

Excel Data Bridge

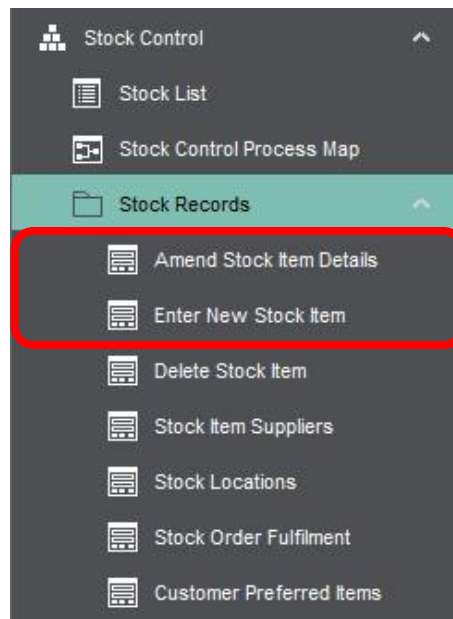
Stock Master Function



Introduction

The Stock Master function enables you to create **new** stock records and make changes to **existing** stock records in Sage 200.

It emulates both the **Enter New Stock Item** and **Amend Stock Item Details** features available in Sage 200 via **Stock Control > Stock Records**.



The multiline template allows multiple stock records to be created in Sage 200 at once; and multiple existing stock records can be easily downloaded, amended and reuploaded to Sage 200.

Excel Data Bridge																			
Stock - Creation																			
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1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20
Header		Details																	
Status	GroupByID	StockItemCode	StockItemName	ProductGroup	ItemCurrentStatus	StockUnit	VAT Rate	Manufacturer	PartNo	LabelP	AllowSale	AvgBuy	BOMDetails	ItemDescription	UseItemID	BarCode	PriceBandName	UseStd	Price
	A	ACS/BLENDER/WHITE	Professional Blender 5 speed WHITE ACCESSORIES														Standard	False	257
	A																Selling Band 2	False	251
	A																Selling Band 3	False	259
	A																Selling Band 4	False	280
	A																Selling Band 5	False	300
	A																Euro	False	251
	B	ACS/BLENDER/BLACK	Professional Blender 5 speed BLACK ACCESSORIES														Standard	False	257
	B																Selling Band 2	False	251
	B																Selling Band 3	False	259
	B																Selling Band 4	False	280
	B																Selling Band 5	False	300
	B																Euro	False	251
	C	ACS/BLENDER/SILVER	Professional Blender 5 speed SILVER ACCESSORIES														Standard	False	257
	C																Selling Band 2	False	251
	C																Selling Band 3	False	259
	C																Selling Band 4	False	280
	C																Selling Band 5	False	300
	C																Euro	False	251
	D	PAINT/GREY/EGGSHELL	Grey Eggshell 5L	DECORATING															
	E	PAINT/GREY/GLOSS	Grey Gloss 5L	DECORATING															
	F	PAINT/GREY/MATT	Grey Matt 5L	DECORATING															
	G	WW/WASHER/1200/SILVER	Washing Machine 1200 spin SILVER	WWRE															

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Field Mappings

The field mappings are controlled within the **Designer** button in the Excel Data Bridge tab.

Map Fields	
Alternatives	
AltCode	AltCode
AltPreferred	Alt Preferred
DeleteFlag	
Download	True
Analysis	
AccruedReceiptsCC	AccruedReceiptsCC
AccruedReceiptsCode	AccruedReceiptsCode
AccruedReceiptsDept	AccruedReceiptsDept
AnalysisCodes	Analysis Codes
CommodityCode	CommodityCode
CountryOfOrigin	CountryOfOrigin
IssuesCC	IssuesCC
IssuesCode	IssuesCode
IssuesDept	IssuesDept
IsWEEEItem	IsWEEEItem
RevenueCC	RevenueCC
RevenueCode	RevenueCode
RevenueDept	RevenueDept
StockCC	StockCC
StockCode	StockCode
StockDept	StockDept
StockTakeCycle	Stock TakeCycle
SupplementaryUnitRatio	SupplementaryUnit Ratio
SuppressNetMass	SuppressNet Mass
UsesRCV	UsesRCV
UsesSupplementaryUnit	UsesSupplementaryUnit
Weight	Weight
Batch Info	
AllowDuplicateNumbers	AllowDuplicateNumbers
AllowSerialToBatchCnv	False
AutoGenerateNextNum	AutoGenerateNext Numb
AutoGeneratePadding	AutoGeneratePadding
AutoGeneratePrefix	AutoGeneratePrefix
AutoGenerateSeparator	AutoGenerateSeparator
IncludeNosOnCountSh	IncludeNosOnCount She
NumberGeneration	NumberGeneration
RecordNosOnGoodsRe	RecordNosOnGoodsRec
SaleFromSingleBatch	SaleFromSingleBatch
ShelfLife	Shelf Life
ShelfLifeType	Shelf Life Type
TraceableType	Traceable Type
UsesAlternativeRef	UsesAlternativeRef
UsesSellByDate	UsesSellByDate
UsesUseByDate	UsesUseByDate

Batch Info

The **Alternatives** section shows all Sage 200 fields available to the Alternatives tab of the stock record in the left-hand column.

The **Analysis** section shows all Sage 200 fields available to the Analysis tab of the stock record in the left-hand column.

The **Batch Info** section shows all Sage 200 fields available to the Batch/Serial Nos tab of the stock record in the left-hand column.

Only for items assigned to a Product Group where “Items use batch or serial numbers” is checked.

If an entry appears in the right-hand column, it means the Sage 200 field is mapped to a cell, or range of cells in the Excel worksheet.

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Map Fields	
▼ Comments	
> DespatchNote	DespatchNote
> PickingList	PickingList
▼ Cross-Selling	
> CSCode	
> DeleteFlag	
> Download	True
▼ Detail	
> AllowSOInvs	AllowSOInvs
> AverageBuyingPrice	AverageBuyingPrice
> Barcode	Barcode
> BOMDetails	BOMDetails
> CurrentStatus	CurrentStatus
> ItemDescription	ItemDescription
> LabelPrintingOption	LabelPrintingOption
> Manufacturer	Manufacturer
> OrderInvoiceDescription	OrderInvoiceDescription
> PartNo	PartNo
> ProductGroup	ProductGroup
> StockUnit	StockUnit
> VATRate	VATRate
▼ Header	
> Code	Code
> GroupById	GroupById
> Name	Name
▼ Information	
> Status	Status
▼ Landed Cost	
> LandedType	
> LandedValue	
▼ Locations	
> BinName	BinName
> BinPriority	BinPriority
> DeleteFlag	
> Download	True
> Maximum	Maximum
> Minimum	Minimum
> Reorder	Reorder
> Warehouse	Warehouse
> WarehouseMandatory	False
Comments	

The **Comments** section shows all Sage 200 fields available to the Comments tab of the stock record in the left-hand column.

The **Cross-Selling** section shows all Sage 200 fields available to the Cross-selling tab of the stock record in the left-hand column.

The **Detail** section shows all Sage 200 fields available to the Details tab of the stock record in the left-hand column.

The **Header** section shows all Sage 200 fields available to the header section of the stock record in the left-hand column.

The **Information** section contains Excel Data Bridge specific fields.

The **Landed Cost** section shows all Sage 200 fields available to the Landed Costs tab of the stock record in the left-hand column.

Only for items assigned to a Product Group where "Use Landed Costs" is checked.

The **Locations** section shows all Sage 200 fields available to the Locations tab of the stock record in the left-hand column.

Again, if an entry appears in the right-hand column, it means the Sage 200 field is mapped to a cell, or range of cells in the Excel worksheet.

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Map Fields

Memo	
DeleteRecreate	False
Download	True
MemoStatus	MemoStatus
MemoText	MemoText
Search Categories	
SearchCategories	SearchCategories
Selling Prices	
Download	True
Price	Price
PriceBand	PriceBand
UseStandard	UseStandard
Suppliers	
DeleteFlag	
Download	True
LandedCostType	LandedCostType
LandedCostValue	LandedCostValue
LastOrderPrice	LastOrderPrice
LeadTime	LeadTime
LeadTimeUnit	LeadTimeUnit
ListPrice	ListPrice
ListPriceExpiry	ListPriceExpiry
MinimumOrderQuantity	MinimumOrderQuantity
PriceSource	PriceSource
SetAsPreferred	SetAsPreferred
SuppCountryOfOrigin	SuppCountryOfOrigin
SupplierCode	SupplierCode
SupplierStockCode	SupplierStockCode
UsualOrderQuantity	UsualOrderQuantity
Units of Measure	
AllowUnitMultipleLessT	False
BaseUnit	BaseUnit
DeleteFlag	
Download	True
Precision	Precision
PriceBasis	PriceBasis
StockMultOfBaseUnit	StockMultOfBaseUnit
UnitName	UnitName
UnitToBaseConversion	UnitToBaseConversion

PriceBasis
Unit price basis. Acceptable values are StockMultiple or SpecificPrice. Default is StockMultiple if unspecified

The **Memo** section shows all Sage 200 fields available to the Memo tab of the stock record in the left-hand column.

