SPS COMMERCE

INFINITE RETAIL POWER™

FULFILLMENT

McKESSON Med Surgical
WebForms Reference Guide - **Core Documents**
February 2016

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Introduction

Welcome to the **McKesson Med Surgical WebForms Reference Guide**. This reference material is intended to make your transition to the world of web business-to-business communication as smooth as possible. At the completion of this document, you will have a basic understanding of WebForms functions, capabilities, and the tools needed to begin using WebForms to access your EDI documents and begin trading with McKesson.

MCKESSON

As the oldest and largest health care services company in the nation, McKesson plays an integral role in health care and has a unique vision for its future. We serve more than 50% of American hospitals, 20% of physicians and 100% of health plans, and as the largest pharmaceutical distributor in North America, where they deliver one-third of all medications used there every day.

Their software, distribution and business services play an essential role in addressing the challenges health care organizations face today — and shaping how they'll overcome them tomorrow. They connect people and organizations, support the quest for higher quality and improved clinical outcomes, and help health care businesses run better. And that supports better patient health.

Today, McKesson is ranked in the top companies on the FORTUNE 500. The company delivers vital medicines, medical supplies and health care information technology solutions that touch the lives of patients in every health care setting. McKesson is committed to creating a health care system that leads to lower costs, fewer mistakes, higher quality and better health for all.

What is EDI?

EDI stands for *Electronic Data Interchange*. It allows you, the Supplier to electronically exchange documents like the Advanced Ship Notices and Invoices with your Trading Partner.

Using EDI streamlines the connection between you and your Trading Partners. It makes it easy to send and receive documents through one Web portal that operates like an email account. This will help keep all of your Orders organized and in one place. It also provides a great place for creating your own documents that need to be sent without having to fax or e-mail them. Documents are able to be both sent and received in a matter of minutes, and Orders become flexible in all formats: In-Store, Online, and Drop-Ship.

Java

Java is an application required for operating the WebForms account. You will want to ensure that the platform is downloaded, installed, and updated on your computer. How do you download Java?

Go to **www.java.com** and click on the red download button: **Free Java Download**
After installing Java, re-start your Browser.

Do you have Java but your forms seem to be not loading? You may be having an issue related to an outdated version of Java or an overcrowded cache of temporary internet files. Please follow the below steps, close out of your browser, re-open and re-try after completion.

1. Clear temporary Internet Files

mozilla **Firefox**®

1. Navigate to **Tools**
2. Select *Clear Recent History*
    Select only *Cookies* and *Cache* from the list
3. Click *Clear Now*
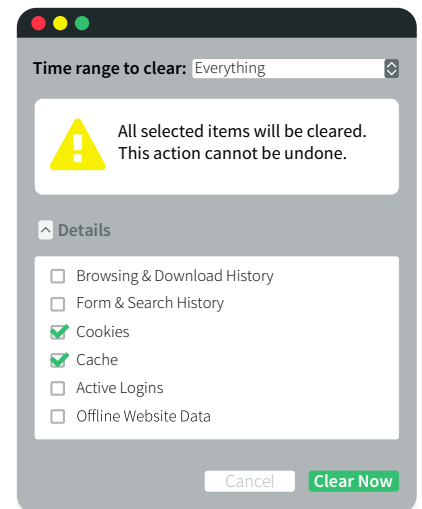
Internet **Explorer**

