

From
DC-IA/SPF75

Our Reference
MTpro Support

Telephone
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Stuttgart-Feuerbach
07 November 2013

Memo

Recipient
Cc

Template-based export of MTpro order lists

This document describes how to export MTpro order lists to Excel files or RTF files for further processing.

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1 Introduction

MTpro order lists can be exported into the file formats Microsoft Excel (*.xls) and Rich Text Format (*.rtf) for further processing.

The exported Excel files can be opened using Microsoft Excel. The exported RTF files can be opened with standard word processing programs such as Microsoft Word.

Customizable templates help you export the order list data in a layout of your choice.

2 Requirements

Prerequisite for exporting an Excel file based on an MTpro order list is an installed version of Microsoft Excel version 2003 or higher. Microsoft Excel is also required for editing Excel printing templates.

RTF files can be exported without installing additional software. Editing the RTF print templates can be done in MTpro as well as with an external RTF-compatible word processing program such as Microsoft Word.

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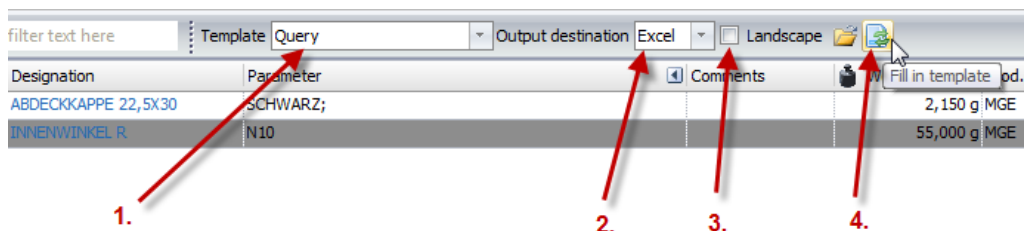
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3 Exporting an MTpro Order List

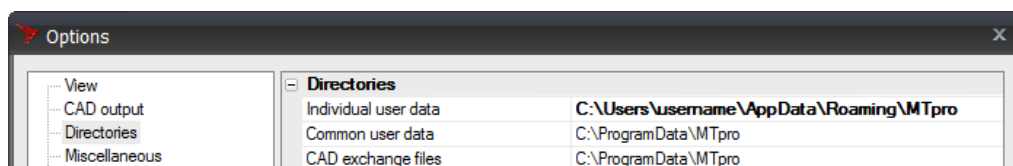


1. First, select one of the standard print templates or select your own by choosing "Individual...".
2. If you would like to create an Excel file, select the output destination "Excel". To generate an RTF file, select "MTpro" as output destination.
3. If a standard template is chosen and the checkbox "Landscape" is active, the appropriate template is selected in landscape format.
4. The button "Fill in template" creates the export file based on the order list data and opens the result in either MTpro or Microsoft Excel.

Standard print templates can be stored in three different directories that are searched by the program in the following order:

1. Individual user data
2. Common user data
3. MTpro Installation directory

The user data directories can be customized in the options:



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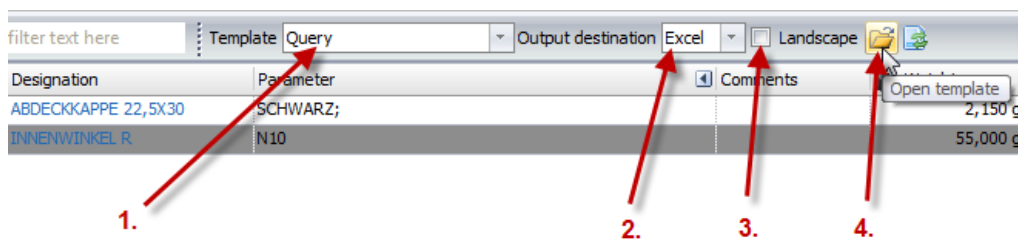
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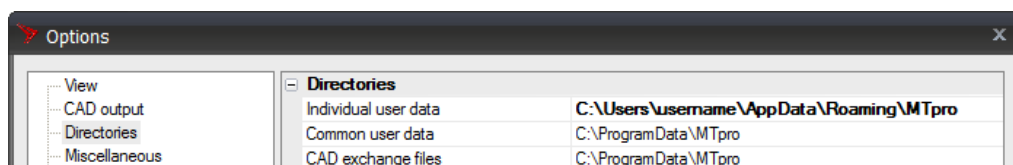
4 Customize the default print template

To customize a default print template, proceed as follows:



1. First, select one of the three standard print templates that you would like to change.
2. If you would like to modify an Excel template, select the output destination "Excel". To edit an RTF print template, select "MTpro".
3. If a standard template is chosen and the checkbox "Landscape" is active, the appropriate template is selected in landscape format.
4. The "Open template" button opens the selected print template for editing. Based on the file format either the integrated MTpro RTF editor or Microsoft Excel is started.

