



# Commport Internet EDI | User Guide

This is a general use and process guide, it is not hub specific.

Version 1.1

April 11, 2016

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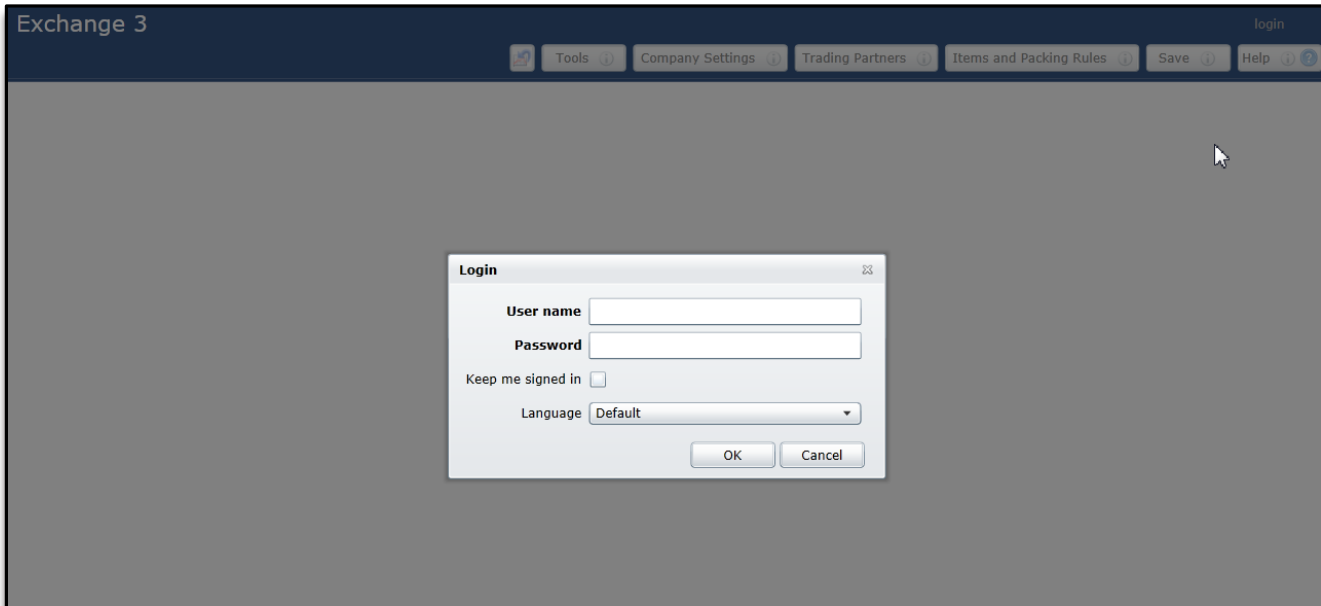
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## Accessing Internet EDI

Go to the Internet EDI website at <https://exchange3.commport.com> to login.

You will be presented with a Username and Password prompt. Enter the username and password as provided by Commport.

**Fig 1.0**



After entering your Username and Password a new screen will appear that will enable you to view and post orders, create purchase order acknowledgements, shipments and invoices to be sent.

## Navigating your Mailbox

Upon login, the system will automatically present the Mailbox Tab defaulted to the Inbox. The Mailbox is divided into 2 main folders: the Inbox and the Outbox. The Inbox lists all inbound EDI documents (documents you receive) and the Outbox lists all outbound documents (documents you send).

By default the Inbox is initially selected, and all types of inbound documents appear in the list. The Inbox can be expanded by pressing the little arrow just to the left of "Inbox." This will expand the Inbox to reveal sub-folders. Selecting any one of the subfolders will filter the list of documents just to the types of documents described by the sub-folder name. The same is true of the Outbox and its sub-folders.

The column headings will provide information that will help you identify each transaction type, along with sending and receiving parties, important dates, document status, and more.

**Fig 2.0**

	Sender	Document Type	Document Date	Doc Number	PO Number	Received	Status
1	Commport Hospital	850 - Purchase Order	Jul-14-2013	50505052	50505052	Nov-21-2013 02:25P	New
2	Commport Hospital	850 - Purchase Order	Jul-14-2013	50505051	50505051	Nov-21-2013 02:25P	New
3	Commport Hospital	850 - Purchase Order	Jul-14-2013	10101010	10101010	Nov-08-2013 09:52A	New

**Mailbox** tab displays the Inbox by default which displays all transactions that have been sent by your trading partner(s).

**Orders** tab displays the active sales orders that are available in the system along with their current status.

**Shipments** tab displays the active shipments (Advanced Shipping Notifications or ASNs) that are in the system along with their current status.

**Invoices (will only appear if you are set up to do Invoices)** tab displays the active invoices that are in the system along with their current status.

**DSD Statements (will only appear if you are set up to do DSDs):** Tab displays the active direct to store statements with their current status. You can also create new statements.

*Within the inbox the information about your transactions include:*

**Sender:** The name of the trading partner that has sent the transaction

**Document Type:** Indicates what type of transaction received from trading partner

**Document Date:** The date the transaction was issued by the trading partner. This is most often the same date as the received date (may be different if the document resent).

**Document Number:** An original number sent on the transaction.

**PO Number:** Purchase order number assigned by the trading partner.

**Received:** Date the transaction was received into Internet EDI

**Status:**

Posted – purchase order has been turned into a customer order.

Applied – Purchase order change (860) has been applied.

Error – Purchase order change (860) cannot find matching Purchase order (850)

New – Untouched Purchase order.

**Viewed:** Transaction has been viewed at least once.

### **PURCHASE ORDERS (850)**

**Sender:** The name of the trading partner that has sent the transaction.

**PO Number:** Purchase order number assigned by the trading partner.

**PO Date:** Purchase order date as assigned by the trading partner.

**Value:** This is the dollar amount of the purchase order. It will default to \$0.00 if no value is sent.

**Received:** Date the transaction was received into Internet EDI

**Document Type:** Indicates what type of transaction received from trading partner

**Status:**

Posted – purchase order has been turned into a customer order.

Applied – Purchase order change (860) has been applied.

Error – Purchase order change (860) cannot find matching Purchase order (850)

New – Untouched Purchase order.

**PLANNING SCHEDULES /ORDER FORECASTS (830)**

**Sender:** The name of the trading partner that has sent the transaction

**Document Type:** Indicates what type of transaction received from trading partner

**Document Date:** The date the transaction was issued by the trading partner. This is most often the same date as the Rec'd Date (may be different if the document resent).

**Document Number:** An original number sent on the transaction.

**Received:** Date the transaction was received into Internet EDI

**PMTS REMITTANCE (820)**

**Payer:** Name of the trading partner.

**Payer Action:** Payment Type

**Value:** Dollar Amount of Payment

**Effective Pmt Date:** Date of Payment

**Received:** Date the transaction was received into Internet EDI

**PRODUCT ACTIVITY/SALES (852)**

**Sender:** The name of the trading partner that has sent the transaction

**Document Type:** Indicates what type of transaction received from trading partner

**Document Date:** The date the transaction was issued by the trading partner. This is most often the same date as the Rec'd Date (may be different if the document resent).

**Document Number:** An original number sent on the transaction.

**Received:** Date the transaction was received into Internet EDI

**CUSTOMER MESSAGES (864)**

**Sender:** The name of the trading partner that has sent the transaction

**Document Type:** Indicates what type of transaction received from trading partner

**Document Date:** The date the transaction was issued by the trading partner. This is most often the same date as the Rec'd Date (may be different if the document resent).

**Document Number:** An original number sent on the transaction.

**Received:** Date the transaction was received into Internet EDI

**Outbox**

Shows transactions that have been sent or are on hold status. On Hold transactions are transactions that have been created and are ready to be sent but have been put on hold awaiting release.

You can expand the Outbox to have your transactions segregated by transaction type. When using the transaction type specific view, there are details available that are specific to each transaction type.

**INVOICES (810)**

**Sent To:** Shows the name of trading partner that the invoice has been or will be transmitted to

**Invoice Number:** Invoice number, this is the document number for the invoice

**Invoice Date:** Date of invoice

**Amount:** Total Dollar Amount of Invoice

**Sent:** Date Invoice was transmitted to Trading Partner

**Type:** 810 = Invoice

**PO Number:** Purchase order number as assigned by the trading partner.

***Status Definitions:***

**New:** Status will only be new when the invoice is received and has not been translated to EDI. This status is very rare.

**Sent:** Document has been sent to trading partner and no Functional Acknowledgement (997) has been received yet.

**Accepted:** 997 has been received by the trading partner.

**Rejected:** 997 has been received by the trading partner but was rejected due to an issue with the EDI structure.

**SHIPMENT NOTICES (856)**

**Sent To:** Name of the trading partner that the Shipment Notice has been transmitted to

**Ship To:** Name of the store or DC that shipment is being delivered

**Ship From:** Name of the party that is shipping the goods

**Ship Date:** mm/dd/yr of shipment sent to destination

**ASN Ref #:** Shipment Number

**BOL #:** Bill of Lading Number

**Lading Qty:** Number of Containers or Pallets

**Total Weight:** Total Weight of Shipment

**PO Number:** Purchase order number as assigned by the trading partner.

***Status Definitions:***

**New:** Status will only be new when the shipment notice is created and has not been translated to EDI. This status is very rare.

**Sent:** Document has been sent to trading partner and no Functional Acknowledgement (997) has been received yet.

**Accepted:** 997 has been received by the trading partner.

**Rejected:** 997 has been received by the trading partner but was rejected due to an issue with the EDI structure.

**PURCHASE ORDER ACKNOWLEDGMENTS (855)**

**Sent to:** Shows the name of trading partner that the acknowledgment has been or will be transmitted to.

**Document Type:** Patric to have Vlad remove – redundant

**Document Number:** An original number sent on the transaction.

**PO Number:** Purchase order number as assigned by the trading partner.

**Document Date:** Date the document was created by the customer, but not sent.

**Sent:** Date the transaction was sent from Internet EDI

**Status Definitions:**

**New:** Status will only be new when the invoice is received and has not been translated to EDI. This status is very rare.

**Sent:** Document has been sent to trading partner and no Functional Acknowledgement (997) has been received yet.

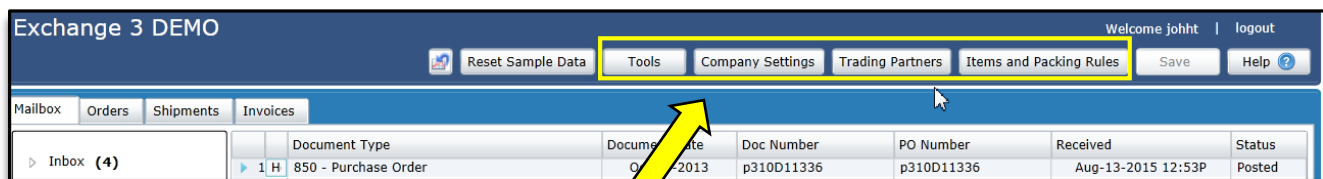
**Accepted:** 997 has been received by the trading partner.

**Rejected:** 997 has been received by the trading partner but was rejected due to an issue with the EDI structure.

## Account Administration

Administration of your account and settings in Internet EDI is accessible from the buttons located at the top right of the page. Refer to figure 3.0 below.

**Fig 3.0**



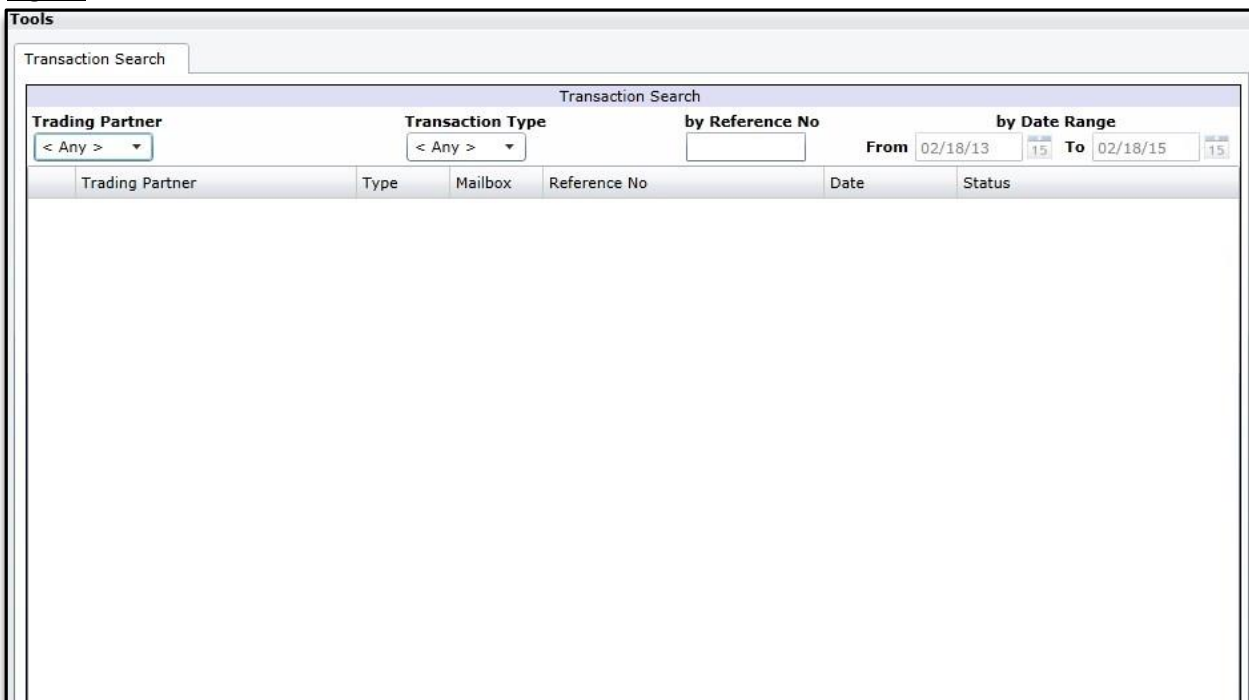
## Tools

It is important to note that this section is found on the home screen as a separate button and not under Company Settings in one of the tabs. Refer to figure 3.0 below.

## Transaction Search

The transaction search tool allows you to filter out unwanted data/transactions in order to find exactly what you are looking for. Transaction search includes transactions that are no longer visible due to the document threshold you set previously. This way old transaction are always available to you.

**Fig 4.0**



**Trading Partner:** Can search for documents sent and received by specified Trading Partners you deal with.

**Transaction Type:** Search by Business or EDI document Type i.e. Invoice (810), Purchase order (850), Advance Ship Notice (856) etc.

**By Reference No:** Ref number could be the Invoice #, PO #, Shipment ID, CO #.

**By Date Range:** When the EDI or document was created in system or received into Internet EDI.

**Find Transactions:** Does the search based on the settings you have selected.

**Open Selected Transactions:** will open the selected document. Can also be done by double clicking the document in the list.

## Company Settings

You can access the Company Settings section by selecting the Company settings button shown in figure 3.0 above. The Company Settings section allows you to set up your account profile, tax jurisdictions, company addresses and document thresholds, refer to figure 5.0 below.

**Fig 5.0**

**Company Setting**

Profile | Tax Jurisdictions | Company Addresses | 3PL Users | Document Threshold

Name of Business: Commport Demo 50 | Language: [v]

**Transaction Control Numbers**

Sales/Customer Orders	<input type="text"/>	No	<input type="text" value="4"/>
Invoices	<input type="text"/>	No	<input type="text" value="0"/>
Shipments/ASNs	<input type="text"/>	No	<input type="text" value="0"/>
PO Acks	<input type="text"/>	No	<input type="text" value="4"/>
DSD Statement	<input type="text"/>	No	<input type="text" value="0"/>

**Electronic ID Numbers**

ISA ID Qualifier: [v]  
 ISA Interchange ID:   
 GS App Code:   
 GS1 (UCC, EAN) Company Prefix:

**Main EDI or IT Contact**

Name:   
 Phone:   
 Email:

**Canadian Provinces**

GST or HST Registration Number:    
 Taxes for All Provinces turn

**USA settings**

Taxes for All States turn

Send Alerts and Notifications To

Name	Email



## Profile Tab

The profile tab allows you to set your contact details, including specifying whom to send the Alerts and Notifications from Internet EDI.