1. Navigate to **Tools**
2. Select *Internet Options*
3. Navigate to the *General* tab
4. Within *Browsing History*, click *Delete*
    Select only *Cookies* and *Cache* from the list
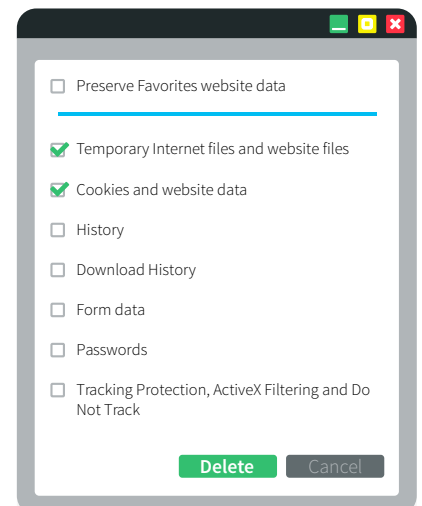
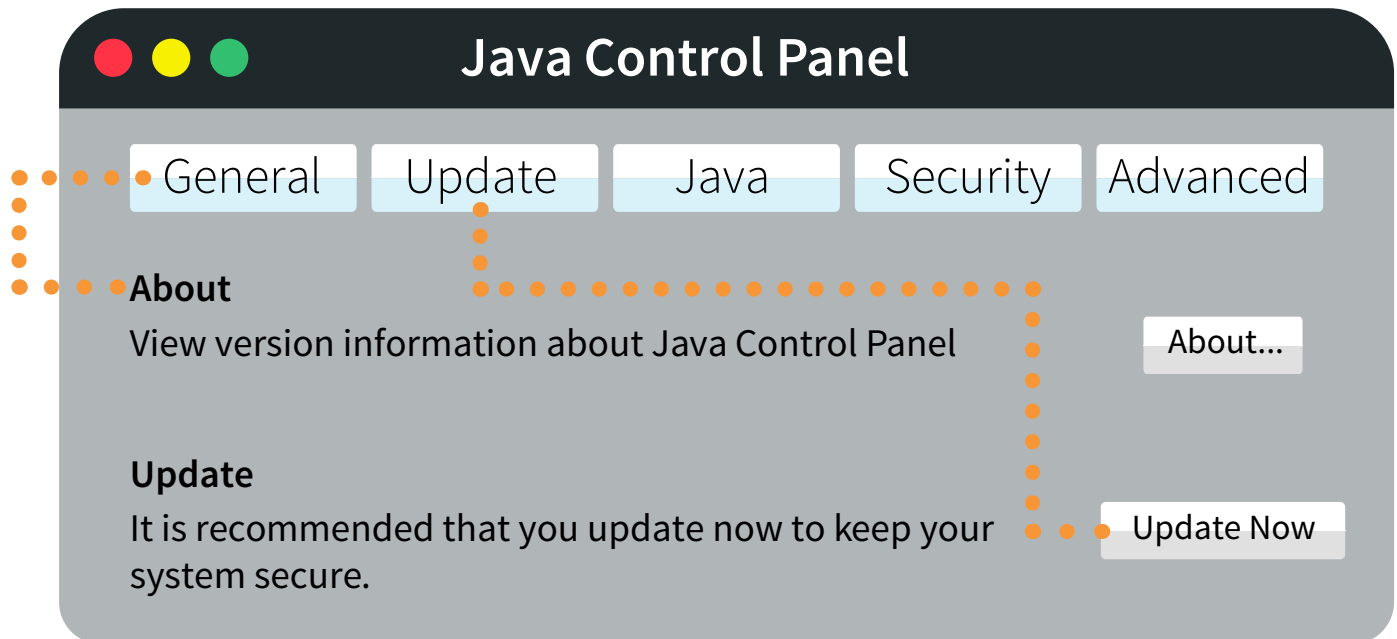## 2. Verify Version of Java

Open your Java control panel:

PC-users: Start menu > Control Panel > Programs > Java

Mac-users: Apple Start Menu > System Preferences > Java

a) Check for an updated Java version. (Update tab)

b) Verify that Java is up-to-date. (General tab)

If not, uninstall the existing version and download an updated one at www.java.com.

Java Control Panel

General	Update	Java	Security	Advanced

About

View version information about Java Control Panel

About...

Update

It is recommended that you update now to keep your system secure.

Update Now

c) Verify that your system does not have more than one Java program installed.

Multiple Java programs can compete with each other.

3. Enable Java in your Internet Browser

1. In Mozilla Firefox, navigate to Tools > Add-ons > Search for Java and enable it.
2. In Internet Explorer,navigate to Tools > Manage Add-ons > Search to find Java and ensure that it is enabled.

For Java video training, visit our Support Center: Check and Update Java

WebForms Navigation

To access your WebForms Fulfillment account:

1. Navigate to **www.spscommerce.net**
2. Enter your username and password (provided to your System Administrator by your dedicated Analyst)
3. Click **Login**

Login to Hosted Commere

Username

Password

Login

Need help logging in? Did you forget your username or forget your password?

