchronous mode without the creation of batch tasks. After finishing the process, a message “File <name of the file> upload completed” is shown.

- Click **OK** to upload the selected file.

6.4.2 Catalog file history grid

When a file is imported to vendor catalog through webservice or uploaded manually with “Upload file” button, a new record will appear in the catalog file history grid.



○	File name	File size (MB)	Upload date	Status	Upload type	Effective date	Expiration date	Effective date discounts	Expiration date discounts	Approved	Rejected	Total
○	Ahlsell catalog 2.xml	0.009692	6/21/2021 12:42:24 PM	Succeeded	Add updates to the existing vendor catalog	6/21/2021	Never	6/21/2021	Never	2	0	2
	Ahlsell catalog 2.xml	0.009692	6/21/2021 12:40:58 PM	Succeeded	Add updates to the existing vendor catalog	6/21/2021	Never	6/21/2021	Never	2	0	2
	Ahlsell catalog 2.xml	0.009692	6/21/2021 12:40:33 PM	Succeeded	Add updates to the existing vendor catalog	6/21/2021	Never	6/21/2021	Never	2	0	2

- **File name:** Name of uploaded file

- **File size (MB):** Size of uploaded file

- **Upload date:** Date/Time of upload

- **Status:** Status of catalog file

- **Upload type:** Upload type used when uploading file

- **Effective date:** Displays the effective date used for the upload. If the “Use dates from import” slider is turned on, an effective date from import XML file for the maintenance request entity is used to populate this field. If it is empty in an import file, then an effective date from the Upload file form is used.

- **Expiration date:** Displays the expiration date used for the upload. If the “Use dates from import slider” is turned on, an expiration date from import XML file for the maintenance request entity is used to populate this field. If it is empty in an import file, then an expiration date from the Upload file form is used.
  Note: If “No expiration date” is Yes, then it is set to Never for any case.

- **Effective date discounts.** Displays effective date discounts for the upload. If the “Use dates from import slider” is turned on, an effective date discounts from import XML file for the maintenance request entity is used to populate this field. If it is empty in an import file, then an effective date from the Upload file form is used.
  Note: Only used together with “Separate discount import” = yes.

- **Expiration date discounts.** Displays expiration date discounts used for the upload. If the “Use dates from import” slider is turned on, an expiration date discounts from import XML file for the maintenance request entity is used to populate this field. If it is empty in an import file, then an expiration date from the Upload file form is used.
  Note:
  - Only used together with “Separate discount import” = yes.
  - If “No expiration date discount is Yes”, then it is set to Never for any case.

- **Approved:** Number of approved products

- **Rejected:** Number of rejected products

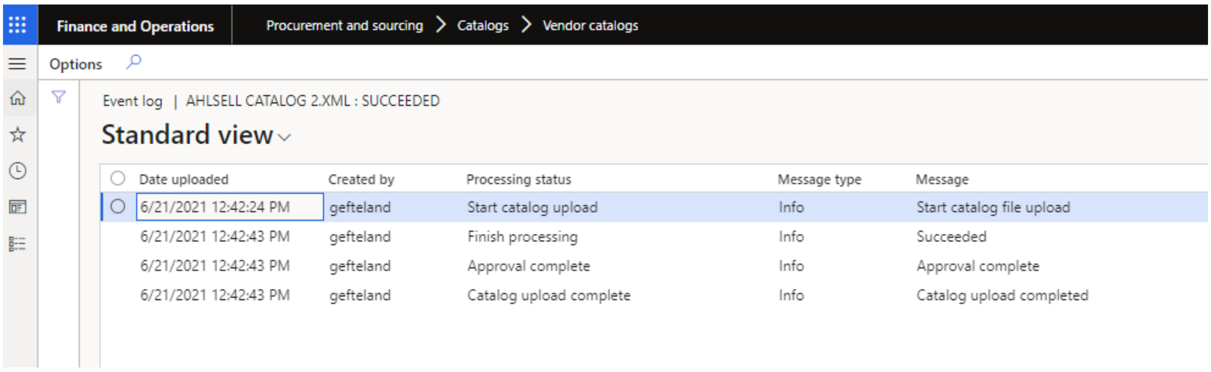
- **Total:** Total number of products

- **Other fields:**
  - **Currency.** To show currency from import XML file for the maintenance request entity while vendor catalog upload. It is not shown by default on this form, add it by using the personalization if needed.

  - **Currency code discounts.** To show currency code from import XML file for the maintenance request entity while vendor catalog upload. It is not shown by default on this form, add it by using the personalization if needed.

6.4.3 Event log (upload of file and approval)

The button **Event log** opens the logged events when a file is uploaded, and the approval is processed. The logging to the Event log form has been enhanced to catch all possible errors which could occur during uploading a file after jobs for importing data in the Data management are finished and place the text of error messages into it. The screenshot below shows a succeeded upload and complete approval of products but will also contain events of type warning and errors. You should visit the event log after each new upload to see if there is important information to react to.



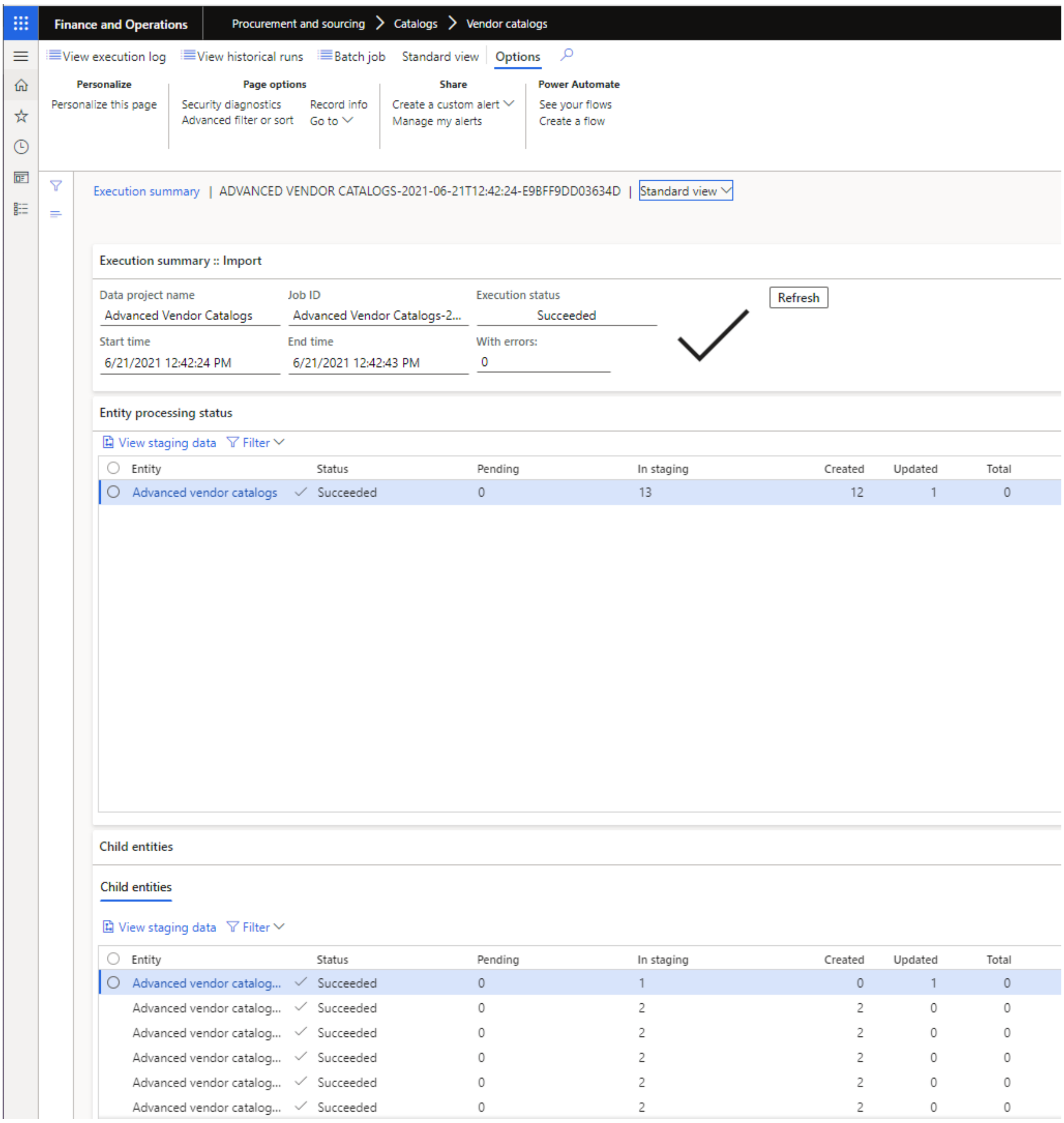
Event log | AHLSELL CATALOG 2.XML : SUCCEEDED

Standard view

Date uploaded	Created by	Processing status	Message type	Message
6/21/2021 12:42:24 PM	gefteland	Start catalog upload	Info	Start catalog file upload
6/21/2021 12:42:43 PM	gefteland	Finish processing	Info	Succeeded
6/21/2021 12:42:43 PM	gefteland	Approval complete	Info	Approval complete
6/21/2021 12:42:43 PM	gefteland	Catalog upload complete	Info	Catalog upload completed

6.4.4 Execution log

To have the ability to quickly open and review the execution details for uploaded files, click on the **Execution log** button on the Action Pane of the **Catalog file history** tab. The same form is accessible from System administration > Workspaces > Data management > Job history tab > Execution details button.


Finance and Operations
Procurement and sourcing > Catalogs > Vendor catalogs
View execution log
View historical runs
Batch job
Standard view
Options
Personalize
Personalize this page
Page options
Security diagnostics
Advanced filter or sort
Record info
Go to
Share
Create a custom alert
Manage my alerts
Power Automate
See your flows
Create a flow
Refresh
View staging data
Filter

Execution summary | ADVANCED VENDOR CATALOGS-2021-06-21T12:42:24-E9BFF9DD03634D | Standard view

Execution summary :: Import

Data project name Advanced Vendor Catalogs	Job ID Advanced Vendor Catalogs-2...	Execution status Succeeded
Start time 6/21/2021 12:42:24 PM	End time 6/21/2021 12:42:43 PM	With errors: 0

Entity processing status

○	Entity	Status	Pending	In staging	Created	Updated	Total
○	Advanced vendor catalogs	✓ Succeeded	0	13	12	1	0

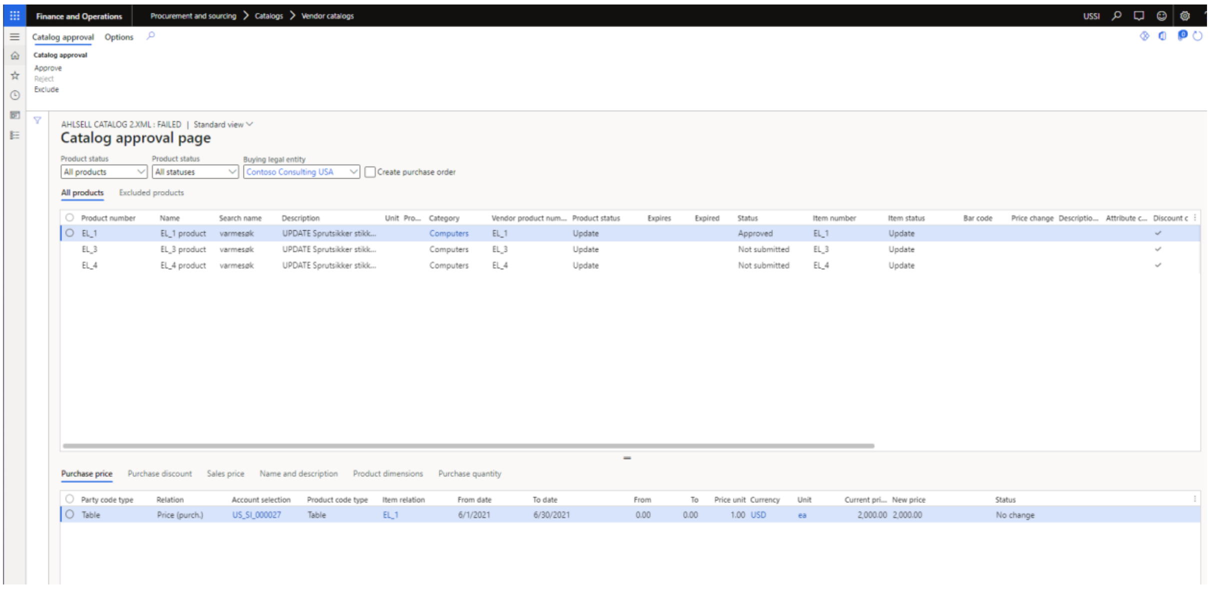
Child entities

Child entities

○	Entity	Status	Pending	In staging	Created	Updated	Total
○	Advanced vendor catalog...	✓ Succeeded	0	1	0	1	0
	Advanced vendor catalog...	✓ Succeeded	0	2	2	0	0
	Advanced vendor catalog...	✓ Succeeded	0	2	2	0	0
	Advanced vendor catalog...	✓ Succeeded	0	2	2	0	0
	Advanced vendor catalog...	✓ Succeeded	0	2	2	0	0
	Advanced vendor catalog...	✓ Succeeded	0	2	2	0	0

6.5 Catalog approval page form

Once a file is successfully uploaded without an error which stop the upload, then the **Details** button is accessible on the **Catalog file history** tab to open the **Catalog approval page** form.


Finance and Operations
Procurement and sourcing > Catalogs > Vendor catalogs
USSI
Catalog approval
Options
Catalog approval
Approve
Reject
Exclude
Standard view
All products
Excluded products
Purchase price
Purchase discount
Sales price
Name and description
Product dimensions
Purchase quantity

AHLSELL CATALOG 2.XML : FAILED | Standard view

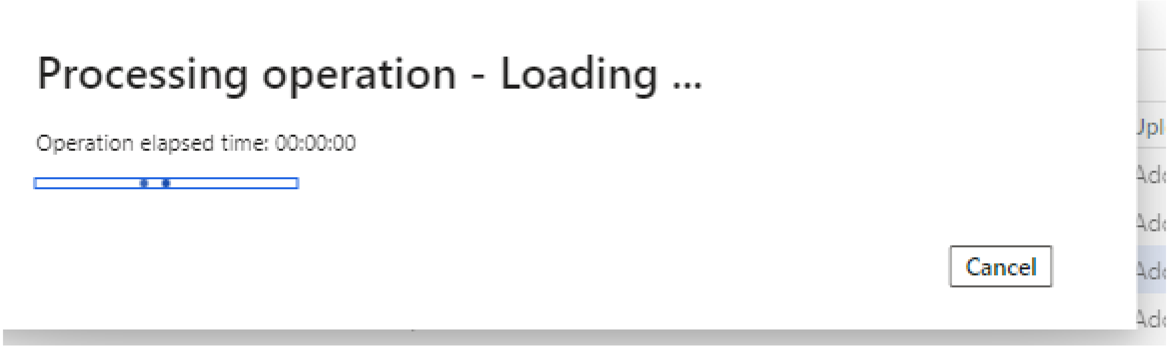
Catalog approval page

Product status: All products
Product status: All statuses
Buying legal entity: Contoso Consulting USA
☐ Create purchase order

	Product number	Name	Search name	Description	Unit	Pro...	Category	Vendor product num...	Product status	Expires	Expired	Status	Item number	Item status	Bar code	Price change	Descriptio...	Attribute c...	Discount c
○	EL_1	EL_1 product	varmesøk	UPDATE Sprutsikker stikk...			Computers	EL_1	Update			Approved	EL_1	Update					✓
	EL_3	EL_3 product	varmesøk	UPDATE Sprutsikker stikk...			Computers	EL_3	Update			Not submitted	EL_3	Update					✓
	EL_4	EL_4 product	varmesøk	UPDATE Sprutsikker stikk...			Computers	EL_4	Update			Not submitted	EL_4	Update					✓

	Party code type	Relation	Account selection	Product code type	Item relation	From date	To date	From	To	Price unit	Currency	Unit	Current pri...	New price	Status
○	Table	Price (purch.)	US_SI_000027	Table	EL_1	6/1/2021	6/30/2021	0.00	0.00	1.00	USD	ea	2,000.00	2,000.00	No change

Note: If you have imported a large file, then it may take some time to open the Catalog page form, and you will see that the operation is processing with a popup “Processing operations – Loading …” that shows until the form is opened.



Processing operation - Loading ...

Operation elapsed time: 00:00:00

6.5.1 All products

Grid:

- **Product number:** Product number of new or existing product. If a value exists in the Prefix product number on the procurement category setup then it is added to a product number.
- **Name:** Name of product
- **Search name:** Search name of product. If it is a blank in XML-file, then it is inserted based on the product name in the same way as in manual New product
- **Description:** Description of product
- **Unit:** Unit of product, inserted from XML import file for the product candidate entity based on setup on procurement category.
- **Product type:** Product type, inserted from XML import file for the product candidate entity.
- **Category:** If a category from import XML file for the product candidate entity does not exist in D365 or it is specified as ‘$BLANK$’, then the default product category from the Details tab is inserted in this field.
- **Vendor product number:** Displays the vendor product number without any prefixes.

- **Product status:** Displays the status for the product. Possible values:
  - **Add**: The product does not exist and will be added.
  - **Update:** The product exists and will be updated.
  - **Delete:** The product exists and will be set as “IsDeleted” in table CatVendorApprovedProducts. If the product also has been released, then Purchase and Sales will be set to Stopped on Default order settings of the released product.

  Note: If an action type from import XML file for the product candidate entity is ‘Add’ or ‘Update’ and a product number exists in D365 then set to ‘Update’. Otherwise, ‘Add’.