### Language:

You can select your language preference which will determine what language Internet EDI will be presented to you in. The system default language is English, or your operating system's default language.

### GS1 Company Prefix:

Enter your GS1 Company Prefix (also known as a UCC/EAN number or company prefix) in this section. This number is required to print labels. You may be wondering why you need a GS1 Company Prefix. Look at it as the license plate of an item or product moving through the supply chain. It forms the base for a family of identifiers that uniquely distinguish your company's products, locations, documents, shipments and relationships in the supply chain.

### Transaction Control Numbers:

There are two boxes for each transaction type. The first box can be used to designate characters to be used to prefix all control numbers for your company. Some examples could be:

- INV for invoice
- CO for purchase orders.

Internet EDI gives you the option to specify them (or not at all) for each transaction type. The transaction control numbers allow you to establish the starting number to support the system's ability to automatically increment document numbers. Using the value in this section for Orders (850), Invoices (810), Advanced Ship Notices (856) and Purchase Order Acknowledgements (855), the system will assign a unique document number each time you create a new document. This number will increment every time you begin a new document of the same type. The document number on an invoice can be over written when creating a new document by keying the desired number into the document during creation.

### Taxes:

You can also turn on or off taxes for Canada or the U.S.A. This is also the section where you can enter your GST or HST registration number. Refer to figure 6.0 below.

**Fig 6.0**

The screenshot shows the 'Company Setting' profile tab. The 'Name of Business' is 'Commport Demo 50'. The 'Language' is set to a dropdown menu. The 'Transaction Control Numbers' section includes fields for 'Sales/Customer Orders' (CO, No, 10098), 'Invoices' (INV, No, 10050), 'Shipments/ASNs' (No, 0), 'PO Acks' (No, 0), and 'DSD Statement' (No, 0). The 'Electronic ID Numbers' section includes 'ISA ID Qualifier' (dropdown), 'ISA Interchange ID' (0), and 'GS App Code' (0). The 'GS1 (UCC, EAN) Company Prefix' is '1234567'. The 'Main EDI or IT Contact' section has fields for 'Name', 'Phone', and 'Email'. At the bottom, the 'Send Alerts and Notifications To' table lists one contact: '1 Fake Smith' with email 'fake@commport.com'.

## Tax Jurisdictions

This section is automatically filled out for you by the Internet EDI.0 system.

However, just as a review, this is the area where you would establish tax percentages and handling based on the jurisdiction. You can also turn on/off taxes for Canada or the U.S.A. This is also the section where you can enter your GST or HST registration number. Refer to figure 7.0 below.

**Fig 7.0**

**Company Setting**

Profile | **Tax Jurisdictions** | Company Addresses | 3PL Users | Document Threshold

**Canadian Provinces**

**GST or HST Registration Number** 12345679RT000

Taxes for All Provinces turn

**USA settings**

Taxes for All States turn

**Jurisdictions**

Jurisdiction ID	On/Off	Description
1 ON-Ontario	<input checked="" type="checkbox"/>	
2 AB-Alberta	<input checked="" type="checkbox"/>	
3 QC-Quebec	<input checked="" type="checkbox"/>	
4 NS-Nova Scotia	<input checked="" type="checkbox"/>	
5 SK-Saskatchewan	<input checked="" type="checkbox"/>	testing
6 SK-Saskatchewan	<input checked="" type="checkbox"/>	
7 MB-Manitoba	<input checked="" type="checkbox"/>	
8 NL-Newfoundland	<input checked="" type="checkbox"/>	

Figure 7.1 is the window that appears when you select edit a jurisdiction. You can add a new tax to a jurisdiction in this screen. You can also edit the default taxes.

**Fig 7.1**

**Jurisdiction settings**

**Jurisdiction ID** ON-Ontario

**Description**

**Is Active**

**Jurisdiction Taxes**

Tax	Description	%	Registration Number	On/Off
HST		13.00%	12345679RT000	<input checked="" type="checkbox"/>

Figure 7.2 displays the screen that appears if you select 'Add' to add a new tax into an existing jurisdiction. The Tax field is a drop down list that allows you to select applicable taxes for Canada. The rest are self-explanatory.

**Fig 7.2**

The screenshot shows a dialog box titled "Tax settings". It contains the following fields and controls:

- Tax**: A dropdown menu.
- %**: A text input field.
- Registration Number**: A text input field with a mouse cursor over it.
- Description**: A larger text input field.
- Is Active**: A checkbox with a minus sign icon.
- Buttons: **Save**, **OK**, and **Cancel**.

Figure 7.3 displays the screen that appears if you edit an existing tax.

**Fig 7.3**

The screenshot shows the "Tax settings" dialog box with the following pre-filled values:

- Tax %**: 13.00%
- Registration Number**: 12345679RT000
- Description**: (Empty)
- Is Active**:
- Buttons: **Save**, **OK**, and **Cancel**.

## Company Addresses

The Company Addresses tab allows you to establish default addresses in the system. You can store addresses for your company's different locations.

**Fig 8.0**

The screenshot shows the "Company Setting" window with the "Company Addresses" tab selected. The table below lists the addresses:

Name	Loc Number	Address Line 1	City	Province	Postal Code
Widget World Inc. (WHS)	V1234	99 Dusty Road	Calgary	AB	N0B 2B0
Widget World Inc.	12345	123 Any Street	Toronto	ON	M4X 2T5
Widget World	55566	555 Test St	Aurora	ON	L4G 5L4
Training	12345	123 Fake St	Aurora	ON	L3Z 2Z9
Jesse James Co.	V1874	13 Wild West Rd.	Tombstone	AB	A8C 3E7
<b>Commport</b>	<b>V1234</b>	<b>5 Scanlon Court</b>	<b>Aurora</b>	<b>ON</b>	<b>L3Z 2Z9</b>
Altwin Dist.		123 Any Stree	Medicine Hat	AB	T1A 8L6

To add a new address, select the 'Add' button. If you want to edit an existing address select the 'Edit' button. You can also delete an address/location from the list. All of these buttons are found at the top right of the screen, refer to figure 8.0.

**Fig 8.1**

The screenshot shows a dialog box titled "Edit/View Address". It contains the following fields and controls:

- Name:** Widget World Inc.
- Location Number (optional):** 12345
- Location Description:** (empty)
- Line1:** 123 Any Street
- Line2:** (empty)
- City:** Toronto
- Province/State:** ON-Ontario (dropdown menu)
- Postal/Zip Code:** M4X 2T5
- Country:** CA-Canada (dropdown menu)
- Contact Name:** (empty)
- Contact Telephone #:** (empty)
- Contact Email Address:** (empty)
- Default Remit-To:**
- Default Ship-From:**
- This Location is a 3PL:** (checkbox)

At the bottom right, there are three buttons: "Save", "OK", and "Cancel".

**Name:** Company Name

**Location Number:** This is the location number identifier. The most common number used is a DUNS (Dun & Bradstreet) number. If your organization has multiple locations that are identified using a number, this field is where you can store this information.

**Location Description:** You can enter a description such as Head Office to help make the address easier to identify.

**Line 1, Line 2, City, Province/State, Country, Postal/Zip Code, and Country:** These fields are the physical address that will be transmitted in EDI documents that use this address.

**Contact Name, Contact Telephone and Contact Email Address:** A place to store contact information for that location.

**Default Remit-To and Default Ship-From:** If you select the checkmark you have activated the addresses to populate on the various transactions for that Trading Partner. It will populate the Remit-To and/or Ship-From depending on your selections here.

### 3PL Users

This tab is currently under construction and not available for use as of yet.

### Document Threshold

This tab allows you to set a transaction data threshold. It will automatically filter out transactions that have a status of **Complete**, **Closed**, **Cancelled** or **Viewed** and that are older than the threshold date that you set. Transactions that are **Complete**, **Closed**, **Cancelled** or **Viewed** will no longer be visible if they are older than the threshold you set. Open and incomplete transactions will always be visible regardless of the threshold you set. Refer to figure 9.0.

It is important to note that although old documents may not be visible, they are still searchable using the Transaction search tool under the Tools button on the home screen. Refer to figure 3.0.

This setting helps you to remove old data and ensures that you receive improved overall system performance because you are reducing the size of your working data.

**Fig 9.0**

**Set Threshold In:** Select either Months or Days.

**Number:** Amount of threshold. Max is 12 months or 365 days

**Save Threshold:** Saves the threshold. When you save the threshold it automatically reloads your transactions with the new threshold.

## Items and Packing Rules

It is important to note that this section is found on the home screen as a separate button and not under Company Settings. Refer to figure 3.0

This is where you can load your product catalogue. If you add your items into Internet EDI, they will be available for use on transactions you create using the system. This tab allows you to Import or Export a product catalogue or manually enter products individually. To import a catalogue it must be in a CSV (Comma Separated Variable) format which is a recognized format that excel files can be saved in.

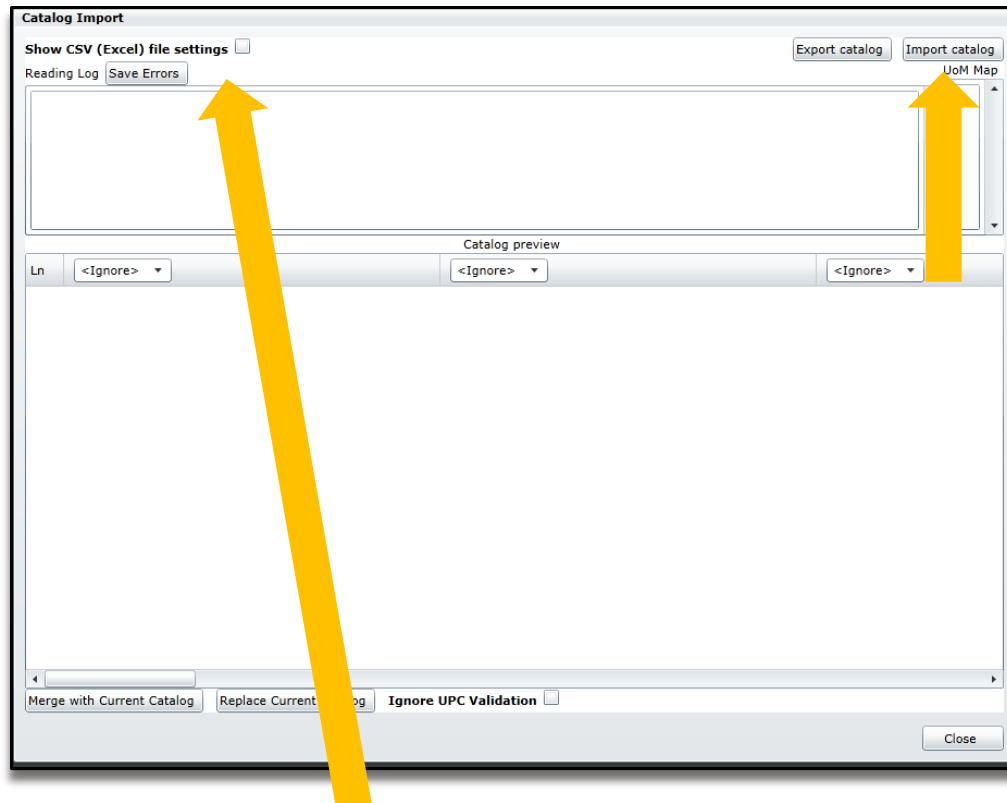
**Fig 10.0**

	Active	UPC Code	Vendor No	Buyer No	Item Description
▶ 1	✓	775276002095	209		Joist Hanger 22G Galv 2X4
2	✓	775276902098	269		Joist Hanger 22G Galv 2X4 - Case Qty 200
3	✓	1519283491827	289		"Frozen" lug nuts

If you want to import a product catalogue simply press the 'Import or Export Item Catalog' button it will bring you to a new window. Refer to Fig 10.1 below

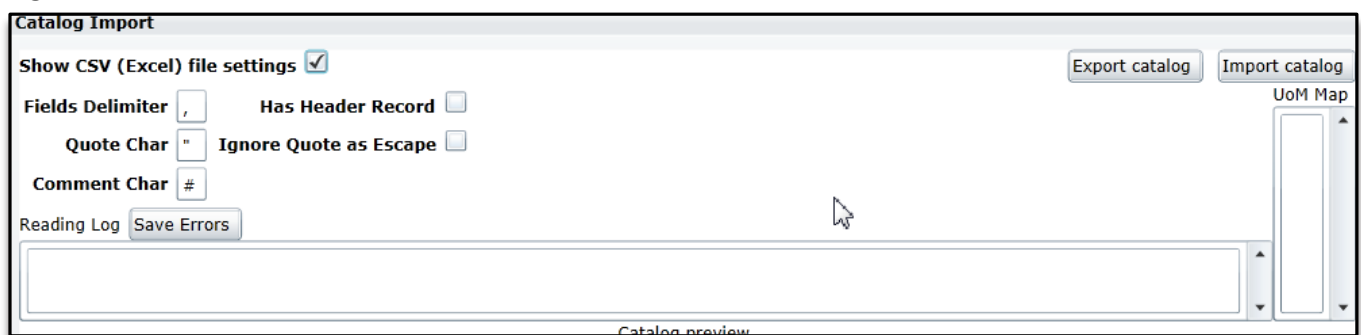
Click 'Import catalog'. Select your CSV file you would like to import. ***Please note that the file you are importing has to be a CSV file.***

**Fig 10.1**



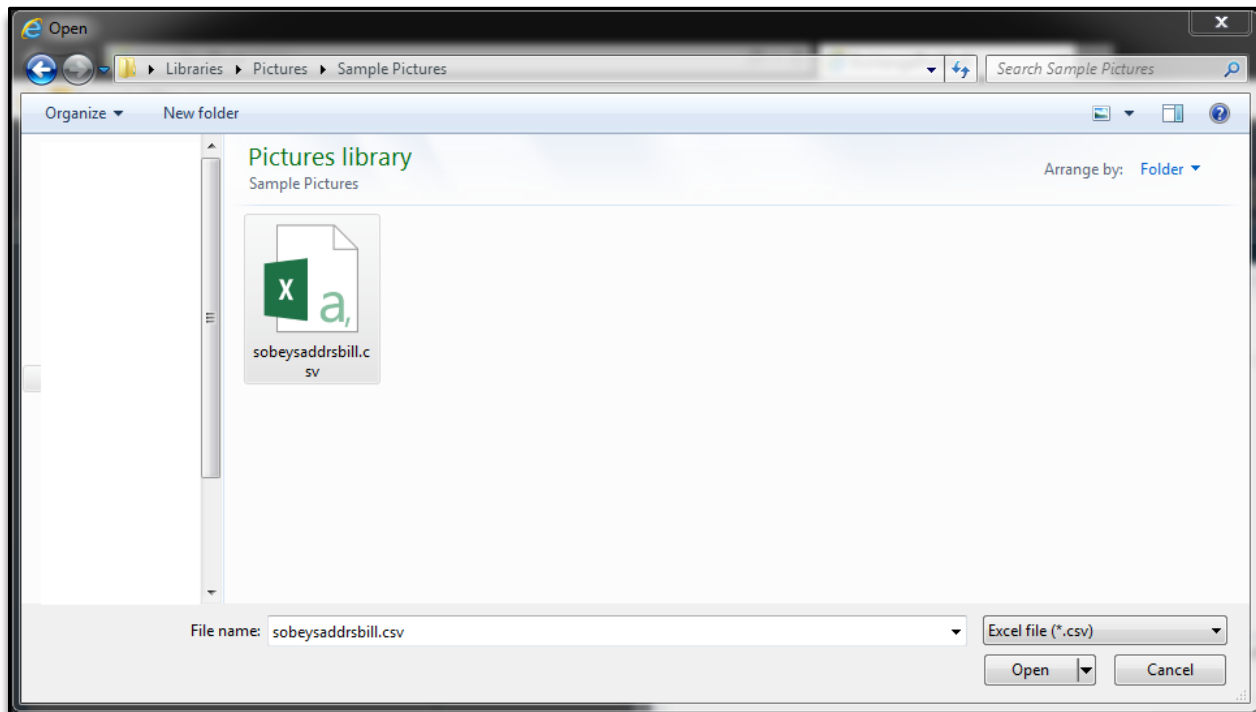
If your file contains column titles you will have to select 'Show CSV (Excel) file settings'. This will bring up a new window. See Figure 10.2 below. Select 'Has Header Record'. This will ensure that the files' column titles are not imported as well.