Once logged in, you are brought to your **Portal Homepage**. This is your home for new product updates and general information regarding your existing partnerships.

CUSTOMER RESOURCES

Support Center
Billing Information
Webinar Training
System Troubleshooting
Partner Information

News Feed

Priority	Date	Trading Partner - Headline
⚠	01/19/2016	Process Update
	12/08/2015	Partnership with SPS
⚠	09/16/2015	Document information

Company User Admin is where you can enable email notifications to be sent when a document is received from McKesson.

ADMINISTRATION

User Security Profile

Company User Admin

To govern permissions and update the recipients for automated emails, click **Edit** ✏
on the right-hand side of the username for which you would like to update permissions.

At the top of the page is the Email Address field. Each time a document posts to a
WebForms account, an automated email is sent out. You can add or remove recipients
here, with each email address separated by a single space.

Display Name: [   ]   Email Address: [❗ **150 character limit**]

❗ *If the email addresses listed exceed the 150 character limit, try creating an internal distribution list so that all
persons can receive new document email notifications.*

PRO TIP

**SPS Commerce
recommends
that you monitor
your WebForms
Inbox, just as you
would an email
Inbox, to ensure
that a new
document is not
missed.**

Automated emails are generated on a per-username basis, so
documents received from all trading partners for a particular
username will generate an email to the email address(es) listed
within Company User Admin.

Inbox / Sent / Drafts

Click **WebForms Fulfillment** at the top of the page to access
your WebForms account.

SPS COMMERCE   WebForms Fulfillment

The **Inbox** will house all documents sent from McKesson and any other trading partner
you are connected with.

The **Sent** folder will house any document you sent to McKesson or any other trading
partner. You can check to see if you document was received by the retailer by checking
the icon in the status column. When a document is first sent the font will be bold and
the status icon will be an envelope.

Once the document has been accepted into the retailer's system the font will turn to regular font and the icon will change to a piece of paper.

Status	Sender	Type	Date
☐ ✉	**Supplier**	**Price Authorization**	**02/14/2016 19:13:08 CST**

Status	Sender	Type	Date
☐ 📄	Supplier	Price Authorization	02/14/2016 21:48:12 CST

The **Drafts** folder will house any *saved* documents that may still need additional information before being sent to McKesson.

Purchase Order Acknowledgement

Suppliers must return a Purchase Order Acknowledgement for all Purchase Orders on the **same day** Order was received.

Acknowledgement information is used to assist with the visibility of the Order within the Supplier's systems & order fulfillment process. This includes reporting on the status of the Order and any discrepancies on the Order.

When **Accepting**, **Rejecting**, or making **changes** to one or more Line Items, Suppliers must include all items that were included in the original Order at the Item level status.

If an entire Item quantity or a portion of the item quantity will be **backordered**, the supplier is to include the **expected future Ship Date** at the Item level.

Price changes are communicated at the Item level.

A new Item Total Quantity should be included when Item Quantity changes or corrections are made.

Item substitution requires the reference of a new Vendor UPC or Vendor Part Number.

Suppliers must provide explanations for both Order **Rejections** and Item **Rejections**.

The **Customer Order Number** must be included on the Purchase Order Acknowledgement for all Direct to Consumer Orders. McKesson will reconcile the portion of the Customer Order that requires attention.

Suppliers must provide updates to the status of the Order throughout the Order life cycle. McKesson will use this information to set expectations on product availability and to determine if Order updates are required.

To access the Purchase Order Acknowledgement, click the orange triangle from either the top right-hand corner of the Purchase Order style sheet or from the WebForms Inbox in the Next Steps column. From the Next Steps dialogue box, select **PO Acknowledgement**.

Next Steps

Working with Purchase Order

- **PO Acknowledgement**
- Advance Ship Notice
- Invoice
- ✔ Auto-Complete
- Related Documents

On the loaded form, fields outlined in blue are mandatory. **Purpose Type** indicates the type of Acknowledgement being sent: *Original*, *Confirmation*, or *Status Update*. **Acknowledgment Type** has a drop-down menu for selecting the type of Acknowledgment you will be sending: *if you are accepting the Order in full, choose Acknowledge-No Detail No Change*.

Backordered or rescheduled Ship Dates require *Acknowledge-With Detail and Change* - be sure to fill in the Ship Date or updated Quantity, accordingly.

