

Quote Import Supplier Quote Price File

This article describes how to import a Supplier Quote Price File so that a Quote(s) follow the imported pricing when calculating the Quote's Contact Price. There are 2 ways to do this; Importing into a Contact (Customer) which can be used for all that Customer's Quotes OR importing into a Quote which is used for that Quote only.

To import a Supplier Quote;


Importing a Supplier Quote Price File is done from a CONTACT: CUSTOMER XXXX OR QUOTE: XXXX Window.

NOTE: The Supplier Quote Price File must be formatted to follow Katipolt's format for product CSVs. Please call NZTG to get formatting.

Quick Flow;


CONTACT: CUSTOMER XXXX OR QUOTE: XXXX Window > [Import Price File] > Supplier > [Next] > [Choose File] > [UPLOAD] > [DONE]

1) To start the import process either;


- From the CONTACT: CUSTOMER XXXX Window, Press the **[Import Price File for Customer]** button  to display the Supplier Price File Import popup



OR

- From the QUOTE: XXXX Window, Press the **[Import Price File]** button  to display the Supplier Price File Import popup



2) From the Supplier Price File Import popup, enter the **Supplier** of the Quote Price File, then Press the **[Next]** button  to display the File Upload Window

Supplier Price File Import
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Select Supplier for Price File Import

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- 3) From the File Upload Window, Press **[Choose File]**, then navigate to the Supplier Quote Price File, then Press **[UPLOAD]** to up-load the file

Upload CSV

In order for Katipolt to understand your csv file, you will need to ensure that it follows Katipolt's **format for product CSVs**

Choose File No file chosen

UPLOAD CANCEL

- 4) Following a successful import, a green success message displays (and an email is sent to the Users email). Press **[Done]** to return to the Window from which you started the import

Processing

Completed - Please check your email for the import log.

DONE CANCEL

NOTE: Supplier Quote Price File imports display in the Contact (Customer) Fixed Price Subnav. If imported from the Contact (Customer), displays TYPE / "Quotes" and WORKS / "All Works". If imported into a Quote, display TYPE / "Quotes" and WORKS / "XXX"