- **Expires:** Inserted from “Expires” from XML import file for the product candidate entity.
- **Expired:** Displays ‘Yes’ if the record with a maximum date from the vendor approval list for the main vendor has an expiration date.
- **Status:** Show status according to workflow, approval
  - **Not submitted:**
    - **Workflow: Enabled:** File uploaded and not submitted in workflow
    - **Workflow: Disabled:** N/A
  - **Submitted:**
    - **Workflow: Enabled:** Submitted for approval
    - **Workflow: Disabled:** Ready for approval
  - **Approved:**
    - **Workflow: Enabled:** Approved in workflow or with automated approval, will be included in Release of approved products
    - **Workflow: Disabled:** Approved with button “Approve” or automated approval, will be included in Release of approved products
  - **Rejected:**
    - **Workflow: Enabled:** Rejected, could have been set automatically because product exists from before in production or the user has rejected the product in the workflow.
    - **Workflow: Disabled:** Rejected, could have been set automatically because product exists not created with vendor catalog, product is expired, or the user has used button “Reject” to reject the product.
  - **Cancelled:**
    - **Workflow: Enabled:** Cancelled in workflow
    - **Workflow: Disabled:** N/A
- **Item number:** Display an item number if the product has previously been released, else the field is blank.
- **Item status:** Displays the item status for previously released products. Possible values:
  - **Add**: The released product does not exist and will be released upon release of products.
  - **Update.** The released product exists and will be updated upon release of products.
- **Bar code:** Inserted from XML import file for the product candidate entity.
- **Price change:** Checkmark if there is a price change
- **Discount change:** Checkmark if there is a discount change

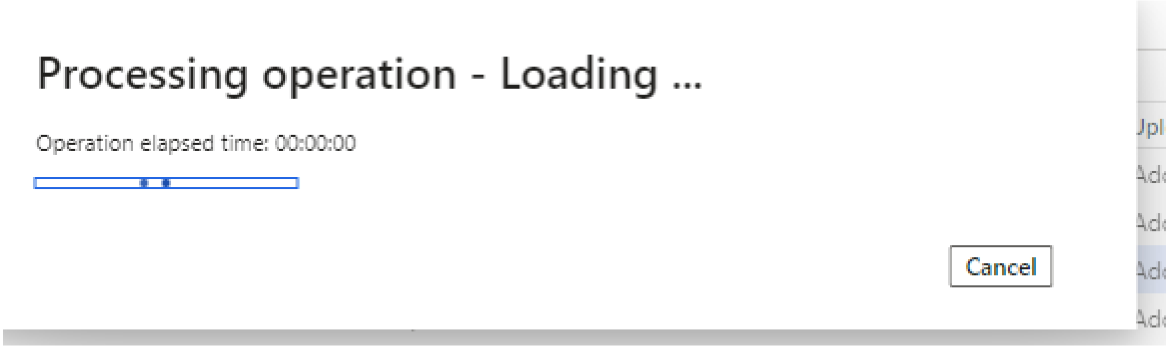
  URL 1: Inserted from XML import file for the product candidate entity.
- **URL 2:** Inserted from XML import file for the product candidate entity.
- **Net weight:** Inserted from XML import file for the product candidate entity.
- **Volume:** Inserted from XML import file for the product candidate entity.
- **Gross height:** Inserted from XML import file for the product candidate entity.
- **Gross width:** Inserted from XML import file for the product candidate entity.
- **Gross depth:** Inserted from XML import file for the product candidate entity.

Fields in top of grid:

- **Product status:** filter in grid on product statuses
- **Status:** filter in grid on statuses

Buying legal entity: current legal entity, change to different legal entity if the vendor is in several entities.

Note: If you have imported a large file, then it may take some time to filter data in the form, and you will see that the operation is processing with a popup “Processing operations – Loading …” that shows until the filtering in the form is finished.



Processing operation - Loading ...

Operation elapsed time: 00:00:00

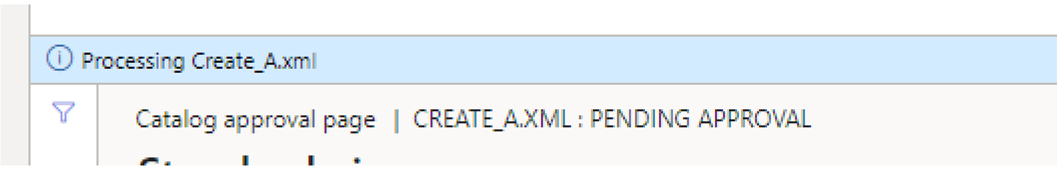
Buttons on Catalog approval (for when Workflow is Disabled):

- **Approve:**
  - If both “Automated approval” and “Workflow” = Disabled, then you must use button “Approve” to approve selected products with status “Submitted”. If “Workflow” = Enabled, then this button is not active (because the approval is then run through workflow).
  - “Automated approval” = Enabled and “Workflow” = Disabled, then you can also use the “Approve” button to approve selected products with status “Rejected”

    Note: Status “Rejected” in this scenario is set automatically with functionality for existing products that have not been created with vendor catalog and option “Reject” in field “Existing products” on the vendor catalog.
  - With click on button “Approve” then the selected products will change to “Status” = “Approved”, which also means that the product will be created or updated depending on if it exists from before in the vendor catalog. If the product is updated, then Search name and Category is updated/inserted. Depending on the setup on the vendor catalog on “Product name” and “Product description”, this is also updated on the product.
- **Reject:**
  - If both “Automated approval” and “Workflow” = Disabled, then you must use button “Reject” to rejct selected products with status “Submitted”. If “Workflow” = Enabled, then this button is not active (because the rejection is then run through workflow).
  - With click on button “Reject” then the selected products will change to “Status” = “Rejected”, which means that the product will not be created or updated, and not be included later in release of products.
  - You cannot reject products that has status “Approved” (this since they are already created or updated upon approval)

  Note: Reject is only for current catalog file upload, if you import the product again in new file upload you must make approval or rejection again. If you want to exclude the product for future imports, see chapter “Excluded products”
- **Reject:**See own chaper ”Excluded products”

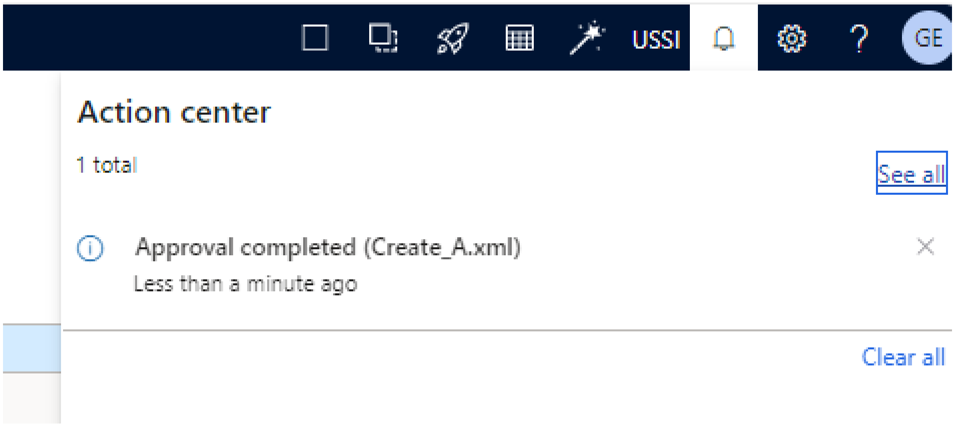
- **Approve (async):**
  - Run ‘Approve’ async.
  - If there are many products that are approved and also new products that will be created in the approval, then the approve process can be time consuming resulting in “Wait” dialogs for the user to finish the process. Therefore ‘Approve (async)’ can be used instead in these cases to run the process async.
  - When you click the button, then a message is given that the async is processing and when finished a message is given in the



Processing Create_A.xml

Catalog approval page | CREATE_A.XML : PENDING APPROVAL

  - When the async is finished, then a message is given in Action center.

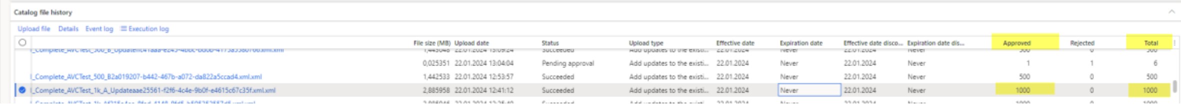


Action center

1 total

Approval completed (Create_A.xml)
Less than a minute ago

  - You can also follow the progress of the approve in async by refreshing the vendor catalog form and check number of approved products in ‘Approved’ column.



Catalog file history

○		File size (MB)	Upload date	Status	Upload type	Effective date	Expiration date	Effective date disco...	Expiration date dis...	Approved	Rejected	Total
		0,025351	22.01.2024 13:04:04	Pending approval	Add updates to the existi...	22.01.2024	Never	22.01.2024	Never	1	1	6
	I_Complete_AVCTest_500_B2a019207-b442-467b-a072-da822a5ccad4.xml.xml	1,442533	22.01.2024 12:53:57	Succeeded	Add updates to the existi...	22.01.2024	Never	22.01.2024	Never	500	0	500
●	I_Complete_AVCTest_1k_A_Updateaae25561-f2f6-4c4e-9b0f-e4615c67c35f.xml.xml	2,885958	22.01.2024 12:41:12	Succeeded	Add updates to the existi...	22.01.2024	Never	22.01.2024	Never	1000	0	1000

6.5.2 Excluded products

Excluded products are used to exclude a product for future approvals with the current vendor catalog.

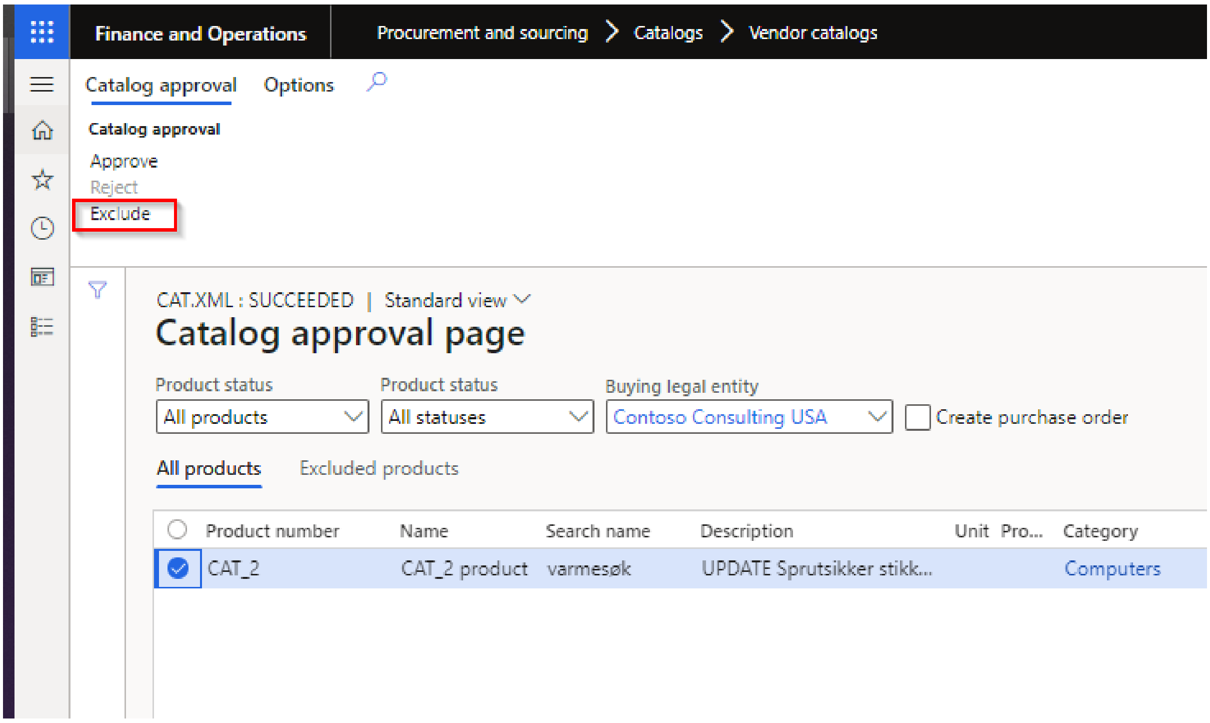
Tab All products:

Select products to exclude and click on button **Exclude**. The product is then removed from “All products” tab and moved over to tab “Excluded products”.

This function can only be used when Workflow is Disabled.

You cannot use multiselect to exclude products, you must select the row of the product to exclude.

You can only exclude products that have status Submitted or Rejected.


Finance and Operations
Procurement and sourcing > Catalogs > Vendor catalogs
Catalog approval
Options
Catalog approval
Approve
Reject
Exclude
CAT.XML : SUCCEEDED | Standard view
Catalog approval page
All products
Excluded products

Product status: All products

Product status: All statuses

Buying legal entity: Contoso Consulting USA

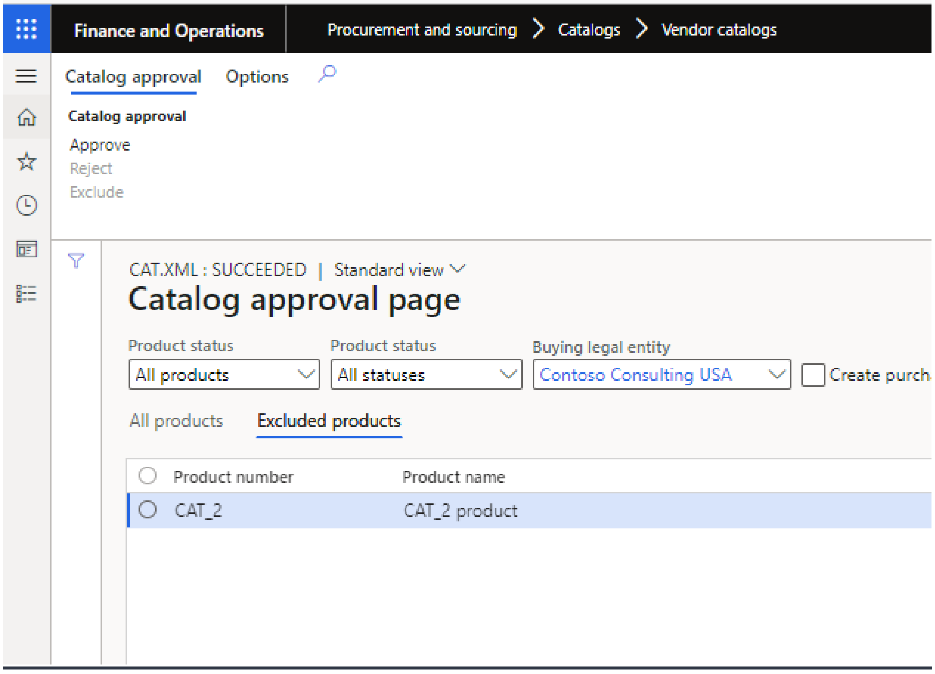
☐ Create purchase order

	Product number	Name	Search name	Description	Unit	Pro...	Category
●	CAT_2	CAT_2 product	varmesøk	UPDATE Sprutsikker stikk...			Computers

Tab Excluded products:

Fields in grid:

- Product number
- Product name


Finance and Operations
Procurement and sourcing > Catalogs > Vendor catalogs
Catalog approval
Options
Catalog approval
Approve
Reject
Exclude
CAT.XML : SUCCEEDED | Standard view
Catalog approval page
All products
Excluded products

Product status: All products

Product status: All statuses

Buying legal entity: Contoso Consulting USA

☐ Create purch

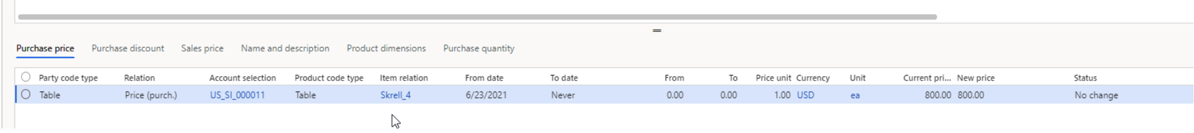
	Product number	Product name
○	CAT_2	CAT_2 product

If you want to include the product again, then select the product and click on button **Approve.**
Note: This will also create or update the product.

If you import an excluded product with the same vendor catalog again, you will get a message in the event log "Product <*product number*> has previously been excluded and is not included in this import", and you will also see the product on tab "Excluded products"
Note: You will only see the products excluded with current upload/import file on tab "Excluded products". You must look at other uploads if you want to see other excluded products not part of current upload.

The exclusion is only for *current vendor catalog*, meaning if you import the same product in another vendor catalog it will not be excluded and processed as normal.

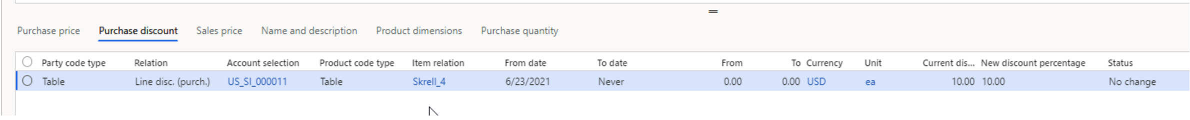
6.5.3 Purchase price



○	Party code type	Relation	Account selection	Product code type	Item relation	From date	To date	From	To	Price unit	Currency	Unit	Current pri...	New price	Status
○	Table	Price (purch.)	US_SI_000011	Table	Skrell_4	6/23/2021	Never	0.00	0.00	1.00	USD	ea	800.00	800.00	No change

- **Party code type:** The selected party code type based on the trade agreement setup for purchase prices.
- **Account relation:** Defaulted to 'Price (purch.)'.
- **Account selection:** The selected account selection based on the trade agreement setup for purchase prices.
- **Product code type:** Defaulted to 'Table'.
- **Item relation:** Item number with or without the item number prefix.
- **From date:** From date from XML import file for the product purchase prices entity. If it is empty, a from date is inserted based on the Effective date from the Catalog file history tab.
- **To date:** To date from XML import file for the product purchase prices entity. If it is empty, a to date is inserted based on the Expiration date from the Catalog file history tab.
- **From:** From quantity from XML import file for the product purchase prices entity.
- **To:** To quantity from XML import file for the product purchase prices entity.
- **Price unit.** To insert a price unit from XML import file for the product purchase prices entity. If it is empty, defaulted to 1.
- **Status:** Shows if there a new, updated or no changed price for the current product based on the parameters for trade agreement setup. The list of possible values: New, Update, No change.