Acknowledgement Type

Acknowledge - With Detail and change
Acknowledge - With Detail no change
Rejected with Detail

Upon completing the **Header** tab, navigate to the **Detail** tab. Once there, click on the plus sign under **Item** to source in the Line Items.

Use the **Select All** button to source in all Line Items before clicking **OK**.

Once the Line Items source in, complete the **Item Acknowledgment** box. Click into the box for a new window to appear. On the new window, click the plus sign to add line acknowledgement information. The **Item Status** box has a drop-down menu with different acknowledgment types. *If you choose any option other than **Item Accepted,** you will need to complete the **Quantity, UOM,** and **Ship Date** fields.*

Upon completing all mandatory fields, click the [i] **Check** button at the bottom of the form. If you receive ***Check Successful!***, you are ready to send the document.
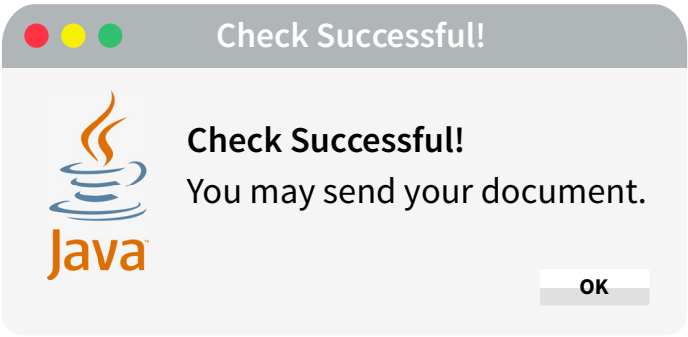
If you missed a mandatory field on the form, you will receive an error message indicating the error on the form. Click on the error message to see where information is missing on the form.
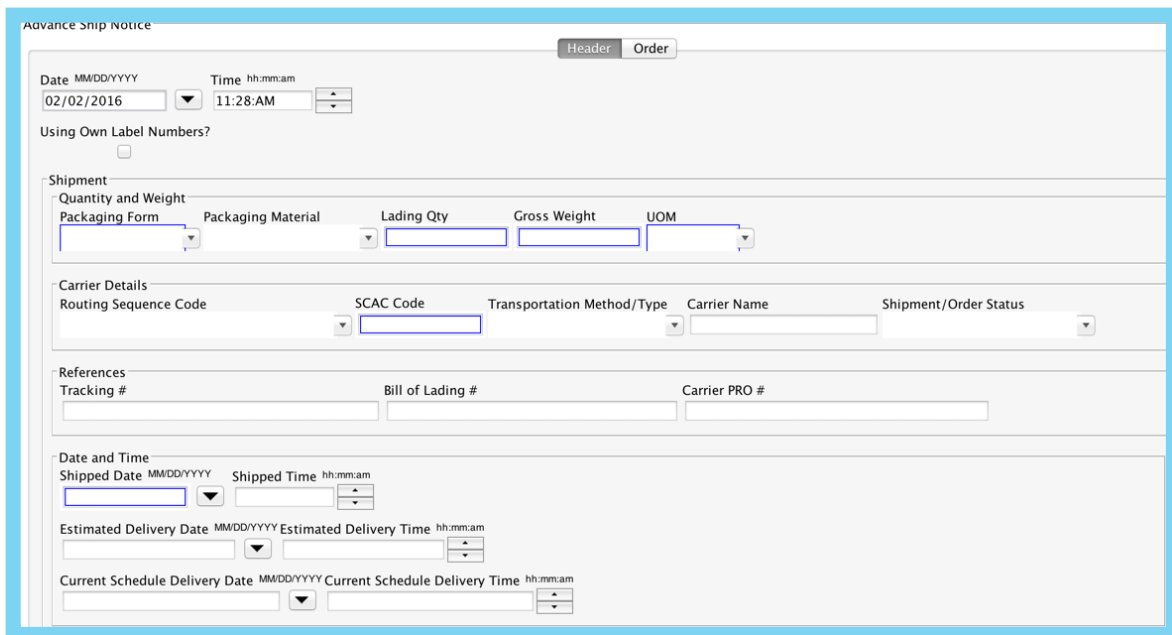
To access the Advance Ship Notice, click the orange [Next Steps ▶ ⠿] triangle from either the top right-hand corner of the Purchase Order style sheet or from the WebForms Inbox in the Next Steps column. From the Next Steps dialogue box, select **Advance Ship Notice**.

