

Wholegoods Inventory List Export

Ibcos have produced a spreadsheet to manipulate the standard export file for the Wholegood Inventory List into a professional format useful for salespersons.

The resulting Excel spreadsheet is divided into separate sheets for wholegood group codes with each stocked wholegood detailed within.

The Ibcos spreadsheet is named whlgood.xls and is available from Ibcos Support. This spreadsheet should be stored on a users pc, ideally in the same location as the Gold excel export files are stored when produced in Windows Gold.

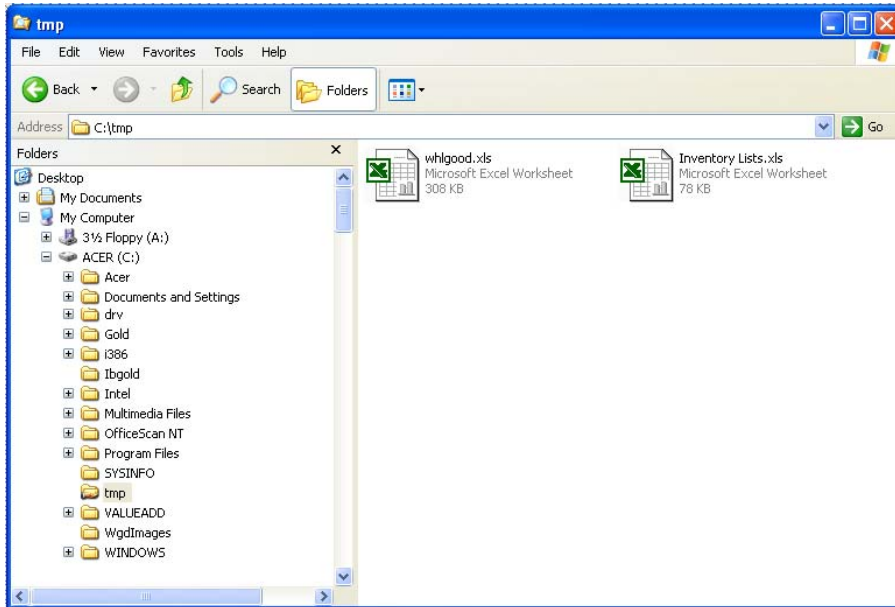
Note: this is only available for a Terminal Server set up.

1. Export the Wholegood Inventory List

From the Windows version of Gold, use the standard option to export the Wholegood Inventory List to Excel. This produces a default of the Internal Summary style of report and creates a spreadsheet called Inventory Lists.xls

The screenshot shows the 'Inventory Lists Print Preview' dialog box. The 'Options' tab is active. The 'Report Type' is set to 'Internal Summary', 'Report Sequence' is 'Group/Stock No', 'Machine Type' is 'New and Used', and 'Cut Off Date' is '6/01/2009'. The '(WHOLEGD) Type' is '[WHOLEGD] and [VEHIC]', '(WHOLEGD) Stock Status' is 'All stock statuses', and 'Print Specification?' is 'Do not show Specifications'. A sub-dialog 'Inventory Lists' is open, showing 'Excel Filename:' set to 'Inventory Lists'. The main dialog has 'OK', 'Cancel', 'Save', 'Batch', 'Reset', and 'Default' buttons at the bottom.

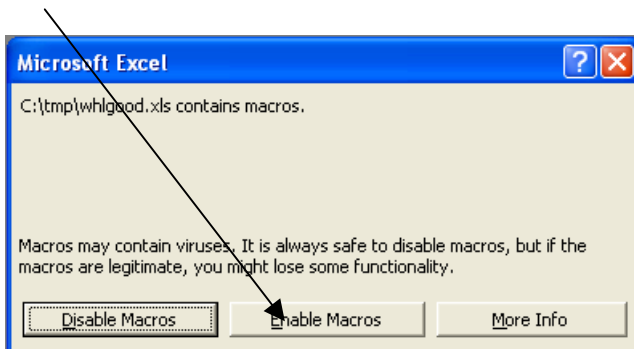
The spreadsheet will be saved to the default directory set up for the user, for example, C:\tmp



2. Open whlgood.xls

Using Microsoft Excel, open the spreadsheet whlgood.xls

Office 2000 and 2003 will prompt that the spreadsheet contains macros. Select “**Enable Macros**” to continue. Office 2007 may need the security options for macros adjusted.