If a print template is opened for the first time, it will be copied from the MTpro installation directory to the directory containing the individual user data. After that the template will be opened. The directory can be customized in the MTpro options:



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5 Structure of print templates

5.1 RTF format

The RTF print template is based on a standard RTF file which can be edited with the integrated RTF editor as well as other word processing programs such as Microsoft Word.

5.2 Excel format

Since Excel print templates are based on standard Excel files of version 97-2003 (*.xls), they can be edited with compatible programs and expanded with user-defined functions, such as Macros, formulas, etc.

During the process of filling out a print template, variables are replaced specified by the data of the current order list. Variable names are enclosed in angle brackets. Beginning and end of the repeating product data row is defined with curly braces. A complete list of available variable can be found in the annex.

In the following, the procedure will be explained with three examples of the standard print template for queries:

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	B	C	D	E	F
2	<Text.To>				<Text.Date><Info.Date>
3	<Distributor.Company.Name>				
4	<Distributor.Person.Department>				
5	<Distributor.Person.FirstName> <Distributor.Person.LastName>				
6	<Distributor.Company.Street_PO_Box>			This is plain text	
7	<Distributor.Company.City>				
8					
9	<Distributor.Company.Country>				
10					
11	<Text.FaxTo> <Distributor.Person.Fax>				
12					
13	<Text.Request>				
14					
15	<Text.BillingAddress>			<Text.ShippingAddress>	
16					
17	<Customer.Company.Name>			<Shipping.Company.Name>	
18	<Customer.Person.Department> - <Customer.Person.LastName>			<Shipping.Person.Department> - <Shipping.Person.LastName>	
19	<Customer.Company.Street_PO_Box>			<Shipping.Company.Street_PO_Box>	
20	<Customer.Company.City>			<Shipping.Company.City>	
21	<Customer.Company.Country>			<Shipping.Company.Country>	
22	<Text.Phone> <Customer.Person.Phone>			<Text.Phone> <Shipping.Person.Phone>	
23	<Text.Fax> <Customer.Person.Fax>			<Text.Fax> <Shipping.Person.Fax>	
24	<Text.eMail> <Customer.Person.eMail>			<Text.eMail> <Shipping.Person.eMail>	
25	<Text.CustomerId> <Customer.Person.CustomerID>				
26					
27					
28	<Text.Salutation>				
29	<Text.RequestTxt>				
30					
31	<Text.List.PosNo>	<Text.List.Quantity>	<Text.List.OrderNo>	<Text.List.Designation>	<Text.List.Parameter>
32	{<Article.No>	<Article.Quantity>	<Article.OrderNo>	<Article.Designation>	<Article.Parameter>}
33					
34					
35					
36					
37	<Text.Regards>				
38					
39					

1. Text variables will be replaced with text according to the actual MTpro language settings. For example, in the default print template for queries, the **<Text.Request>** variable will be replaced by the heading **Request**.
All cell properties including font formatting can be freely customized.
2. Within the template it is possible to change almost anything, such as inserting own text and graphics.
3. The two brackets { } define the beginning and end of a product data line. For each line of the order list a new product data line will be in-

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sorted in Excel and the existing variables will be replaced with the product data.