**Fig 10.2**



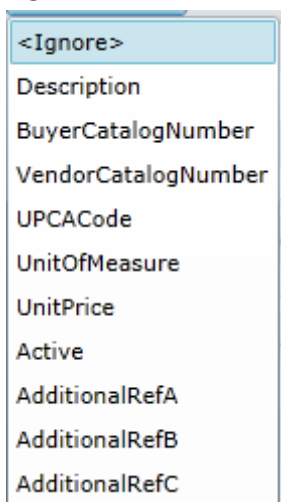
Once you have selected the CSV file to import you will have to map the fields from your file to the fields available in Internet EDI. This is telling Internet EDI.0 where you want the data from your file to be placed in the catalog fields available.

**Fig 10.3**



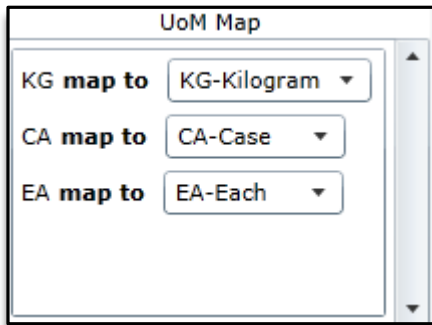
Map the fields from the CSV to the right files in the drop down lists for each column.

**Fig 10.4**



When you select Unit of Measure (UOM) in the drop down list, you will be prompted to map all the different words listed in that column to the right 2 digit UOM.

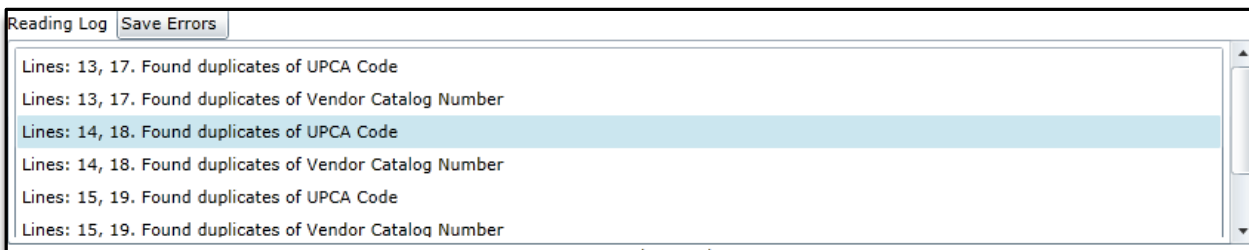
**Fig 10.5**



Once you have mapped the fields, you can select either 'Merge with current catalog' or 'Replace current catalog'. Merge will only import Items that are not already there. This is based on the UPC Code and Vendor catalog number. The system does a check on the UPC code to make sure it's valid. To ignore this rule, check the Ignore UPC Validation box. Replace will delete whatever is currently in the catalog and replace it with the catalog you are importing.

If there are any issues on the import, they will be shown in the error box. The errors will reference which line the error occurred on in the csv file. You can save the errors to your PC by clicking 'Save Errors'.

**Fig 10.6**



## Packing Rules

This section is currently under construction and not available for use.



## Trading Partner Defaults

It is important to note that this section is found on the home screen as a separate button and not under Company Settings in one of the tabs. Refer to figure 4.0

Trading partner defaults is where you set up all of the detail/defaults for your trading partners.

**Fig 11.0**

The screenshot shows the 'Trading Partners' window for 'Walmart' with 'System I.D. 556'. The 'Partner Defaults' tab is active. The 'General Settings' section contains 'My Vendor Number' (text input), 'Preferred Currency' (dropdown), and 'Read Only Settings' (a list of 'All Interchange Ids' including ISA ZZ:0078742000008, ISA ZZ:0681131000000, ISA ZZ:78742000008, and ISA ZZ:7891737000004). The 'Default Invoice Settings' section contains 'Terms Type' (dropdown), 'Net Days Due' (text input), 'Net Day of Month' (text input), 'Discount Days Due' (text input), 'Discount Percent' (text input), 'Basis Date' (dropdown), and 'Terms Description' (text area). An 'Override Ship-To as Tax Basis' checkbox is located below the 'Terms Description' field. A 'Save' button is at the bottom center, and a 'Close' button is at the bottom right.

**Vendor Number:** Assigned number for Trading Partner. Used as the vendor number and Ship-From Number.

**Preferred Currency:** Currency used by the Vendor with the selected Trading Partner

**Terms Type:** Type of payment terms

**Net Days Due:** Number of days until total invoice amount is due

**Net Day of Month:** Day of the month the terms is being referenced

**Discount Days Due:** Number of days in the terms discount period by which payment is due if terms discount is earned

**Discount Percent:** Terms discount percentage available to the purchaser if an invoice is paid on or before the Terms Discount Due Date

**Basis Date:** identifying the beginning of the terms period

**Terms Description:** A free-form description to clarify the Terms

**Override Ship-To as Tax Basis:** Allows Vendor to overwrite the selected Tax Jurisdiction on the Invoice.

## Partner Locations

You can sort your addresses by adding your addresses to different tabs depending on the address type using the following Internet EDI.0 tabs:

- Billing Addresses
- Distributions Centers
- Store Locations
- Other Addresses

This is how you add addresses to any tab of the above listed tabs:

**Fig 11.1**

**Create New Address**

Name

Location ID

Location Type

Address Line1

Address Line2

City

Province/State

Postal/Zip Code

Country

Contact Name

Contact Telephone #

Contact Email Address

Default Billing Address

Save OK Cancel

**Location ID:** This could be a Trading partner's store number, DUNS number, DC number etc.

**Location Type:** Designate the type of trading partner location: Billing Address, Distribution Center Store Location or other.

**Default Billing Address:** If you select the checkmark when the invoice is created it will pull that address as the billing address.

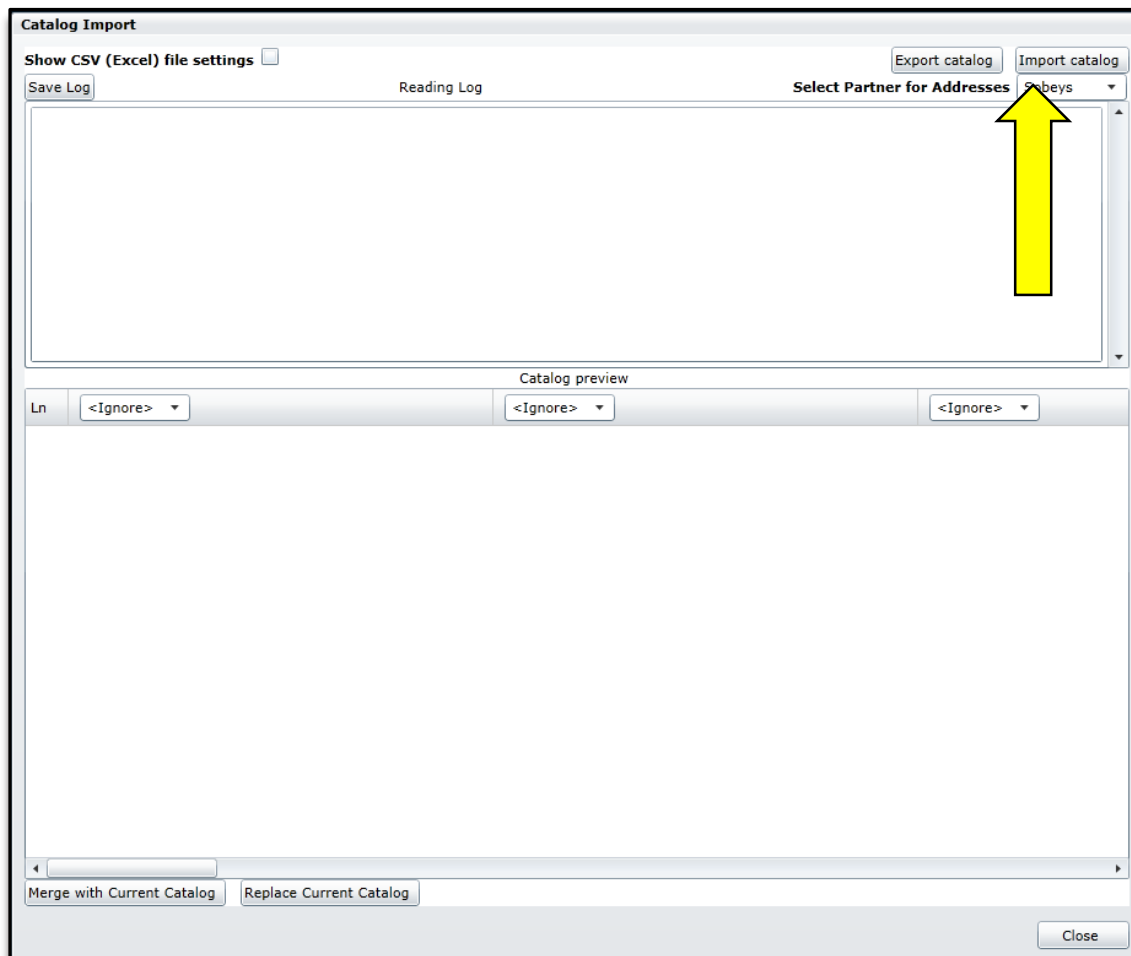
## Import or Export an Address Catalog:

If you want to import a product catalogue simply press the 'Import or Export Catalog' button, this will bring you to a new window. Refer to Fig 11.2 below

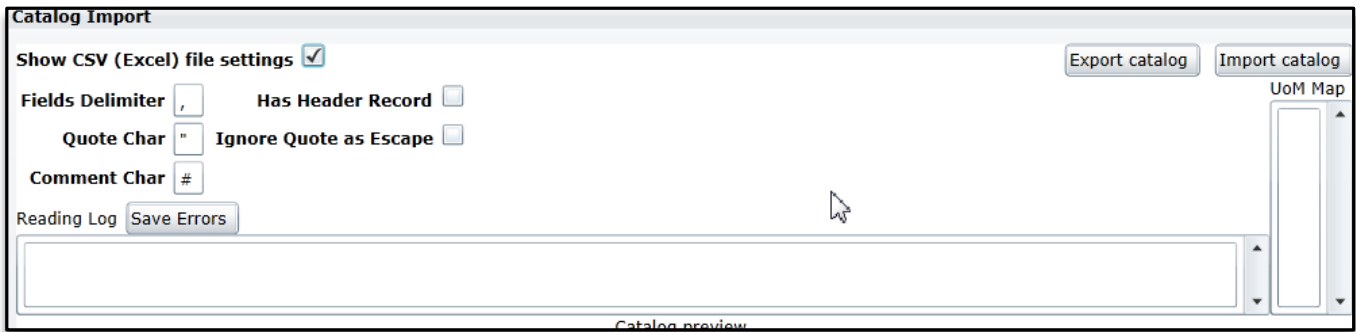
Click import catalog from the screen below. Select your CSV file you would like to import. ***Please note that the file you are importing has to be a CSV file.***

This is where you can load your hub specific addresses. If you add your items into Internet EDI, they will be available for use on transactions you create using the system. This tab allows you to Import or Export addresses or manually enter addresses individually. To import a file it must be in a CSV (Comma Separated Variable) format which is a recognized format that excel files can be saved in.

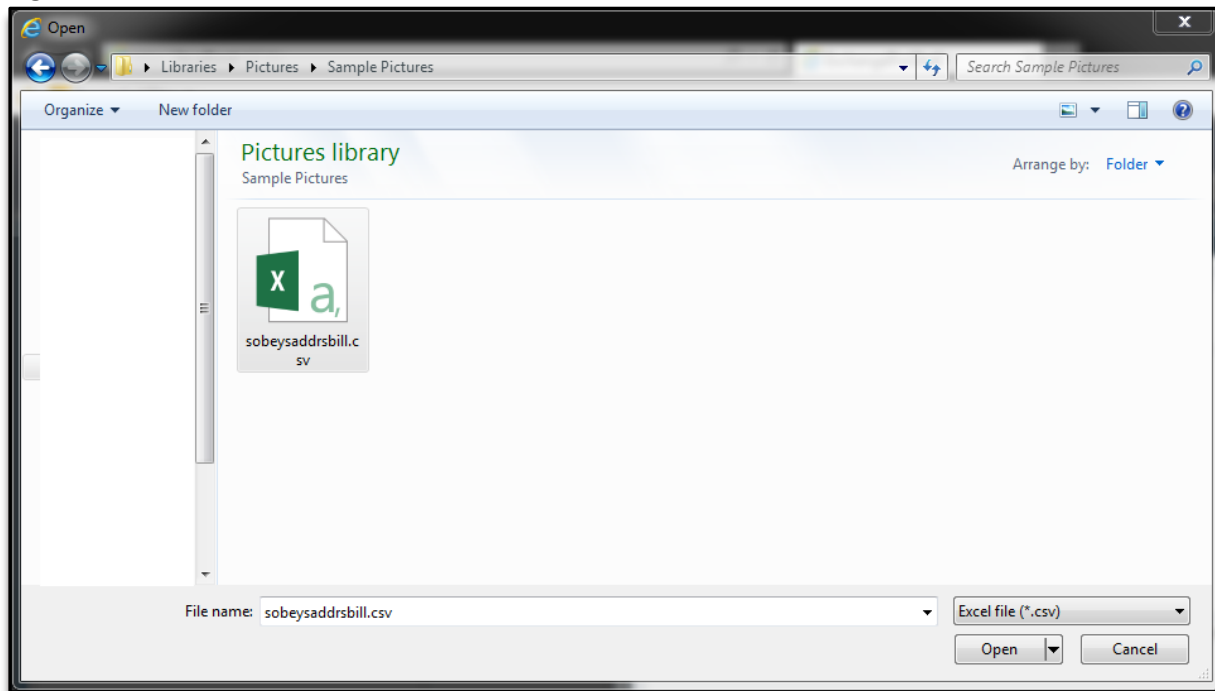
**Fig. 11.2**



If your file contains column titles you will have to select 'Show CSV (Excel) file settings'. This will bring up a new window. See Figure 10.2 below. Select 'Has Header Record'. This will ensure that the files column titles are not imported as well.

**Fig 11.3**

Once you have selected the CSV file to import you will have to map the fields from your file to the fields available in Internet EDI. This is telling Internet EDI.0 where you want the data from your file to be placed in the catalog fields available.