6.5.4 Purchase discount



○	Party code type	Relation	Account selection	Product code type	Item relation	From date	To date	From	To	Currency	Unit	Current dis...	New discount percentage	Status
○	Table	Line disc. (purch.)	US_SI_000011	Table	Skrell_4	6/23/2021	Never	0.00	0.00	USD	ea	10.00	10.00	No change

- **Party code type:** The selected party code type based on the trade agreement setup for purchase discounts.
- **Account relation:** Defaulted to 'Line disc. (purch.)'.
- **Account selection:** The selected account selection based on the trade agreement setup for purchase discounts.
- **Product code type:** Defaulted to 'Table'.
- **Item relation:** Item number with or without the item number prefix.
- **From date:** From date is inserted based on the Effective discount date from the Catalog file history tab.
- **To date:** To date is inserted based on the Expiration discount date from the Catalog file history tab.
- **From:** Defaulted to zero.
- **To:** Defaulted to zero.
- **Currency.** If the Separate discount is Yes, a currency discount from the Vendor discount tab is inserted. Otherwise, the same currency as for a purchase price is inserted.
- **Unit.** To insert a unit from an XML import file for the product purchase prices entity.
- **Current discount percentage:** Shows a current discount percentage based on the existing trade agreements for purchase discount and on the parameters for trade agreement setup.
- **New discount percentage**: Discount percentage from XML file.

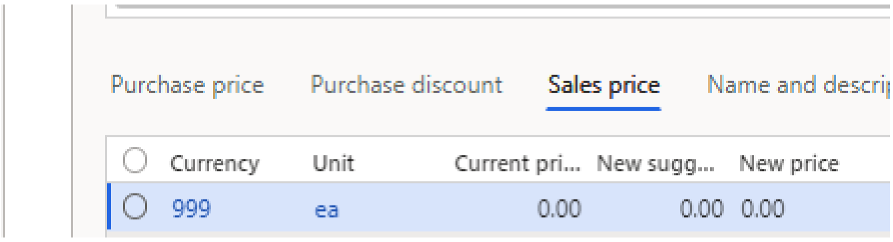
- **Status:** Shows if there a new, updated or no changed discount for the current product based on the parameters for trade agreement setup. The list of possible values: New, Update, No change.

6.5.5 Sales price

Tab for imported sales prices

There is one enhancement for sales prices in Advanced Vendor Catalog compared to standard vendor catalog, which is following: If there is a purchase price and a sales price in the vendor catalog import, then sales price will now use the from/to dates on the sales trade agreement that is created upon Release of products. If there are several purchase prices, then the first record in purchase prices will be used for input to from/to dates for the sales price trade agreement.

Else it is as in standard Vendor Catalog, meaning if you import a sales price, then a new trade agreement sales price line will be created with the imported price. There is no checks on existing data or update functionality as there is with purchase prices in Advanced Vendor Catalog.



○	Currency	Unit	Current pri...	New sugg...	New price
○	999	ea	0.00	0.00	0.00

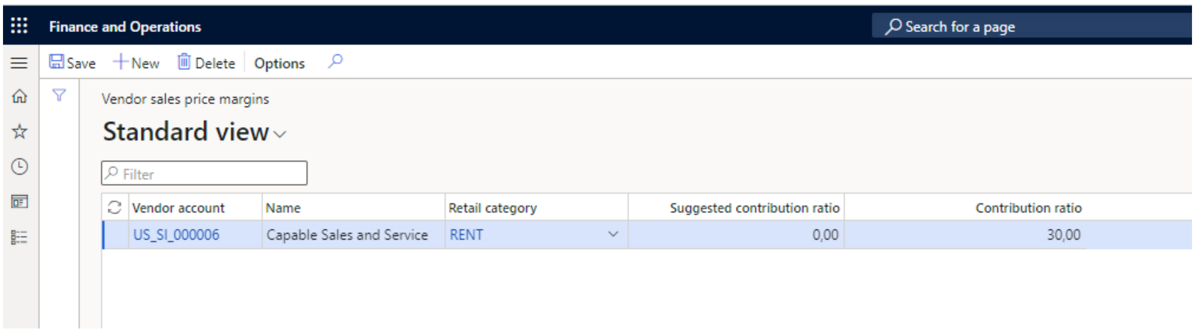
The standard functionality with sales price margin can be used also with Advanced Vendor Catalog, which can be setup in **Retail and Commerce > Products and Categories > Vendor Catalog import > Vendor sales price margin setup.**

Select **Vendor account,** enter the procurement category in **Retail category**, and the margin in **Contribution ratio**

Note: You will not find the procurement category in field **Retail category** dropdown, but you can enter and save the category.

If you import a purchase price, then the margin will be used on the imported purchase price to calculate the sales price. It is also possible to have a margin on 0 to get same sales price as purchase price.

Note: You must import a sales price in order to use the sales margin setup, for example with 0.



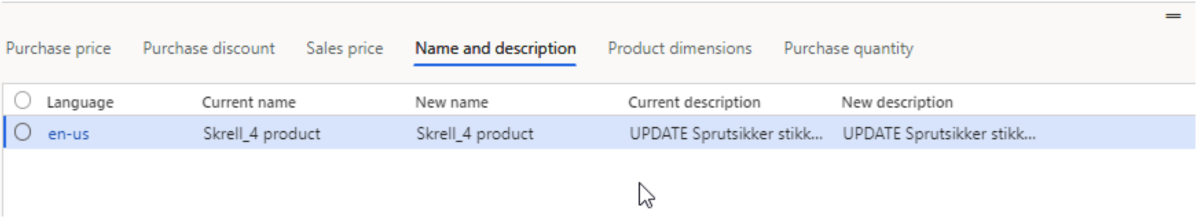
Vendor sales price margins

Standard view

Vendor account	Name	Retail category	Suggested contribution ratio	Contribution ratio
US_SI_000006	Capable Sales and Service	RENT	0,00	30,00

6.5.6 Name and description

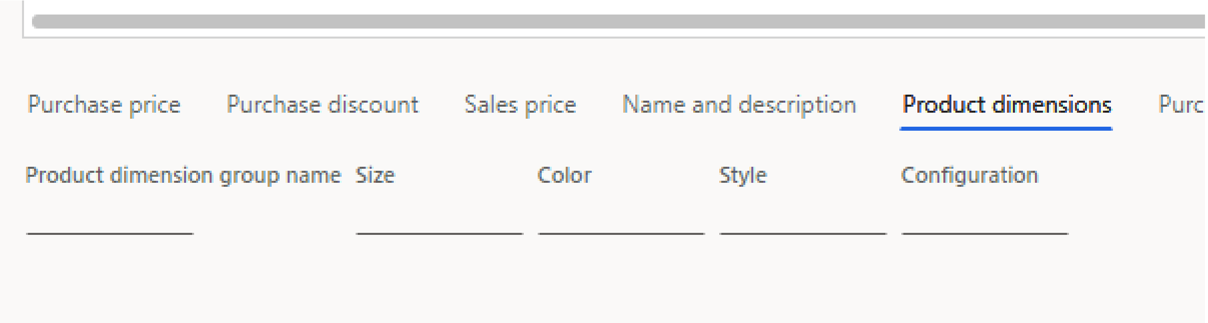
Tab showing current and new description


Purchase price
Purchase discount
Sales price
Name and description
Product dimensions
Purchase quantity

Language	Current name	New name	Current description	New description
en-us	Skrell_4 product	Skrell_4 product	UPDATE Sprutsikker stikk...	UPDATE Sprutsikker stikk...

6.5.7 Product dimensions

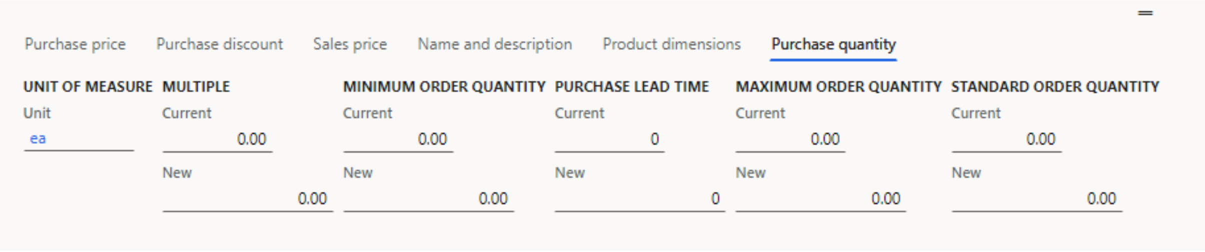
Tab showing product dimensions


Purchase price
Purchase discount
Sales price
Name and description
Product dimensions
Purc

Product dimension group name	Size	Color	Style	Configuration

6.5.8 Purchase quantity

Tab showing Unit and purchase quantities


Purchase price
Purchase discount
Sales price
Name and description
Product dimensions
Purchase quantity

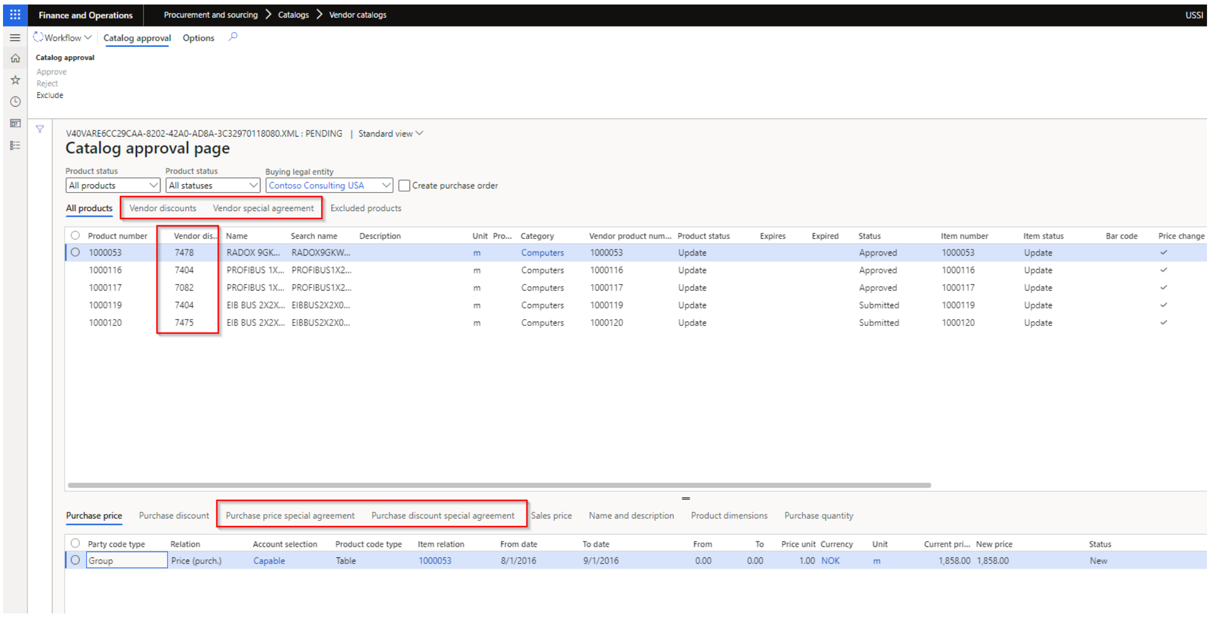
UNIT OF MEASURE	MULTIPLE	MINIMUM ORDER QUANTITY	PURCHASE LEAD TIME	MAXIMUM ORDER QUANTITY	STANDARD ORDER QUANTITY
Unit	Current	Current	Current	Current	Current
ea	0.00	0.00	0	0.00	0.00
	New	New	New	New	New
	0.00	0.00	0	0.00	0.00

6.5.9 Separate discount import

If the **Separate discount import** slider is Yes on the **Details** tab of the **Vendor catalog** details form, then following is shown/changed on **Catalog approval page:**

- Tab **All products:**
  - **Vendor discount group:** Vendor discount group from XML import file for the product candidate entity.
- Tab **Purchase discount:**
  - **New discount percentage:** Inserted from **Vendor discounts** *(not from Product Candidate)*
- The following additional tabs are shown:
  - Vendor discount

  - Vendor special agreement
  - Purchase price special agreement
  - Purchase discount special agreement


Finance and Operations
Procurement and sourcing > Catalogs > Vendor catalogs
USSI
Workflow
Catalog approval
Options
Catalog approval
Approve
Reject
Exclude
Standard view
All products
Vendor discounts
Vendor special agreement
Excluded products
Purchase price
Purchase discount
Purchase price special agreement
Purchase discount special agreement
Sales price
Name and description
Product dimensions
Purchase quantity

V40VARE6CC29CAA-8202-42A0-AD8A-3C32970118080.XML : PENDING

Catalog approval page

Product status: All products

Product status: All statuses

Buying legal entity: Contoso Consulting USA

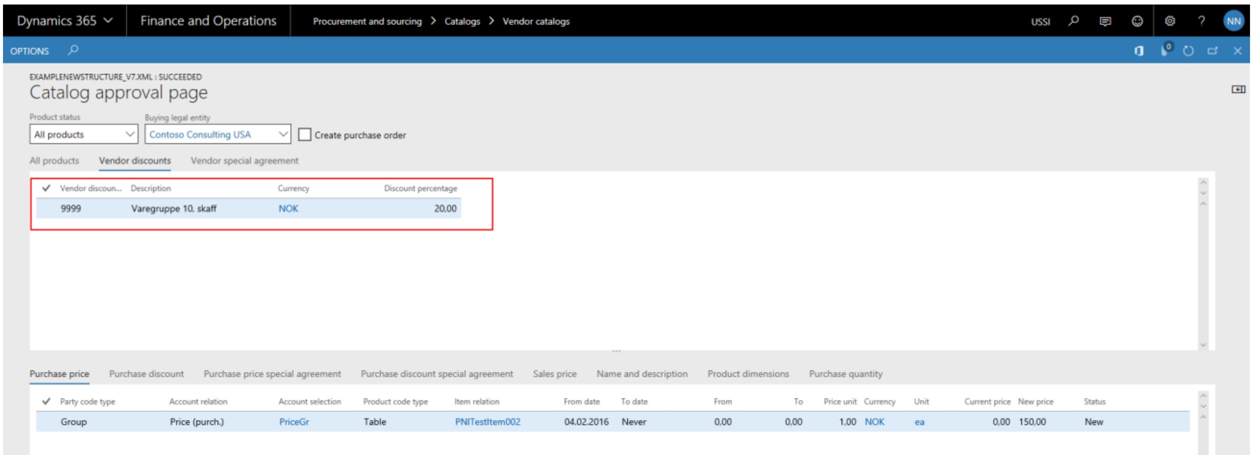
☐ Create purchase order

Product number	Vendor dis...	Name	Search name	Description	Unit	Pro...	Category	Vendor product num...	Product status	Expires	Expired	Status	Item number	Item status	Bar code	Price change
1000053	7478	RADOX 9GK...	RADOX9GKW...		m		Computers	1000053	Update			Approved	1000053	Update		✓
1000116	7404	PROFIBUS 1X...	PROFIBUS1X2...		m		Computers	1000116	Update			Approved	1000116	Update		✓
1000117	7082	PROFIBUS 1X...	PROFIBUS1X2...		m		Computers	1000117	Update			Approved	1000117	Update		✓
1000119	7404	EIB BUS 2X2X...	EIBBUS2X2X0...		m		Computers	1000119	Update			Submitted	1000119	Update		✓
1000120	7475	EIB BUS 2X2X...	EIBBUS2X2X0...		m		Computers	1000120	Update			Submitted	1000120	Update		✓

Party code type	Relation	Account selection	Product code type	Item relation	From date	To date	From	To	Price unit	Currency	Unit	Current pri...	New price	Status
Group	Price (purch.)	Capable	Table	1000053	8/1/2016	9/1/2016	0.00	0.00	1.00	NOK	m	1,858.00	1,858.00	New

Vendor discounts

Vendor discounts tab with the following fields to show vendor discounts for the **Vendor discount** entity from XML import file.


