PartnerView Sales Order Export

PartnerView can be used to eliminate the manual entry of sales orders by offering a sales order export. When a dealer orders material from their distributor through PartnerView, the export can be used to generate an XML file containing the fields needed to import the sales order into the dealer's Agility system.

Fields Exported to PartnerView XML File

When creating the export file using the XML icon, the following fields are included in the xml file.

Description	Export File
Distributor's branch location	<BranchID>
Distributor's transaction id	<OrderID>
Distributor's customer id	<CustomerID>
Distributor's ship-to customer sequence	<ShipToSequence>
Order placed by name	<OrderedBy>
Order date	<OrderDate>
Expected delivery date	<ExpectedDate>
Sale type	<SaleType>
Job number	<TransactionJob>
Reference number	<TransactionReference>
Customer purchase Order number	<CustomerPO>
Ship via	<ShipVia>
Distributor's pay terms	<PayTermsCode>
Transactions order total	<OrderTotal>
Ship-to customer name	<ShipToName>
Ship-to customer address 1	<ShipToAddress1>
Ship-to customer address 2	<ShipToAddress2>
Ship-to customer address 3	<ShipToAddress3>
Ship-to customer city	<ShipToCity>
Ship-to customer state	<ShipToState>
Ship-to customer country	<ShipToCountry>
Ship-to customer zip code	<ShipToZip>
Transaction number the order was generated from.	<OriginalTran>
Identifies if the transaction was released from a quote or copied from a sales order.	<OriginalTranSource>
Login id of the user that created the transaction	<CreatedBy>
Date the transaction was created	<CreatedDate>
Time the transaction was created	<CreatedTime>
Header level transaction message	<TransactionMessage>

Detail sequence number	<Sequence>
Item ID	<ItemCode>
Item size	<ItemSize>
Dimensional item's thickness	<Thickness>
Dimensional item's width	<Width>
Dimensional item's length	<Length>
Item description	<ItemDescription>
Quantity ordered	<TotalOrderedQuantity>
Unit of measure for order quantity	<QuantityUOM>
Item price without discounts	<GrossPrice>
Item price net of discounts	<NetPrice>
Unit of measure for item price	<PriceUOM>
Description of discounts applied to net price	<DiscountDescription />
Calculated based on order quantity times gross price	<ExtendedPriceGross>
Calculated based on order quantity times net price	<ExtendedPriceNet>
Type of item being ordered	<ItemType>
Cross reference number	<CrossReference />
Supplier part number	<ItemPartNumber />
String of tallies ordered on dimensional item	<TallyString />
Message attached to the item	<ItemMessage>
Extended description of the item	<ExtendedDescription />
Item's major product group	<ItemGroupMajor>
Item's minor product group	<ItemGroupMinor>
Indicates if item is a configured parent	<BOMParentFlag>
Short description string of components associated with configured parent	<WOPhrase >
Credit memo reason code	<CMReason>
This field is only populated for dimensional items. The dimensional header row identifies the dimensional item and contains sales order header and item information followed by a separate row for each dimension. NOTE: For the Agility Sales Order/Quote import to correctly handle dimensional items, you must enter the value of "Header" in the import definition 'Item Header Identifier' field in the Tally tab and specify the column containing the value.	<HeaderIdentifier>**Header**</HeaderIdentifier>
This field identifies whether the line is a detail group header item. It is only populated if the line has a Group ID assigned.	<GroupHeader>
This field is the detail group header id. It is used to group order lines together for contract billing purposes.	<GroupID>

Piece count for dimensional items ordered by units	\<PieceCount\>
Retail customer id	\<RetailCustomerID\>
Retail customer ship-to sequence	\<RetailShipToSequence\>
Retail customer name	\<RetailName\>
Retail customer address 1	\<RetailAddress1\>
Retail customer address 2	\<RetailAddress2\>
Retail customer address 3	\<RetailAddress3\>
Retail customer city	\<RetailCity\>
Retail customer state	\<RetailState\>
Retail customer ZIP code	\<RetailZip\>
Retail customer country	\<RetailCountry\>
Retail customer phone number	\<RetailPhone\>
Contact name of the retail customer	\<RetailContactName\>
E-mail address of the retail customer's contact	\<RetailContactEmail\>
Reference for the retail customer order. It may contain customer PO, Job number or reference.	\<RetailReference\>
Item price including retail pricing markup	\<RetailPrice\>
Unit of measure for the retail price	\<RetailPriceUOM\>
Calculated based on order quantity times retail price converted to the stocking unit of measure	\<RetailExtendedPrice\>