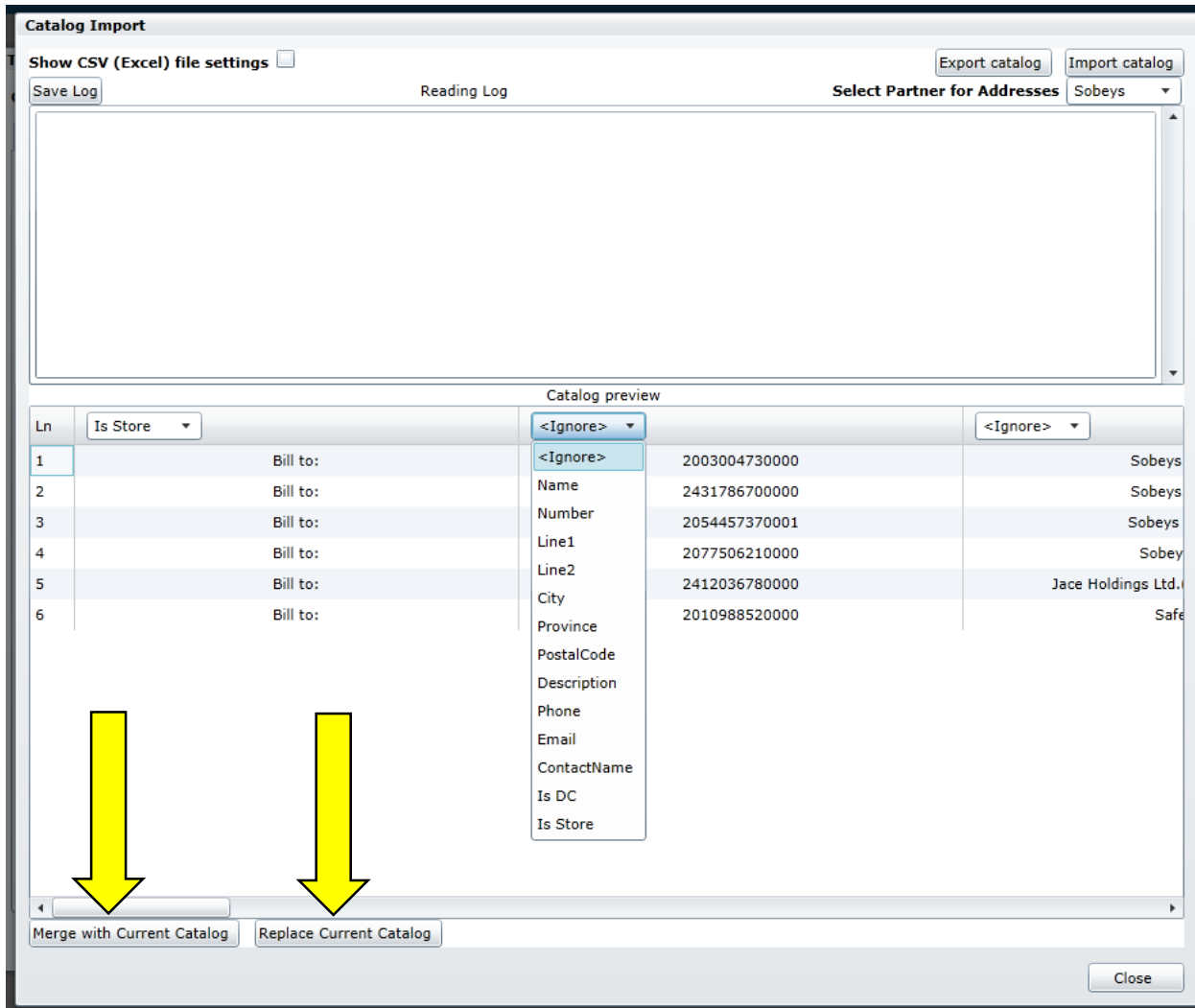
**Fig 11.4**

Map the fields from the CSV to the right files in the drop down lists for each column.

**Fig 11.5**

Once you have mapped the fields, you can click 'Merge with current catalog' or 'Replace current catalog'. Merge will only import address that are not already there. This is based off of the Store/DC/Bill number. Replace will delete whatever is currently in the catalog and replace it with the catalog you are importing.

**Fig 11.6**



## 997 – Functional Acknowledgements

Functional Acknowledgements or 997's are sent by the Trading partner, they confirm that your trading partner has received the document and it conforms to EDI Standards. In your Internet EDI outbox, once a transaction has received a 997, its' status will be updated from sent to Accepted or Rejected. This applies to any related transactions (Invoices (810), Advance Ship Notices (856)) as well.

## Managing Purchase Orders Using Internet EDI.0

In order to use and begin creating return documents in response to the purchase orders you receive, you must first create a sales order in Internet EDI.0. The sales order is a copy of the purchase order as sent by your customer. As you create shipments and invoices against the sales order, Internet EDI.0 will update the sales order with the products and quantities that have been fulfilled or remain available for fulfillment.

## Viewing and Printing Your Purchase Order (850)

The purchase order is available in your Inbox under the Mailbox tab. You can view a printable copy of this purchase order by double clicking on the order or by clicking on the print button. This will generate a report with all of the details as provided by your customer.

**Fig.12.0**

The screenshot shows the 'Exchange 3' software interface. At the top, there's a navigation bar with 'Mailbox', 'Orders', 'Shipments', and 'Invoices'. Below that, there are tabs for 'Order: 2', 'Acknowledgment: 2', and '850 Report'. The main content area displays a purchase order for 'Commport Hospital' with 'Purchase Order: 50505051'. The order details include Buyer (Gunther Smith), Ship To (Commport Hospital), Vendor (Trinity Industries), and Ship From (Trinity Industries). The order includes a table of items with columns for Ln #, UPC #, Buyer #, Seller's #, Product Description, QTY, UoM, Unit Price, Total, and Pack. The items listed are: 1. INFANT DIAPERS SMALL (7 CA, \$14.00, Total 98.00), 2. ALCOHOL WIPES 10X8 IN (4 CA, \$20.62, Total 82.48), 3. SURGICAL TAPE (10 CA, \$12.70, Total 127.00), and 4. GAUZE (5 CA, \$11.25, Total 56.25). The Sub Total is 363.73, Total Allowances is 0, and Total Charges is 0. At the bottom of the screen, there is a 'Print' button and other controls like 'Page 1 of 1', 'One per page', 'Copies: 1', 'as Bitmap', 'CSV', and 'Zoom'.

Ln #	UPC #	Buyer #	Seller's #	Product Description	QTY	UoM	Unit Price	Total	Pack
1	123922	11-462211		INFANT DIAPERS SMALL	7	CA	\$14.00	98.00	
2	1234567	00-001234		ALCOHOL WIPES 10X8 IN	4	CA	\$20.62	82.48	
3	1234567	23-2113-04		SURGICAL TAPE	10	CA	\$12.70	127.00	
4	7654321	09-2000-77		GAUZE	5	CA	\$11.25	56.25	

You can use the 'Print' button at the bottom of the screen to print a copy of your purchase order. You can print multiple purchase orders by simply selecting multiple orders. You will know that the order/orders have been selected as they will be highlighted in blue.

## Creating a Sales Order from a Purchase Order

In the Mailbox tab, click on a purchase order with the status “New”, then click the ‘Post’ button (at the bottom right hand side of the page). The status of the purchase order will change to ‘Posted’.

**Fig 12.1**

The screenshot shows the Exchange 3 interface. At the top, there is a navigation bar with tabs for Mailbox, Orders, Shipments, and Invoices. The Mailbox tab is active, showing a list of documents. The first document is highlighted: '1 C 850 - Purchase Order'. Below the list, there are buttons for 'Check Mail', 'View EDI', 'Print POs', 'Packing Instructions', 'Post', 'Send', and 'Cancel'.

Document Type	Document Date	Doc Number	PO Number	Received	Status
1 C 850 - Purchase Order	Jul-14-2013	10101010	10101010	Nov-08-2013 09:52A	New

You can access your sales orders by clicking on the ‘Orders’ tab at the top of the page. Within the ‘Orders’ tab you will see the new sales order which has been posted. The status on the sales order shows “New”.

**Fig 12.2**

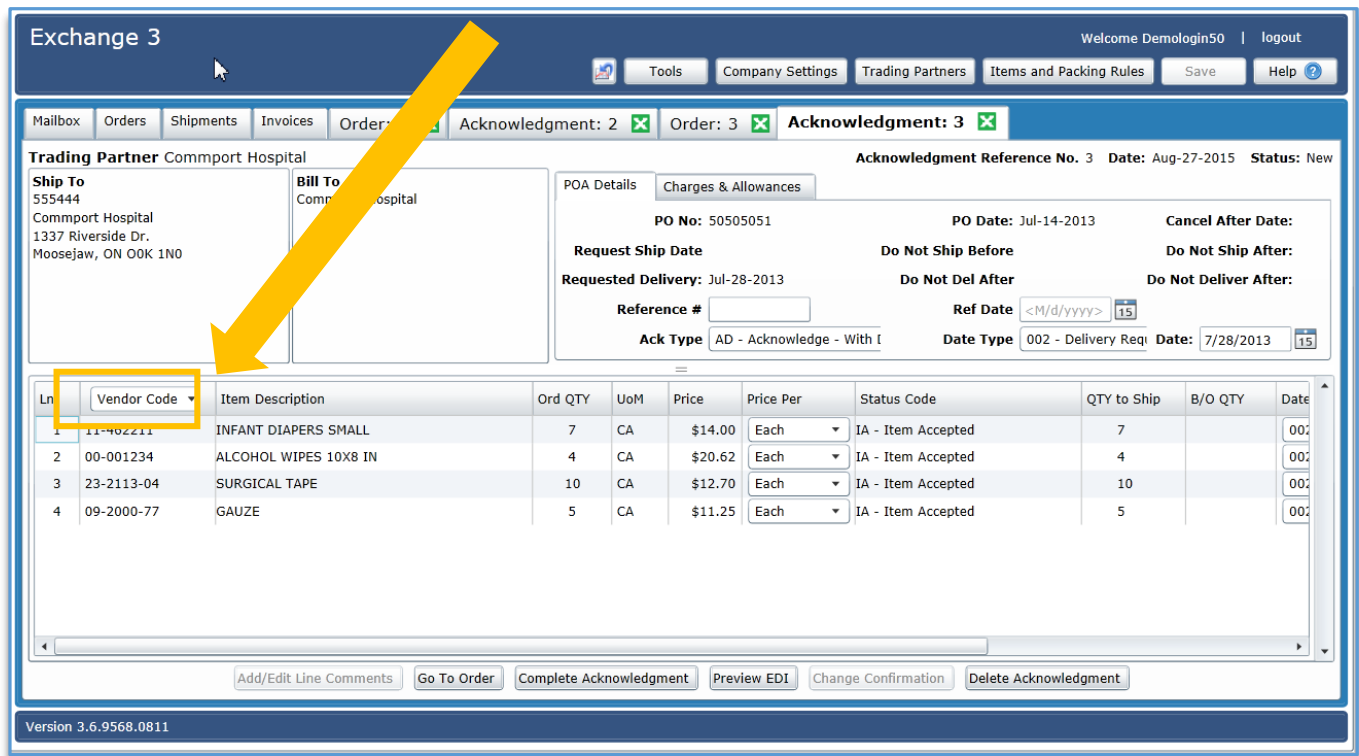
The screenshot shows the Exchange 3 interface with the Orders tab active. It displays a list of sales orders. The first three orders are highlighted. At the bottom, there are buttons for 'Export', 'View', and 'Create Multi Order Shipment'.

Customer Name	Ship To	Exp. Ship Date	PO No	PO Date	CO Number	CO Date	Status
1 Commport Hospital	555444		50505051	Jul-14-2013	3	Aug-27-2015	Acknowledgment Pending
2 Commport Hospital	555444		50505052	Jul-14-2013	2	Aug-25-2015	Acknowledgment Pending
3 Commport Hospital	555444		50505053	Jul-14-2013	1	Aug-25-2015	Acknowledgment Pending

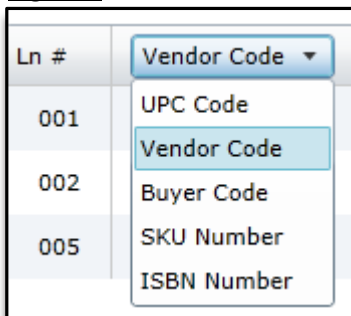
To open the order, click on the order and then click on the ‘View’ button. You can also double click the sales order to open it. The sales order is displayed in a new tab.

From the sales order you can review the order using the tabs to verify the purchase order header information. You can also change how the items on the order are sorted and displayed by clicking on the drop down menu in the second column.

**Fig 12.3**

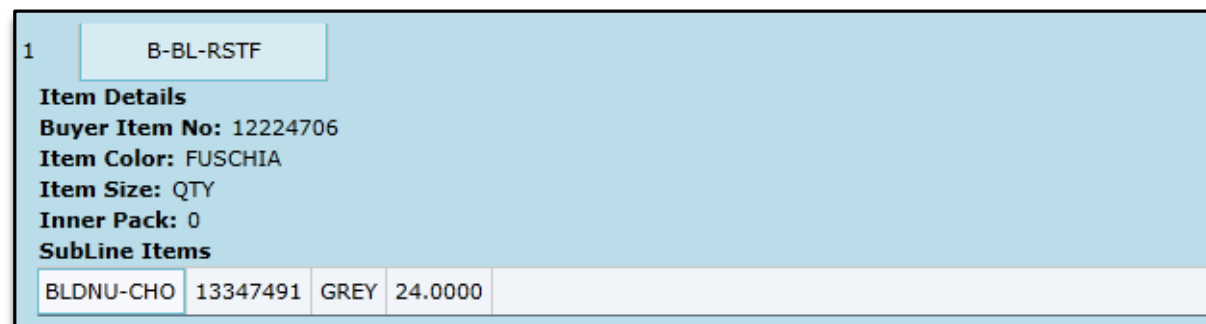


**Fig 12.4**



To view the full details of a line item, highlight and click the line. Figure 12.5 displays what it looks like when the full details are displayed.

**Fig 12.5**





Note: You cannot make changes to the quantity or price on the sales order.

### [Creating a PO Acknowledgement \(855\)](#)

When you receive a purchase order you may be required (this will usually be dictated by your Trading Partner) to acknowledge your acceptance or rejection of the order (based on your ability to fulfill it) by creating a Purchase Order Acknowledgment (POA), also known in EDI as an 855.

To create a POA, open the sales order from the 'Orders' tab and click on the 'Create Acknowledgment' button at the bottom of the page, this will bring you to the purchase order acknowledgement screen in its own tab.

**Fig 12.6**

The screenshot shows the 'Exchange 3' interface with the 'Order: 4' tab selected. The interface includes a navigation bar with 'Tools', 'Company Settings', 'Trading Partners', 'Items and Packing Rules', 'Save', and 'Help'. Below the navigation bar, there are tabs for 'Mailbox', 'Orders', 'Shipments', and 'Invoices'. The 'Order: 4' tab is active, displaying the 'EDI Account Name: Commpport Hospital' and a table of order items. A yellow arrow points from the 'Create Acknowledgment' button at the bottom to the 'Order: 4' tab.

Ln #	Vendor Code	Item Description	Qty Ordered	UoM	Shipped To Date	Shipped Last	Qty O/S	Qty Invoiced	Unit Price	Ext. Price
1	11-462211	INFANT DIAPERS SMALL	7	CA			7		\$14.00	\$98.00
2	00-001234	ALCOHOL WIPES 10X8	4	CA			4		\$20.62	\$82.48
3	23-2113-04	SURGICAL TAPE	10	CA			10		\$12.70	\$127.00
4	09-2000-77	GAUZE	5	CA			5		\$11.25	\$56.25

Total Order Value: \$363.73

Buttons at the bottom: Create Acknowledgment, Direct Invoice, Create Shipment, Open Current Shipment, Cancel Order, Close Order, Open Order.

The acknowledgment will open up in a new tab as seen in figure 12.7.

**Fig 12.7**

The screenshot shows the 'Exchange 3' interface with the 'Acknowledgment: 3' tab selected. The interface includes a navigation bar with 'Tools', 'Company Settings', 'Trading Partners', 'Items and Packing Rules', 'Save', and 'Help'. Below the navigation bar, there are tabs for 'Mailbox', 'Orders', 'Shipments', and 'Invoices'. The 'Acknowledgment: 3' tab is active, displaying the 'Trading Partner: Commpport Hospital' and a table of acknowledgment details. A yellow arrow points from the 'Acknowledgment: 3' tab to the 'Create Acknowledgment' button in the previous figure.