Dynamics 365
Finance and Operations
Procurement and sourcing > Catalogs > Vendor catalogs
USSI
NN
OPTIONS
All products
Vendor discounts
Vendor special agreement
Purchase price
Purchase discount
Purchase price special agreement
Purchase discount special agreement
Sales price
Name and description
Product dimensions
Purchase quantity

EXAMPLENEWSTRUCTURE_V7.XML : SUCCEEDED

Catalog approval page

Product status: All products

Buying legal entity: Contoso Consulting USA

☐ Create purchase order

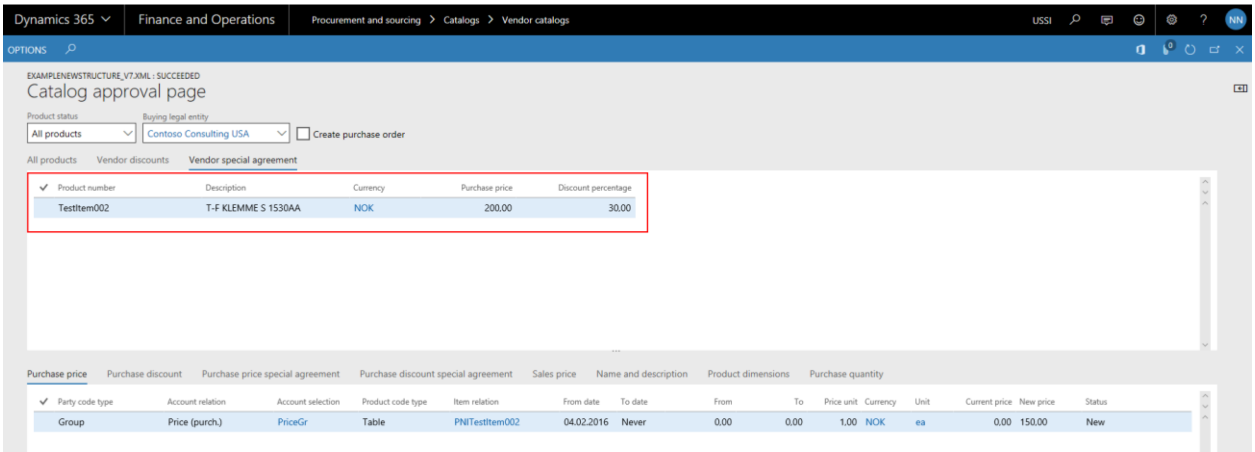
Vendor discoun...	Description	Currency	Discount percentage
9999	Varegruppe 10. skaff	NOK	20,00

Party code type	Account relation	Account selection	Product code type	Item relation	From date	To date	From	To	Price unit	Currency	Unit	Current price	New price	Status
Group	Price (purch.)	PriceGr	Table	PNITestItem002	04.02.2016	Never	0,00	0,00	1,00	NOK	ea	0,00	150,00	New

- **Vendor discount group:** Vendor discount group from XML import file for the vendor discounts entity.
- **Description:** Description from XML import file for the vendor discounts entity.
- **Currency.** Currency from XML import file for the vendor discounts entity. If it is empty, a currency from a vendor for the selected buying legal entity is shown.
- **Discount percentage:** Discount percentage from XML import file for the vendor discounts entity.

Vendor special agreement

Vendor special agreement tab with the following fields to show vendor special agreements for the **Vendor special agreement** entity from XML import file.


Dynamics 365
Finance and Operations
Procurement and sourcing > Catalogs > Vendor catalogs
USSI
NN
OPTIONS
All products
Vendor discounts
Vendor special agreement
Purchase price
Purchase discount
Purchase price special agreement
Purchase discount special agreement
Sales price
Name and description
Product dimensions
Purchase quantity

EXAMPLENEWSTRUCTURE_V7.XML : SUCCEEDED

Catalog approval page

Product status: All products
Buying legal entity: Contoso Consulting USA
☐ Create purchase order

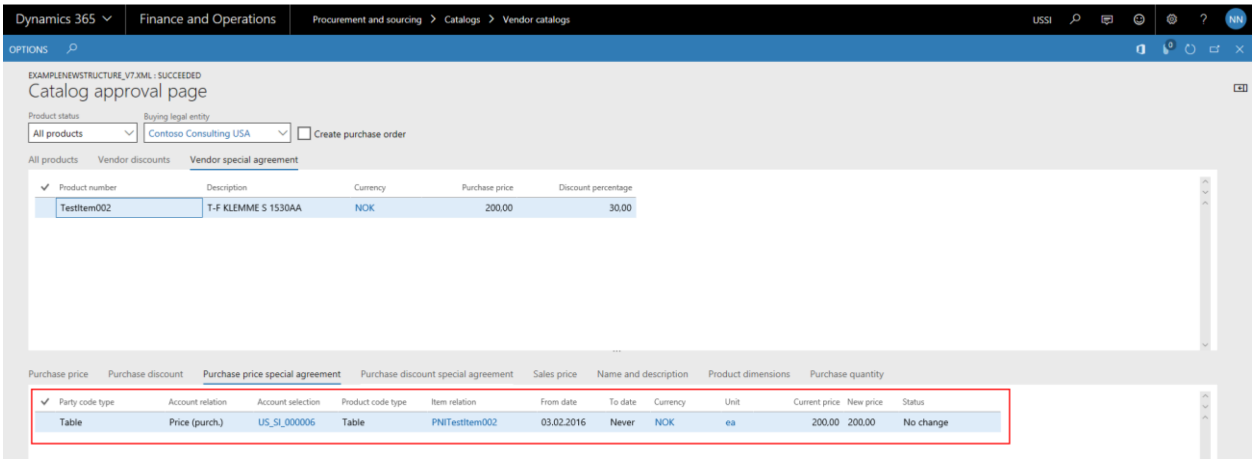
Product number	Description	Currency	Purchase price	Discount percentage
TestItem002	T-F KLEMME S 1530AA	NOK	200,00	30,00

Party code type	Account relation	Account selection	Product code type	Item relation	From date	To date	From	To	Price unit	Currency	Unit	Current price	New price	Status
Group	Price (purch.)	PriceGr	Table	PNITestItem002	04.02.2016	Never	0,00	0,00	1,00	NOK	ea	0,00	150,00	New

- **Product number:** Product number from XML import file for the vendor special agreement entity.
- **Description:** Description from XML import file for the vendor special agreement entity.
- **Currency:** Currency from XML import file for the vendor special agreement entity. If it is empty, a currency from a vendor for the selected buying legal entity is shown.
- **Purchase price:** Purchase price from XML import file for the vendor special agreement entity.
- **Discount percentage:** Discount percentage from XML import file for the vendor special agreement entity.

Purchase price special agreement

Purchase price special agreement tab to show additional information based on the trade agreement setup for purchase price special agreement and new fields from XML import file for the vendor special agreement entity. The data is not shown on this tab if a purchase price on the Vendor special agreement tab is zero.


Dynamics 365
Finance and Operations
Procurement and sourcing > Catalogs > Vendor catalogs
USSI
NN
OPTIONS
All products
Vendor discounts
Vendor special agreement
Purchase price
Purchase discount
Purchase price special agreement
Purchase discount special agreement
Sales price
Name and description
Product dimensions
Purchase quantity

EXAMPLENEWSTRUCTURE_V7.XML : SUCCEEDED

Catalog approval page

Product status: All products
Buying legal entity: Contoso Consulting USA
☐ Create purchase order

Product number	Description	Currency	Purchase price	Discount percentage
TestItem002	T-F KLEMME S 1530AA	NOK	200,00	30,00

Party code type	Account relation	Account selection	Product code type	Item relation	From date	To date	Currency	Unit	Current price	New price	Status
Table	Price (purch.)	US_SI_000006	Table	PNITestItem002	03.02.2016	Never	NOK	ea	200,00	200,00	No change

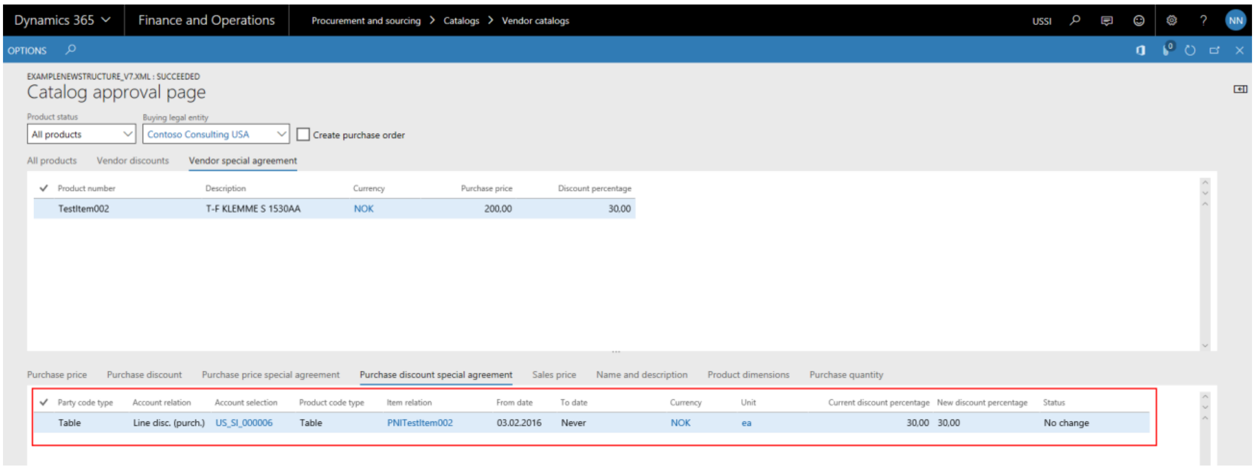
- **Party code type:** Selected party code type based on the trade agreement setup for purchase price special agreements.
- **Account relation:** Defaulted to ‘Price (purch.)’.
- **Account selection:** Selected account selection based on the trade agreement setup for purchase price special agreements.
- **Product code type:** Defaulted to ‘Table’.
- **Item relation:** Item number with or without the item number prefix.
- **From date:** From date is inserted based on the Effective discount date from the Catalog file history tab.

- **To date:** To date is inserted based on the Expiration discount date from the Catalog file history tab.
- **From:** Defaulted to zero.
- **To:** Defaulted to zero.
- **Currency:** Currency from the Vendor special agreement tab is inserted.
- **Unit:** Unit from XML import file for the product purchase prices entity.
- **Current price:** Show current price based on the existing trade agreements for purchase price special agreements and on the parameters for trade agreement setup.
- **New price:** Price from the Vendor special agreement tab is inserted.
- **Status:** Shows if there a new, updated or no changed price for the current product based on the parameters for trade agreement setup. The list of possible values: New, Update, No change.

Purchase discount special agreement

Purchase discount special agreement tab to show additional information based on the trade agreement setup for purchase discount special agreement and new fields from XML import file for the vendor special agreement entity.

Note: If a special purchase price exists and a special discount percentage is zero on the Vendor special agreement tab, and there is no discount trade agreement with zero discount percentage in D365, the data shows on this tab, and the status shows 'New.' It means that a trade agreement with zero discount at first time is created when releasing products. It allows to not consider a vendor discount, which might exist, to a special price when creating a purchase line for example.


Dynamics 365
Finance and Operations
Procurement and sourcing > Catalogs > Vendor catalogs
USSI
NN
OPTIONS

EXAMPLENEWSTRUCTURE_V7.XML : SUCCEEDED

Catalog approval page

Product status: All products

Buying legal entity: Contoso Consulting USA

☐ Create purchase order

All products
Vendor discounts
Vendor special agreement

✓	Product number	Description	Currency	Purchase price	Discount percentage
	TestItem002	T-F KLEMME S 1530AA	NOK	200,00	30,00

Purchase price
Purchase discount
Purchase price special agreement
Purchase discount special agreement
Sales price
Name and description
Product dimensions
Purchase quantity

✓	Party code type	Account relation	Account selection	Product code type	Item relation	From date	To date	Currency	Unit	Current discount percentage	New discount percentage	Status
	Table	Line disc. (purch.)	US_SI_000006	Table	PNITestItem002	03.02.2016	Never	NOK	ea	30,00	30,00	No change

- **Party code type:** Selected party code type based on the trade agreement setup for purchase discount special agreements.
- **Account relation:** Defaulted to ‘Line disc. (purch.)’.
- **Account selection:** Selected account selection based on the trade agreement setup for purchase discount special agreements.
- **Product code type:** Defaulted to ‘Table’.
- **Item relation:** item number with or without the item number prefix.
- **From date:** From date is inserted based on the Effective discount date from the Catalog file history tab.
- **To date:** To date is inserted based on the Expiration discount date from the Catalog file history tab.
- **From:** Defaulted to zero.
- **To:** Defaulted to zero.
- **Currency:** Currency from the Vendor special agreement tab is inserted.
- **Unit:** Unit from XML import file for the product purchase prices entity.
- **Current discount percentage:** Shows current discount percentage based on the existing trade agreements for purchase special discount and on the parameters for trade agreement setup.
- **New discount percentage:** Discount percentage from the Vendor special agreement tab is inserted.

- **Status.** Shows if there a new, updated or no changed discount for the current product based on the parameters for trade agreement setup. The list of possible values: New, Update, No change.

6.5.10 Logic for price and discount updates

See the excel file “Logic for price and discount updates.xslx” to see the logic for showing price and discount change on the **All products** tab and statuses on the **Purchase price/discount** tabs and the **Purchase price/discount special agreement** tabs.

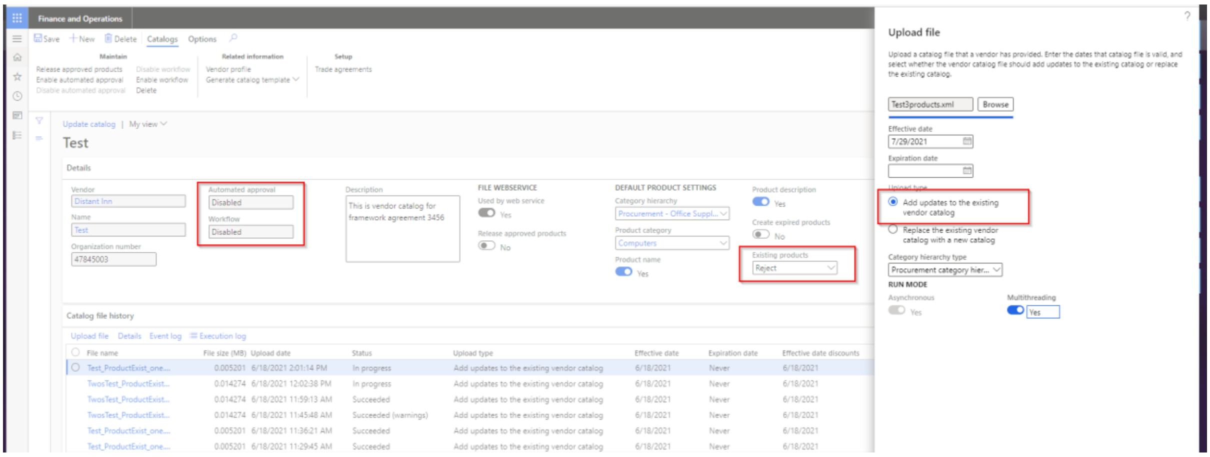
6.6 Examples on upload of files

6.6.1 No workflow

6.6.1.1 Manual approval

Workflow: Disabled, **Automated Approval**: Disabled, and **Existing products:** Reject

Uploading file with **Upload type**: Add updates to the existing vendor catalog


Finance and Operations
Save
New
Delete
Catalogs
Options
Maintain
Release approved products
Enable automated approval
Disable automated approval
Disable workflow
Enable workflow
Delete
Related information
Vendor profile
Generate catalog template
Setup
Trade agreements
Update catalog | My view
Test
Details
Catalog file history
Upload file
Details
Event log
Execution log
Browse

Vendor: Distant Inn
Name: Test
Organization number: 47845003
Automated approval: Disabled
Workflow: Disabled
Description: This is vendor catalog for framework agreement 3456
FILE WEBSERVICE
Used by web service: Yes
Release approved products: No
DEFAULT PRODUCT SETTINGS
Category hierarchy: Procurement - Office Suppl...
Product category: Computers
Product name: Yes
Product description: Yes
Create expired products: No
Existing products: Reject

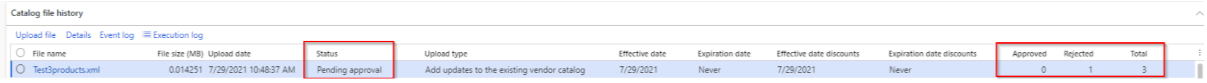
File name	File size (MB)	Upload date	Status	Upload type	Effective date	Expiration date	Effective date discounts
Test_ProductExist_one....	0.005201	6/18/2021 2:01:14 PM	In progress	Add updates to the existing vendor catalog	6/18/2021	Never	6/18/2021
TwosTest_ProductExist...	0.014274	6/18/2021 12:02:38 PM	In progress	Add updates to the existing vendor catalog	6/18/2021	Never	6/18/2021
TwosTest_ProductExist...	0.014274	6/18/2021 11:59:13 AM	Succeeded	Add updates to the existing vendor catalog	6/18/2021	Never	6/18/2021
TwosTest_ProductExist...	0.014274	6/18/2021 11:45:48 AM	Succeeded (warnings)	Add updates to the existing vendor catalog	6/18/2021	Never	6/18/2021
Test_ProductExist_one....	0.005201	6/18/2021 11:36:21 AM	Succeeded	Add updates to the existing vendor catalog	6/18/2021	Never	6/18/2021
Test_ProductExist_one....	0.005201	6/18/2021 11:29:45 AM	Succeeded	Add updates to the existing vendor catalog	6/18/2021	Never	6/18/2021

Upload file

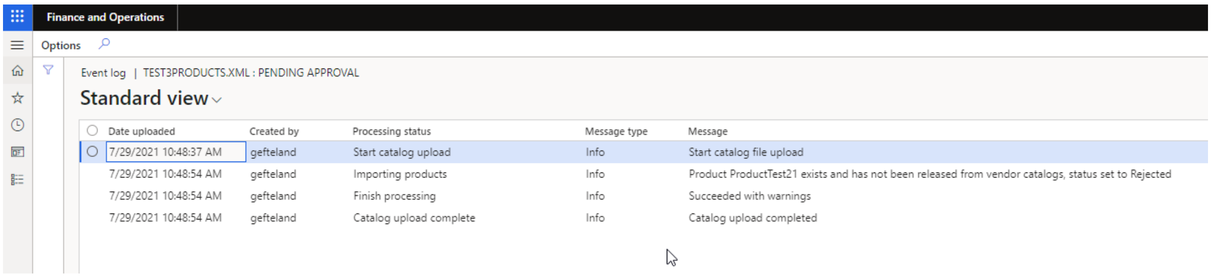
Upload a catalog file that a vendor has provided. Enter the dates that catalog file is valid, and select whether the vendor catalog file should add updates to the existing catalog or replace the existing catalog.