The spreadsheet may take a minute to load as it builds the background information.

If the source spreadsheet (Inventory Lists.xls) is changed the whlgood.xls spreadsheet must be reloaded.

3. Refresh Data

Using Microsoft Excel, open the spreadsheet whlgood.xls

The screenshot shows the Microsoft Excel interface with the 'whlgood.xls' spreadsheet open. The 'Refresh Data' form is displayed in the spreadsheet cells. The form includes the following fields and options:

- Price From**: £0.00 **To**: £0.00
- Make**: *ANY* (dropdown menu)
- Model**: *ANY* (dropdown menu)
- Condition**: *ANY* (dropdown menu)
- Description Contains**: (text input field)
- Stock Number Contains**: (text input field)
- Buying Rep**: (text input field)
- Internal
- Use Uniform Column Sizes
- Image Path**: C:\WgdImages\ (text input field)
- Load Images (Images must be in '.jpg' format)
- Records are ignored if they have no make or model code
- Refresh Data** button

Key Entry Fields

Price From/To	The default will include all wholegoods regardless of price. A price range may be entered to include wholegoods with a sell price within the range entered.
Make	Enter a 2 character make (supplier) code or select from the list.
Model	Enter a model code or select from the list.
Condition	Enter a condition or select from the list.
Description Contains	Enter a partial description if required, e.g. Tractor.
Stock Number Contains	Enter a partial stock number if required, e.g. 100004
Buying Rep	Enter the buying sales representatives initials if required to see data for a single rep.

Internal	Adds Cost Price and Estimated Cost to the spreadsheet. Also includes the Group cost on the Index page.
Use Uniform Column Sizes	If ticked, all columns on all pages will be the same size as the biggest column. Otherwise each column is sized to fit the contents.
Image Path	If required a path to a folder containing pictures of the wholegoods may be entered. Images must be jpg format and the file name needs to be the wholegood number followed by a-z for multiple images, e.g. 10000468a.jpg
Load Images	Tick the option to include images from the path entered above.

After selecting the required options, click on “Refresh Data” to update the data from the Inventory Lists spreadsheet.

4. Completed Spreadsheet

Inventory Lists.xls

The original file as exported from Gold.