Trading Partner: Commpport Hospital

Ship To: 555444, Commpport Hospital, 1337 Riverside Dr., Moosejaw, ON 00K 1N0

Bill To: Commpport Hospital

POA Details

PO No: 50505051 | PO Date: Jul-14-2013 | Cancel After Date: | Request Ship Date: | Do Not Ship Before: | Do Not Ship After: | Requested Delivery: Jul-28-2013 | Do Not Del After: | Reference #: | Ref Date: | Ack Type: AD - Acknowledge - With Detail, No Change | Date Type: 002 - Delivery Requested | Date: 7/28/2013

Ln	Vendor Code	Item Description	Ord QTY	UoM	Price	Price Per	Status Code	QTY to Ship	B/O QTY	Date Type	Date	Unit Price
1	11-462211	INFANT DIAPERS SMALL	7	CA	\$14.00	Each	IA - Item Accepted	7		002 - Delivery Requested	7/28/2013	\$14.00
2	00-001234	ALCOHOL WIPES 10X8 IN	4	CA	\$20.62	Each	IA - Item Accepted	4		002 - Delivery Requested	7/28/2013	\$20.62
3	23-2113-04	SURGICAL TAPE	10	CA	\$12.70	Each	IA - Item Accepted	10		002 - Delivery Requested	7/28/2013	\$12.70
4	09-2000-77	GAUZE	5	CA	\$11.25	Each	IA - Item Accepted	5		002 - Delivery Requested	7/28/2013	\$11.25

Buttons at the bottom: Add/Edit Line Comments, Go To Order, Complete Acknowledgment, Preview EDI, Change Confirmation, Delete Acknowledgment.

Version 3.6.9568.0811

You will be presented with a few options for 'Ack Type' (Acknowledgment Type).

Depending on the customer you are dealing with, the most commonly used Acknowledgement types are:

**AR** – Rejected – No Detail

**AD** – Acknowledge – with Detail, No Change

**AC** - Acknowledge - with Detail and Change. You were required to make changes to the line details.

**AT** – Accepted (no Change) – order can be fulfilled as requested.

If you are accepting the order click on the 'Complete Acknowledgment' button at the bottom of the page. The Complete PO Ack box will be displayed.

You must pick an acknowledgment type to continue to the next step.

You now must select the item status code. See figure 12.7. Item Accepted (IA) is the most common.

**Fig 12.8**

Ln	Vendor Code	Item Description	Ord QTY	UoM	Price	Price Per	Status Code	QTY to Ship	B/O QTY	Date Type	Date	Unit Price
1	11-462211	INFANT DIAPERS SMALL	7	CA	\$14.00	Each	IA - Item Accepted	7		002 - Delivery Requested	7/28/2013	\$14.00
2	00-001234	ALCOHOL WIPES 10X8 IN	4	CA	\$20.62	Each	IA - Item Accepted	4		002 - Delivery Requested	7/28/2013	\$20.62
3	23-2113-04	SURGICAL TAPE	10	CA	\$12.70	Each	IA - Item Accepted	10		002 - Delivery Requested	7/28/2013	\$12.70
4	09-2000-77	GAUZE	5	CA	\$11.25	Each	IA - Item Accepted	5		002 - Delivery Requested	7/28/2013	\$11.25

Under status code, you can select different status types. See Fig 12.8 for all of the status code options.

**Fig 12.9**

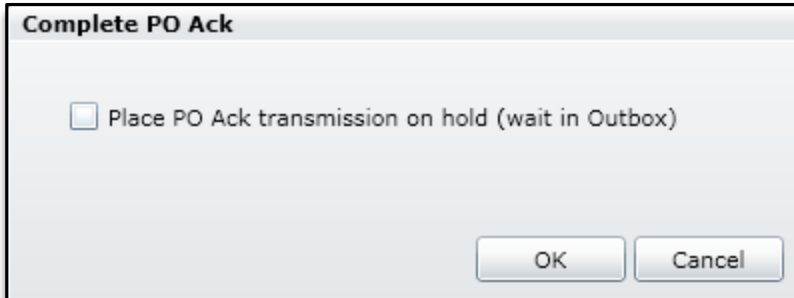
AC - Item Accepted and Shipped
AR - Item Accepted and Released for Shipment
BP - Item Accepted - Partial Shipment, Balance Backordered
DR - Item Accepted - Date Rescheduled
IA - Item Accepted
IB - Item Backordered
IC - Item Accepted - Changes Made
ID - Item Deleted
IP - Item Accepted - Price Changed
IQ - Item Accepted - Quantity Changed
IR - Item Rejected
IS - Item Accepted - Substitution Made
R1 - Item Rejected, Not a Contract Item
R2 - Item Rejected, Invalid Item Product Number
R3 - Item Rejected, Invalid Unit of Issue
R4 - Item Rejected, Contract Item not Available

Depending on the status you have chosen per line item, fields available for editing will change. For example if Item Accepted – Partial Shipment, Balance Backordered (BP) is selected, you can change the

'QTY to ship' field and it will auto calculate the 'Backorder QTY'. If Item Accepted – Price Changed (IP) is selected, you can edit the unit price.

Once you have finished selecting the acknowledgment and item status' select 'Complete Acknowledgement'.

**Fig 12.10**



You can put the Purchase Order Acknowledgement (855) on hold (to send at a later date from the Outbox) or leave the check box blank and click OK to send the Purchase Order Acknowledgement right away. Once you have sent the POA (855) the Purchase Order Acknowledgement screen will be closed automatically and you will be presented with the Order.

Similarly, if after contacting your Customer you do need to reject the purchase order, choose reject and then click the send button. This will display the option to place the POA on hold. If you leave the check box blank the POA indicating your rejection will be sent.

### Managing Purchase Order Changes

Some trading partners send a purchase order change request (860). Since these are sent by the buyer often without consultation with the vendor, these changes can have an impact on documents already in the workflow process. If you have started a shipment before a change request (860) came in for the purchase order, the shipment will be frozen until after you have reviewed and posted the change.

If you have packed a shipment and the change impacts items you may have to unpack and repack your shipment.

If you have created the invoice for this shipment you will not be able to apply the purchase order change request (860).

## Creating an Advanced Ship Notice (ASN - 856)

Open the sales order from the 'Orders' Tab and select 'Create Shipment'. You will be presented with the Shipment Creation screen in a separate tab. Initially it mirrors the order but now you have the option to change information.

All of the fields that have a yellow box or where the entry field is yellow are mandatory fields. Internet EDI will not allow you to send the shipment notification until you have completed all of these fields.

Start by completing the Header information. All fields with shading indicate mandatory fields. If you don't have all of the information, you will have an opportunity to complete these details before sending the ASN. Use the ASN structure to indicate how you are going to be packing your shipment. This will be defined by your partner in combination with your product type.

**Fig 13.0**

Exchange 3.0

Welcome Training | logout

Administration Save Help ?

Mailbox Orders Shipments Invoices Shp: 02

Buyer: Home Hardware Stores Limited

ASN Structure Only Cartons Shipment Id: 02 Status: Pending

Ship From Contact

Ship To HOME HARDWARE - WETASKIWIN CAN

Shipment Summary Carrier Details Load Details

Order No 3 Start Date 9/24/2013 1:04:47 PM

PO Number V307W09504PR Ship Date Oct-25-2013

BOL No 1111111 ASN Date

PRO / BILL No Tracking No

Ln #	Any Item Code	Item Description	Qty Ordered	Qty To Ship	Qty Packed	Ship Item
1	771250906632		24	24		<input checked="" type="checkbox"/>
2	771250906649		24	24		<input checked="" type="checkbox"/>
3	771250906663		36	36		<input checked="" type="checkbox"/>

Go To Order Pick List Pack Shipment Preview EDI Review P Complete Shipment Cancel Shipment

## Completing the Mandatory Fields for an Advance Ship Notification (ASN - 856)

The field ASN Structure refers to how you will be packaging your shipment.

**Only Pallets:** If you are shipping pallets (SOTI Structure), you will be asked to indicate the items and cartons on each pallet.

**Only Cartons:** If you are shipping cartons only (SOPI Structure), you will only be asked to indicate what items have been packed into which cartons.

**Only Items:** Used when the trading partner only wants to see which items are being shipped.(SOI Structure)

**Cartons and Pallets:** If you are shipping Cartons that are packed onto Pallets (SOTPI Structure).

**Fig 13.1**

Only Cartons


Only Cartons

Only Items

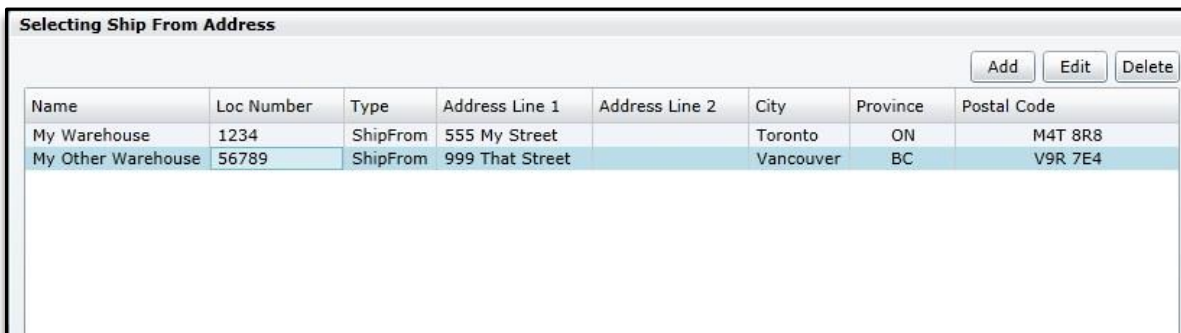
Cartons and Pallets

Only Pallets


To indicate how you are packing this shipment, go to the ASN Structure drop down and click on the arrow and then choose either 'Only Cartons' (This will produce the SOPI ASN Structure), or 'Only Pallets' (This will produce SOTI ASN Structure), or Only Items (SOI Structure), or Only Cartons and Pallets (SOTPI Structure). This selection will also tell the system if you need carton labels or pallet labels.

**Ship-From Information:** To indicate your Ship from location click the ellipsis  button. This will display your address list for your company from your Administration section. You can add new addresses here or you can select the ship from address that you would like to use on this shipment. You also have the flexibility to establish a 'default' ship-from address.

**Fig 13.2**

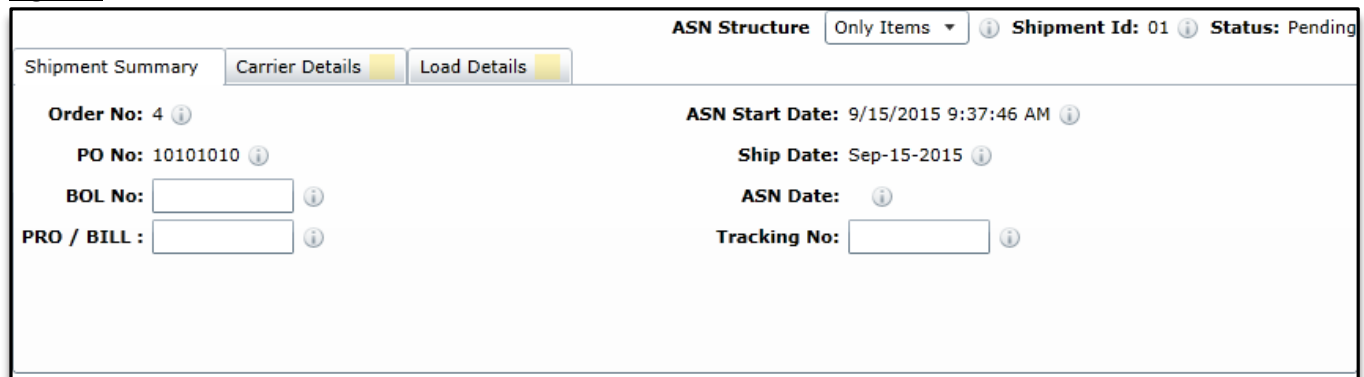


Name	Loc Number	Type	Address Line 1	Address Line 2	City	Province	Postal Code
My Warehouse	1234	ShipFrom	555 My Street		Toronto	ON	M4T 8R8
My Other Warehouse	56789	ShipFrom	999 That Street		Vancouver	BC	V9R 7E4

**Ship-To Information:** The ship-to information is pulled from the purchase order and made available on the shipment – If changes are required click the ellipsis  button and choose the ship-to address for this shipment. If the ship-to address is not in the list you can add it using the 'Add' button.

### Shipment Summary Tab:

**Fig 13.3**



ASN Structure: Only Items | Shipment Id: 01 | Status: Pending

Shipment Summary | Carrier Details | Load Details

Order No: 4 | ASN Start Date: 9/15/2015 9:37:46 AM

PO No: 10101010 | Ship Date: Sep-15-2015

BOL No:  | ASN Date:

PRO / BILL :  | Tracking No:

Enter BOL No – This is your Bill of Lading Number for this shipment.

In order to help track your shipment you also have the option to provide your Carrier PRO bill number or tracking number

**BOL No** - This field identifies the bill of lading number or tracking number the shipment was sent on

**Pro/Bill** - identifies the number assigned by the carrier to the shipment

## Tracking No. - Carrier Tracking Number

### Carrier Details Tab:

**Fig 13.4**

Shipment Summary	Carrier Details	Load Details
Carrier Package ID:	<input type="text"/>	Carrier: PRLA - PUROLATOR COURIER LIMITED
Payment Method:	PP - Prepaid (by Seller)	Trans Method: M - Motor (Common Carrier)
Equipment Number:	<input type="text"/>	Equipment Code: <input type="text"/>
Routing Sequence:	1 - 1st Carrier after Origin Carrier	Equipment Initial: <input type="text"/>
Delivery Contact:	<input type="text"/>	Routing: <input type="text"/>
Trans Service:	<input type="text"/>	Delivery Phone: <input type="text"/>

**Carrier Package ID** - Carrier ID Number, can be a secondary tracking number

**Payment Method** - payment terms for transportation charges

**Equipment Number** - Sequencing or serial part of an equipment unit's identifying number

**Routing Sequence** - Describing the relationship of a carrier to a specific shipment movement

**Delivery Contact** - Contact Name of person who is making the delivery

**Trans Service** - Indicating the level of transportation service or the billing service offered by the transportation carrier

**Carrier** - identifies the name of the carrier used for the shipment

**Trans Method** - indicates the method of transportation for the shipment

**Equipment Code** - Identifying type of equipment used for shipment

**Equipment Initial** - Prefix or alphabetic part of an equipment unit's identifying number

**Routing** - identifies the description of the routing or requested routing for shipment, or can be used for the originating carrier's identity

**Delivery Phone** - Contact Phone Number of person who is making the delivery

### Load Details Tab:

Enter the Lading Qty – This is the number of Cartons or Pallets that are on the shipment.

Enter the Total Weight and its unit of measure. This is the Total Shipment Weight for this shipment.

**Fig 13.5**

Shipment Summary	Carrier Details	Load Details
ASN Structure Only Items Shipment Id: 01 Status: Pending		
Lading Qty:	1	Packaging Type: PLT-Pallet
Total Weight:	100 LB-Pound	Ship Status: AV - Available
Total Volume:	<input type="text"/>	Special Handling: <input type="text"/>
Delivery Date:	7/28/2013 15	

**Lading QTY** - identifies the number of units shipped

**Total Weight** - identifies the total weight of the shipment

**Total Volume** – Identifies the Total Volume of the Shipment

**Delivery Date** - identifies the date of delivery for the shipment

**Packaging Type** - Identifying the type of packaging

**Ship Status** - Indicating the status of an order or shipment or the disposition of any difference between the quantities ordered and the quantity shipped for a line item or transaction

**Special Handling** - Specifying special transportation handling instructions

#### Items to be Shipped:

Internet EDI assumes that you will be shipping all of the items in the quantities ordered. If you will be shipping a different quantity, you change the 'Qty to Ship' field as required.