Test3products.xml
Effective date: 7/29/2021
Expiration date:
Upload type:
● Add updates to the existing vendor catalog
○ Replace the existing vendor catalog with a new catalog
Category hierarchy type: Procurement category hier...
RUN MODE
Asynchronous: Yes
Multithreading: Yes

Upload finished with file with in total three products, where one has been automatically rejected. The event log shows that the product “ProductTest21” has been rejected because it exists from before and has not been released with vendor catalog. The status of the catalog file is **Pending approval.**


Catalog file history
Upload file
Details
Event log
Execution log

File name	File size (MB)	Upload date	Status	Upload type	Effective date	Expiration date	Effective date discounts	Expiration date discounts	Approved	Rejected	Total
Test3products.xml	0.014251	7/29/2021 10:48:37 AM	Pending approval	Add updates to the existing vendor catalog	7/29/2021	Never	7/29/2021	Never	0	1	3


Finance and Operations
Options

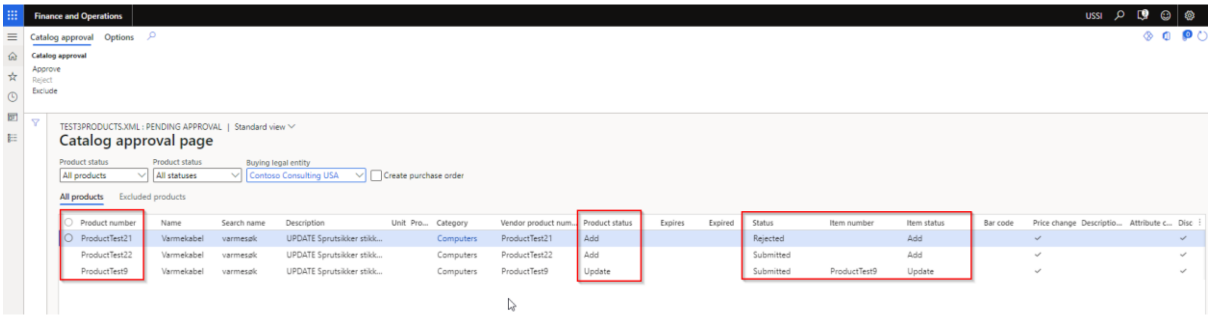
Event log | TEST3PRODUCTS.XML : PENDING APPROVAL

Standard view

Date uploaded	Created by	Processing status	Message type	Message
7/29/2021 10:48:37 AM	gefteland	Start catalog upload	Info	Start catalog file upload
7/29/2021 10:48:54 AM	gefteland	Importing products	Info	Product ProductTest21 exists and has not been released from vendor catalogs, status set to Rejected
7/29/2021 10:48:54 AM	gefteland	Finish processing	Info	Succeeded with warnings
7/29/2021 10:48:54 AM	gefteland	Catalog upload complete	Info	Catalog upload completed

Checking **Details** and we see that:

- ProductTest21
    - **Product status**: Add, this because it has not been created with vendor catalog before
    - **Status**: Rejected, this because it exists from before not created with vendor catalog and has automatically been set to rejected (based on setup of parameter **Existing product** on the vendor catalog)
    - **Item number**: blank, this because it has not been created with venfor catalog before
    - **Item status**: Add, this because it has not been created with vendor catalog before
- ProductTest22
    - **Product status**: Add, this because it has not been created with vendor catalog before
    - **Status**: Submitted, this because approval is manual and is waiting for next action with approve or reject.
    - **Item number**: blank, this because it does not exist
    - **Item status**: Add, this because it does not exist
- ProductTest9
    - **Product status**: Update, this because it exists from before and will be updated if approved
    - **Status**: Submitted, this because approval is manual and is waiting for next action with approve or reject.
    - **Item number**: ProductTest9, this because the match is found in released products
    - **Item status**: Update, this because it exists from before and will be updated if approved and released approved products is processed next



TEST3PRODUCTS.XML : PENDING APPROVAL | Standard view

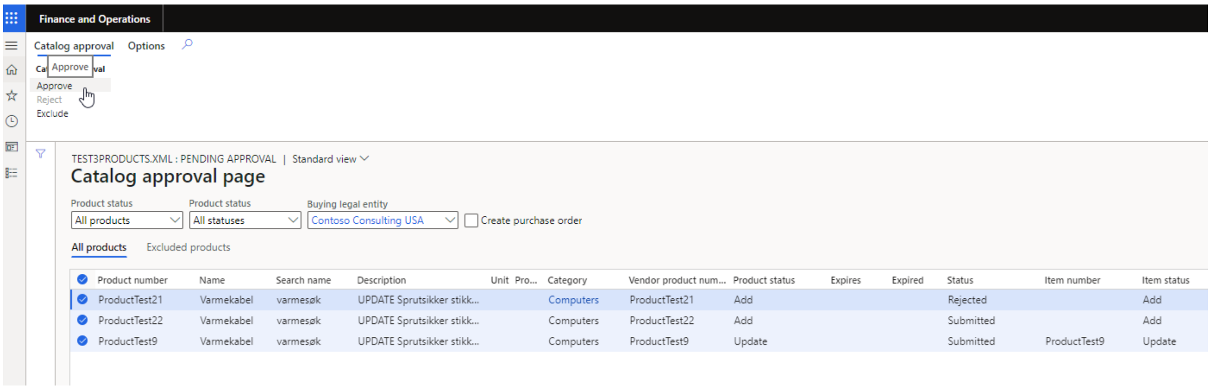
Catalog approval page

Product status: All products
Product status: All statuses
Buying legal entity: Contoso Consulting USA
☐ Create purchase order

Product number	Name	Search name	Description	Unit	Pro...	Category	Vendor product num...	Product status	Expires	Expired	Status	Item number	Item status	Bar code	Price change	Descriptio...	Attribute c...	Disc
ProductTest21	Varmekabel	varmesøk	UPDATE Sprutsikker stikk...			Computers	ProductTest21	Add			Rejected		Add		✓			✓
ProductTest22	Varmekabel	varmesøk	UPDATE Sprutsikker stikk...			Computers	ProductTest22	Add			Submitted		Add		✓			✓
ProductTest9	Varmekabel	varmesøk	UPDATE Sprutsikker stikk...			Computers	ProductTest9	Update			Submitted	ProductTest9	Update		✓			✓

Selecting all three products and clicking on button **Approve**, this because I want to include all in released of approved products and I also want to update the existing product not created with vendor catalog

Note: You can also use the **Reject** button on selected products with **Status**: Submitted


Finance and Operations
Catalog approval
Options
Approve
Approve
Reject
Exclude
Standard view
All products
Excluded products

TEST3PRODUCTS.XML : PENDING APPROVAL

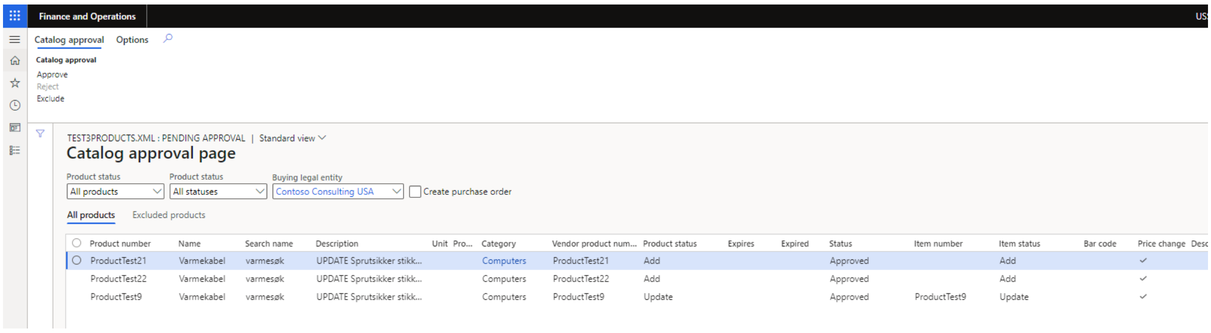
Catalog approval page

Product status: All products
Product status: All statuses
Buying legal entity: Contoso Consulting USA
☐ Create purchase order

Product number	Name	Search name	Description	Unit	Pro...	Category	Vendor product num...	Product status	Expires	Expired	Status	Item number	Item status
ProductTest21	Varmekabel	varmesøk	UPDATE Sprutsikker stikk...			Computers	ProductTest21	Add			Rejected		Add
ProductTest22	Varmekabel	varmesøk	UPDATE Sprutsikker stikk...			Computers	ProductTest22	Add			Submitted		Add
ProductTest9	Varmekabel	varmesøk	UPDATE Sprutsikker stikk...			Computers	ProductTest9	Update			Submitted	ProductTest9	Update

Status for all products changed to Approved, meaning that:

- ProductTest21: The existing product has been updated from vendor catalog, meaning with name, search name, description, and procurement category.
  Note: If the product had another procurement category with same procurement hierarchy, then the category from the vendor catalog has replaced it.
- ProductTest22: The product has been created
- ProductTest9: The existing product has been updated


Finance and Operations
Catalog approval
Options
Catalog approval
Approve
Reject
Exclude
Standard view
All products
Excluded products

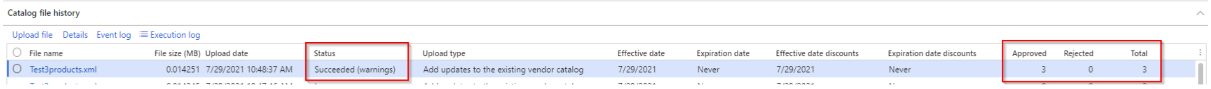
TEST3PRODUCTS.XML : PENDING APPROVAL

Catalog approval page

Product status: All products
Product status: All statuses
Buying legal entity: Contoso Consulting USA
☐ Create purchase order

Product number	Name	Search name	Description	Unit	Pro...	Category	Vendor product num...	Product status	Expires	Expired	Status	Item number	Item status	Bar code	Price change
ProductTest21	Varmekabel	varmesøk	UPDATE Sprutsikker stikk...			Computers	ProductTest21	Add			Approved		Add		✓
ProductTest22	Varmekabel	varmesøk	UPDATE Sprutsikker stikk...			Computers	ProductTest22	Add			Approved		Add		✓
ProductTest9	Varmekabel	varmesøk	UPDATE Sprutsikker stikk...			Computers	ProductTest9	Update			Approved	ProductTest9	Update		✓

We close Details and see that **Status**: Succeeded (with warnings), because we are finished with the approval (and with warnings because there was one product that existed from before not created with vendor catalog). All three is now Approved.

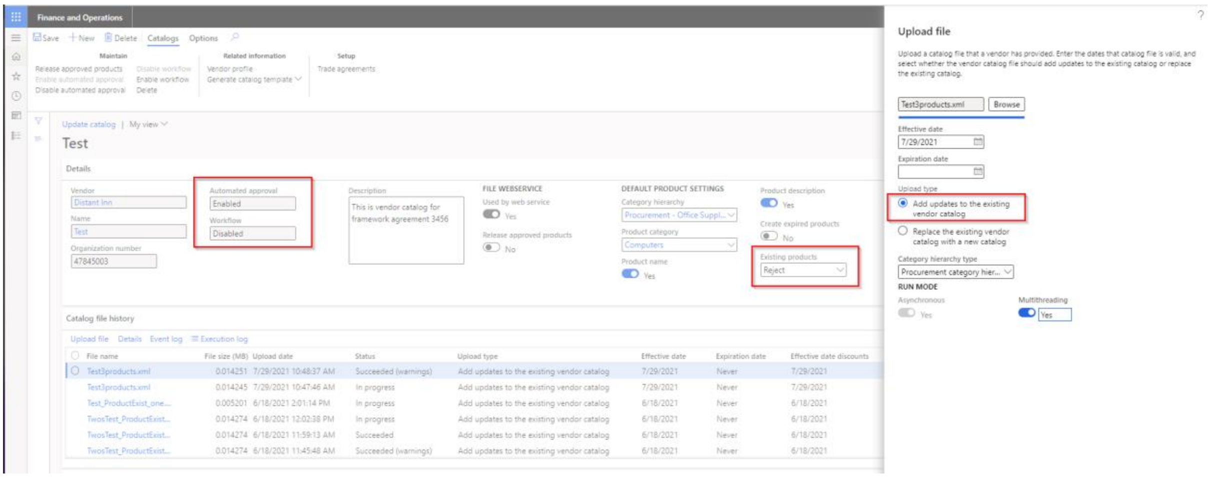

Catalog file history
Upload file
Details
Event log
Execution log

File name	File size (MB)	Upload date	Status	Upload type	Effective date	Expiration date	Effective date discounts	Expiration date discounts	Approved	Rejected	Total
Test3products.xml	0.014251	7/29/2021 10:48:37 AM	Succeeded (warnings)	Add updates to the existing vendor catalog	7/29/2021	Never	7/29/2021	Never	3	0	3

6.6.1.2 Automated approval

Workflow: Disabled, **Automated Approval**: Enabled, and **Existing products:** Reject

Uploading file with **Upload type**: Add updates to the existing vendor catalog



Test

Details

Vendor: Distant Inn
Name: Test
Organization number: 47845003
Automated approval: Enabled
Workflow: Disabled
Description: This is vendor catalog for framework agreement 3456

FILE WEBSERVICE
Used by web service: Yes
Release approved products: No

DEFAULT PRODUCT SETTINGS
Category hierarchy: Procurement - Office Suppl...
Product category: Computers
Product name: Yes
Product description: Yes
Create expired products: No
Existing products: Reject

Catalog file history

Upload file | Details | Event log | Execution log

File name	File size (MB)	Upload date	Status	Upload type	Effective date	Expiration date	Effective date discounts
Test3products.xml	0.014251	7/29/2021 10:48:37 AM	Succeeded (warnings)	Add updates to the existing vendor catalog	7/29/2021	Never	7/29/2021
Test3products.xml	0.014245	7/29/2021 10:47:46 AM	In progress	Add updates to the existing vendor catalog	7/29/2021	Never	7/29/2021
Test_ProductExist_one...	0.005201	6/18/2021 2:01:14 PM	In progress	Add updates to the existing vendor catalog	6/18/2021	Never	6/18/2021
TwosTest_ProductExist...	0.014274	6/18/2021 12:02:38 PM	In progress	Add updates to the existing vendor catalog	6/18/2021	Never	6/18/2021
TwosTest_ProductExist...	0.014274	6/18/2021 11:59:13 AM	Succeeded	Add updates to the existing vendor catalog	6/18/2021	Never	6/18/2021
TwosTest_ProductExist...	0.014274	6/18/2021 11:45:48 AM	Succeeded (warnings)	Add updates to the existing vendor catalog	6/18/2021	Never	6/18/2021

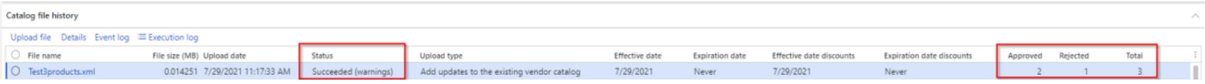
Upload file

Upload a catalog file that a vendor has provided. Enter the dates that catalog file is valid, and select whether the vendor catalog file should add updates to the existing catalog or replace the existing catalog.

Test3products.xml
Effective date: 7/29/2021
Expiration date:
Upload type:
● Add updates to the existing vendor catalog
○ Replace the existing vendor catalog with a new catalog
Category hierarchy type: Procurement category hier...
RUN MODE
Asynchronous: Yes
Multithreading: Yes

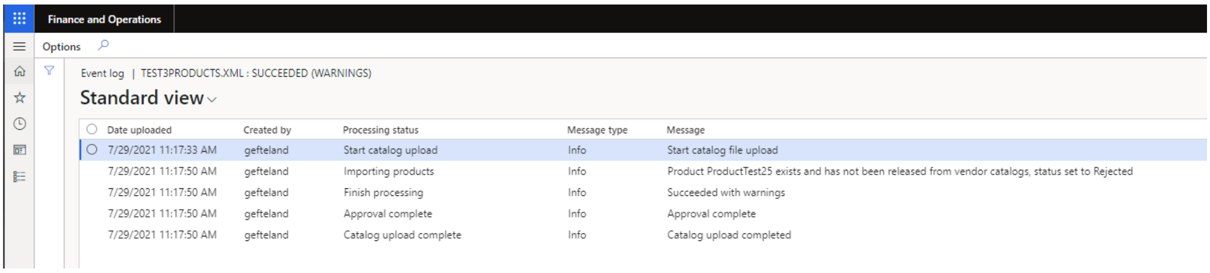
Upload finished with file with in total three products, where one has been automatically rejected. The event log shows that the product "ProductTest25" has been rejected because it exists from before and has not been released with vendor catalog.

The status of the catalog file is Succeeded (with warnings) because automated approval is selected on the vendor catalog, meaning approval is complete (and with warnings because there is one product that existed from before not created with vendor catalog).