A	B	C	D	E	F	G	H	I	J	K	L	R
43	1	1	NTRA	10000469	N	NH	5400	MAGNUM				1201 Main
44	1	1	NTRA	10000471	N	JD	6800	6800 TRACTOR	6635424	JHO4TRA		1201 Main
45	1	1	NTRA	10000473	N	NH	5400	MAGNUM	KJD65553			1203 Adver
46	1	1	NTRA	10000474	N	NH	5400	MAGNUM				1200 James
47	1	1	NTRA	10000475	N	CA	7220	MAGNUM				1200 James
48	1	1	NTRA	10000478	N	NH	5400	MAGNUM				1200 Mr A
49	1	1	NTRA	10000481	N	NH	5400	MAGNUM				1200 Mr A
50	1	1	NTRA	10000482	N	NH	5400	MAGNUM				1200 James
51	1	1	NTRA	10000483	N	NH	5400	MAGNUM				1200 Mr A
52	1	1	NTRA	10000484	N	CA	7220	MAGNUM				1200 Mr A
53	1	1	NTRA	10000485	N	JD	6800	6800 TRACTOR	889705/105			1200 James
54	1	1	NTRA	10000486	N	JD	6800	6800 TRACTOR				1200 Mr A
55	1	1	NTRA	10000488	N	NH	5400	MAGNUM				1200 Mr A
56	1	1	NTRA	10000489	N	NH	5400	MAGNUM				1200 Mr A
57	1	1	NTRA	10000494	N	JD	6800	6820 TRACTOR				1201 Main
58	1	1	NTRA	10000495	N	JD	6800	6820 TRACTOR				1201 Main
59	1	1	NTRA	10000496	N	JD	6800	6820 TRACTOR				1201 Main
60	1	1	NTRA	10000497	N	OT	STOCK	WHOLEGOOD STOCK				1000 Self
61	1	1	NTRA	10000501	U	NH	5400	MAGNUM TRACTOR				1209 Mr P
62	1	1	NTRA	10000502	N	CA	MXU100X	TRACTOR				1100 Case
63	1	1	NTRA	10000503	N	CA	MXU110X	TRACTOR	JJF663876783			1100 Case
64	1	1	NTRA	10000505	N	NH	TN75FA	TRACTOR	TN75A-636552443			1204 New I
65	1	1	NTRA	10000506	N	NH	TN85FA	TRACTOR	277HH662223		2	1204 New I
66	1	1	NTRA	10000507	N	NH	TN95FA	TRACTOR	327HS380923			1204 New I

Whlgood.xls

New formatted spreadsheet.

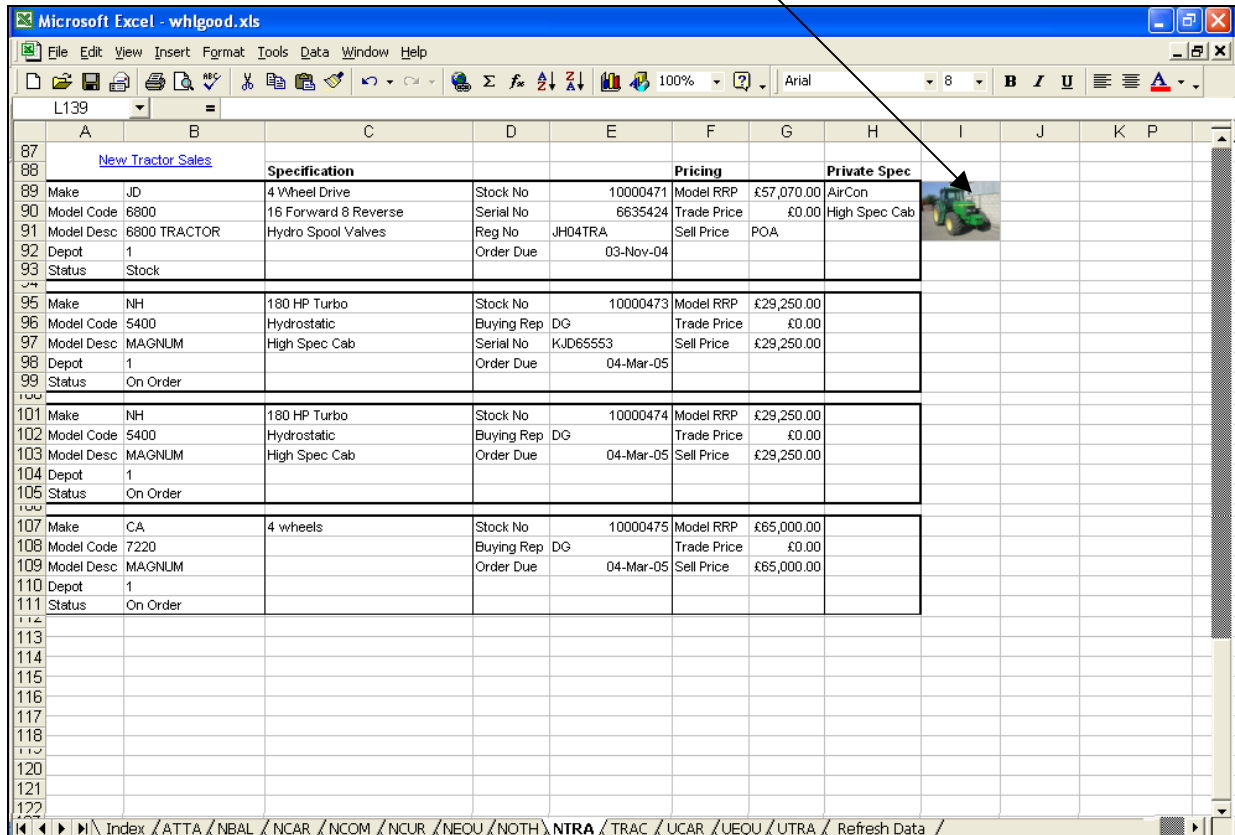
The **Index** page displays a summary of the following sheets, which are split into respective Wholegood groups.