Alternatively, only pack the quantity being shipped during the packing process. If you are not going to be shipping an item on this shipment you can remove the check mark in the 'Ship Item' check box beside the selected item and it will be omitted from the shipment. You can also over ship an item by double clicking the value in the 'Qty to Ship' column.

**Fig 13.6**

Ln #		Item Description	Qty Ordered	Qty To Ship	Qty Packed	<input type="checkbox"/> Ship Item
3	771250906663		36	48	48	<input type="checkbox"/>
4	771250309280		40	40	40	<input checked="" type="checkbox"/>

## Packing and Labeling a Shipment

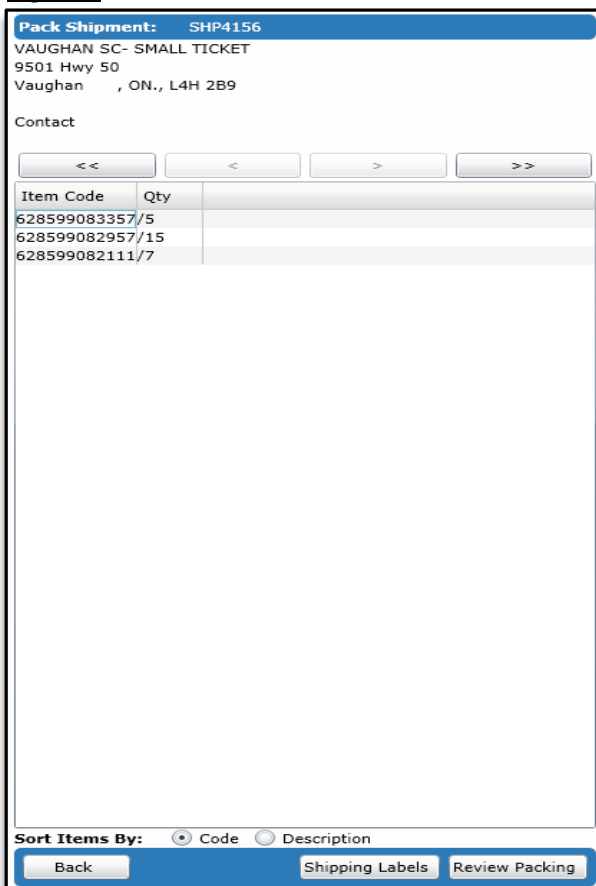
You are now ready to convey to your trading partner exactly how your shipment has been packed. There are a number of ways that you can pack your items into containers for delivery to your trading partners. Internet EDI will support however you have your shipment packed.

### Ready to Pack the Advanced Ship Notice (856):

Click on the 'Pack Shipment' button at the bottom of the shipment page. Note that you are still in the shipment record, no new tab was created.

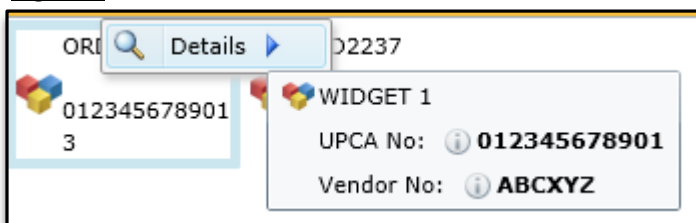
The Item Organizer (section on the left) shows all items and quantities to be shipped as listed on the previous page. The items are also shown in the Item Staging Area listed by UPC code with the ordered quantity displayed below. See Figure 14.0.

**Fig 14.0**



To view more details about an item, right click on the item and hover your mouse over the Details, all of the details about the item that were provided on the purchase order will be displayed in the fly out menu.

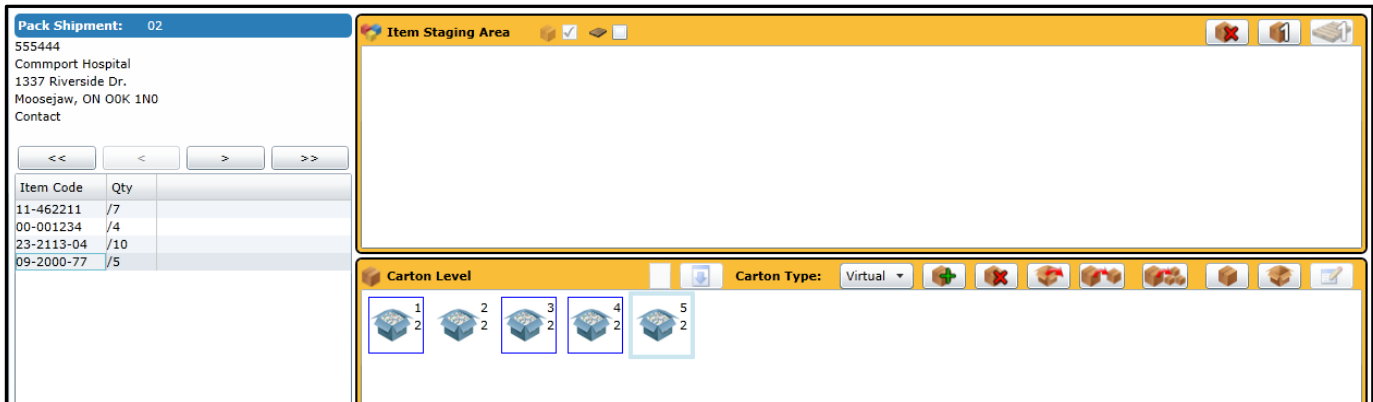
**Fig 14.1**





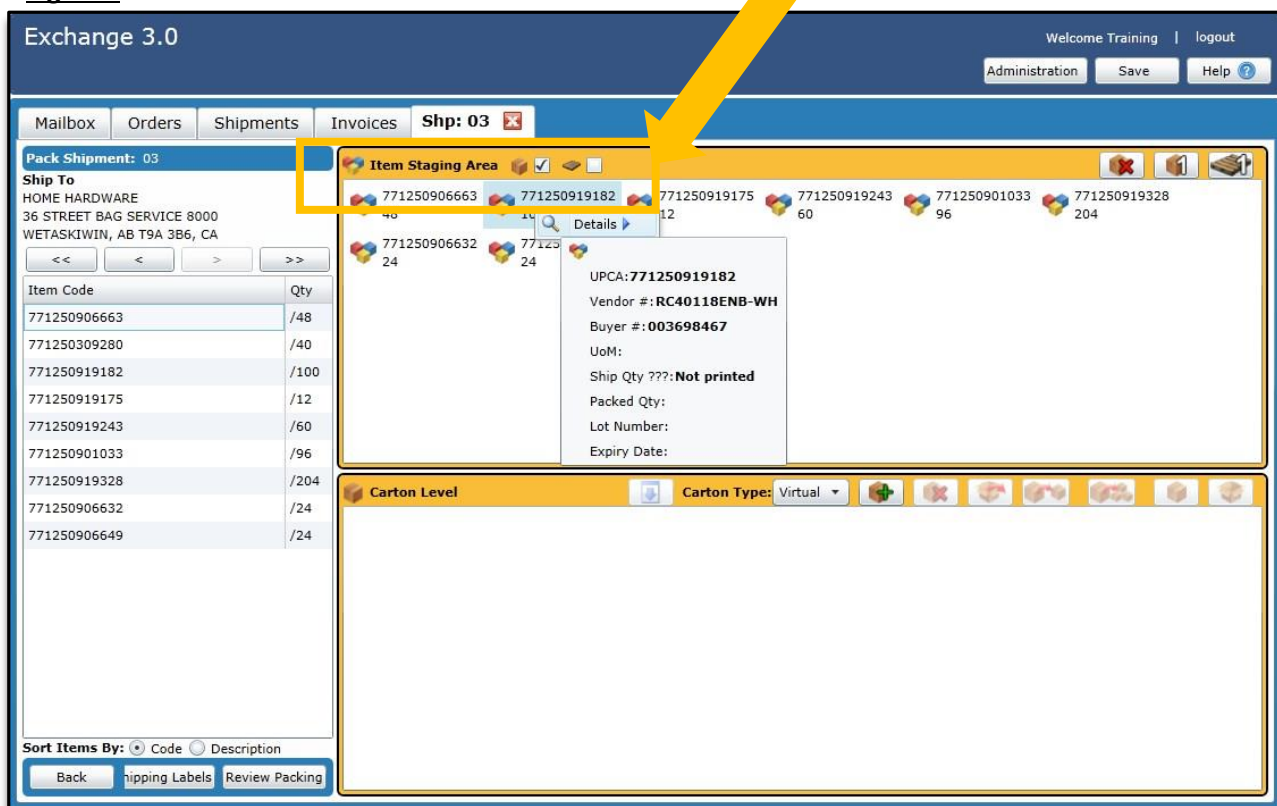
If you select an item from the item organizer section on the left hand side it will display for you where this item has been packed. It will add a blue border to any cartons/pallets it has been packed in.

**Fig 14.2**



You indicated the ASN Structure on the shipment screen. This choice is displayed graphically on the packing screen at the top of the item staging area. If you need to change this, you will need to go back and change the ASN structure on the previous screen.

**Fig 14.3**



**Please note: if you change the ASN structure it will unpack every item and you will have to repack your shipment.**

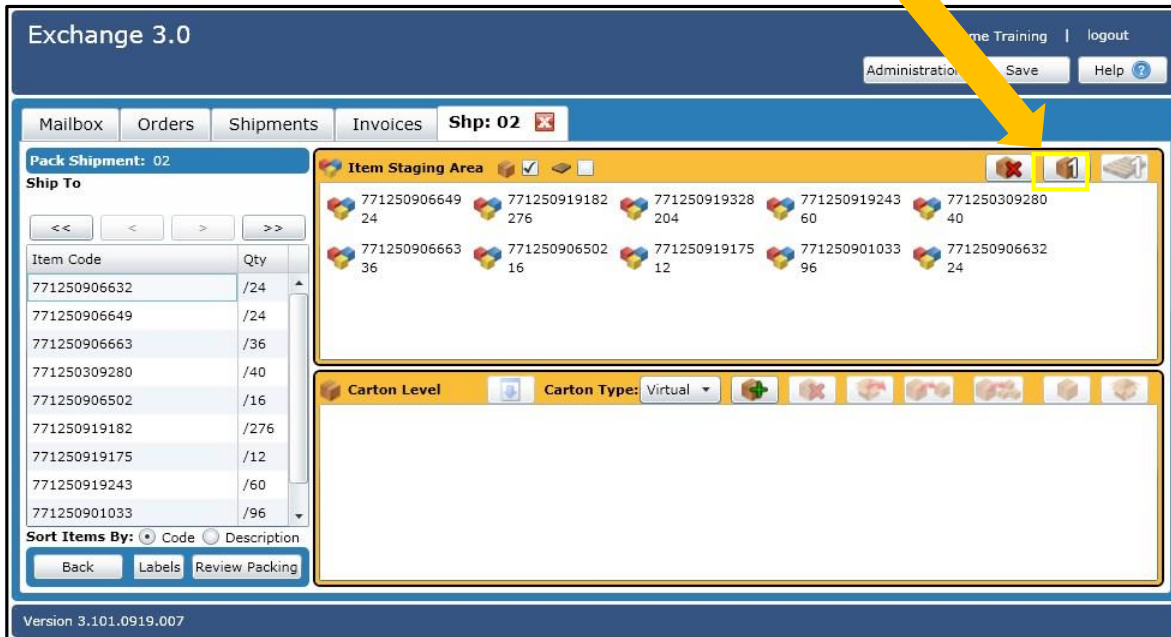
## Using Internet EDI to Pack a Carton Advanced Ship Notice (856)

The following instructions are intended to demonstrate the powerful packing tool that is built into Internet EDI.0. Please use these instructions as a guide to how the Internet EDI packing tool works to create cartons and pallets.

### How to Pack a Single Carton Shipment:

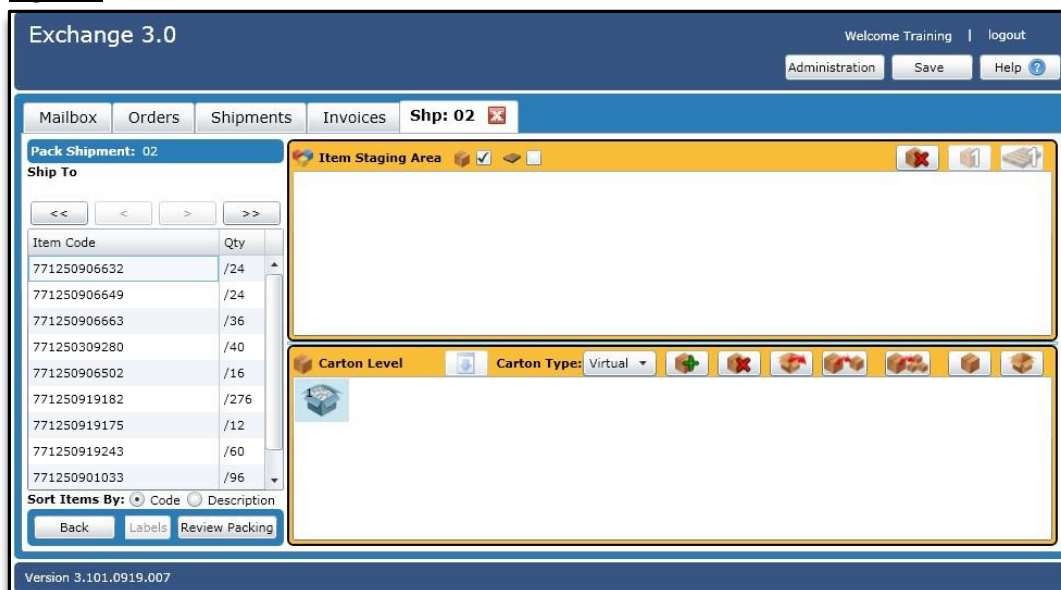
To pack all quantities of all items in one carton, click the all in one carton icon in the staging area.

**Fig 15.1**





This will create the one carton and automatically move all of the items and their quantities into the carton.

**Fig 15.2**

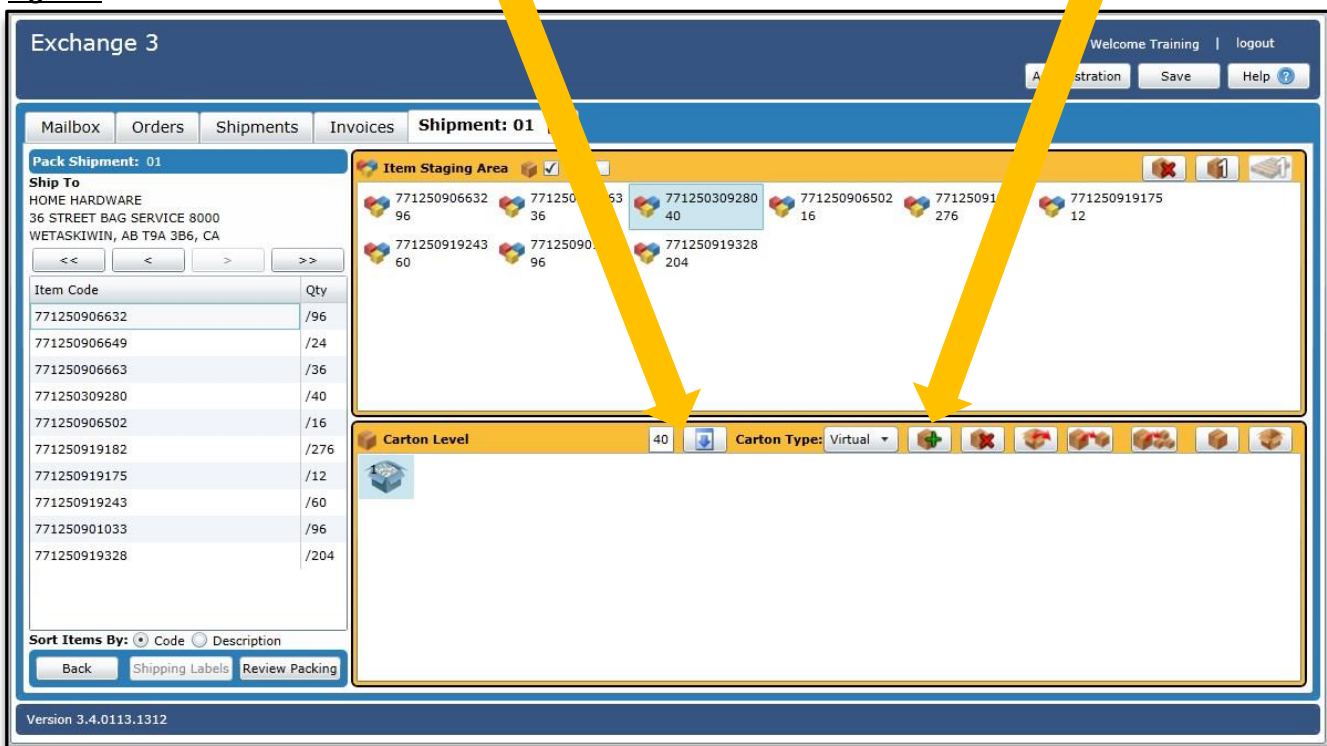


### [How to Pack a Multiple Carton Shipment:](#)

If all quantities of all items will not fit in one carton you will need to create multiple cartons. You can do this two different ways; automatically or manually.

