

Price Book Export

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# User Guide

(For Online Account Holder Customer Only)



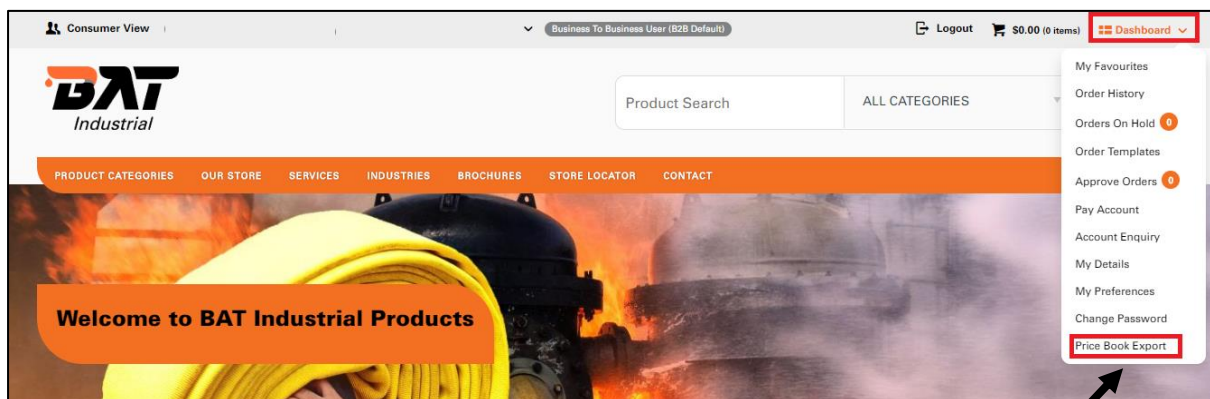
# Price Book Export

## Overview

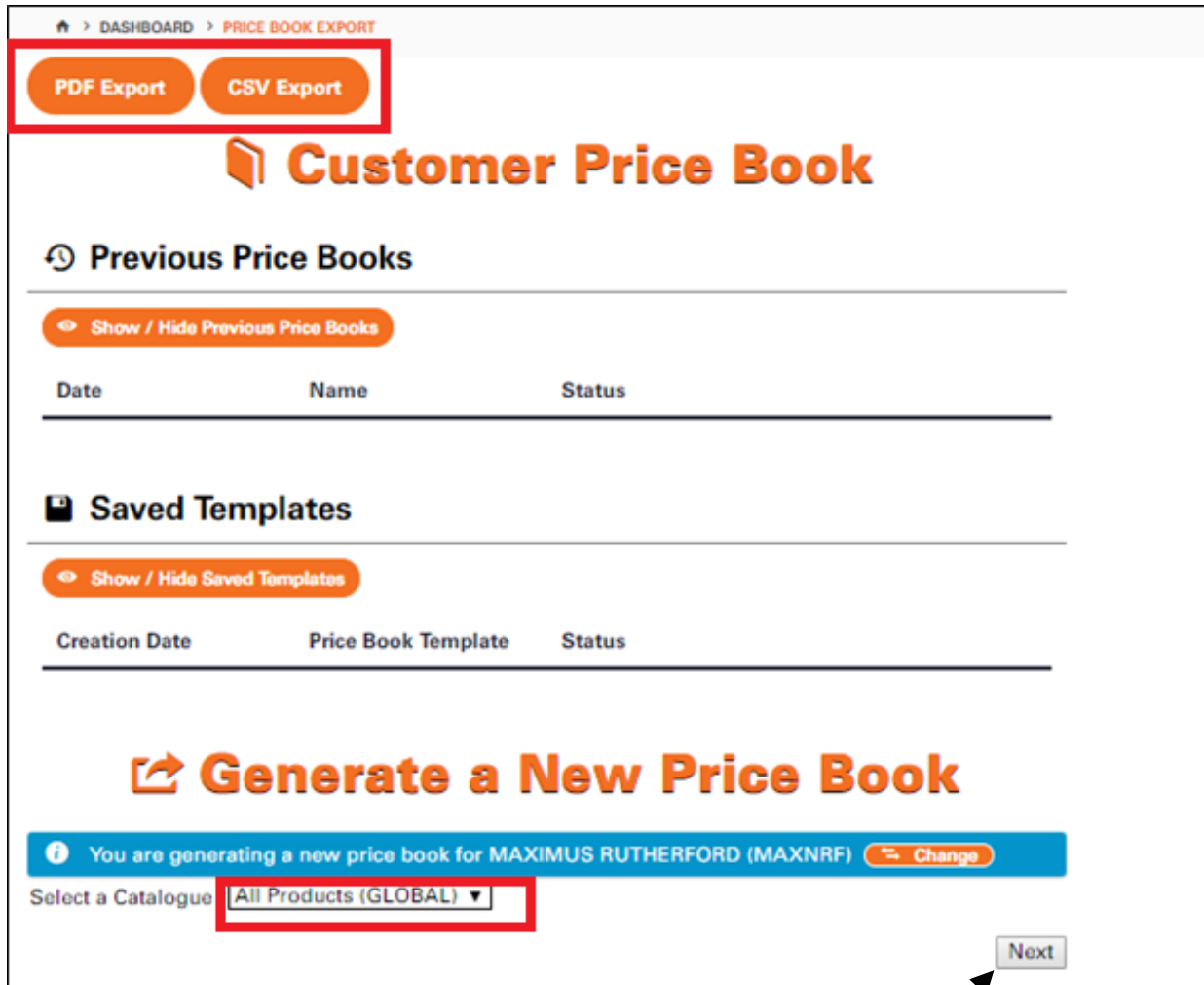
Customer Price Book allows logged in users to export product data from the website (Price Book Export) in a CSV / PDF format.