The **Search Categories** section shows all Sage 200 fields available to the Search Categories tab of the stock record in the left-hand column.

The **Selling Prices** section shows all Sage 200 fields available to the Selling Prices button in the Details tab of the stock record in the left-hand column.

The **Suppliers** section shows all Sage 200 fields available to the Suppliers tab of the stock record in the left-hand column.

The **Units of Measure** section shows all Sage 200 fields available to the Units of Measure tab of the stock record in the left-hand column.

Only for items assigned to a Product Group where "Use Multiple Units" section is completed.

An explanation of the property selected is shown at

the bottom of the Designer window.

NOTE – These default mappings can be amended to suit your business requirement and will be explained later in the document.

Multiline Template

There are two worksheets within this template: **SerialBatchStock** and **NonSerialBatchStock**.

SerialBatchStock	NonSerialBatchStock	Help & Support	+
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If **all** new and existing Sage 200 stock items being created/amended belong to Product Groups that **do not** have the option **Items use batch or serial numbers** selected, use the **NonSerialBatchStock** sheet to create/amend your stock items.

The screenshot shows the 'Details' tab of the Sage 200 Stock Master form. Under 'Product Group Details', the 'Code' is 'ACCESSORIES' and the 'Description' is 'Accessories'. Under 'Product Group Settings', the 'Product type' is 'Stock'. The checkbox 'Items use batch or serial numbers' is unchecked and is highlighted with a red rectangular box.

If **all** new and existing Sage 200 stock items being created/amended belong to Product Groups that **do** have the option **Items use batch or serial numbers** selected, or you have a **mixture** of both types, use the **SerialBatchStock** sheet instead.

The screenshot shows the 'Details' tab of the Sage 200 Stock Master form. Under 'Product Group Details', the 'Code' is 'DECORATING' and the 'Description' is 'Decorating'. Under 'Product Group Settings', the 'Product type' is 'Stock'. The checkbox 'Items use batch or serial numbers' is checked and is highlighted with a red rectangular box.

The **NonSerialBatchStock** worksheet contains columns up to **CA**, and the **SerialBatchStock** worksheet contains columns up to **CP**, as extra fields are available to these records in Sage 200.

Before making any changes to existing Sage 200 stock items, or creating new stock items, it will be useful to know how the template relates to the different sections of the Sage 200 stock records.

By understanding this, this should help you decide which columns you need to complete on the template, and any unrequired columns can be unmapped and removed from the worksheet. This is covered in a later section in the document.

Non-Serial Batch Stock Worksheet

Columns A – B of the multiline template are specific to Excel Data Bridge. These fields will **always** be required on the template.

The table below explains the purpose of each of these fields: -

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Status	<p>Populated when selecting either the Validate or Run buttons on the Excel Data Bridge ribbon.</p> <ul style="list-style-type: none"> The default status on a successful validation will be Pending The default status on a successful creation will be Processed <p>When attempting to post to Sage 200, the status field should either be cleared, or display a status of Pending. Any other data entered in this field will prevent the stock item being created in Sage 200.</p> <p>Should an error be returned in this cell when attempting to post, it will appear in red. The error should be corrected in the worksheet, and the status field cleared before attempting to post again.</p>
GroupByID	<p>IMPORTANT - See section for Group By ID on page 24</p>

After this, on **row 2** of the worksheet, headings appear indicating which area of Sage 200 the columns within the section belong to.

	A	B	C	D	E	F	G
1	Excel Data Bridge Stock - Creation <small>© Draycir Ltd. 2022</small>						
2	Header			Details			
3	Status	GroupByID	StockItemCode	StockItemName	ProductGroup	ItemCurrentStatus	StockUnit

Header Section

Columns **C – D** represent the fields available to the stock item header in Sage 200. These fields will **always** be required on the template.

Stock Item

Code: Name:

The table below explains the purpose of each of the available fields: -

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StockItemCode	<p>Enter your new Sage 200 stock item code in this cell.</p> <p>If an existing stock item has been downloaded for amendment, this cell will automatically populate with the Sage 200 stock item code.</p>
StockItemName	<p>Enter your new Sage 200 stock item name in this cell.</p> <p>If an existing stock item has been downloaded for amendment, this cell will automatically populate with the Sage 200 stock item name.</p>

Details Section

Columns **E – Q** represent the fields available to the stock item **Details** tab in Sage 200.

If any of these fields are **not required** to create / amend Sage 200 data, they can be unmapped and removed from the template – **see page 35 for instructions**.

The table below explains the purpose of each of the available fields: -



ProductGroup	Enter the Sage 200 product group the stock item belongs to manually; or browse your Sage 200 data by right clicking on the cell and selecting Excel Data Bridge Browse.
ItemCurrentStatus	Select the current stock item status from the drop-down options of either Active or Inactive . If left blank, defaults to Active (providing Warehouse column complete, else will create as Inactive).
StockUnit	Enter the stock unit the stock item belongs to manually; or browse your Sage 200 data by right clicking on the cell and selecting Excel Data Bridge Browse.
VAT Rate	Enter the VAT Code the stock item belongs to manually; or browse your Sage 200 data by right clicking on the cell and selecting Excel Data Bridge Browse. If left blank, will default to 1 – Std Rate.
Manufacturer	Enter the manufacturer of the stock item.
PartNo	Enter the part number of the stock item.
LabelPrintingOptions	Select any label printing option required for the stock item from the drop-down options of None , Item or Batch . If left blank, will default to None.
AllowSalesOrdersAndInvoicing	If the stock item is available to sales orders and invoicing, either leave blank, or enter TRUE . If not, enter FALSE .
AvgBuyingPrice	Enter the average buying price of the stock item.
BOMDetails	Select how the stock item will be used in a bill of materials from the drop-down options of Component , Stocked , Phantom or Bought . If left blank, defaults to Component.
ItemDescription	Enter the description of the stock item.
UseItemDescriptionOnOrdersAndInvoices	To use the item description entered on orders and invoices, enter TRUE . If not, enter FALSE or leave blank.



BarCode	Enter the bar code of the stock item.
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Details – Selling Prices Section

Columns **R – T** represent the fields available to the **Selling Prices** button in the stock item **Details** tab in Sage 200.

If any of these fields are **not required** to create / amend Sage 200 data, they can be unmapped and removed from the template – **see page 35 for instructions**.

Price Band Name	Use Std	Price	Currency
Standard	<input checked="" type="checkbox"/>	3500.00000	Pounds Sterling
Selling Band 2	<input type="checkbox"/>	2690.00000	Pounds Sterling
Selling Band 3	<input type="checkbox"/>	2790.00000	Pounds Sterling
Selling Band 4	<input checked="" type="checkbox"/>	3500.00000	Pounds Sterling
Selling Band 5	<input checked="" type="checkbox"/>	3500.00000	Pounds Sterling
Euro	<input type="checkbox"/>	2690.00000	Euro

The table below explains the purpose of each of the available fields: -

PriceBandName	Enter a price band name for the stock item. If additional price bands are required, add each price band name into a separate cell in the column.
UseStd	If any additional price bands created should use the same price as the first price band, enter TRUE , else enter FALSE .
Price	Enter the selling price against each price band being created, or leave blank if UseStd set to true.

Analysis Section

Columns **U – AT** represent the fields available to the stock item **Analysis** tab in Sage 200.

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If any of these fields are **not required** to create / amend Sage 200 data, they can be unmapped and removed from the template – **see page 35 for instructions**.

Code: DEC/PAPER/BEIGE Name: Wallpaper Beige

Details Batch/Serial Nos **Analysis** Suppliers Alternatives Units of Measure Cross-selling Locations Attachments Memo Comment

Analysis Codes

Name	Value
Analysis Code 1	
Analysis Code 2	
Analysis Code 3	
Analysis Code 4	
Analysis Code 5	

Default Nominal Codes

	Code	CC	Dept	Description
Stock:	13101			Stocks - Finished Goods
Revenue:	31100	SAL	COM	Sales - Kitchens Components
Accrued receipts:	29100			Accruals
Issues:	44100	SAL	COM	Materials - Purchases Resale C

Legislative Information

Commodity code: 12658767 WEEE Item: ☐

Country of origin: Use supplementary units: ☐

Weight: 0.7600 Supplementary unit ratio:

Suppress mass on declaration: ☐ Use reverse charge: ☐

VAT rules:

Stock Take Cycle

Stock take every: 0 days

The table below explains the purpose of each of the available fields: -

AnalysisCodesValue 1 - 5	Enter any analysis code values required to be populated in the stock item.
StockNominalCode	Enter the default nominal code to be used for stock manually, or right click on the cell and select Excel Data Bridge Browse.
StockNominalCC	The cost centre will be automatically populated on nominal code selection from a browse.
StockNominalDept	The department will be automatically populated on nominal code selection from a browse.
RevenueNominalCode	Enter the default nominal code to be used for revenue manually, or right click and select Excel Data Bridge Browse.