Catalog file history

Upload file | Details | Event log | Execution log

File name	File size (MB)	Upload date	Status	Upload type	Effective date	Expiration date	Effective date discounts	Expiration date discounts	Approved	Rejected	Total
Test3products.xml	0.014251	7/29/2021 11:17:33 AM	Succeeded (warnings)	Add updates to the existing vendor catalog	7/29/2021	Never	7/29/2021	Never	2	1	3



Event log | TEST3PRODUCTS.XML : SUCCEEDED (WARNINGS)

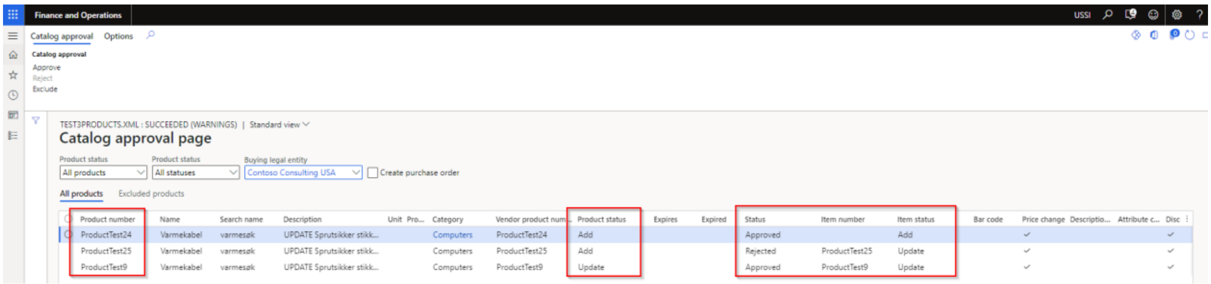
Standard view

Date uploaded	Created by	Processing status	Message type	Message
7/29/2021 11:17:33 AM	gefteland	Start catalog upload	Info	Start catalog file upload
7/29/2021 11:17:50 AM	gefteland	Importing products	Info	Product ProductTest25 exists and has not been released from vendor catalogs, status set to Rejected
7/29/2021 11:17:50 AM	gefteland	Finish processing	Info	Succeeded with warnings
7/29/2021 11:17:50 AM	gefteland	Approval complete	Info	Approval complete
7/29/2021 11:17:50 AM	gefteland	Catalog upload complete	Info	Catalog upload completed

Checking **Details** and we see that:

- ProductTest24
  - **Product status**: Add, this because it has not been created with vendor catalog before
  - **Status**: Approved, this because approval is automated and complete
  - **Item number**: blank, this because it does not exist
  - **Item status**: Add, this because it does not exist

- ProductTest25
    - **Product status**: Add, this because it has not been created with vendor catalog before
    - **Status**: Rejected, this because it exists from before not created with vendor catalog and has automatically been set to rejected (based on setup of parameter **Existing product** on the vendor catalog)
    - **Item number**: ProductTest25, this because it also exists in released products
    - **Item status**: Update, this because it exists in released products and will be updated in released of approved products if approved
- ProductTest9
    - **Product status**: Update, this because it exists from before and will be updated if approved
    - **Status**: Submitted, this because approval is manual and is waiting for next action with approve or reject.
    - **Item number**: ProductTest9, this because the match is found in released products
    - **Item status**: Update, this because it exists from before and will be updated if approved and released approved products is processed next



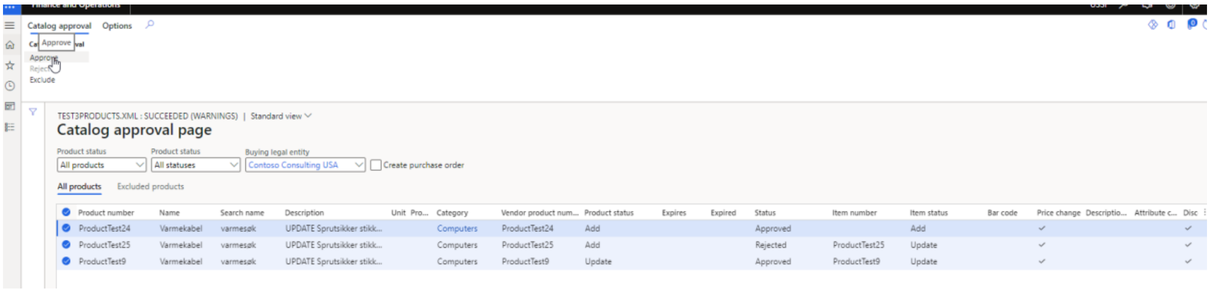
TEST3PRODUCTS.XML : SUCCEEDED (WARNINGS)

Catalog approval page

Product status: All products
Product status: All statuses
Buying legal entity: Contoso Consulting USA
☐ Create purchase order

Product number	Name	Search name	Description	Unit	Pro...	Category	Vendor product num...	Product status	Expires	Expired	Status	Item number	Item status	Bar code	Price change	Descriptio...	Attribute c...	Disc
ProductTest24	Varmekabel	varmesøk	UPDATE Sprutsikker stikk...			Computers	ProductTest24	Add			Approved		Add		✓			✓
ProductTest25	Varmekabel	varmesøk	UPDATE Sprutsikker stikk...			Computers	ProductTest25	Add			Rejected	ProductTest25	Update		✓			✓
ProductTest9	Varmekabel	varmesøk	UPDATE Sprutsikker stikk...			Computers	ProductTest9	Update			Approved	ProductTest9	Update		✓			✓

Selecting all three products and clicking on button **Approve**, this because I want to include all in released of approved products and I also want to update the existing product not created with vendor catalog



TEST3PRODUCTS.XML : SUCCEEDED (WARNINGS)

Catalog approval page

Product status: All products
Product status: All statuses
Buying legal entity: Contoso Consulting USA
☐ Create purchase order

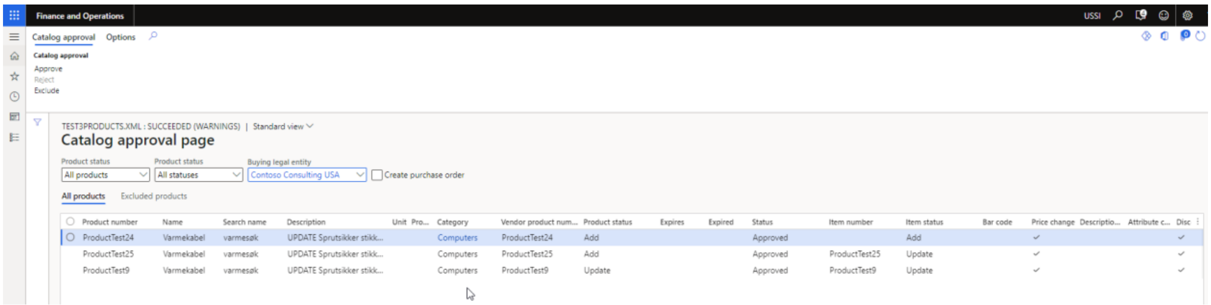
Product number	Name	Search name	Description	Unit	Pro...	Category	Vendor product num...	Product status	Expires	Expired	Status	Item number	Item status	Bar code	Price change	Descriptio...	Attribute c...	Disc
ProductTest24	Varmekabel	varmesøk	UPDATE Sprutsikker stikk...			Computers	ProductTest24	Add			Approved		Add		✓			✓
ProductTest25	Varmekabel	varmesøk	UPDATE Sprutsikker stikk...			Computers	ProductTest25	Add			Rejected	ProductTest25	Update		✓			✓
ProductTest9	Varmekabel	varmesøk	UPDATE Sprutsikker stikk...			Computers	ProductTest9	Update			Approved	ProductTest9	Update		✓			✓

Status for all products changed to Approved, meaning that:

- ProductTest24: The product has been created
- ProductTest25: The existing product has been updated from vendor catalog, meaning with name, search name, description, and procurement category. The released product will be updated depending on the settings on the procurement category.

Note: If the product had another procurement category with same procurement hierarchy, then the category from the vendor catalog has replaced it.

- ProductTest9: The existing product has been updated



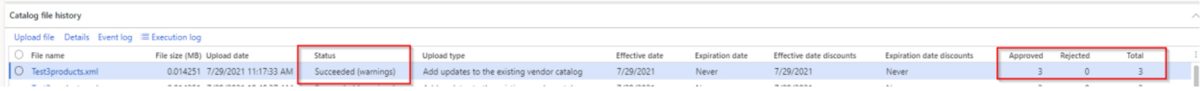
TEST3PRODUCTS.XML : SUCCEEDED (WARNINGS) | Standard view

Catalog approval page

Product status: All products
Product status: All statuses
Buying legal entity: Contoso Consulting USA
☐ Create purchase order

Product number	Name	Search name	Description	Unit	Pro...	Category	Vendor product num...	Product status	Expires	Expired	Status	Item number	Item status	Bar code	Price change	Descriptio...	Attribute c...	Disc
ProductTest24	Varmekabel	varmesøk	UPDATE Sprutsikker stikk...			Computers	ProductTest24	Add			Approved		Add		✓			✓
ProductTest25	Varmekabel	varmesøk	UPDATE Sprutsikker stikk...			Computers	ProductTest25	Add			Approved	ProductTest25	Update		✓			✓
ProductTest9	Varmekabel	varmesøk	UPDATE Sprutsikker stikk...			Computers	ProductTest9	Update			Approved	ProductTest9	Update		✓			✓

We close Details and see that **Status**: Succeeded (with warnings), because we are finished with the approval (and with warnings because there was one product that existed from before not created with vendor catalog). All three is now Approved



File name	File size (MB)	Upload date	Status	Upload type	Effective date	Expiration date	Effective date discounts	Expiration date discounts	Approved	Rejected	Total
Test3products.xml	0.014251	7/29/2021 11:17:33 AM	Succeeded (warnings)	Add updates to the existing vendor catalog	7/29/2021	Never	7/29/2021	Never	3	0	3

6.6.2 With workflow

6.6.2.1 Manual approval

All products must be approved using the standard workflow.

6.6.2.2 Automated approval

All products will be approved automatically using the standard workflow.

6.7 Release approved products

By using button **Release approved products** all products that has been approved and previously not processed in all catalog files on Catalg file history, will be processed. This means that either new released products will be created or existing one will be updated. Trade agreements will also be created or updated on new and existing released products.

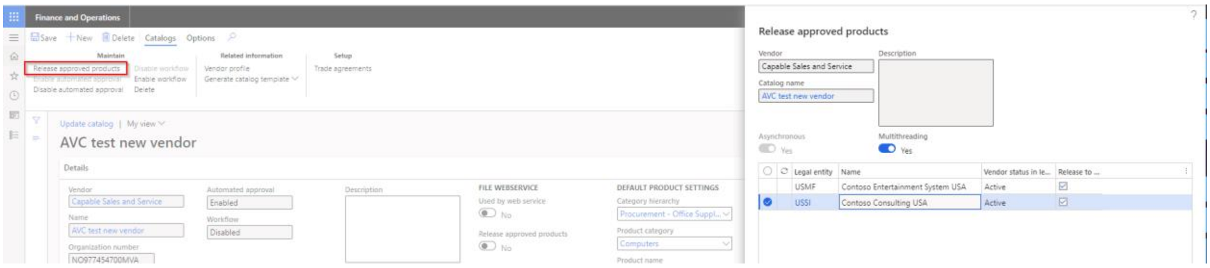
6.7.1 Release approved products

Select first run options:

- **Asynchronous:** Run release of approved products in an asynchronous mode, and the user will not have to click the **OK** button to wait until the process is finished. It means once a user clicks the **OK** button the form is closed, and a user can refresh a page to see the progress on released products on the **Catalog file status per legal entity** tab. After finishing the process, a message “Release products to companies, {company names}, Finished” is shown.

- **Multithreading:** Run release of approved products in a multithreading mode. In this case, batch tasks are created based on the maximum batch threads on the **Server configuration** form in the **System administration** module. In the standard, batch tasks always run in an asynchronous mode. However, if the number of approved products is less than the maximum batch threads, then the process runs in an asynchronous mode without the creation of batch tasks. When this option is checked, the **Asynchronous** slider is turned on automatically and not accessible for editing.

Then select which companies to include in the release of approved products by check marking these in the grid, then click **OK** to start the process.


Finance and Operations
Save
New
Delete
Catalogs
Options
Maintain
Release approved products
Enable automated approval
Disable automated approval
Disable workflow
Enable workflow
Delete
Related information
Vendor profile
Generate catalog template
Setup
Trade agreements
Update catalog
My view
Details
FILE WEBSERVICE
DEFAULT PRODUCT SETTINGS
Product name
?

AVC test new vendor

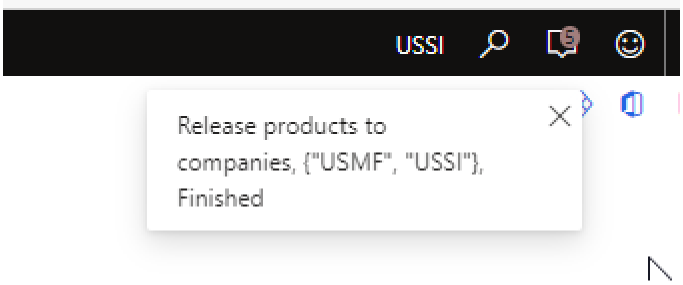
Vendor: Capable Sales and Service
Name: AVC test new vendor
Organization number: NO977454700MVA
Automated approval: Enabled
Workflow: Disabled
Description:
Used by web service: No
Release approved products: No
Category hierarchy: Procurement - Office Suppl...
Product category: Computers

Release approved products

Vendor: Capable Sales and Service
Catalog name: AVC test new vendor
Description:
Asynchronous: Yes
Multithreading: Yes

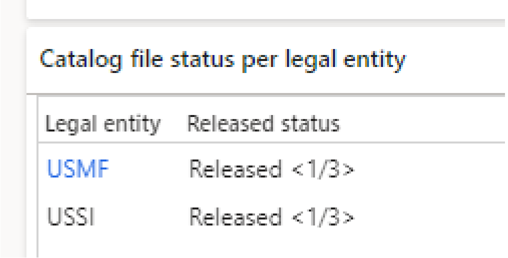
○	Legal entity	Name	Vendor status in le...	Release to ...
	USMF	Contoso Entertainment System USA	Active	☑
●	USSI	Contoso Consulting USA	Active	☑

When finished an Infolog will show



Release products to companies, {"USMF", "USSI"}, Finished

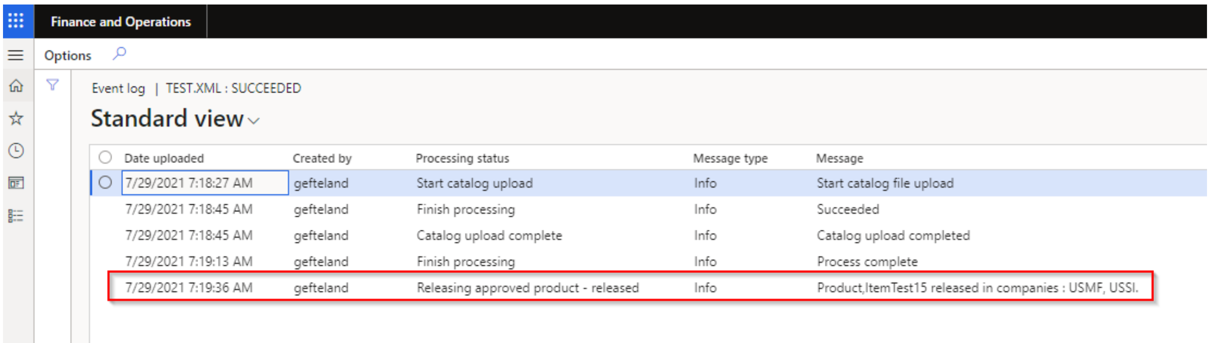
You will also see pr Catalog file how many products has been released per company



Catalog file status per legal entity

Legal entity	Released status
USMF	Released <1/3>
USSI	Released <1/3>

The eventlog will also show products that has been released

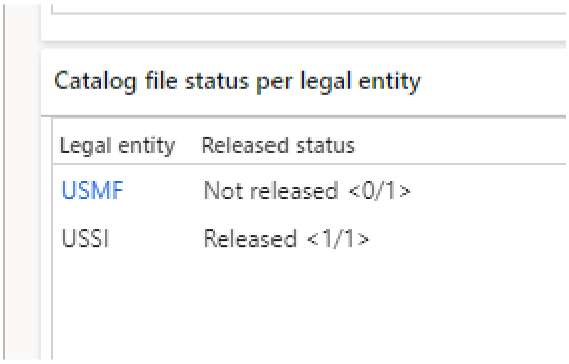


Event log | TEST.XML : SUCCEEDED

Standard view

○	Date uploaded	Created by	Processing status	Message type	Message
○	7/29/2021 7:18:27 AM	gefteland	Start catalog upload	Info	Start catalog file upload
	7/29/2021 7:18:45 AM	gefteland	Finish processing	Info	Succeeded
	7/29/2021 7:18:45 AM	gefteland	Catalog upload complete	Info	Catalog upload completed
	7/29/2021 7:19:13 AM	gefteland	Finish processing	Info	Process complete
	7/29/2021 7:19:36 AM	gefteland	Releasing approved product - released	Info	Product,ItemTest15 released in companies : USMF, USSI.

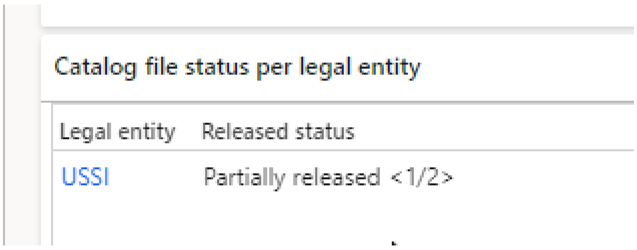
Example where not all companies has been selected in the release



Catalog file status per legal entity

Legal entity	Released status
USMF	Not released <0/1>
USSI	Released <1/1>

If there has been a delete action on a product, then it will say “Partiallly released”



Catalog file status per legal entity

Legal entity	Released status
USSI	Partially released <1/2>

6.7.2 Released products and Trade agreements

While releasing approved products, the parameters and default values from the **Basic product properties** tab and the **Basic product properties updates** tab on the current procurement catagories are used for inserting and updating data on released products.

The purchase price/discount trade agreements are created or updated while releasing approved products based on the following values from the **Status** field on the **Purchase price/discount** tabs and the **Purchase price/special agreement** tabs on the **Catalog approval page** form:

- **New:** If the **Set To date before new From date** slider is turned on and there exist trade agreement lines with the match on setup and imported data and dates, then the day before imported From date are updated on To date on existing lines and a new trade agreement line is inserted.
- **Update:** The existing trade agreements are updated with a new price or discount.
- **No change:** No trade agreements are updated or inserted.

Note: If you have a sales price, then a new sales price trade agreement line will be created with release of products. There functionality above is only for purchase price.

6.7.3 Warnings and error handling in Event log and Execution log

See the table with new possible warnings for advanced vendor catalogs in the **Event log** form which could occur during releasing products.