Click on a group code to jump to that sheet or use the tabs at the bottom of the spreadsheet.

Group	Description	Number of Items
ATTA	New Attachments	3 items (1 Page)
NBAL	New Baler	1 item (1 Page)
NCAR	New Car	5 items (1 Page)
NCOM	New Combine	3 items (1 Page)
NCUR	New Curtain Sider	8 items (2 Pages)
NEQU	New Equipment	6 items (1 Page)
NOTH	New Other Equipment	2 items (1 Page)
NTRA	New Tractor Sales	53 items (8 Pages)
TRAC	No Description	1 item (1 Page)
UCAR	Used Car	3 items (1 Page)
UEQU	Used Equipment	2 items (1 Page)
UTRA	Used Tractor	8 items (2 Pages)

Each tabs shows all the wholegoods within the group code with details such as description, stock status, RRP and Sell price (cost prices are only shown if the Internal option is selected when refreshing data).

If images have been created these are shown as thumbnails alongside the wholegood. Click on an image to display the full picture.



	A	B	C	D	E	F	G	H	I	J	K	P
87												
88		New Tractor Sales	Specification			Pricing		Private Spec				
89	Make	JD	4 Wheel Drive	Stock No	10000471	Model RRP	£57,070.00	AirCon				
90	Model Code	6800	16 Forward 8 Reverse	Serial No	6635424	Trade Price	£0.00	High Spec Cab				
91	Model Desc	6800 TRACTOR	Hydro Spool Valves	Reg No	JH04TRA	Sell Price	POA					
92	Depot	1		Order Due	03-Nov-04							
93	Status	Stock										
95	Make	NH	180 HP Turbo	Stock No	10000473	Model RRP	£29,250.00					
96	Model Code	5400	Hydrostatic	Buying Rep	DG	Trade Price	£0.00					
97	Model Desc	MAGNUM	High Spec Cab	Serial No	KJD65553	Sell Price	£29,250.00					
98	Depot	1		Order Due	04-Mar-05							
99	Status	On Order										
101	Make	NH	180 HP Turbo	Stock No	10000474	Model RRP	£29,250.00					
102	Model Code	5400	Hydrostatic	Buying Rep	DG	Trade Price	£0.00					
103	Model Desc	MAGNUM	High Spec Cab	Order Due	04-Mar-05	Sell Price	£29,250.00					
104	Depot	1										
105	Status	On Order										
107	Make	CA	4 wheels	Stock No	10000475	Model RRP	£65,000.00					
108	Model Code	7220		Buying Rep	DG	Trade Price	£0.00					
109	Model Desc	MAGNUM		Order Due	04-Mar-05	Sell Price	£65,000.00					
110	Depot	1										
111	Status	On Order										
112												
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5. Saving

It is recommended that the spreadsheet is **not** saved on exit but refreshed each time it is loaded. If a static copy is required, the "Save As" option can be used.