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RevenueNominalCC	The cost centre will be automatically populated on nominal code selection from a browse.
RevenueNominalDept	The department will be automatically populated on nominal code selection from a browse.
AccruedReceiptsNominalCode	Enter the default nominal code to be used for accrued receipts manually, or right click and select Excel Data Bridge Browse.
AccruedReceiptsNominalCC	The cost centre will be automatically populated on nominal code selection from a browse.
AccruedReceiptsNominalDept	The department will be automatically populated on nominal code selection from a browse.
IssuesNominalCode	Enter the default nominal code to be used for issues manually, or right click and select Excel Data Bridge Browse.
IssuesNominalCC	The cost centre will be automatically populated on nominal code selection from a browse.
IssuesNominalDept	The department will be automatically populated on nominal code selection from a browse.
CommodityCode	Enter the commodity code of the stock item.
CountryOfOrigin	Enter the country of origin of the stock item.
Weight	Enter the weight of the stock item.
SuppressMassOnDeclaration	Set to TRUE to suppress mass on declaration for the stock item, else set to FALSE , or leave blank.
WEEEItem	Set to TRUE if stock item is liable to WEEE directives, else set to FALSE , or leave blank.
UseSupplementaryUnits	Set to TRUE if Intrastats are required for the stock item, else set to FALSE , or leave blank.
SuppUnitRatio	Enter the supplementary unit ratio for any Intrastat stock items.

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UseReverseChargeVATRules	Set to TRUE if stock item uses reverse charge VAT rules, else set to FALSE , or leave blank.
StockTakeEvery	Enter the number of days when a stocktake is required for the stock item.

Suppliers Section

Columns **AU – BH** represent the fields available to the stock item **Suppliers** tab in Sage 200.

If any of these fields are **not required** to create / amend Sage 200 data, they can be unmapped and removed from the template – **see page 35 for instructions**.

Code: ACS/BLENDER Name: Professional Blender 5 Speed

DetailsManufacturingAnalysisSuppliersAlternativesCross-sellingLocationsAttachmentsMemoCommentsSearch Categories

Suppliers

Pref	Code	Name	Lead Time	Invoiced YTD	Currently on Order
	CHR001	Chrome Decor Wholesale	23 Days	6755.00000	0.00000
	JOH002	Johns Imports Ltd	20 Days	0.00000	0.00000
	KOP001	Kopane Manufacturing	20 Days	0.00000	0.00000
Yes	MOL001	Molster Style	15 Days	9158.00000	0.00000

The table below explains the purpose of each of the available fields: -

SupplierCode	Enter a supplier code for the stock item, or right click and select Excel Data Bridge browse. If additional suppliers can provide the stock item, add each supplier code into a separate cell in the column. Must also complete Preferred Supplier column
SupplierStockCode	Enter the supplier's stock code for the stock item.
LeadTime	Enter the lead time for the supplier to provide the stock item.
LeadTimeUnit	Select the lead time unit for the stock item from the drop-down options of D (Days), W (Weeks), M (Months) or Y (Years). Defaults to days if left blank.
UsualOrderQty	Enter the usual order quantity for the stock item.

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MinimumOrderQty	Enter the minimum order quantity for the stock item.
SupplierListPrice	Enter the supplier list price for the stock item.
ListPriceExpiry	Enter any supplier list price expiry date for the stock item.
PriceSource	Select the price source for the stock item from the drop-down options of List (List Price) or Last (Last Buying Price). Defaults to last if left blank.
LastOrderPrice	Enter the last order price from this supplier for the stock item.
CountyOfOrigin <i>Not a typo – already have a named range for Country of Origin (column AM)</i>	Enter the country of origin for the stock item from the supplier.
LandedCostType	If the stock item belongs to a product group allowing use of landed costs, select the landed cost type for the stock item from the drop-down options of N/A , P (Percentage Based) or V (Value Based). Defaults to N/A if blank.
LandedCostValue	Enter the landed cost value for the stock item based on the landed cost type entered.
PreferredSupplier	Set to TRUE for the preferred supplier for the stock item, leave blank for any other suppliers.



Units of Measure Section

Columns **BI – BN** represent the fields available to the stock item **Units of Measure** tab in Sage 200.

If any of these fields are **not required** to create / amend Sage 200 data, they can be unmapped and removed from the template – **see page 35 for instructions**.

The screenshot shows the 'Units of Measure' tab in Sage 200 for the stock item 'Wallpaper Beige'. The 'Unit Settings' section shows 'Base unit: Roll' and 'Stock unit: Roll' with a 'Stock/base ratio' of 1.000000. The 'Sales And Purchase Units' table lists units: 'Base', 'Stock', '4 rl pack', and '50 rl batc'. The 'Ratio' column shows conversion rules, and the 'Precision' column shows values like 0.00001. The 'Price Basis' column shows 'Yes' for all units.

Name	Ratio	Precision	Price Basis
Base	One Roll is made of 1 Roll	0.00001	Yes
Stock	One Roll is made of 1 Roll	0.00001	Yes
4 rl pack	One 4 rl pack is made of 4 Roll	0.00001	
50 rl batc	One 50 rl batc is made of 50 Roll	0.00001	

The table below explains the purpose of each of the available fields: -

BaseUnit	Enter the base unit of the stock item manually, or right click on the cell and select Excel Data Bridge Browse.
StockMultOfBaseUnit	Enter the stock/base conversion ratio for the stock item.
UnitName	Enter the unit name of the stock item manually, or right click on the cell and select Excel Data Bridge Browse. If additional unit names are required for the stock item, add each unit name into a separate cell in the column.
UnitToBaseConversion	Enter the unit/base conversion ratio for the stock item.
Precision	Enter the precision value for the unit on the stock item.
PriceBasis	Select the price basis for the stock item from the drop-down options of Stock Multiple , or Specific Price . Defaults to stock multiple if left blank.



represent the fields available to the stock item

Alternatives Section

Columns **BO – BP**

Alternatives tab in Sage 200.

If any of these fields are **not required** to create / amend Sage 200 data, they can be unmapped and removed from the template – **see page 35 for instructions**.

Code	Name	Preferred
ACS/MIXER	Professional Mixer 3 Speed	Yes

The table below explains the purpose of each of the available fields: -

AltCode	Enter the stock code of any alternatives offered for the stock item manually, or right click on the cell and select Excel Data Bridge Browse. If multiple alternatives are available, add each alternative stock code into a separate cell in the column.
AltPreferred	Set to TRUE for the preferred alternative for the stock item, leave blank for any other alternatives.

Locations Section

Columns **BQ – BV**

Locations tab in Sage 200.

If any of these fields are **not required** to create / amend Sage 200 data, they can be unmapped and removed from the template – **see page 35 for instructions**.



represent the fields available to the stock item

Code: ACS/BLENDER Name: Professional Blender 5 Speed

Details Analysis Suppliers Alternatives Cross-selling **Locations** Attachments Memo Comments Manufacturing Search Categories

Warehouses

Name	Re-order	Minimum	Maximum	Qty in Stock
SHOWROOM	0.00000	0.00000	0.00000	57.00000
WAREHOUSE	100.00000	50.00000	500.00000	90.00000

Add... Edit... Remove

Bins At SHOWROOM (Fulfilment Sequence: Bin Priority)

Priority	Name	Qty in Stock
1	Bin 1	10.00000
2	Bin 3	10.00000
4	Bin 46	0.00000
9	Unspecified	27.00000
9	Bin 2	10.00000

The table below explains the purpose of each of the available fields: -

Warehouse	<p>Enter the warehouse location of the stock item manually, or right click on the cell and select Excel Data Bridge Browse. If the Warehouse is not entered when creating stock items, the status of the stock item will be set as Inactive.</p> <p>If the stock item is available in multiple warehouse locations, add each location into a separate cell in the column.</p>
Re-Order	Enter the re-order stock level for the stock item.
Minimum	Enter the minimum stock level for the stock item.
Maximum	Enter the maximum stock level for the stock item.
BinName	Enter a bin name for the warehouse location of the stock item. If the stock item is available in multiple bins in the warehouse location, add each bin into a separate cell in the column.
BinPriority	Enter an allocation priority value for the bin, between 1 – 9 . Defaults to priority 9 if left blank.

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represent the fields available to the stock item

Memo Section

Columns **BW – BY**

Memo tab in Sage 200.

If any of these fields are **not required** to create / amend Sage 200 data, they can be unmapped and removed from the template – **see page 35 for instructions**.

Code: BS/ARIZONA/BOM Name: Arizona Kitchen

Details Analysis Suppliers Alternatives Cross-selling Locations Attachments **Memo** Comments Manufacturing Search Categories

Memos

Created	Last Updated	User	Text	Active
15/06/2015 16:19	11/05/2020 13:25	Conversion	This is a Bill of Materials finished item	Yes

The table below explains the purpose of each of the available fields: -

MemoID	Enter a unique value in this cell when creating multiple memos to enable Excel Data Bridge to post separate memo lines to the stock record.
MemoText	Enter the text required for the memo in the stock item.
MemoStatus	Enter FALSE to create the memo as Inactive, else leave blank or enter TRUE to create an active memo.

Comments Section

Columns **BZ – CA**

Comments tab in Sage 200.

If any of these fields are **not required** to create / amend Sage 200 data, they can be unmapped and removed from the template – **see page 35 for instructions**.