Our Price Books include product codes, descriptions, and related data, including the customer's pricing. It allows the customer to save each profile for future use.

Step 1 – Login to your account, under Dashboard -> click **Price Book Export**:



Step 2 - Select the format (CSV / PDF) & Catalogue:



The screenshot shows the 'Customer Price Book' interface. At the top, there is a breadcrumb trail: 'DASHBOARD > PRICE BOOK EXPORT'. Below this, two buttons are visible: 'PDF Export' and 'CSV Export', both highlighted with a red box. The main heading is 'Customer Price Book'. Underneath, there are sections for 'Previous Price Books' and 'Saved Templates', each with a 'Show / Hide' button. A large orange button with a right-pointing arrow says 'Generate a New Price Book'. Below this, a blue information bar states: 'You are generating a new price book for MAXIMUS RUTHERFORD (MAXNRF) Change'. Underneath the bar, there is a 'Select a Catalogue' dropdown menu with 'All Products (GLOBAL)' selected, also highlighted with a red box. At the bottom right, there is a 'Next' button, which is pointed to by a black arrow.

Step 3 - Select the entire category or drill down to specific sub-category:

Select Categories for your Price List Report

Select All    Un-select All

- CLAMPS & CLAMPING SYSTEMS
  - Banding
    - Band
    - Buckle
    - Hose
    - Pre-form
    - Tooling & Merchandisers
  - Clips
  - Heavy Duty Bolt Clamps
  - Pipe Coupling
  - Super Clamps
  - Worm Drive Clamps
- CONSUMABLE PRODUCTS
- HOSE REELS, GUNS & NOZZLES
- HYDRAULIC HOSE & FITTINGS
- INDUSTRIAL BRASS & PNEUMATICS
- INDUSTRIAL FITTINGS
- INDUSTRIAL HOSE & DUCTING
- INDUSTRIAL HOSE ASSEMBLIES
- INDUSTRIAL HOSE COUPLINGS
- INDUSTRIAL VALVES
- IRRIGATION PRODUCTS

Previous    Next

Step 4 - For CSV format, select the fields (not applicable for PDF exports):

🏠 > DASHBOARD > PRICE BOOK EXPORT

Select Columns for your Price List Report

Name	Include in Report
Product Code	<input checked="" type="checkbox"/>
Description	<input checked="" type="checkbox"/>
List Price	<input checked="" type="checkbox"/>
Discount Percentage	<input checked="" type="checkbox"/>
Nett Price	<input checked="" type="checkbox"/>
<input type="button" value="Update"/>	

Step 5 - For CSV format, select the order of the fields, and decide which field you'd like to sort the output by (not applicable for PDF exports):

🏠 > DASHBOARD > PRICE BOOK EXPORT

### Set Ordering of Report Fields

Drag and drop the fields to set the order you would like them to appear in your report (first at top). Click the Save Order button to save.