If you are manually building your cartons, you can add a carton to your shipment by clicking The  button. From here, you can begin adding products to your carton by clicking on the item to be packed in the Item Staging Area and then entering the quantity to pack in the box to the left of the down arrow  and then clicking the down arrow. This will move the specified quantity of the selected item from the Item Staging Area into the carton. If the entire quantity of the selected item should be packed into the current carton, you can simply select the item in the Item Staging Area and then click the down arrow. See Figure 15.3 below.

**Fig 15.3**






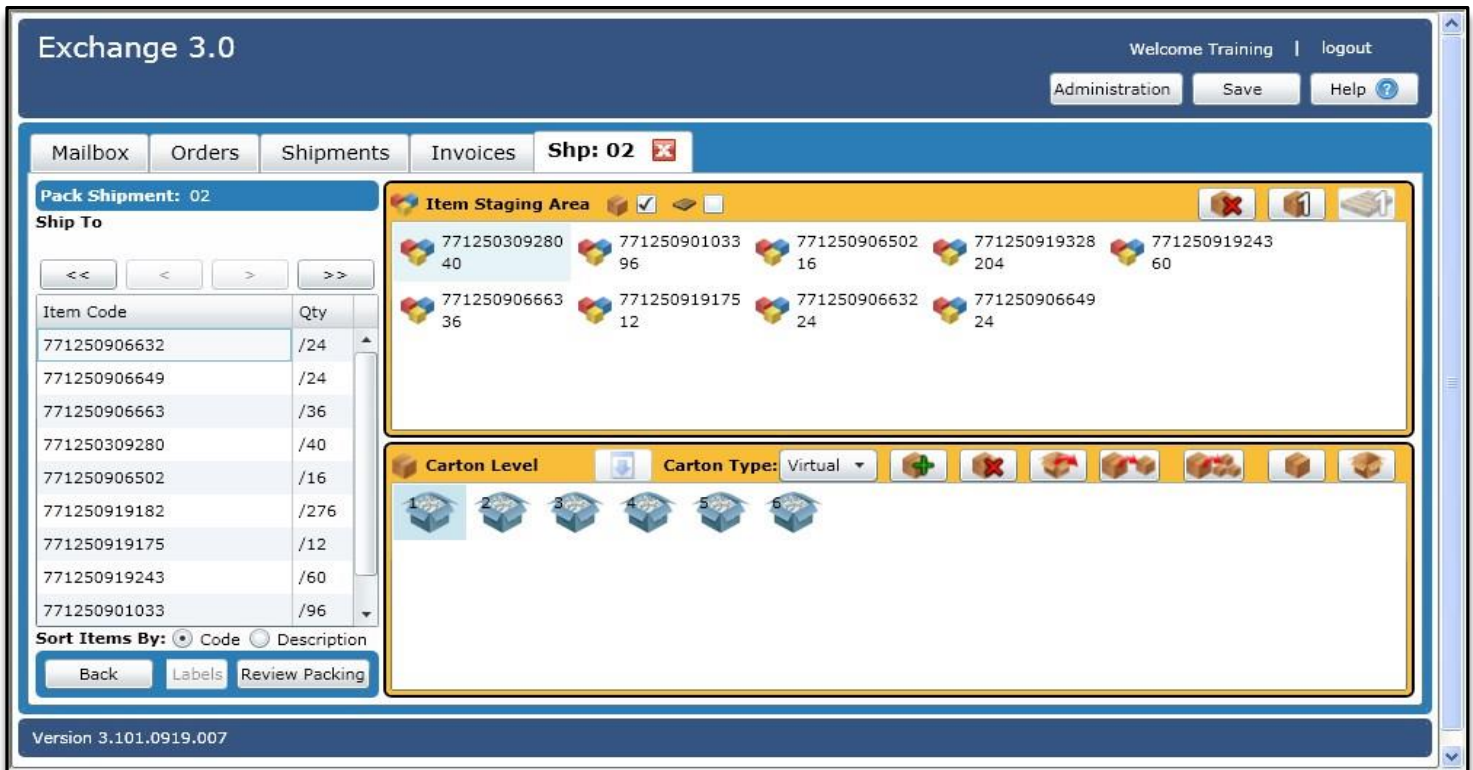
If you are splitting an item into multiple cartons, add a carton , enter your quantity per carton, click on the arrow key, then use the clone buttons  to create one duplicate carton, or click  to create as many duplicates as required until all items in the staging area are depleted. The cloning is especially useful if you are creating multiple mixed cartons. Simply create one carton that contains the items and then clone that carton to create your shipment (see Figure 15.4 on next page).

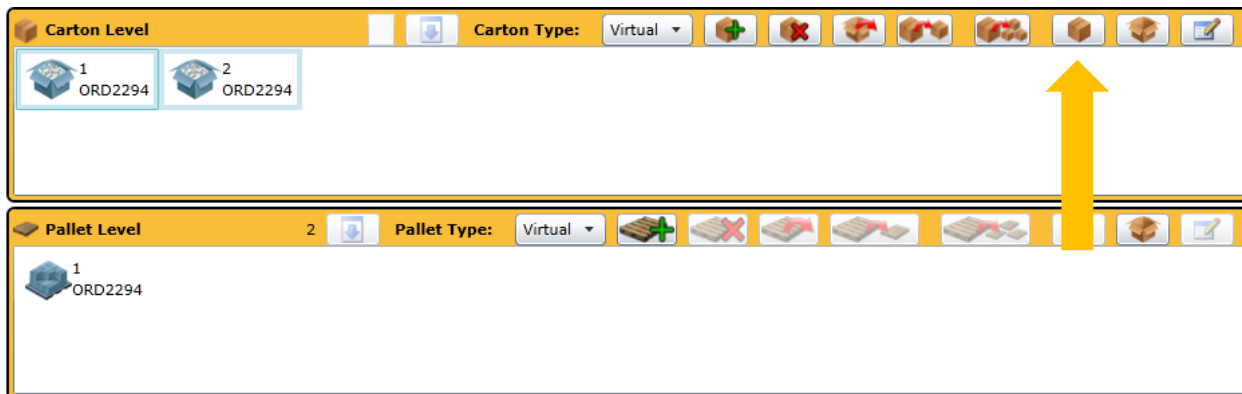
Fig 15.4



If you are creating pallets rather than cartons, the functionality is the same however you will be creating a pallet rather than a carton. When you have packed your shipment. Click 'Save'.

To pack cartons onto a pallet, you must make sure to close the cartons first. To do this select the carton/cartons, then click the close button.

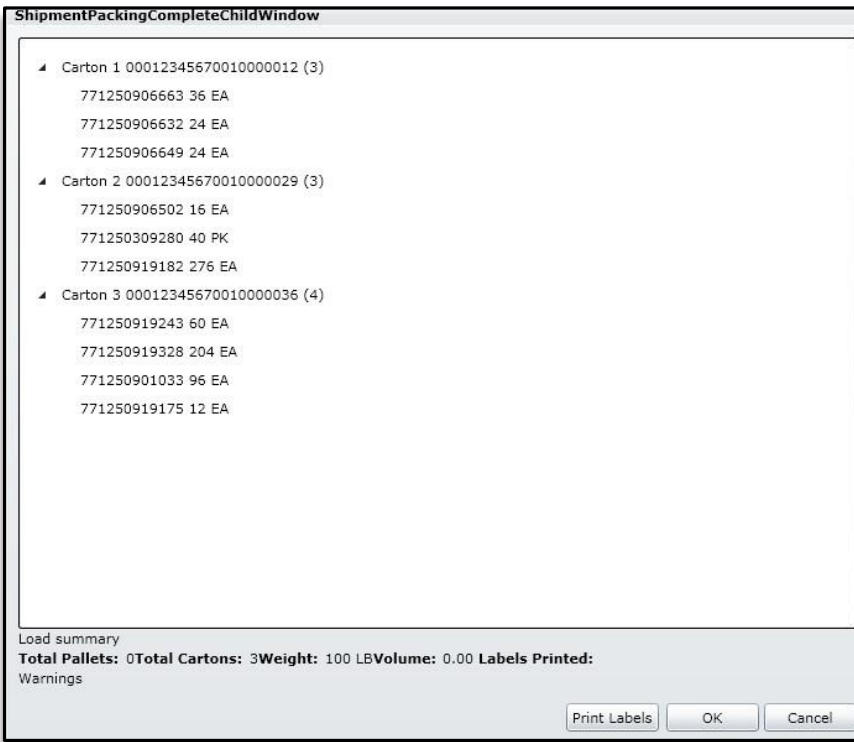
Fig 15.5



Once you have closed the cartons, add a new empty pallet. Select the closed cartons you would like to pack on the pallet and then select the pallet. From there click the down arrow to pack the cartons onto the pallet.

You can review your packing list by clicking 'Review Packing'. The Review Packing box will summarize each carton and pallet as well as the items and quantities contained therein.

**Fig 15.6**



### [Printing Labels](#)

Clicking the 'Print Labels' button opens a new window shown in Figure 15.7. Here you have different options on which labels you would like to print. Once you have selected your options, click the 'Generate Labels' button.

**Fig 15.7**

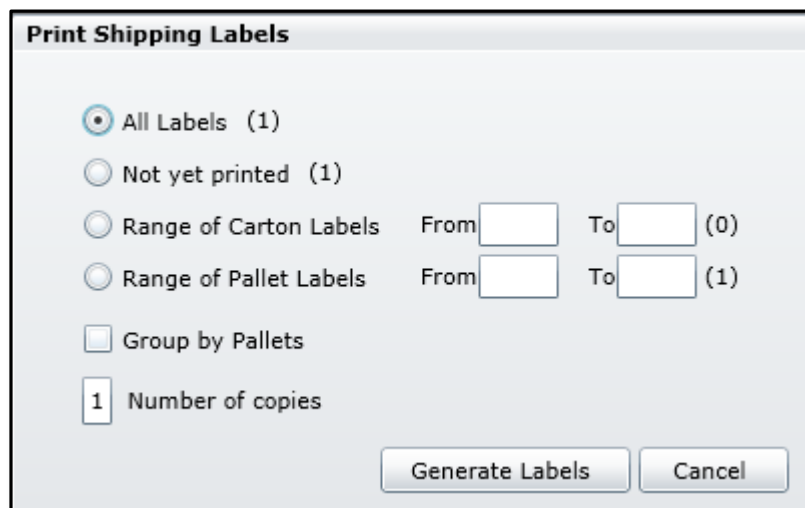
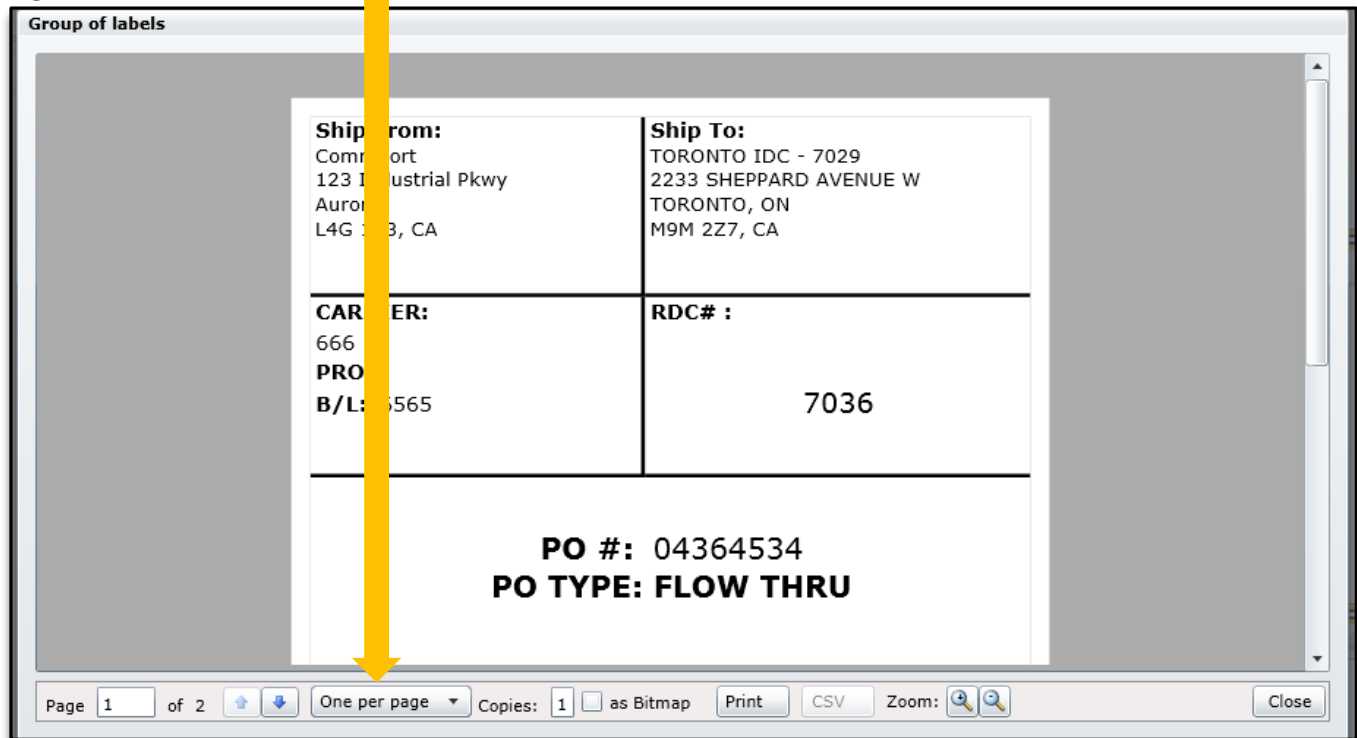


Figure 15.8 is a preview of what your labels will look like once printed. You can review each label by clicking the arrow buttons. You can also select the number of labels (2 or 4) to print per page by selecting it from the dropdown list. This will be reflected in the preview screen. In the event your printer doesn't print the label, try selecting the 'as Bitmap' option on the bottom of the preview screen. Once you are satisfied, click print.

**Fig 15.8**

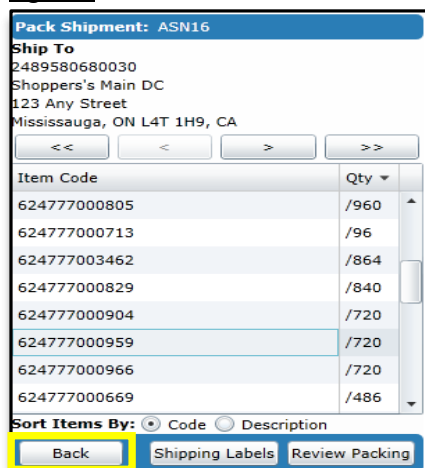


To send the ASN, you must go back to the shipment header screen and click the 'Complete Shipment' button.