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represent the fields available to the stock item

Code: ACS/BLENDER Name: Professional Blender 5 Speed

Details Analysis Suppliers Alternatives Cross-selling Locations Attachments Memo **Comments** Manufacturing Search Categories

Default Comment For Picking List

Check colour on order picking list to colour mark on box

Default Comment For Despatch Note

handle with care - 30 day return policy

The table below explains the purpose of each of the available fields: -

PickingListComment	Enter any comments to be shown against the stock item on the Picking List in Sage 200.
DespatchNoteComment	Enter any comments to be shown against the stock item on the Despatch Note in Sage 200.



Serial / Batch Stock Worksheet

The Serial Batch Stock worksheet contains an extra section called **BatchInfo**. The remaining sections are the same as the Non-Serial Batch Stock worksheet, but the sections from **Analysis** onwards will appear in columns further along the worksheet.

Columns **U – AI** represent the fields available to the stock item **Batch/Serial Nos** tab in Sage 200.

If any of these fields are **not required** to create / amend Sage 200 data, they can be unmapped and removed from the template – **see page 35 for instructions**.

The table below explains the purpose of each of the available fields: -

TraceableType	Select the traceable type for the stock item from the drop-down options of B (Batch Numbered) or S (Serial Numbered).
SaleFromSingleBatch	Batch Stock Items Only Set to TRUE if items should be sold from a single batch only. This must also be set against the Product Group in Sage 200.
AllowDuplicateNumbers	Set to TRUE if duplicate batch/serial numbers are permitted. Defaults to FALSE if left blank.



NumberGeneration	Select whether batch/serial numbers are automatically generated for the stock items from the drop-down options of None , Sequence , DateSequence , or OrderNoSequence . Defaults to none if left blank.
AutoGenerateSeparator	Enter a separator character for auto generated numbers. Valid options are characters displayed in the dropdown for the Separator Character field in Sage 200.
AutoGeneratePrefix	Enter a prefix for auto generated numbers.
AutoGenerateNextNumber	Enter the next available number for auto generated numbers.
AutoGeneratePadding	Enter the padding length required for auto generated numbers.
UsesAlternativeRef	Enter TRUE if the stock item can use Alternatives. Defaults to FALSE if left blank.
UsesSellByDate	Enter FALSE if the stock item does not require a sell-by date. Defaults to TRUE if left blank.
UsesUseByDate	Enter TRUE if the stock item has a use by date. Defaults to FALSE if left blank.
ShelfLife	Enter the number of days / weeks / months / years the stock item is still usable within, in conjunction with selected Shelf-Life Type .
ShelfLifeType	Select the shelf-life type for the stock item from the drop-down options of D (Days), W (Weeks), M (Months) or Y (Years). Defaults to days if left blank.
RecordNosOnGoodsReceived	Enter TRUE to record batch / serial numbers when goods are received. Defaults to FALSE if left blank.
IncludeNosOnCountSheets	Enter FALSE to record individual batch / serial numbers on count sheets. Defaults to TRUE if left blank.

Quick Stock Item Creation

All Sage 200 stock items will belong to one of the following traceable types: -

Excel Data Bridge

Stock Master Function



- Non-Traceable
- Batch Numbered
- Serial Numbered

How stock items are created in the Stock Master sheet depends on the traceable type of the stock item being created. All examples will be covered in this document.

Non-Traceable Stock Items

When creating new **non-traceable** stock items, the minimum columns required for completion are **GroupByID** (see [page 24](#)), **Stock Item Code**, **Stock Item Name**, **Product Group** and **Warehouse** (columns **B – E** and **BQ**).

This example shows three new stock items for different coloured blenders being added to the stock list.

B	C	D	E	BQ
	Header		Details	Locations
GroupByID	StockItemCode	StockItemName	ProductGroup	Warehouse
A	ACS/BLENDER/WHITE	Professional Blender 5 speed WHITE	ACCESSORIES	WAREHOUSE
B	ACS/BLENDER/BLACK	Professional Blender 5 speed BLACK	ACCESSORIES	WAREHOUSE
C	ACS/BLENDER/SILVER	Professional Blender 5 speed SILVER	ACCESSORIES	WAREHOUSE

Batch / Serial Numbered Stock Items

When creating new stock items which are **traceable** by either **batch** or **serial number**, the minimum columns required for completion are **GroupByID** (see [page 24](#)), **Stock Item Code**, **Stock Item Name**, **Product Group**, **Traceable Type** and **Warehouse** (columns **B – E**, and columns **U** and **CF** in the **SerialBatchStock** sheet).

This example shows three new stock items for different kinds of grey paint, with **Batch Numbers**, and a stock item for a washing machine with a **Serial Number** being added to the stock list.

The Traceable Type column will only accept values of **B** for batch, and **S** for serial number.

B	C	D	E	U	CF
	Header		Details	BatchInfo	Locations
GroupByID	StockItemCode	StockItemName	ProductGroup	TraceableType	Warehouse
A	PAINT/GREY/EGGSHELL	Grey Eggshell 5L	DECORATING	B	SHOWROOM
B	PAINT/GREY/GLOSS	Grey Gloss 5L	DECORATING	B	SHOWROOM
C	PAINT/GREY/MATT	Grey Matt 5L	DECORATING	B	SHOWROOM
D	WW/WASHER/1200/SILVER	Washing Machine 1200 spin SILVER	WWRE	S	WAREHOUSE

Once you have entered your new stock item data in the template, you have the following options:

- **Validate (optional)** – will run the data through a validation check and result in a status of **Pending**, if successful. If validation is unsuccessful, an error will be returned in **red**. This

Excel Data Bridge

Stock Master Function



error must be rectified, and the error cleared from the status field before either validating again or selecting Run.

- **Run** – will attempt to create the stock items / amendments in Sage 200. This process also performs a full Sage validation check. If successful, the status cell will change to **Processed**.

The new stock items can be traced in Sage 200 by viewing the stock list.

Code	Name	Sales Price	Actual Quantity	Product Group Code
ACS/BLENDER/WHITE	Professional Blender 5 speed WHITE	0.00000	0.00000	ACCESSORIES
ACS/BLENDER/BLACK	Professional Blender 5 speed BLACK	0.00000	0.00000	ACCESSORIES
ACS/BLENDER/SILVER	Professional Blender 5 speed SILVER	0.00000	0.00000	ACCESSORIES

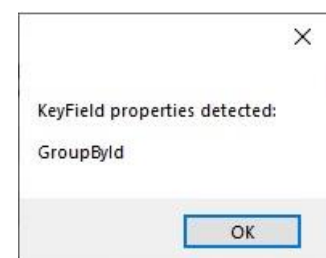
Code	Name	Sales Price	Actual Quantity	Product Group Code
PAINT/GREY/EGGSHELL	Grey Eggshell 5L	0.00000	0.00000	DECORATING
PAINT/GREY/GLOSS	Grey Gloss 5L	0.00000	0.00000	DECORATING
PAINT/GREY/MATT	Grey Matt 5L	0.00000	0.00000	DECORATING

Code	Name	Sales Price	Actual Quantity	Product Group Code
WWW/WASHER/1200/SILVER	Washing Machine 1200 spin SILVER	0.00000	0.00000	WWRE

Group By ID

When creating multiple stock items in Sage 200 at once, Excel Data Bridge needs to let Sage 200 know when a new stock item should be created. It does this by assigning certain fields as “key fields” which can be seen by selecting the **Key Fields** button from the ribbon.

The only key field assigned in the Stock Master worksheet is the field for **Group By ID**, so when creating multiple stock items via Excel Data Bridge, it's vital that data is entered in this column.



Excel Data Bridge

Stock Master Function



If unique data is entered in the **Group By ID** field against each stock item, separate stock records will be created in Sage 200.

See screenshot below from earlier example creating three new stock items for blenders, and the letters **A**, **B** and **C** have been entered against each stock item.

B	C	D	E
	Header		Details
GroupByID	StockItemCode	StockItemName	ProductGroup
A	ACS/BLENDER/WHITE	Professional Blender 5 speed WHITE	ACCESSORIES
B	ACS/BLENDER/BLACK	Professional Blender 5 speed BLACK	ACCESSORIES
C	ACS/BLENDER/SILVER	Professional Blender 5 speed SILVER	ACCESSORIES

Any unique data can be entered in the Group By ID field, so using numbers 1, 2 and 3 instead would have had the same effect.

In this example, leaving Group By ID empty would create a single stock record in Sage 200 for the first row of data found in the worksheet. Any subsequent stock records in the worksheet would be ignored, and therefore not created in Sage 200.

Full Stock Item Creation

When creating new Sage 200 stock items in Excel Data Bridge fully, *how* these stock items will be created can vary, depending on whether the stock items require **single** or **multi-dimensional** data to be added to Sage 200.

Several tabs of the stock record in Sage 200 allow you to enter **multiple** lines of data against a single stock record, namely: -

- Details - Selling Prices
- Suppliers
- Units of Measure
- Alternatives
- Cross-Selling
- Locations
- Memo

Excel Data Bridge

Stock Master Function



Prior to creating any stock items via Excel Data Bridge, it's a good idea to see which fields are required for completion when you create a new stock item in Sage 200, to help you identify which columns of data should be populated in the Excel Data Bridge template.