Product Code

Description

List Price

Discount Percentage

Nett Price

Sort By: Please Select ... ▼

Please Select ...

**Product Code**

Description

List Price

Discount Percentage

Nett Price

PreviousNext

Step 6: Enter the destination email address, and save the report profile for future exports (optional):

🏠 > DASHBOARD > PRICE BOOK EXPORT

Save Price List Report:

Price List Report Name:

File Type:

Email address:

Email subject:

The report will then generate in the background and email the user once complete.

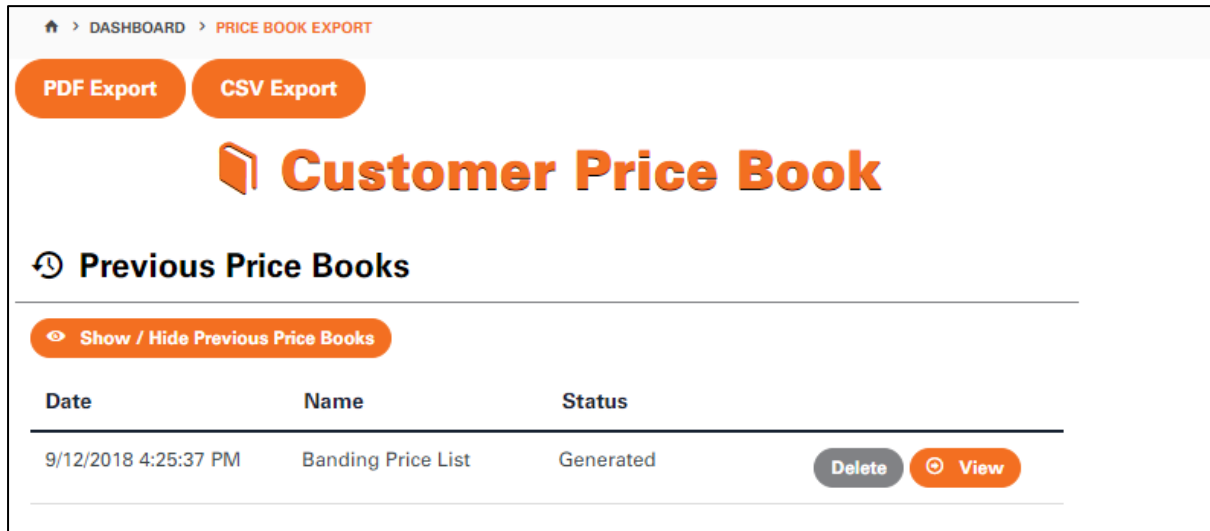
🏠 > DASHBOARD > PRICE BOOK EXPORT

## Customer Price Book

Your price book is currently being generated. Once the report is finished, you will receive an email with the link to the CSV file

[Click here](#) to see a list of Price Books

The user can see the status of the report and collect the CSV or PDF file from the export home page:



The screenshot shows a web interface for 'Customer Price Book' exports. At the top, there are navigation breadcrumbs: 'DASHBOARD > PRICE BOOK EXPORT'. Below this are two orange buttons: 'PDF Export' and 'CSV Export'. The main heading is 'Customer Price Book' with a book icon. Underneath is a section titled 'Previous Price Books' with a refresh icon. A toggle button 'Show / Hide Previous Price Books' is present. A table lists the previous price books with columns for Date, Name, and Status. The table contains one entry: '9/12/2018 4:25:37 PM', 'Banding Price List', and 'Generated'. To the right of the 'Generated' status are two buttons: 'Delete' and 'View'.

Date	Name	Status	
9/12/2018 4:25:37 PM	Banding Price List	Generated	Delete View