### Finalizing the Shipment

There may have been header details that were not known until after the packing was completed. Some of these details are required to generate the shipping labels. Click 'Back' under the Item Organizer to go back to the shipping details page. See figure 16.0 below.

**Fig 16.0**



## Header Tabs

Go back and complete any missing fields in the header tabs. Yellow shaded fields are mandatory. A shaded box on the tab indicates there are mandatory fields on this tab. See figure 16.1 below.

**Fig 16.1**

The screenshot shows a software interface for managing shipments. At the top, there are three tabs: 'Shipment Summary' (highlighted in yellow), 'Carrier Details' (highlighted in yellow), and 'Load Details' (highlighted in yellow). Below the tabs, the 'Shipment Summary' section displays: Order No EDIORD15, Start Date 4/16/2013 4:52:02 PM, PO Number 247747, BOL No 3245 (yellow shaded), and Tracking No (empty). A yellow shaded box highlights the 'Carrier Details' section, which includes: Lading Qty 256 (yellow shaded), Total Weight 100 (yellow shaded) with a unit dropdown set to 'Kilogram', Total Volume (empty), Delivery Date Apr-24-2013 (yellow shaded) with a calendar icon, Packaging Type: Wood Pallet - PLT94 (dropdown), Ship Status (dropdown), Special Handling (dropdown), Method of Transport (dropdown), Equipment Type (dropdown), Routing: UPS (yellow shaded), and Delivery Contact: Alison Bartlet (yellow shaded). Other fields like Carrier Package ID, Payment Method (DF - Defined by Buyer and Seller), Equipment Number, Routing Sequence, and Delivery Phone (905-727-6782) are also visible.

In the following screen confirm the ship date. You can put the ASN on hold (to send at a later date) or leave the check box blank and click OK to send ASN right away, click OK.

**Fig 15.9**

The 'Complete Shipment' dialog box displays the following information:
 

- Status Summary:**
  - ✓ Shipment data for ASN is valid
  - ✗ Labels 3 to 3 have not been printed
- Options:**
  - Place ASN transmission on hold (wait in Outbox)
  - Create Single Invoice for shipment
- Confirm Ship Data:**
  - Ship Date: 10/25/2013 (with a calendar icon)
  - Ship Time: (with a clock icon)

 At the bottom, there are 'OK' and 'Cancel' buttons.

## Reprinting Labels

After the shipment has been completed you can always go back and review packing and print or reprint labels. Open the shipment through the Shipments tab. Click on 'Review Packing'. See figure 15.4. Print labels the same as if you hadn't yet completed the shipment



## How to Pack a Multiple Order Advanced Ship Notice (856)

**Fig 15.10**

Customer Name	Ship To	Exp. Ship Date	PO No	PO Date	CO Number	CO Date	Status
1 Commport Hospital	555444		10101010	Jul-14-2013	4	Aug-27-2015	Pending Shipment
2 Commport Hospital	555444		50505051	Jul-14-2013	3	Aug-27-2015	Order Confirmed
3 Commport Hospital	555444		50505052	Jul-14-2013	2	Aug-25-2015	Order Confirmed
4 Commport Hospital	555444		50505053	Jul-14-2013	1	Aug-25-2015	Acknowledgment Pending

To create a shipment with multiple POs. You will need to select each PO on the Order List, then click 'Create Multi Order Shipment'. There are rules in place for this button to be enabled. They all have to be shipping to the same location. It also has to be the same trading partner. If your shipment does not meet the rules as laid out when you attempt to click on the 'Create Multi Order Shipment' button you will see a blue question mark (?). If you hover over the question mark Internet EDI will explain why the shipments is not accepted as a multi order shipment.

Packing the shipment is the same as reviewed above with the exception of, you can not add different purchase orders into the same Carton / Pallet.



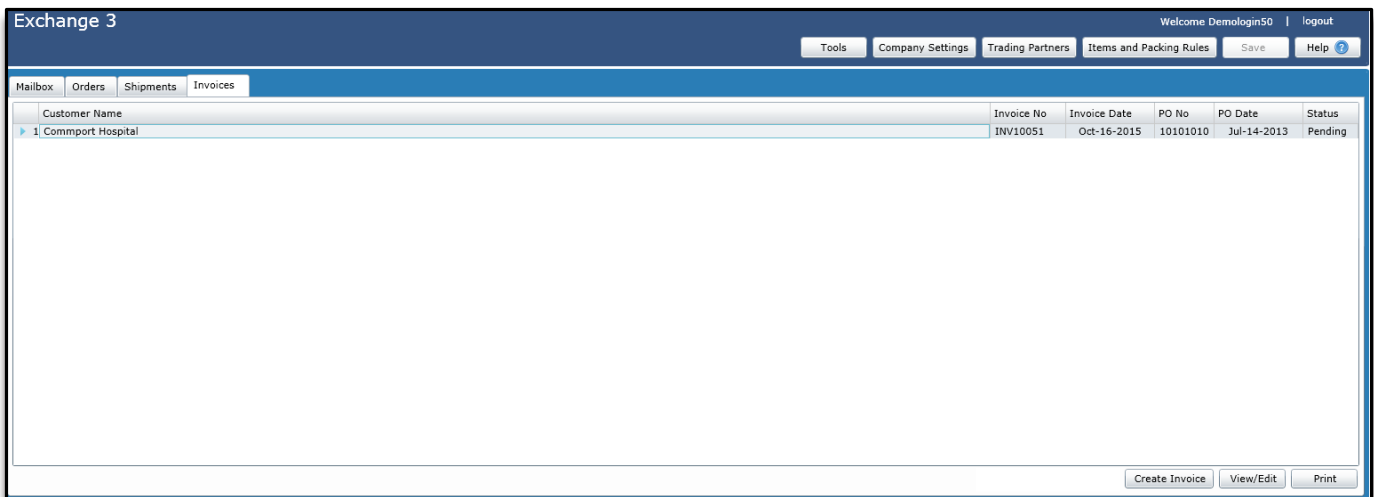
## Creating an Invoice Using Internet EDI

Internet EDI helps you manage your transactions with your trading partners quickly and efficiently. Internet EDI workflows allows you to create an invoice directly from a shipment. The details from the shipment are added to the invoice and from there you only need to complete the invoice specific fields.

Alternatively you may also create an invoice from the sales order by clicking the 'Direct Invoice' button on the sales order screen or you can create a manual invoice by going to the 'Invoice' tab and clicking on the 'Add' button.

A new invoice will be created with a status of 'Pending'. You will be brought to the 'Invoices' tab to open the invoice and complete the needed details.

**Fig 17.0**



Highlight the invoice and click View/Edit or else double click on the invoice to open it.

A new invoice tab will open. Information from the shipment has now flipped to the invoice. All highlighted boxes are mandatory, if you forget to fill them in, when you click 'Complete Invoice' at the bottom of the screen, you will be prompted to complete the missing information and the boxes will be outlined in red.

**Fig 17.1**

Carrier:  Packing Slip Number:

BOL No:  Tracking Number:


Similarly, if you fill out a field and there is a field associated with it that must be filled out. It will be highlighted in green. These are called conditional fields. In Figure 17.2 below the vendor number is required because the shipping location selected is a store and the trading partner requires a vendor number if a store is selected as the shipping address.


**Fig 17.2**

**Currency:**    
**Vendor No:**    
**Invoice Type** <Clear Entry> 










This is what you will see on your screen next:

**Fig 17.3**

Mailbox Orders Shipments Invoices **INV10051** 

EDI Account Name: Commport Hospital Invoice No: INV10051 Date: 10/16/2015  Status: Pending

Bill To: Ship To: Ship From: Invoice Details Terms of Sale Charges & Allowances Shipment Details Additional References

555444 Commport Hospital 1337 Riverside Dr. Moosejaw, ON 00K 1N0
 
 PO No: 10101010  PO Date: 7/14/2013   
 Sales Order No:  Sales Order Date: <M/d/yyyy>   
 Invoice No: INV10051  Transmission Date: <M/d/yyyy>   
 Currency:    
 Vendor No:    
 Transaction Type: <Clear Entry> 

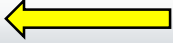
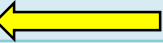
Notes:

Ln	Vendor Code	Item Description	Qty	UoM	Unit Price	Price Per	Ext. Price	Allow.	Charges	Net Price	HST
1	11-462211	INFANT DIAPERS SMALL	7	CA	\$14.00	Each	\$98.00	\$0.00	\$0.00	\$98.00	<input checked="" type="checkbox"/> \$12.74
2	00-001234	ALCOHOL WIPES 10X8 IN	4	CA	\$20.62	Each	\$82.48	\$0.00	\$0.00	\$82.48	<input checked="" type="checkbox"/> \$10.72
3	23-2113-04	SURGICAL TAPE	10	CA	\$12.70	Each	\$127.00	\$0.00	\$0.00	\$127.00	<input checked="" type="checkbox"/> \$16.51
4	09-2000-77	GAUZE	5	CA	\$11.25	Each	\$56.25	\$0.00	\$0.00	\$56.25	<input checked="" type="checkbox"/> \$7.31

Sub Total: \$363.73  
 HST: \$47.28  
**Total: \$411.01**

Taxes are based off of the 'Ship To' Province. Taxes are auto applied. If you want to remove the taxes you can click the checkbox for the appropriate ax. If you only want to remove the tax for one line, you would only need to uncheck the tax for the line.

**Fig 17.4**

**HST**    
 \$12.74  
   
 \$16.51  
 \$7.31

## View/Edit Line

Highlight the item and click on View/Edit Line

**Fig 17.5**

The screenshot shows a dialog box titled "Line: 1 Item" with several tabs: "Line details", "Sub-line details", "Taxes", "Charges & Allowances", and "Case-Pack Physical Details". The "Line details" tab is active. It contains a search section with a "Select Item:" dropdown, "Search by Vendor No:" and "Search by UPC:" input fields. Below this is the "Model item details" section with fields for "Vendor Catalog Number" (T4-8W-W41), "UPCA Number" (771250906632), "Buyer Catalog Number" (003648075), "Item Description", "Qty Invoiced" (24), "EnumItemUnitOfMeasure" (Each), and "Unit Price" (\$3.91). Summary statistics at the bottom show "Extended Price: \$93.84", "Total Allowances:", "Total Charges:", "Total Net Amount: \$93.84", "Total Taxes: \$4.69", and "Total Line Amount: \$98.53". "OK" and "Cancel" buttons are at the bottom right.

Make changes if necessary, click 'OK'.

**Delete Line** – Click on 'Delete Line'.

**Fig 17.6**

The screenshot shows a "Message" dialog box with a close button in the top right corner. The message text reads "You are deleting Item. Delete it?". At the bottom right, there are "OK" and "Cancel" buttons.

You will prompted to click 'OK' or Cancel

Fig 17.7

## Preview EDI

SAMPLE ONLY

**EDI text**

```

ISA*00*      *00*      *ZZ*DEMOB      *01*201481793      *010101*0000*U*00401*536717830*0*P*>
GS*IN*DEMOB*201481793*00010101*0000*153081*X*004010
ST*810*48052
BIG*20130926*1*20130723*V307W09504PR***DI
CUR*BY*CAD
REF*IA*V2174
REF*PK*555555
N1*SN**92*6410
N4***T9A 3B6
N1*RI**93*12121212
N1*ST**93*6410 - 36 STREET
N3*BAG SERVICE 8000
N4*WETASKIWIN*AB*T9A 3B6
ITD*14**2**90*20131027*30*0
DTM*011*20131025
IT1**24*EA*3.91**UP*771250906632*VN*T4-8W-W41*CB*003648075
IT1**24*EA*4.49**UP*771250906649*VN*T4-12-W41*CB*003648084
IT1**36*EA*5.83**UP*771250906663*VN*T4-20-W41*CB*003648119
IT1**40*PK*4.07**UP*771250309280*VN*KPR75/30/2CD*CB*003654557
IT1**16*EA*21.51**UP*771250906502*VN*ALFT4-8-4100*CB*003697431
IT1**27*EA*12.55**UP*771250919182*VN*RC40118ENB-WH*CB*003698467
IT1**12*EA*15.53**UP*771250919175*VN*RC40118ENB-BN*CB*003698476
IT1**60*EA*12.55**UP*771250919243*VN*RC40218ENB-WH*CB*003698494
IT1**96*EA*4.54**UP*771250901033*VN*LJCX20-1223CD*CB*003698537
IT1**204*EA*17.26**UP*771250919328*VN*RC40518ENB-WH*CB*003698582
TDS*974240***0
TXI*GS*463.92*5*****45672822
CAD*M***PRF2*PREPAID      0000000000
CTT*10
SE*28*48052
GE*1*153081
IEA*1*536717830

```

This window will show the EDI transmitting to your Trading Partner.

### Complete Invoice – Click complete

Fig 17.8

**Complete Invoice**

Place Invoice transmission on hold (wait in Outbox)

You can either place the invoice on (hold to send at a later date) by clicking on the box OR click on the 'OK' button to send the invoice to your trading partner right away. Clicking OK will take you back to the invoice page.

## How to Remove Transactions from 'On Hold' status in the Outbox and transmit them.

In your Internet EDI Outbox you will see all transactions listed that have been placed 'On Hold'. To transmit them to your trading partner you must select each transaction one at a time and select the 'Send' button.

You can also cancel an 'On Hold' transaction by selecting the 'Cancel' button. This will allow you to go back and edit the transaction.

**Fig 18.0**

Sent To	Document Type	Doc Number	PO Number	Doc Date	Sent	Status
1 Commport Hospital	810S - Invoice	INV10051	10101010	Oct-16-2015		On hold
2 Commport Hospital	856I - Ship Notice/Manifest	01	10101010	Oct-16-2015		New
3 Commport Hospital	855S - Purchase Order Acknowled	4	10101010	Aug-27-2015	Sep-17-2015 08:33A	Sent
4 Commport Hospital	855S - Purchase Order Acknowled	3	50505051	Aug-27-2015		New
5 Commport Hospital	855S - Purchase Order Acknowled	2	50505052	Aug-25-2015		New

At the bottom of the interface, there are several buttons: Check Mail, View EDI, Print POs, Packing Instructions, Post, Send, and Cancel.

## Support

Our support team is available Monday through Friday from 6:30am to 7:00pm ET. Please contact us at [support@commport.com](mailto:support@commport.com) or (905)727-6782, option 2.

For any training requests that go above and beyond what is included in your agreement with Commport you will be charged an additional \$70.00/hour fee that is charged at a one hour minimum. You may also purchase a support package. Packages offer discounted hourly rates that allow you to save money with day to day assistance for you and your staff. The support packages are as follows:

### Option 1: Annual Support Packages

Bronze: 12 hours per year	\$60.00
Silver: 24 hours per year	\$110.00
Gold: 48 hours per year	\$200.00

#### Features:

- Invoiced monthly.
- Renewed Annually:
  - At the end of each year the unused hours will not be carried over.
  - If you renew your support contract a new allotment will be set up.
- Cases are tracked by the minute with a 15 minute minimum.
- If you use any support over your package allotment, support will be invoiced at \$70.00/hour with a one hour minimum.

### Option 2: Prepaid Support Packages

3 prepaid hours	\$215.00
5 prepaid hours	\$345.00
8 prepaid hours	\$540.00

#### Features:

- Invoiced the first of the month following the purchase.
- Usage of the prepaid time starts immediately.
- Cases are tracked by the minute with a 15 minute minimum.
- You will be notified in advance when 1 hour of prepaid support remains.
- This time will remain available for 36 months. Any support time not used in the 36 months will expire and a new prepaid support time package may be purchased.