Remember, any unwanted columns of data can be unmapped and removed from the template.

Stock Item with single dimensions

If your new stock item contains only a **single** selling price, supplier, and location etc, your new stock record can be created using only a **single row of data** in Excel Data Bridge.

See example below showing three new stock records being added to Sage 200 with the data contained in a single row for each record.

Stock Item with multiple dimensions

If your new stock item contains **several** selling prices, suppliers, locations etc, your new stock record must be created over **several rows of data** in Excel Data Bridge. The number of rows of data is dictated by the maximum number of lines of data required in any one section.

For example, my stock records contain: -

- Selling Prices x 5
- Suppliers x 4
- Locations x 2

This means to create this stock item via Excel Data Bridge, I would need **five** rows of data, as my maximum number of selling prices required is five. If I had **six** suppliers instead of four, I would need six rows etc.

	Header		Details		Details - SellingPrices			Suppliers		Locations
GroupByID	StockItemCode	StockItemName	ProductGroup	ItemCurrentStatus	PriceBandName	UseStd	Price	SupplierCode	SupplierStockCode	Warehouse
A	ACS/BLENDER/WHITE	Professional Blender 5 speed WHITE	ACCESSORIES	Active	Standard		256.5	MOL001		WAREHOUSE
B	ACS/BLENDER/BLACK	Professional Blender 5 speed BLACK	ACCESSORIES	Active	Standard		256.5	MOL001		WAREHOUSE
C	ACS/BLENDER/SILVER	Professional Blender 5 speed SILVER	ACCESSORIES	Active	Standard		256.5	CHR001		SHOWROOM

Excel Data Bridge

Stock Master Function



Using the same example from the previous page, if these stock items had **multiple** selling prices, suppliers, and locations, this is how they should appear in the Excel Data Bridge template.

Note the following: -

- **Group By ID** – contains the same unique identifier against each row of data belonging to a single stock item to be created. *Can use letters or numbers.*
- **Selling Prices** – five selling price bands added to the stock item (inc. associated prices).
- **Suppliers** – four suppliers added to the stock item, and the preferred supplier identified.
- **Locations** – to locations added to the stock item.

When posted to Sage 200, the different areas of the stock items will appear as follows: -

Selling Prices

Header			Details		Details - SellingPrices			Suppliers			Locations
GroupByID	StockItemCode	StockItemName	ProductGroup	ItemCurrent	PriceBandName	UseStd	Price	SupplierCode	Supplier!	PreferredSup	Warehouse
A	ACS/BLENDER/WHITE	Professional Blender 5 speed WHITE	ACCESSORIES	Active	Standard		256.5	MOL001		TRUE	WAREHOUSE
A					Selling Band 2	FALSE	251	CHR001			Newcastle
A					Selling Band 3	FALSE	259.4	JOH002			
A					Selling Band 4	FALSE	280	KOP001			
A					Selling Band 5	FALSE	300				
B	ACS/BLENDER/BLACK	Professional Blender 5 speed BLACK	ACCESSORIES	Active	Standard		256.5	MOL001		TRUE	WAREHOUSE
B					Selling Band 2	FALSE	251	CHR001			Newcastle
B					Selling Band 3	FALSE	259.4	JOH002			
B					Selling Band 4	FALSE	280	KOP001			
B					Selling Band 5	FALSE	300				
C	ACS/BLENDER/SILVER	Professional Blender 5 speed SILVER	ACCESSORIES	Active	Standard		256.5	MOL001		TRUE	SHOWROOM
C					Selling Band 2	FALSE	251	CHR001			Middlesbrough
C					Selling Band 3	FALSE	259.4	JOH002			
C					Selling Band 4	FALSE	280	KOP001			
C					Selling Band 5	FALSE	300				

Excel Data Bridge

Stock Master Function



Prices for Stock Item

Stock Item

Code: ACS/BLENDER/WHITE Name: Professional Blender 5 speed WHITE

Stock unit: Each

Selling Prices

Price Band Name	Use Std	Price	Currency
Standard	<input checked="" type="checkbox"/>	256.50000	Pounds Sterling
Selling Band 2	<input type="checkbox"/>	251.00000	Pounds Sterling
Selling Band 3	<input type="checkbox"/>	259.40000	Pounds Sterling
Selling Band 4	<input type="checkbox"/>	280.00000	Pounds Sterling
Selling Band 5	<input type="checkbox"/>	300.00000	Pounds Sterling

Save Close

Suppliers

Stock Item

Code: ACS/BLENDER/WHITE Name: Professional Blender 5 speed WHITE

Details Manufacturing Analysis **Suppliers** Alternatives Cross-selling Locations Attachments Memo Comments Search Categories

Suppliers

Pref	Code	Name	Lead Time	Invoiced YTD	Currently on Order
	CHR001	Chrome Decor Wholesale	0 Days	0.00000	0.00000
	JOH002	Johns Imports Ltd	0 Days	0.00000	0.00000
	KOP001	Kopane Manufacturing	0 Days	0.00000	0.00000
Yes	MOL001	Molster Style	0 Days	0.00000	0.00000

Locations

Stock Item

Code: ACS/BLENDER/WHITE Name: Professional Blender 5 speed WHITE

Details Manufacturing Analysis Suppliers Alternatives Cross-selling **Locations** Attachments Memo Comments Search Categories

Warehouses

Name	Re-order	Minimum	Maximum	Qty in Stock
Newcastle	0.00000	0.00000	0.00000	0.00000
WAREHOUSE	0.00000	0.00000	0.00000	0.00000

Add... Edit... Remove

Working with existing Stock Items

The Stock Master sheet has been designed to also allow existing stock items to be downloaded, amended and then reuploaded to Sage 200.

Excel Data Bridge

Stock Master Function



Let's use the example of the three new blender stock items we created with the minimum fields. None of these stock items have yet been given selling prices in Sage 200.

Code	Name	Sales Price	Actual Quantity	Product Group Code
ACS/BLENDER/WHITE	Professional Blender 5 speed WHITE	0.00000	0.00000	ACCESSORIES
ACS/BLENDER/BLACK	Professional Blender 5 speed BLACK	0.00000	0.00000	ACCESSORIES
ACS/BLENDER/SILVER	Professional Blender 5 speed SILVER	0.00000	0.00000	ACCESSORIES

Prices for Stock Item

Stock Item

Code: ACS/BLENDER/WHITE Name: Professional Blender 5 speed WHITE

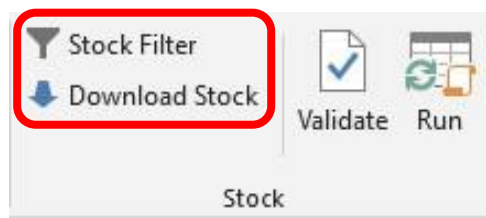
Stock unit: Each

Selling Prices

Price Band Name	Use Std	Price	Currency
Standard	<input checked="" type="checkbox"/>	0.00000	Pounds Sterling
Selling Band 2	<input type="checkbox"/>	0.00000	Pounds Sterling
Selling Band 3	<input type="checkbox"/>	0.00000	Pounds Sterling
Selling Band 4	<input type="checkbox"/>	0.00000	Pounds Sterling
Selling Band 5	<input type="checkbox"/>	0.00000	Pounds Sterling
Euro	<input type="checkbox"/>	0.00000	Euro

Save Close

There are two further buttons available to the Excel Data Bridge ribbon to enable stock items to be downloaded from Sage 200, the **Stock Filter** and **Download Stock** buttons.



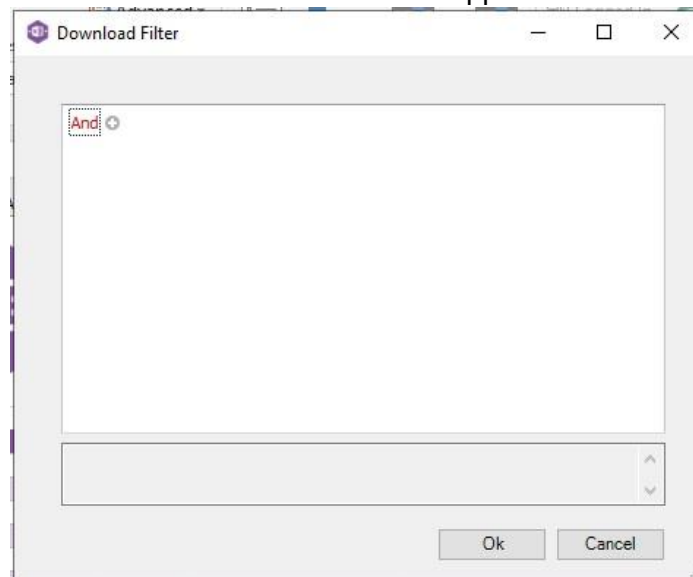
Excel Data Bridge

Stock Master Function



Step 1 Set Filter

Click the Stock Filter button from the ribbon. The screen appears as follows: -



Setting a filter uses the same logic as filters in Sage 200: -

FIELD **OPERATOR** **VALUE**

For example, add the following filter to download the Sage 200 stock item **ACS/BLENDER**: -

CODE **EQUALS** **ACS/BLENDER**

Wildcards can also be used to download stock items containing certain data. For example, if I wanted to download all stock items with the word **BLENDER** somewhere in the stock item code, I would click the + next to **And**, then add the following filter before clicking OK. : -



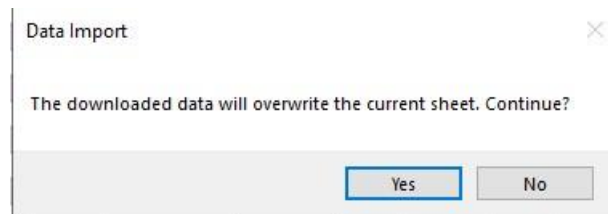
Excel Data Bridge

Stock Master Function



Step 2 Download Data

Once the filter has been set, click **Download Stock**. When downloading data from Sage 200, any existing data in the template will be overwritten in the worksheet. A message appears confirming this to give the opportunity of saving the file before the data is downloaded.