If a print template is saved and an order list is exported afterwards (see „Exporting an MTpro Order List“), the variables will be replaced with data from the order list:

	B	C	D	E	F
2	To:				Date:07.11.2013
3	Bosch Rexroth Limited				
4					
5					
6	38 Herald Way			This is plain text	
7	Coventry, CV3 2RQ				
8					
9	Great Britain			Logo	
10					
11	Fax to: + 44 (0) 24 7663 5041				
12					
13	Query				
14					
15	Billing address			Shipping address	
16					
17	Test company			Test company	
18	- Musterman			- Musterman	
19	test street 1			test street 1	
20	12345 Test city			12345 Test city	
21					
22	Telephone: 12345/67890			Telephone: 12345/67890	
23	Fax: 12345/67891			Fax: 12345/67891	
24	E-mail: info@test.com			E-mail: info@test.com	
25	Customer no.: 123456				
26					
27					
28	Dear Sir or Madam,				
29	please give us an offer for the following articles:				
30					
31	Pos.	Quantit y	Article no.	Designation	Parameter
32	1	1	3842516720	COVER CAP	22,5X30; CONDUCTIVE; FOR FRAME PROFILE; PA12 BLACK; LE1;
33	2	1	3842535637	CORNER BRACKET	22,5X45
34					
35					
36					
37					
38	Best regards				
39					
40					

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Annex – MTpro template variables

MTpro Variable	Description	Example (language setting: English)
Text items		
<Text.List.PosNo>	Order list title – position number	Pos.
<Text.List.Quantity>	Order list title - quantity	Quantity
<Text.List.OrderNo>	Order list title – article number	Article no.
<Text.List.Designation>	Order list title – article name	Designation
<Text.List.Parameter>	Order list title - parameters	Parameter
<Text.List.Weight>	Order list title - weight	Weight
<Text.List.CodeNo>	Order list title Statistische Warennummer	Commodity Code
<Text.List.CADFile>	Order list title - CAD file	CAD
<Text.List.PDFFile>	Order list title - PDF file	PDF
<Text.List.ListPrice>	Order list title – list price	List price
<Text.List.NetPrice>	Order list title – net price	Net price
<Text.List.Subtotal>	Order list title - subtotal	Subtotal
<Text.List.MaterialCostIncrease>	Order list title – material cost surcharge	MKZ
<Text.List.Discount>	Order list title Rabatt	Discount
<Text.Quotation>	Text “Quotation”	Quotation
<Text.QuotationText>	Introduction to quotations	We are pleased to submit the following quotation:
<Text.QuotationId>	Text “Quotation number”	Quotation no.:
<Text.Request>	Text “Query”	Query
<Text.RequestTxt>	Introduction to queries	please give us an offer for the following articles:
<Text.Order>	Text “Order”	Order
<Text.OrderId>	Text “Order number”	Order no.:
<Text.OrderTxt>	Introduction to orders	we hereby order the following articles:
<Text.For>	Address field text "for"	for:
<Text.From>	Address field text “from”	From:

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MTpro Variable	Description	Example (language setting: English)
<Text.To>	Address field text "to"	To:
<Text.Phone>	Address field text "telephone"	Telephone:
<Text.Fax>	Address field text "fax"	Fax:
<Text.eMail>	Address field text "eMail"	E-mail:
<Text.FaxTo>	Address field text "fax to"	Fax to:
<Text.CustomerID>	Address field text "customer number"	Customer no.:
<Text.ShippingAddress>	Address field text "shipping address"	Shipping address
<Text.BillingAddress>	Address field text "billing address"	Billing address
<Text.Page>	Text "page"	Page
<Text.Of>	Text "of" (pages)	of
<Text.Salutation>	Salutation text	Dear Sir or Madam,
<Text.Regards>	Greeting text	Best regards
<Text.BillOfMaterial>	Text "parts list"	Parts list
<Text.Conditions>	Text "price conditions"	Not included in the prices: transport costs, transport insurance, packaging, assembly, and initial operation. Subject to technical changes and errors.
<Text.TermsAndConditions>	Text "General terms"	The general business terms and conditions from Bosch Rexroth AG apply
<Text.Date>	Text "Date"	Date:
<Text.IntermediateTotal>	Text "Intermediate total"	Intermediate total:
<Text.EndTotal>	Text "End total"	End total:
<Text.Label>	Text Copyright MTpro	Designed and printed with MTpro - Bosch Rexroth AG
Addresses		
<Distributor.Company.Nam e>	Sales contact - Company	Bosch Rexroth Limited