Warning text	
Company: ####. An exchange rate cannot be found for exchange rate type Default between currencies <currency code from created trade agreements> and <accounting currency code> on exchange date. Purchase price cannot be updated.	It refers to inserting or updating a purchase price on released products.
Company: ####. An exchange rate cannot be found for exchange rate type Default between currencies <currency code from created trade agreements> and <accounting currency code > on exchange date. Cost price cannot be updated.	It refers to inserting or updating a cost price on released products.
Company: ####. Unit conversion from <trade agreement unit> to <inventory unit> does not exist. Cost price cannot be updated.	It refers to inserting or updating a cost price on released products.
Company: ####. Unit conversion from <trade agreement unit > to <purchase unit> does not exist. Purchase price cannot be updated.	It refers to inserting or updating a purchase price on released products.
Company: ####. Unit conversion from <BOM unit> to <inventory unit> does not exist. Inventory unit cannot be updated.	It refers to inserting an inventory unit on new released products based on setup from procurement category.
Company: ####. Unit conversion from <purchase unit> to <inventory unit> does not exist. Purchase unit cannot be updated.	It refers to inserting a purchase unit on new released products based on setup from procurement category.
Company: ####. Unit conversion from <sales unit> to <inventory unit> does not exist. Sales unit cannot be updated.	It refers to inserting a sales unit on new released products based on setup from procurement category.
Company: ####. URL 1 is missing. The provided document type is not a URL type.	It refers to creation of attachment with class ‘Attach URL’ for released products.
Company: ####. URL 2 is missing. The provided document type is not a URL type.	It refers to creation of attachment with class ‘Attach URL’ for released products.
Company: ###. URL 1 is missing. URL format is not supported. URL must start with http(s)://, ftp://, or point to a valid file.	It refers to creation of attachment with class ‘Attach URL’ for released products.
Company: ###. URL 2 is missing. URL format is not supported. URL must start with http(s)://, ftp://, or point to a valid file.	It refers to creation of attachment with class ‘Attach URL’ for released products.
Company: ###. Unit sequence group not found, cannot be updated on released product ###	It refers to that a corresponding "Unit sequence group ID" has not been found for the imported unit. The "Unit sequence group ID" has to be corrected manually on the new released products. See more details about "Unit sequence group ID" in chapter on setup on Procurement categories.

In case of any error while releasing products, D365 catches it and shows in the Event log form. It could happen that the process will stop due to an error.

Note: If you delete a Product, then it is also deleted from the vendor catalog approved products. Meaning you can then import the product againg. This can be useful in cases where you have approved products with wrong data and need to fix.

7 D365 CUSTOM WEB-SERVICES

7.1 Web service for Azure logic app

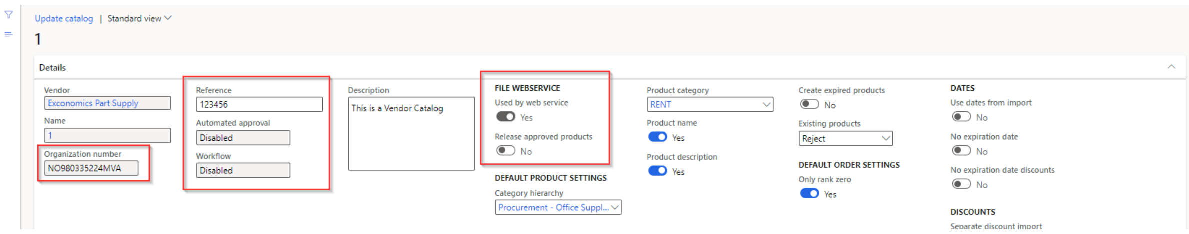
A D365 custom web service has been developed in order to receive an XML-file from the Azure blob storage folder based on new parameters in the **File webservice group** on the **Vendor catalog import parameters** form (the parameters are described in the relevant chapters) and upload a file to a vendor catalog which is selected based on the PJMAVCORGANIZATIONNUMBER in XML-file, value in Organization number & Reference-field on the Vendor Catalog and marked to be used by web service.

When importing a vendor catalog through web service, the value in PJMAVCORGANIZATIONNUMBER in XML-file will be compared with the values in 'Organization number' and 'Reference' fields, where the '#' character is used as divider. Reference must be must be used if there are more than one active vendor catalog for same vendor account, this to find the correct vendor catalog for uploading the file.

For example:

- a file with PJMAVCORGANIZATIONNUMBER = NO980335224MVA will upload the catalog to a vendor catalog with 'Organization number': NO980335224MVA and Reference <blank>.
- a file with PJMAVCORGANIZATIONNUMBER = NO980335224MVA#123456 will upload the catalog to a vendor catalog with 'Organization number': NO980335224MVA and Reference 123456

If the workflows are disabled and the automated approval is enabled, then the process of approving products and releasing approved products run automatically as well. Automated approval is only run if "Automated approval" = Enabled and release of approved products is run only if 'Release approve products' = Yes.



1

Vendor: Exconomics Part Supply
Name: 1
Organization number: NO980335224MVA
Reference: 123456
Automated approval: Disabled
Workflow: Disabled
Description: This is a Vendor Catalog

FILE WEBSERVICE
Used by web service: Yes
Release approved products: No

DEFAULT PRODUCT SETTINGS
Category hierarchy: Procurement - Office Suppl...
Product category: RENT
Product name: Yes
Product description: Yes
Create expired products: No
Existing products: Reject

DEFAULT ORDER SETTINGS
Only rank zero: Yes

DATES
Use dates from import: No
No expiration date: No
No expiration date discounts: No

DISCOUNTS
Separate discount import

With the usage of a web-service, an approve of products and a release of approved products always run in a multithreading mode. To use this option, it requires to set up a maximum batch threads on the standard Server configuration form.

This custom D365 web-service is utilized in the Azure logic app for sending files in Operation ('BU_540_PJMACVSendFileTOD365FO') which is part of the Azure samples.

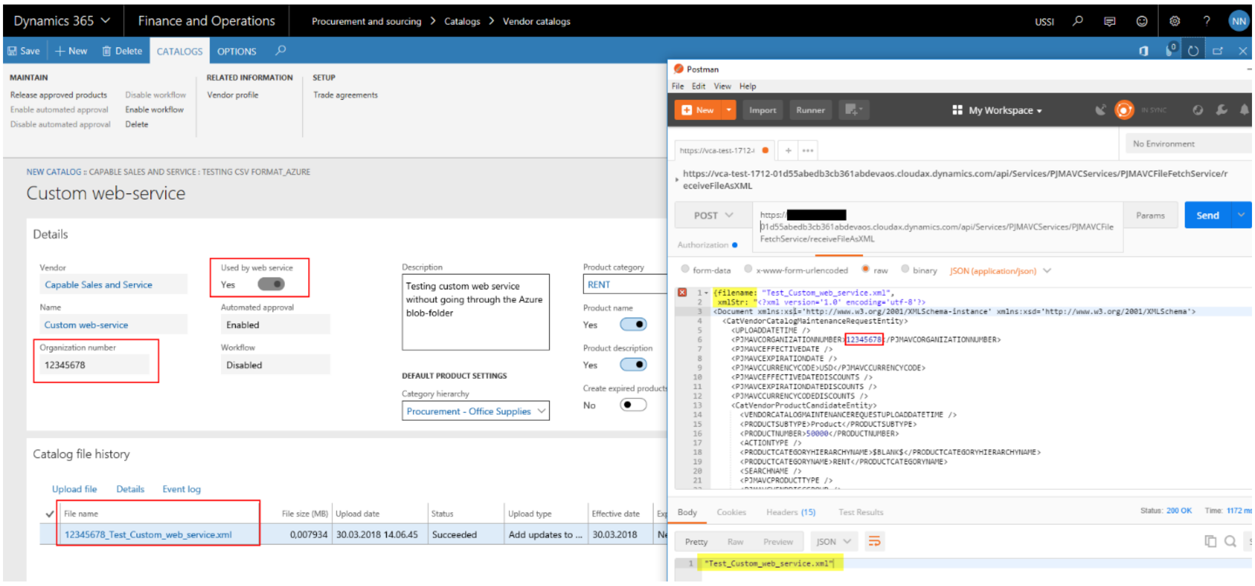
If a vendor catalog is not found the custom web-service returns an error with the text 'An exception occurred when invoking the operation - No active vendor catalog for org. no. #######'.

The web service '/api/Services/PJMAVCServices/PJMAVCFileFetchService/receiveFileAsXML' is implemented as a REST interface with two input parameters and one output parameter:

- **Filename.** Input parameter. It is a file name of an XML-file. It uses for displaying a file name on the Catalog file history tab.
- **XMLStr.** Input parameter. It is an XML-file for sending in Operations.

- **Return.** Output parameter. It is a file name.

```
<OperationGetResponse xmlns:i="http://www.w3.org/2001/XMLSchema-instance" xmlns="http://schemas.datacontract.org/2004/07/Microsoft.Dynamics.Platform.Integration.Services.Xpp">

<Parameters>

<OperationGetResponse.Parameter>

<Name>xmlStr</Name>

<Type>String</Type>

</OperationGetResponse.Parameter>

<OperationGetResponse.Parameter>

<Name>filename</Name>

<Type>String</Type>

</OperationGetResponse.Parameter>

</Parameters>

<Return>

<Name>return</Name>

<Type>String</Type>

</Return>

</OperationGetResponse>
```


Dynamics 365
Finance and Operations
Procurement and sourcing > Catalogs > Vendor catalogs
USSI
NN
Save
New
Delete
CATALOGS
OPTIONS
MAINTAIN
Release approved products
Enable automated approval
Disable automated approval
Disable workflow
Enable workflow
Delete
RELATED INFORMATION
Vendor profile
SETUP
Trade agreements
Postman
File
Edit
View
Help
New
Import
Runner
My Workspace
IN SYNC
No Environment
https://vca-test-1712-
Params
Send
Authorization
Body
Cookies
Headers (15)
Test Results
Pretty
Raw
Preview
JSON

NEW CATALOG :: CAPABLE SALES AND SERVICE : TESTING CSV FORMAT_AZURE

Custom web-service

Details

Vendor: Capable Sales and Service

Name: Custom web-service

Organization number: 12345678

Used by web service: Yes

Automated approval: Enabled

Workflow: Disabled

Description: Testing custom web service without going through the Azure blob-folder

DEFAULT PRODUCT SETTINGS

Category hierarchy: Procurement - Office Supplies

Product category: RENT

Product name: Yes

Product description: Yes

Create expired products: No

Catalog file history

Upload file　Details　Event log

✓	File name	File size (MB)	Upload date	Status	Upload type	Effective date	Exp
	12345678_Test_Custom_web_service.xml	0,007934	30.03.2018 14.06.45	Succeeded	Add updates to ...	30.03.2018	Ne

https://vca-test-1712-01d55abedb3cb361abdevaos.cloudax.dynamics.com/api/Services/PJMAVCServices/PJMAVCFileFetchService/receiveFileAsXML

POST https://[redacted]01d55abedb3cb361abdevaos.cloudax.dynamics.com/api/Services/PJMAVCServices/PJMAVCFileFetchService/receiveFileAsXML

○ form-data ○ x-www-form-urlencoded ● raw ○ binary JSON (application/json)

```
{filename: "Test_Custom_web_service.xml",
 xmlStr: "<?xml version='1.0' encoding='utf-8'?>
<Document xmlns:xsi='http://www.w3.org/2001/XMLSchema-instance' xmlns:xsd='http://www.w3.org/2001/XMLSchema'>
  <CatVendorCatalogMaintenanceRequestEntity>
    <UPLOADDATETIME />
    <PJMAVCORGANIZATIONNUMBER>12345678</PJMAVCORGANIZATIONNUMBER>
    <PJMAVCEFFECTIVEDATE />
    <PJMAVCEXPIRATIONDATE />
    <PJMAVCCURRENCYCODE>USD</PJMAVCCURRENCYCODE>
    <PJMAVCEFFECTIVEDATEDISCOUNTS />
    <PJMAVCEXPIRATIONDATEDISCOUNTS />
    <PJMAVCCURRENCYCODEDISCOUNTS />
    <CatVendorProductCandidateEntity>
      <VENDORCATALOGMAINTENANCEREQUESTUPLOADDATETIME />
      <PRODUCTSUBTYPE>Product</PRODUCTSUBTYPE>
      <PRODUCTNUMBER>50000</PRODUCTNUMBER>
      <ACTIONTYPE />
      <PRODUCTCATEGORYHIERARCHYNAME>$BLANK$</PRODUCTCATEGORYHIERARCHYNAME>
      <PRODUCTCATEGORYNAME>RENT</PRODUCTCATEGORYNAME>
      <SEARCHNAME />
      <PJMAVCPRODUCTTYPE />
```

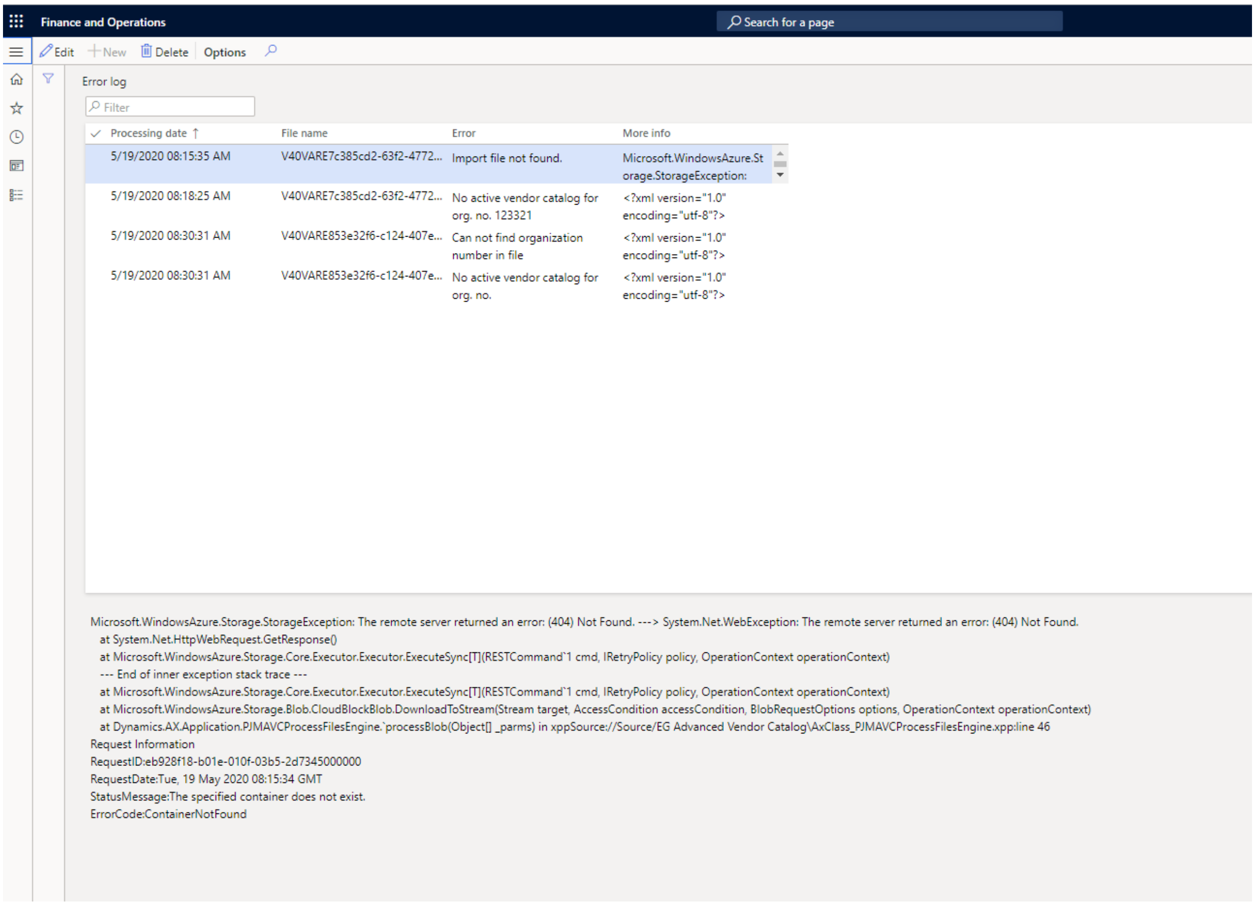
Status: 200 OK　Time: 1172 ms

```
"Test_Custom_web_service.xml"
```

7.2 Web service log

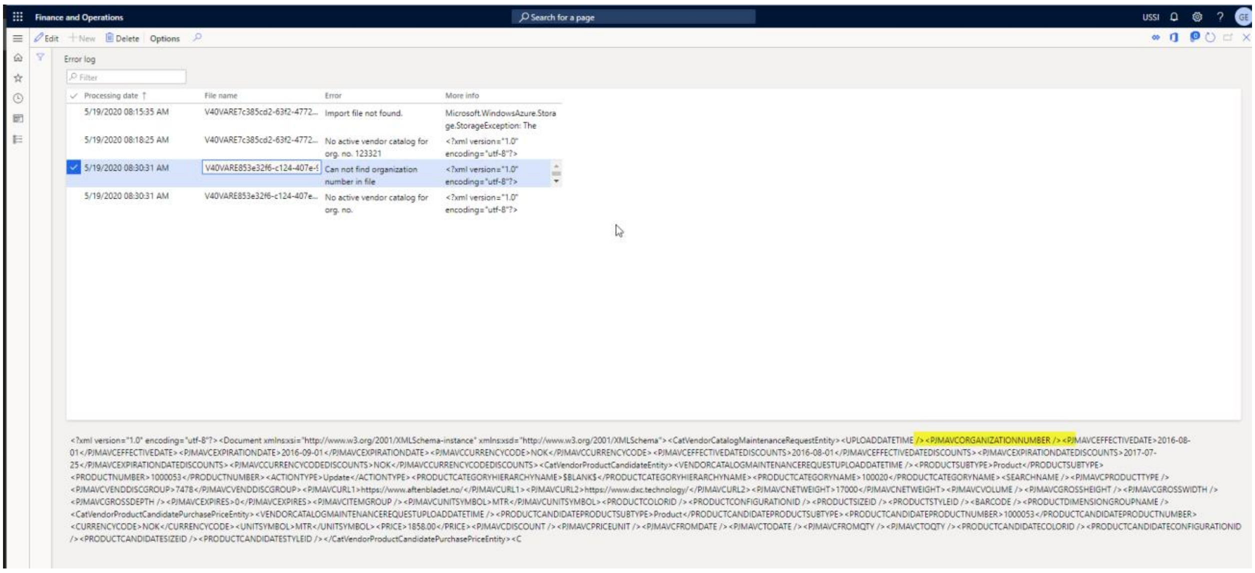
Procurement and sourcing > Periodic tasks > Vendor catalog webservice log

Log for webservice which will log if any fails in the import of files. This include if wrong parameters on Vendor catalog import parameters for Azure webservice, no active vendor catalog found for a file or organization number and reference missing on a catalog, or if organization number and reference is missing in the file and therefore no match on vendor catalog is found. Example screenshots below.