Clicking **Yes**, will download all data from Sage 200 that matches the filter request. In this example, **four** stock items have been downloaded from Sage 200 as they matched the criteria.

An existing stock code for **ACS/BLENDER** has been downloaded in addition to the three new

	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T
	Header			Details													Details - SellingPrices		
	GroupByID	StockItemCode	StockItemName	ProductGroup	ItemCurrentStatus	StockUnit	VAT Rate	Manufacturer	PartNo	LabelPr	AllowSales	AveBuy	BOMDetails	ItemDescription	UseItemDe	BarCode	PriceBandName	UseStd	Price
3	1	ACS/BLENDER	Professional Blender 5 Speed	ACCESSORIES	Active	Each	1	Philips	MO33349-92	None	TRUE	11.53	Component	Kensons 5 speed	False		Standard	False	251
4	1	ACS/BLENDER	Professional Blender 5 Speed	ACCESSORIES	Active	Each	1	Philips	MO33349-92	None	TRUE	11.53	Component	Kensons 5 speed	False		Selling Band 2	False	251
5	1	ACS/BLENDER	Professional Blender 5 Speed	ACCESSORIES	Active	Each	1	Philips	MO33349-92	None	TRUE	11.53	Component	Kensons 5 speed	False		Selling Band 3	False	259
6	1	ACS/BLENDER	Professional Blender 5 Speed	ACCESSORIES	Active	Each	1	Philips	MO33349-92	None	TRUE	11.53	Component	Kensons 5 speed	False		Selling Band 4	False	280
7	1	ACS/BLENDER	Professional Blender 5 Speed	ACCESSORIES	Active	Each	1	Philips	MO33349-92	None	TRUE	11.53	Component	Kensons 5 speed	False		Selling Band 5	False	300
8	1	ACS/BLENDER	Professional Blender 5 Speed	ACCESSORIES	Active	Each	1	Philips	MO33349-92	None	TRUE	11.53	Component	Kensons 5 speed	False		Euro	False	251
9	2	ACS/BLENDER/BLACK	Professional Blender 5 speed BLACK	ACCESSORIES	Inactive	Each	1			None	TRUE	0	Component		False		Standard	False	0
10	2	ACS/BLENDER/BLACK	Professional Blender 5 speed BLACK	ACCESSORIES	Inactive	Each	1			None	TRUE	0	Component		False		Selling Band 2	False	0
11	2	ACS/BLENDER/BLACK	Professional Blender 5 speed BLACK	ACCESSORIES	Inactive	Each	1			None	TRUE	0	Component		False		Selling Band 3	False	0
12	2	ACS/BLENDER/BLACK	Professional Blender 5 speed BLACK	ACCESSORIES	Inactive	Each	1			None	TRUE	0	Component		False		Selling Band 4	False	0
13	2	ACS/BLENDER/BLACK	Professional Blender 5 speed BLACK	ACCESSORIES	Inactive	Each	1			None	TRUE	0	Component		False		Selling Band 5	False	0
14	2	ACS/BLENDER/BLACK	Professional Blender 5 speed BLACK	ACCESSORIES	Inactive	Each	1			None	TRUE	0	Component		False		Euro	False	0
15	3	ACS/BLENDER/SILVER	Professional Blender 5 speed SILVER	ACCESSORIES	Inactive	Each	1			None	TRUE	0	Component		False		Standard	False	0
16	3	ACS/BLENDER/SILVER	Professional Blender 5 speed SILVER	ACCESSORIES	Inactive	Each	1			None	TRUE	0	Component		False		Selling Band 2	False	0
17	3	ACS/BLENDER/SILVER	Professional Blender 5 speed SILVER	ACCESSORIES	Inactive	Each	1			None	TRUE	0	Component		False		Selling Band 3	False	0
18	3	ACS/BLENDER/SILVER	Professional Blender 5 speed SILVER	ACCESSORIES	Inactive	Each	1			None	TRUE	0	Component		False		Selling Band 4	False	0
19	3	ACS/BLENDER/SILVER	Professional Blender 5 speed SILVER	ACCESSORIES	Inactive	Each	1			None	TRUE	0	Component		False		Selling Band 5	False	0
20	3	ACS/BLENDER/SILVER	Professional Blender 5 speed SILVER	ACCESSORIES	Inactive	Each	1			None	TRUE	0	Component		False		Euro	False	0
21	4	ACS/BLENDER/WHITE	Professional Blender 5 speed WHITE	ACCESSORIES	Inactive	Each	1			None	TRUE	0	Component		False		Standard	False	0
22	4	ACS/BLENDER/WHITE	Professional Blender 5 speed WHITE	ACCESSORIES	Inactive	Each	1			None	TRUE	0	Component		False		Selling Band 2	False	0
23	4	ACS/BLENDER/WHITE	Professional Blender 5 speed WHITE	ACCESSORIES	Inactive	Each	1			None	TRUE	0	Component		False		Selling Band 3	False	0
24	4	ACS/BLENDER/WHITE	Professional Blender 5 speed WHITE	ACCESSORIES	Inactive	Each	1			None	TRUE	0	Component		False		Selling Band 4	False	0
25	4	ACS/BLENDER/WHITE	Professional Blender 5 speed WHITE	ACCESSORIES	Inactive	Each	1			None	TRUE	0	Component		False		Selling Band 5	False	0
26	4	ACS/BLENDER/WHITE	Professional Blender 5 speed WHITE	ACCESSORIES	Inactive	Each	1			None	TRUE	0	Component		False		Euro	False	0
27	4	ACS/BLENDER/WHITE	Professional Blender 5 speed WHITE	ACCESSORIES	Inactive	Each	1			None	TRUE	0	Component		False		Euro	False	0

blender stock items we created earlier in the document.

NOTE – several rows will be downloaded into Excel Data Bridge for each stock code containing multi-dimensional data. In this example, there are SIX selling price bands in Sage 200, therefore SIX lines of data are downloaded for each stock item, and each is assigned a unique value in the GroupByID column.

	Header		Details	Details - SellingPrices		
	GroupByID	StockItemCode	StockItemName	ProductGroup	PriceBandName	UseStd Price
	1	ACS/BLENDER	Professional Blender 5 Speed	ACCESSORIES	Standard	False 257
	1	ACS/BLENDER	Professional Blender 5 Speed	ACCESSORIES	Selling Band 2	False 251
	1	ACS/BLENDER	Professional Blender 5 Speed	ACCESSORIES	Selling Band 3	False 259
	1	ACS/BLENDER	Professional Blender 5 Speed	ACCESSORIES	Selling Band 4	False 280
	1	ACS/BLENDER	Professional Blender 5 Speed	ACCESSORIES	Selling Band 5	False 300
	1	ACS/BLENDER	Professional Blender 5 Speed	ACCESSORIES	Euro	False 251



Step 3 Make Changes

In this example, we have an existing pricing structure against the stock item **ACS/BLENDER**. I can either copy this pricing structure down to each of the three new stock items, or I can manually enter prices against each band.

Let's say the prices for the new stock items are the same as the existing stock item, so I'll copy the pricing data from the first stock item down to the other three.