On the form, complete all fields outlined in blue. You will need to fill in *either* the **Bill of Lading Number** field, **Tracking Number** field, or **Carrier Pro Number** field. Though mandatory, these fields are not highlighted in blue because they are either-or fields.

Please note, the **Lading Quantity** is the total amount of cartons or pallets shipped.

SCAC Code stands for the Standard Carrier Alpha Code. It identifies a Carrier as a four-letter code. At the bottom of the form you will also find a **Transaction Statement**: select one, the other, or both check boxes to complete the mandatory **Header** tab information. Upon completing the Header tab, navigate to the **Order** tab.

Click the plus sign under **Tare/Pack Info** and choose *Pack* or *Tare* and *Single* or *Multiple*. *Pack indicates carton, Tare indicates pallet.* Select Single if you are putting one SKU in your carton and Multiple if you are putting more than one SKU into the carton.

Click the plus sign under **Item Info** and select the Items that will be going into the Pack/Tare. After the Line Items source in, complete the **Quantity per Carton** column.

If you need to send more than one pallet or carton with additional SKUs, you will need to click the plus sign again under **Tare/Pack Info** and follow the same steps listed on the previous page.

Once complete, follow the same Check process by clicking the **ⓘ Check** button at the bottom of the form to ensure your document has all mandatory fields filled in. Once checked successfully, you are able to Send or Save the Advanced Ship Notice.

Shipping Labels

PRO TIP

SPS Commerce recommends that you save your Advance Ship Notice and check Shipping Labels before sending the document to your trading partner.

You are required to send your shipments with corresponding *UCC-128 Shipping Labels* on the outside of the carton or pallet. Depending on whether you Saved or Sent the Advance Ship Notice, you may access the Shipping Labels by navigating to your **Drafts Folder** or to your **Sent Folder**. Click on the orange **Next Steps** triangle off of the Advance Ship Notice and select **Shipping Label**.

The Shipping Labels will load in a new tab where you have access to print them by clicking on the print icon 🖨 in the top right- hand corner of the page.

Ship From:
Ship From Name
321 Water St.
Waterville, WI 54703
US

Ship To:
MCKESSON MEDICAL-SURGICAL INC
(TEMPE) 082
7343-A SOUTH HARDY DRIVE
TEMPE, AZ 85283

(420) SHIP TO POSTAL CODE:

(420)85283

Carrier: Common Carrier Name
Tracking #: 42342342334

Number of Cartons:
1 of 22

Contents
PO#: 18022833
Vendor Order #: 1243423434
Item #: 01E6604
Item Desc: CALIBRATOR, AERO BILIRUBIN 6X5ML B/DS
Carton Qty: 2

Serialized Shipping Container Number

(00) 0 9876543 210005974 4

Invoice

To create an Invoice, click the orange [Next Steps ▶ ••] triangle from either the top right-hand corner of the Purchase Order style sheet or from the WebForms Inbox in the Next Steps column. From the Next Steps dialogue box, select **Invoice**.

On the form, the **Invoice Number** can be a unique number that you use to track the document in your own system. Once complete, navigate to the **Item** tab.

On the Item tab, click the plus sign at the top of the page to reveal the Line Items from the Order. Use the **Select All** button to source all Items onto the Invoice.

The **Summary** tab contains the Invoice total. If you need to include an *Allowance* or *Charge*, you may do so under the **Allowance/Charge Information** section by clicking the plus sign and then selecting the type of indicator you will be including. Additionally, you will need to include the *Type*, the *Amount*, and a brief *Description*.

Upon completing the Invoice, follow the same Check process by clicking the **Check** button at the bottom of the form to ensure your document has all mandatory fields filled in. Once checked successfully, you are able to Send or Save the Invoice.

Support Center

The **SPS Commerce Support Center** is home to a wide variety of training material, including videos and forums for answering common EDI-related questions. Access the Support Center by clicking on the blue banner at the bottom of the WebForms portal home page, or by navigating to **supportcenter.spscommerce.com**.