Processing date ↑	File name	Error	More info
5/19/2020 08:15:35 AM	V40VARE7c385cd2-63f2-4772...	Import file not found.	Microsoft.WindowsAzure.Storage.StorageException:
5/19/2020 08:18:25 AM	V40VARE7c385cd2-63f2-4772...	No active vendor catalog for org. no. 123321	<?xml version="1.0" encoding="utf-8"?>
5/19/2020 08:30:31 AM	V40VARE853e32f6-c124-407e...	Can not find organization number in file	<?xml version="1.0" encoding="utf-8"?>
5/19/2020 08:30:31 AM	V40VARE853e32f6-c124-407e...	No active vendor catalog for org. no.	<?xml version="1.0" encoding="utf-8"?>

```
Microsoft.WindowsAzure.Storage.StorageException: The remote server returned an error: (404) Not Found. ---> System.Net.WebException: The remote server returned an error: (404) Not Found.
   at System.Net.HttpWebRequest.GetResponse()
   at Microsoft.WindowsAzure.Storage.Core.Executor.Executor.ExecuteSync[T](RESTCommand`1 cmd, IRetryPolicy policy, OperationContext operationContext)
   --- End of inner exception stack trace ---
   at Microsoft.WindowsAzure.Storage.Core.Executor.Executor.ExecuteSync[T](RESTCommand`1 cmd, IRetryPolicy policy, OperationContext operationContext)
   at Microsoft.WindowsAzure.Storage.Blob.CloudBlockBlob.DownloadToStream(Stream target, AccessCondition accessCondition, BlobRequestOptions options, OperationContext operationContext)
   at Dynamics.AX.Application.PJMAVCProcessFilesEngine.`processBlob(Object[] _parms) in xppSource://Source/EG Advanced Vendor Catalog\AxClass_PJMAVCProcessFilesEngine.xpp:line 46
Request Information
RequestID:eb928f18-b01e-010f-03b5-2d7345000000
RequestDate:Tue, 19 May 2020 08:15:34 GMT
StatusMessage:The specified container does not exist.
ErrorCode:ContainerNotFound
```


Finance and Operations
Search for a page
USSI
Edit
New
Delete
Options
Filter

Error log

✓	Processing date	File name	Error	More info
	5/19/2020 08:15:35 AM	V40VARE7c385cd2-63f2-4772...	Import file not found.	Microsoft.WindowsAzure.Storage.StorageException: The
	5/19/2020 08:18:25 AM	V40VARE7c385cd2-63f2-4772...	No active vendor catalog for org. no. 123321	<?xml version="1.0" encoding="utf-8"?>
☑	5/19/2020 08:30:31 AM	V40VARE853e32f6-c124-407e-	Can not find organization number in file	<?xml version="1.0" encoding="utf-8"?>
	5/19/2020 08:30:31 AM	V40VARE853e32f6-c124-407e...	No active vendor catalog for org. no.	<?xml version="1.0" encoding="utf-8"?>

```
<?xml version="1.0" encoding="utf-8"?><Document xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" xmlns:xsd="http://www.w3.org/2001/XMLSchema"><CatVendorCatalogMaintenanceRequestEntity><UPLOADDATETIME /><PJMAVCORGANIZATIONNUMBER /><PJMAVCEFFECTIVEDATE>2016-08-
01</PJMAVCEFFECTIVEDATE><PJMAVCEXPIRATIONDATE>2016-09-01</PJMAVCEXPIRATIONDATE><PJMAVCCURRENCYCODE>NOK</PJMAVCCURRENCYCODE><PJMAVCEFFECTIVEDATEDISCOUNTS>2016-08-01</PJMAVCEFFECTIVEDATEDISCOUNTS><PJMAVCEXPIRATIONDATEDISCOUNTS>2017-07-
25</PJMAVCEXPIRATIONDATEDISCOUNTS><PJMAVCCURRENCYCODEDISCOUNTS>NOK</PJMAVCCURRENCYCODEDISCOUNTS><CatVendorProductCandidateEntity><VENDORCATALOGMAINTENANCEREQUESTUPLOADDATETIME /><PRODUCTSUBTYPE>Product</PRODUCTSUBTYPE>
<PRODUCTNUMBER>1000053</PRODUCTNUMBER><ACTIONTYPE>Update</ACTIONTYPE><PRODUCTCATEGORYHIERARCHYNAME>$BLANK$</PRODUCTCATEGORYHIERARCHYNAME><PRODUCTCATEGORYNAME>100020</PRODUCTCATEGORYNAME><SEARCHNAME /><PJMAVCPRODUCTTYPE />
<PJMAVCVENDDISCGROUP>7478</PJMAVCVENDDISCGROUP><PJMAVCURL1>https://www.aftenbladet.no/</PJMAVCURL1><PJMAVCURL2>https://www.dxc.technology/</PJMAVCURL2><PJMAVCNETWEIGHT>17000</PJMAVCNETWEIGHT><PJMAVCVOLUME /><PJMAVCGROSSHEIGHT /><PJMAVCGROSSWIDTH />
<PJMAVCGROSSDEPTH /><PJMAVCEXPIRES>0</PJMAVCEXPIRES><PJMAVCITEMGROUP /><PJMAVCUNITSYMBOL>MTR</PJMAVCUNITSYMBOL><PRODUCTCOLORID /><PRODUCTCONFIGURATIONID /><PRODUCTSIZEID /><PRODUCTSTYLEID /><BARCODE /><PRODUCTDIMENSIONGROUPNAME />
<CatVendorProductCandidatePurchasePriceEntity><VENDORCATALOGMAINTENANCEREQUESTUPLOADDATETIME /><PRODUCTCANDIDATEPRODUCTSUBTYPE>Product</PRODUCTCANDIDATEPRODUCTSUBTYPE><PRODUCTCANDIDATEPRODUCTNUMBER>1000053</PRODUCTCANDIDATEPRODUCTNUMBER>
<CURRENCYCODE>NOK</CURRENCYCODE><UNITSYMBOL>MTR</UNITSYMBOL><PRICE>1858.00</PRICE><PJMAVCDISCOUNT /><PJMAVCPRICEUNIT /><PJMAVCFROMDATE /><PJMAVCTODATE /><PJMAVCFROMQTY /><PJMAVCTOQTY /><PRODUCTCANDIDATECOLORID /><PRODUCTCANDIDATECONFIGURATIONID
/><PRODUCTCANDIDATESIZEID /><PRODUCTCANDIDATESTYLEID /></CatVendorProductCandidatePurchasePriceEntity><C
```

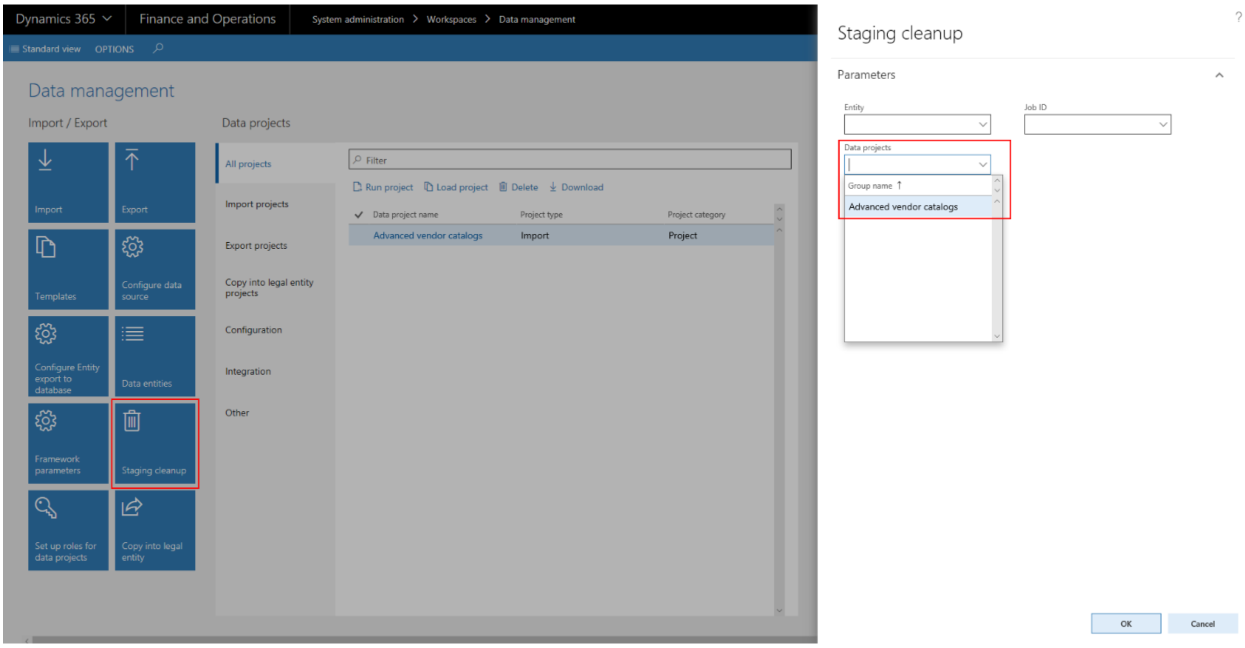
8 MAINTENANCE

To not store to much data after uploading a vendor catalog, approving, and releasing of approved products, follow these steps to clean up this data.

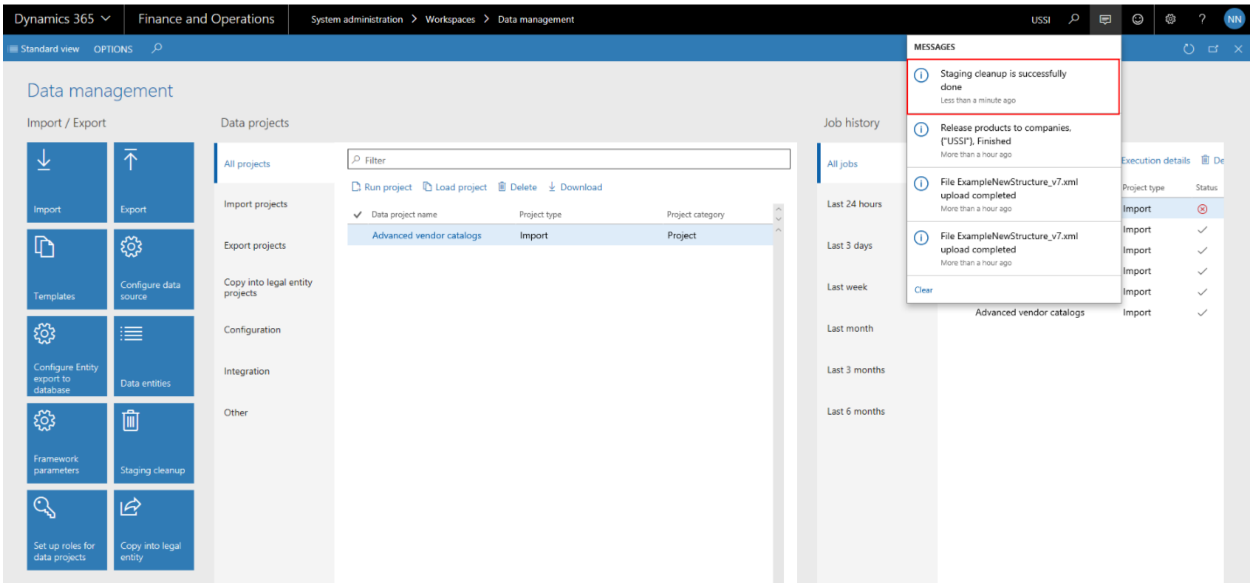
8.1 Clean up staging tables

This is the standard operation to clean up staging tables.

1. Go to **System administration > Workspaces > Data management**
2. Click the **Staging cleanup** title
3. You can select in one of the fields on the Staging cleanup dialog form how do you what to clean up data. For instance, in the **Data projects** drop-down, select the created import data project for advanced vendor catalogs.


Dynamics 365
Finance and Operations
System administration > Workspaces > Data management
Standard view
OPTIONS
Data management
Import / Export
Import
Export
Templates
Configure data source
Configure Entity export to database
Data entities
Framework parameters
Staging cleanup
Set up roles for data projects
Copy into legal entity
Data projects
All projects
Import projects
Export projects
Copy into legal entity projects
Configuration
Integration
Other
Filter
Run project
Load project
Delete
Download
Data project name
Project type
Project category
Advanced vendor catalogs
Import
Project
Staging cleanup
Parameters
Entity
Job ID
Data projects
Group name
Advanced vendor catalogs
OK
Cancel

4. Click **OK**
5. It performs in an asynchronous mode. So, wait until you get the pop-up message “Staging cleanup is successfully done.” As a result, the staging tables are cleaned up.


Dynamics 365
Finance and Operations
System administration > Workspaces > Data management
USSI
Standard view OPTIONS
Data management
Import / Export
Import
Export
Templates
Configure data source
Configure Entity export to database
Data entities
Framework parameters
Staging cleanup
Set up roles for data projects
Copy into legal entity
Data projects
All projects
Import projects
Export projects
Copy into legal entity projects
Configuration
Integration
Other
Filter
Run project
Load project
Delete
Download
Data project name
Project type
Project category
Advanced vendor catalogs
Import
Project
Job history
All jobs
Last 24 hours
Last 3 days
Last week
Last month
Last 3 months
Last 6 months
Execution details
Project type
Status
Import
MESSAGES
Clear

Staging cleanup is successfully done
Less than a minute ago

Release products to companies, ("USSI"), Finished
More than a hour ago

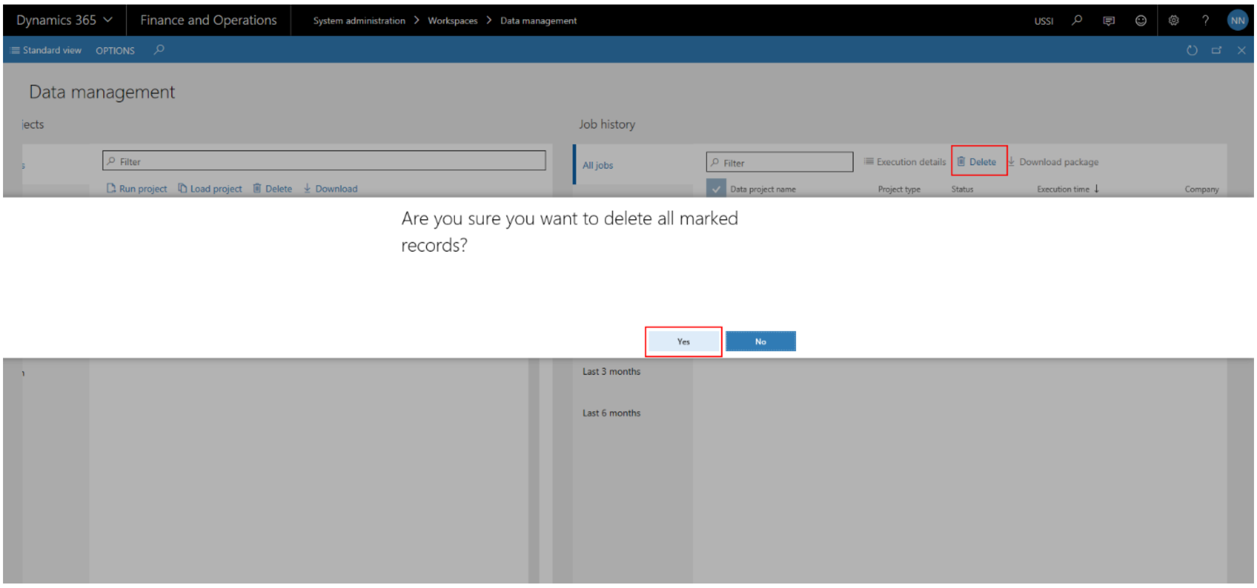
File ExampleNewStructure_v7.xml upload completed
More than a hour ago

File ExampleNewStructure_v7.xml upload completed
More than a hour ago

8.2 Remove historical job runs

To remove historical job runs:

1. Go to **System administration > Workspaces > Data management**
2. Select desired records on the **Job history** section
3. Click **Delete**
4. Click **Yes**
5. It performs in a synchronous mode. So, wait until the process is finished. As a result, the staging tables related to selected jobs are cleaned up.


Dynamics 365
Finance and Operations
System administration > Workspaces > Data management
USSI
Standard view OPTIONS
Data management
jects
Job history
Filter
Run project
Load project
Delete
Download
All jobs
Filter
Execution details
Delete
Download package
Data project name
Project type
Status
Execution time
Company
Yes
No
Last 3 months
Last 6 months

Are you sure you want to delete all marked records?