	Header		Details	Details - SellingPrices		
GroupByID	StockItemCode	StockItemName	ProductGroup	PriceBandName	UseStd	Price
1	ACS/BLENDER	Professional Blender 5 Speed	ACCESSORIES	Standard	False	257
1	ACS/BLENDER	Professional Blender 5 Speed	ACCESSORIES	Selling Band 2	False	251
1	ACS/BLENDER	Professional Blender 5 Speed	ACCESSORIES	Selling Band 3	False	259
1	ACS/BLENDER	Professional Blender 5 Speed	ACCESSORIES	Selling Band 4	False	280
1	ACS/BLENDER	Professional Blender 5 Speed	ACCESSORIES	Selling Band 5	False	300
1	ACS/BLENDER	Professional Blender 5 Speed	ACCESSORIES	Euro	False	251
2	ACS/BLENDER/BLACK	Professional Blender 5 speed BLACK	ACCESSORIES	Standard	False	257
2	ACS/BLENDER/BLACK	Professional Blender 5 speed BLACK	ACCESSORIES	Selling Band 2	False	251
2	ACS/BLENDER/BLACK	Professional Blender 5 speed BLACK	ACCESSORIES	Selling Band 3	False	259
2	ACS/BLENDER/BLACK	Professional Blender 5 speed BLACK	ACCESSORIES	Selling Band 4	False	280
2	ACS/BLENDER/BLACK	Professional Blender 5 speed BLACK	ACCESSORIES	Selling Band 5	False	300
2	ACS/BLENDER/BLACK	Professional Blender 5 speed BLACK	ACCESSORIES	Euro	False	251
3	ACS/BLENDER/SILVER	Professional Blender 5 speed SILVER	ACCESSORIES	Standard	False	257
3	ACS/BLENDER/SILVER	Professional Blender 5 speed SILVER	ACCESSORIES	Selling Band 2	False	251
3	ACS/BLENDER/SILVER	Professional Blender 5 speed SILVER	ACCESSORIES	Selling Band 3	False	259
3	ACS/BLENDER/SILVER	Professional Blender 5 speed SILVER	ACCESSORIES	Selling Band 4	False	280
3	ACS/BLENDER/SILVER	Professional Blender 5 speed SILVER	ACCESSORIES	Selling Band 5	False	300
3	ACS/BLENDER/SILVER	Professional Blender 5 speed SILVER	ACCESSORIES	Euro	False	251
4	ACS/BLENDER/WHITE	Professional Blender 5 speed WHITE	ACCESSORIES	Standard	False	257
4	ACS/BLENDER/WHITE	Professional Blender 5 speed WHITE	ACCESSORIES	Selling Band 2	False	251
4	ACS/BLENDER/WHITE	Professional Blender 5 speed WHITE	ACCESSORIES	Selling Band 3	False	259
4	ACS/BLENDER/WHITE	Professional Blender 5 speed WHITE	ACCESSORIES	Selling Band 4	False	280
4	ACS/BLENDER/WHITE	Professional Blender 5 speed WHITE	ACCESSORIES	Selling Band 5	False	300
4	ACS/BLENDER/WHITE	Professional Blender 5 speed WHITE	ACCESSORIES	Euro	False	251

I can then make changes to any other required fields in the worksheet before sending back to Sage 200.

We'll leave the amendments just with the selling prices for now.

Excel Data Bridge

Stock Master Function



Step 4 Send to Sage 200

Once the changes to the data have been made in Excel Data Bridge, we can send them through to Sage 200 in the normal way.

We can either **Validate** before posting, or just click **Run** to make the changes in Sage 200. If the postings are successful, the Status column will return a status of **Processed**, and the amended prices will have been sent to Sage 200.

Prices for Stock Item

Stock Item

Code: \CS/BLENDER/BLACK Name: Professional Blender 5 speed BLACK

Stock unit: Each

Selling Prices

Price Band Name	Use Std	Price	Currency
Standard	<input checked="" type="checkbox"/>	256.50000	Pounds Sterling
Selling Band 2	<input type="checkbox"/>	251.00000	Pounds Sterling
Selling Band 3	<input type="checkbox"/>	259.40000	Pounds Sterling
Selling Band 4	<input type="checkbox"/>	280.00000	Pounds Sterling
Selling Band 5	<input type="checkbox"/>	300.00000	Pounds Sterling

Save Close

Prices for Stock Item

Stock Item

Code: \CS/BLENDER/SILVER Name: Professional Blender 5 speed SILVER

Stock unit: Each

Selling Prices

Price Band Name	Use Std	Price	Currency
Standard	<input checked="" type="checkbox"/>	256.50000	Pounds Sterling
Selling Band 2	<input type="checkbox"/>	251.00000	Pounds Sterling
Selling Band 3	<input type="checkbox"/>	259.40000	Pounds Sterling
Selling Band 4	<input type="checkbox"/>	280.00000	Pounds Sterling
Selling Band 5	<input type="checkbox"/>	300.00000	Pounds Sterling

Save Close

Prices for Stock Item

Stock Item

Code: ACS/BLENDER/WHITE Name: Professional Blender 5 speed WHITE

Stock unit: Each

Selling Prices

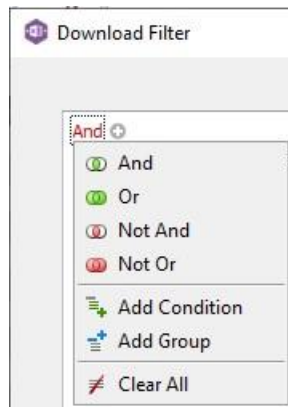
Price Band Name	Use Std	Price	Currency
Standard	<input checked="" type="checkbox"/>	256.50000	Pounds Sterling
Selling Band 2	<input type="checkbox"/>	251.00000	Pounds Sterling
Selling Band 3	<input type="checkbox"/>	259.40000	Pounds Sterling
Selling Band 4	<input type="checkbox"/>	280.00000	Pounds Sterling
Selling Band 5	<input type="checkbox"/>	300.00000	Pounds Sterling

Save Close



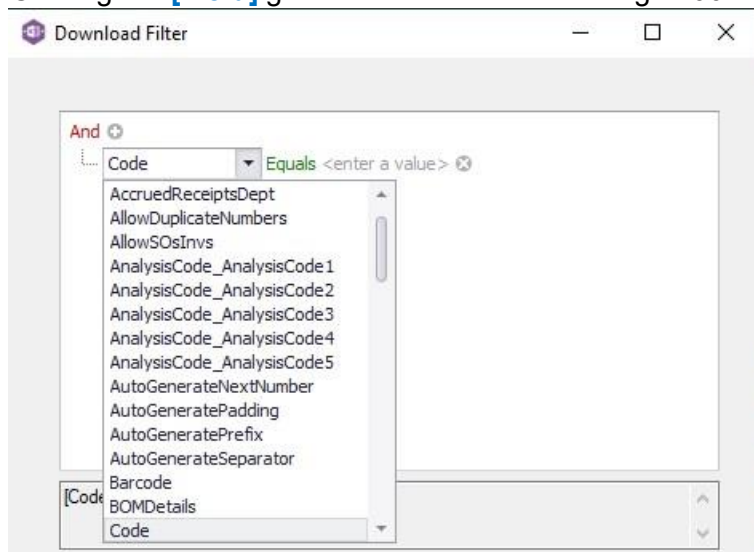
Tips – Filters

- Clicking the **+** next to **And** allows you to **add** a condition, or use the **Insert** or **Add** keys.
- Clicking the **x** at the right of a condition allows you to **delete** it or use the **Delete** key.
- Clicking **And** allows you to: -



- Add a condition
- Add a group of conditions
- Change the linking operator on a filter with multiple conditions
- Clear all current conditions (only if any are set)

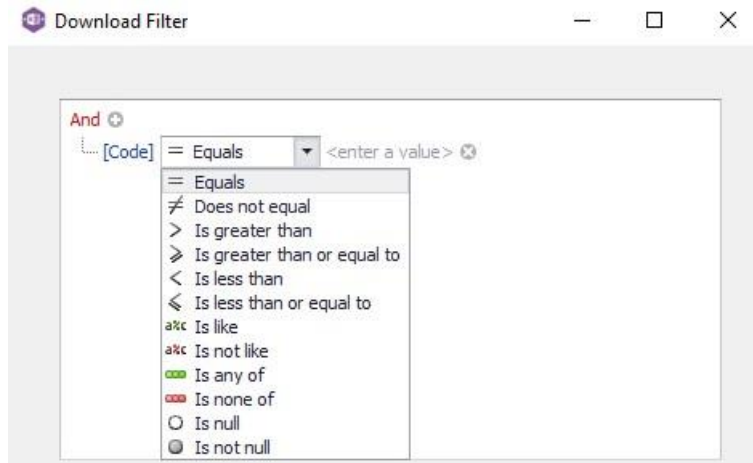
- Clicking the **[Field]** gives access to available Sage 200 fields



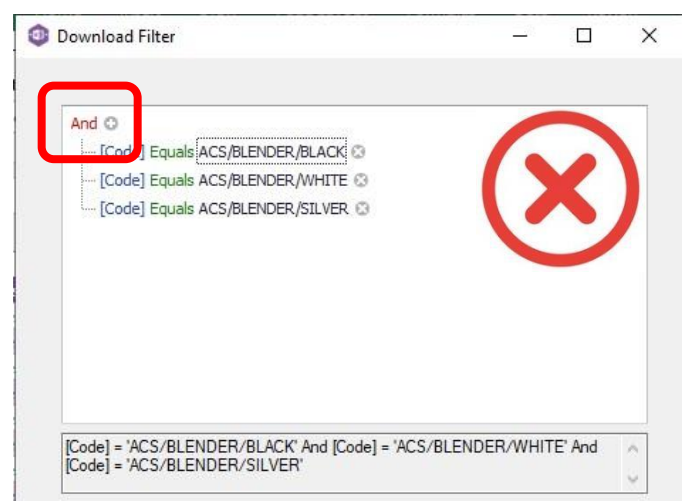
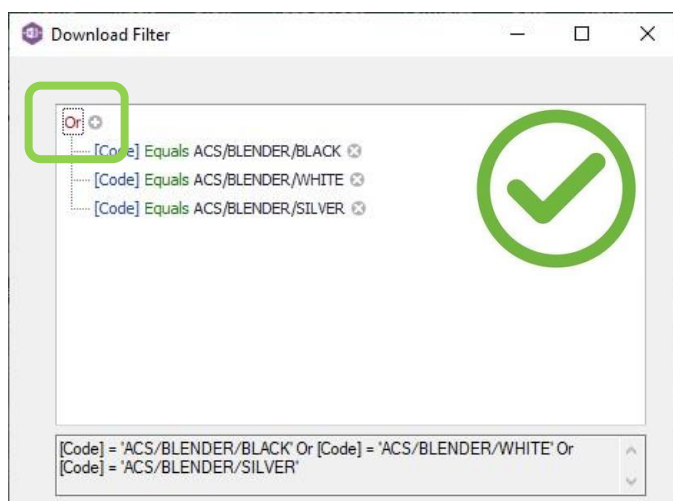
- Clicking the **Operator** gives access to string / numeric operators