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<Distributor.Company.Street_PO_Box>	Sales contact - address	Broadway Lane
<Distributor.Company.City>	Sales contact - town	Cirencester, GL7 5UH
<Distributor.Company.Country>	Sales contact - country	Great Britain
<Distributor.Person.Title>	Sales contact - title	Mrs.
<Distributor.Person.FirstName>	Sales contact – first name	M.
<Distributor.Person.LastName>	Sales contact – last name	Miller
<Distributor.Person.Department>	Sales contact - department	Sales
<Distributor.Person.Phone>	Sales contact - telephone	+44 (0)1285 863000
<Distributor.Person.Fax>	Sales contact - fax	+44 (0)1285 863003
<Distributor.Person.eMail>	Sales contact – e-mail	info@boschrexroth.co.uk
<Ids.Quotation>	Quotation number	Abc 123
<Ids.Order>	Order number	O 345
<Customer.Company.Name>	Customer contact - company	Phantasia Co. Ltd
<Customer.Company.Street_PO_Box>	Customer contact - address	Moon st. 7
<Customer.Company.City>	Customer contact - town	Somewhere XYZ 123
<Customer.Company.Country>	Customer contact - country	Wonderland
<Customer.Person.Title>	Customer contact - title	Mr.
<Customer.Person.FirstName>	Customer contact – first name	John
<Customer.Person.LastName>	Customer contact – last name	Smith
<Customer.Person.Department>	Customer contact - department	P400
<Customer.Person.Phone>	Customer contact - telephone	(010) 245245
<Customer.Person.Fax>	Customer contact - fax	(010) 245246

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MTpro Variable	Description	Example (language setting: English)
<Customer.Person.eMail>	Customer contact – e-mail	js@phantasia.co.uk
<Customer.Person.CustomerID>	Customer number	P12
<Customer.Person.DiscountNo>	Discount number	R12
<Shipping.Company.Name>	Shipping address - company	Phantasia Co. Ltd
<Shipping.Company.Street_PO_Box>	Shipping address - street	No way 12
<Shipping.Company.City>	Shipping address - town	Somewhere XYZ 123
<Shipping.Company.Country>	Shipping address - country	Wonderland
<Shipping.Person.Title>	Shipping address – contact - title	Mr.
<Shipping.Person.FirstName>	Shipping address – contact – first name	Woody
<Shipping.Person.LastName>	Shipping address – contact – last name	Pecker
<Shipping.Person.Department>	Shipping address – contact - department	LOG123
<Shipping.Person.Phone>	Shipping address – contact - telephone	(010) 245542
<Shipping.Person.Fax>	Shipping address – contact - fax	(010) 245500
<Shipping.Person.eMail>	Shipping address – contact – e-mail	pp@phantasia.co.uk
Order list data		
<Article.PosNo>	Article data – position number	1
<Article.Quantity>	Article data - quantity	1
<Article.CADFile>	Article data - checkbox CAD	No
<Article.PDFFile>	Article data - checkbox PDF	Yes
<Article.PackUnit>	Article data – packing unit	1
<Article.OrderNo>	Article number	3842523167

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MTpro Variable	Description	Example (language setting: English)
<Article.Designation>	Article name	PROTECTIVE FRAME H
<Article.Parameter>	Article data - parameters	WG40; HR=1800MM; B=1000MM
<Article.Remarks>	Article data – remarks	
<Article.Weight>	Article data - weight	13,00kg
<Article.ProductLine>	Article data – product catalog	MGE
<Article.CodeNo>	Article data – commodity code	76101000
<Article.NetPrice>	Article data – net price	147,00
<Article.ListPrice>	Article data – list price	150,00
<Article.Subtotal>	Article data – sub total	147,00
<Article.Currency>	Article data - currency	EUR
<Article.AssemblyTime>	Article data – assembly time	0,0
<Article.Sawed>	Article data – checkbox “sawed part”	No
<Article.MaterialCostIncrease>	Article data – material cost surcharge	0,0%
<Article.Discount>}	Article data - discount	2,0%
<Price.TotalGrossListPrice>	Price calculation - total material price	150,00
<Price.TotalNetPrice>	Price calculation - total material net price	147,00
<Price.TotalPrice>	Price calculation – total price	147,00
<Price.Currency>	Price calculation - currency	EUR
<Assembly.TotalTime>	Price calculation – total assembly time	0,0
<Assembly.TotalCosts>	Price calculation – total assembly cost	0,00
<Assembly.TotalWeight>	Order list – total weight	13,000
Date		
<Info.Date>	Actual date	08.11.2013