Automated Template Instructions

Using the Trilogie Bid Download Template automates the process of downloading and formatting bids and orders for conversion to ProVisions portfolios. This will not create the portfolio for you on the ProVisions website, but it will prepare the file for upload. Please follow the instructions below to automatically download a bid or order through PVIS in Trilogie.

NOTE: ProVisions does not accept scrambled bids. Alt codes must be present for ProVisions to match products to information in the database.

Getting Started

- Download the template and open it.
- For LOGON, designate the location that hosts the bid or order you want to download using the appropriate name or abbreviation (for example, Portland is PORTLAND and Jacksonville is JAX).
- Username and Password are the same combination you use to log in to Trilogie.
- Enter the bid or order number making sure to precede any bid number with a "B".

Using the Template

• After entering your information and clicking the “Download” button, please allow the template to send all commands to your computer uninterrupted. Do not click anything else or enter any keystrokes while the template is working. Once the template is finished, it will log you out of Trilogie, bring Excel to the foreground, and the "Import" button will be highlighted in green (at this time, you may resume activity in other programs).

• Click the "Import" button to import the bid or order to Excel. The "Clean" button will now be highlighted in green. Click it, and the template will switch to your bid or order and ask several questions about formatting.

NOTE: when asked about room names, choosing "yes" will format text in the selected cell so that ProVisions will recognize it as a room name while choosing "no" will clear the row. Room names must be followed by at least one product; bids and orders may not contain empty rooms; any empty room will cause an error when uploading to ProVisions.

Products designated by SP-codes will be highlighted in yellow. Please review all SP-code products to ensure that information is present in the required columns (SKU, vendor, description, and UM).

Once formatting is complete, click the "Run/Save" button located at left. Doing so will save a .txt version of the bid or order to your Downloads folder. You may then upload that file to ProVisions to create a portfolio.

Creating a Portfolio

- Log in to ProVisions and choose "New Portfolio" near the top of the page.

- Fill out the necessary information and click the "Choose File" button.

- Navigate to your Downloads folder, choose the appropriate .txt file and click "Open".

- Click the "Continue" button at the bottom-right corner of the page. At this point a portfolio has been created.

- The next page allows you to upload a custom logo if you wish to do so. If not, simply click "Continue".

- Near the bottom left of your screen under the "Preview and Print" menu is a command called "Portfolio Summary". By selecting this link, you will see all products in your portfolio and be able to add images that are not in your database.