Excel Data Bridge

Stock Master Function



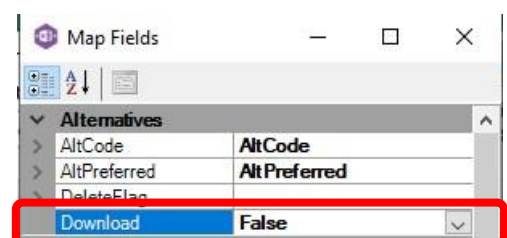
- Standard wildcards can be used when entering string values
- Use the correct linking operator on filters with multiple conditions. To download multiple named stock codes, use **Or** not **And**. If the filter is invalid, nothing will download.



Tips – Downloading

If downloading data into Excel Data Bridge is taking some time, and you only need data downloaded from certain areas of Sage 200, the download can be turned off for unrequired sections.

Open the **Designer** and change the **Download** property in the section to stop data downloading from **True** to **False**.



Excel Data Bridge

Stock Master Function



The following sections in the Designer can have the ability to download data from Sage 200 turned off.

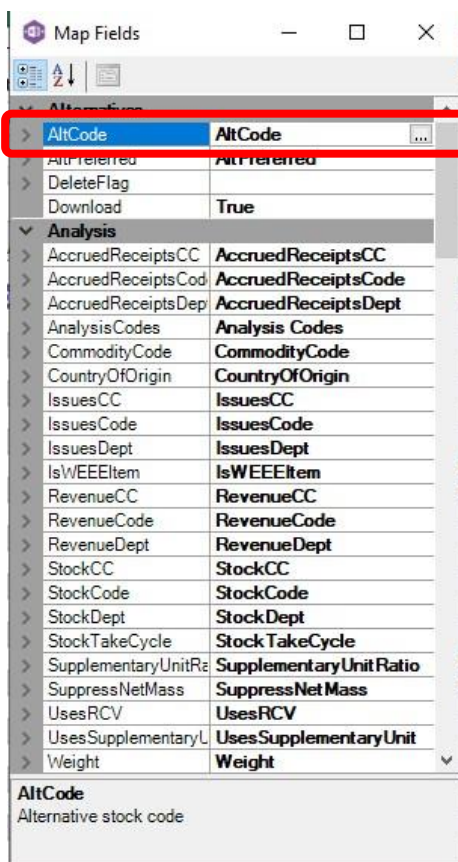
Amending Templates

Deleting unwanted columns

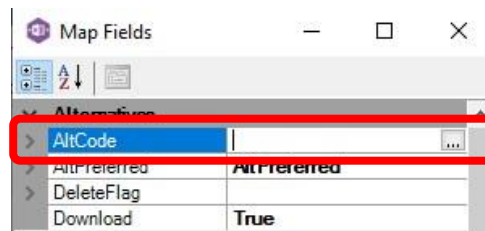
Deleting unwanted columns within a template is a two-step process: -

1. Remove the field mappings from the Designer
2. Delete the columns in the Excel template

Open the **Designer** to view the current field mappings. If for example, you do not offer any **Alternatives** to stock items, these fields can be unmapped, and the columns deleted.



1. Clear the mapping against the first field no longer required

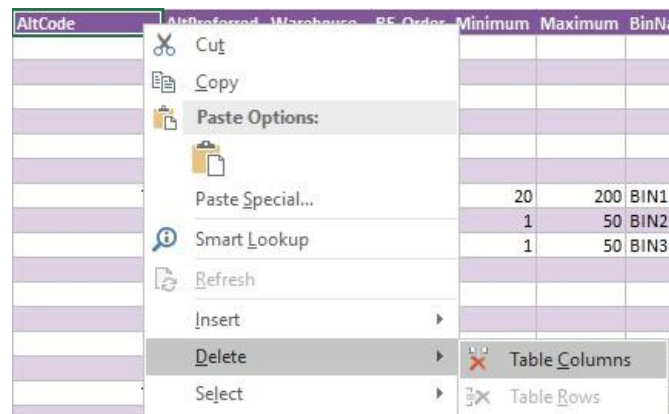


2. Repeat for any other unrequired fields
3. Close the Designer
4. Click **Validate Design** to check for errors

Right click the column heading to remove and select **Delete > Table Columns**. Repeat for any other columns required.

Excel Data Bridge

Stock Master Function



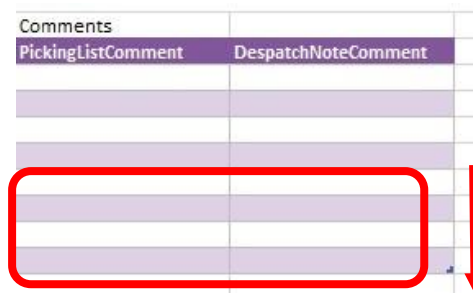
Adding Rows and Columns

The worksheet templates have been created in an Excel table with the correct formatting applied.

To add additional **rows**, firstly locate the cell at the bottom right-hand corner of the formatted table.

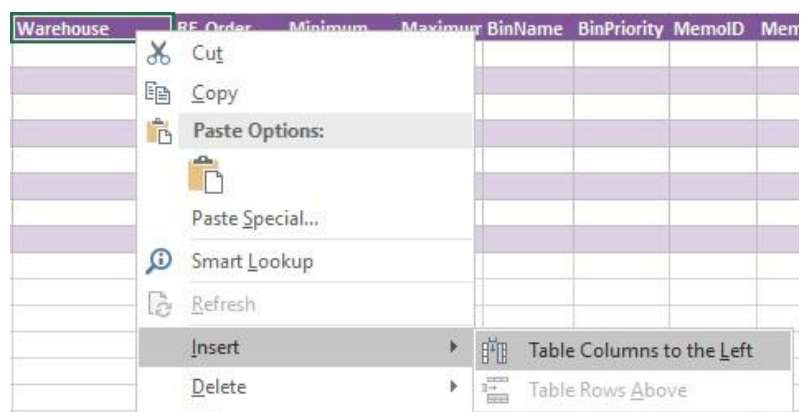


Now select the cell, then click and drag down on the arrow. Extra rows will be added with the correct formatting.



If a column has been deleted in error and you'd like to bring it back again, right click on the column heading where you would like your new column to appear and select -

- **Insert > Table Columns to the Left**



Excel Data Bridge

Stock Master Function



A new column will be added, named **Column1**. Rename the column in Excel, then refer to the next section on how to map this column in the Designer.

BO	BP
Alternatives	
Column1	Warehouse

Mapping a new column

Once a new column has been added to the template, it can be mapped to the required Sage 200 field.

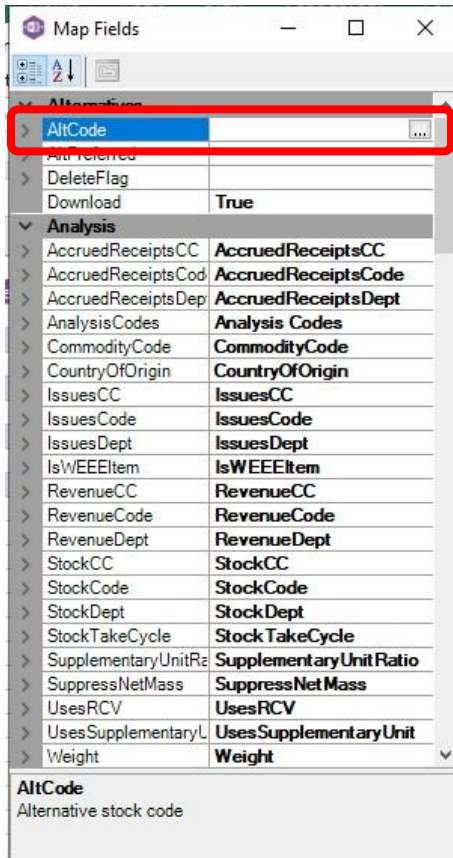
AltCode column re-added to the template to allow the alternative stock code to be entered against the stock item.

BO	BP
Alternatives	
AltCode	Warehouse

Click **Designer** to open the mappings for the template and locate the field to map the column to.

Excel Data Bridge

Stock Master Function



1. Click the **Ellipsis** to the right of the **AltCode** field. The cell mapping window appears.

2. Now select the cell range for the

AltCode column before clicking OK.

The column is now mapped and can be populated in Excel Data Bridge.

