**ARC ID: 4816 – Vendor RFQ Import (with Sort Codes, Comments, and Manual Expiry)**

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For: VeriCor Medical Systems, LLC

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**Business Case:**

Customer was using a previous version of the ARC project that had a version of the import already available but was missing certain fields that they needed added to the import. The customer also needed the ability to set the quote expiration in the import or define a date or no expiry if required from the import screen.

**Project Components:**

This project consists of one custom screen and one custom menu item.

The custom screen/menu item is as follows:

* The screen can be accessed from the menu item: Purchasing > File > Vendor Quote Export/Import [4816]
* This screen allows a user to choose a vendor and bring up all parts with cross references for that vendor then export a template for any parts that they want to import a quote for.
  + The user can also enter a part and all required information that does not currently have a vendor cross reference and create the cross reference on the import.
  + The Alt costs can also be updated in this way if the user chooses to do so during the import process.

**Project Step-by-step:**

The user will navigate to the menu item for the custom screen. Once in the custom screen the user will select a vendor that they want to generate an RFQ for.

Graphical user interface, application, table, Excel

Description automatically generated

The user will then select which parts they want to generate an import template for and click on the “Create CSV File” button. Once the button is clicked the template will be generated and the file explorer will be opened to the template.

A screenshot of a computer

Description automatically generated with medium confidence

The user can then open the template and make the necessary adjustments to the data that they desire to import. Once the changes have been made and the template saved back as a .CSV the user will set the default options for the Quote date(s) and the quote expiry date(s) as well as if whether they want to automatically generate vendor cross references if one is not present. After the defaults are set the user can then drag and drop the template onto the frame on the left side of the window to begin the import process.

At the start of the import process the user will be prompted if they want to update the Alt costs for the parts in the import:

Graphical user interface, text, application

Description automatically generated

The program will then run the 1shot for UPLVENQP/A and prompt the user to process the import.

Graphical user interface, text, application, email

Description automatically generated

Once the import has been completed the user will receive a confirmation log on what was entered by the import.

A screenshot of a computer

Description automatically generated

The user then can go into Purchasing > File > Vendor Quotes > Open and view any quotes that were uploaded.