



SPS COMMERCE

McLendon Hardware

WebForms Overview of McLendon Hardware's specific Documents

Kristina McCollor

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Contents

Welcome 2

What is EDI? 3

Java..... 4

WebForms Navigation 5

Inbox/Sent/Drafts 7

846-Inventory Advice 8

855-Purchase Order Acknowledgment..... 11

856-Advance Ship Notice 15

810-Invoice..... 18

Support Center..... 20

Welcome

Welcome to the McLendon Hardware 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 McLendon Hardware.



McLendon Hardware is a family run business that started as a second hand store in Washington State. The two owners would travel around Renton and South Seattle by horse drawn wagon house to house, collecting used tools, light fixtures, buckets, tubs and whatever else they felt they could resell. They were early "garage sale" shoppers and recyclers. By the 50's, they had started to sell more and more products as the "do it yourself" movement started. In the 70's they started to expand and opened additional stores and now have 7 retail hardware stores and two distribution centers in the Washington market. They stock over 75,000 SKU's covering a multitude of product categories; from paint and power tools to work apparel and sporting goods.

What is EDI?

- **What is EDI?** EDI stands for electronic data interchange, it allows you, the supplier to exchange documents such as the Advanced Ship Notice and Invoice electronically with your trading partner.
- **Why do I need this and how will it help me?** Using EDI streamlines the connection between you and your trading partner. It makes it easy to send and receive documents all through one web portal that works almost like a Gmail account. This will help keep all of your orders organized and in one place. It also provides a great way to create your own documents that you need to send without having to fax or e-mail them. Documents can be sent and received within minutes and it gives you more flexibility to work with your trading partner to fulfill in store, online and drop ship orders all in one easy and convenient process.



Java

Java is one feature you will need to ensure you have downloaded and updated on your computer so that you can work in your WebForms account. How do you download Java?

Go to www.java.com and click on the box that says “Free Download”. After installing Java you will want to 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*
 1. **In Firefox:**
 - Tools > Clear Recent History > Select only “Cookies” and “Cache” from the list then select “Clear Now”
 2. **In Internet Explorer**
 - Tools > Internet Options > General Tab > Under ‘Browsing History’ select “Delete...” > Select only “Cookies” and “Cache” from the list then select “Delete > Press ‘OK’
2. *Verify Version of Java*
 1. To check for an updated version, navigate to your Start Menu > Control Panel (Ensure that it says “View by: Category” in the top right, if not change it from ‘Large Icons’ or ‘Small Icons’) > Under the Programs category select ‘Uninstall a program’ à Search for Java
 2. First verify that your version is up to date, if not, uninstall the existing version and download an updated one at www.java.com
 3. Also verify that you do not have more than one java program installed, as they can compete
3. *Enable Java in your Internet Browser*
 1. **In Firefox**, this can be enabled by navigating to Tools > Add-ons > Search for Java and enable it
 2. **In Internet Explorer**, this can be enabled by navigating to Tools > Manage Add-ons > Search to find Java and ensure that it is enabled

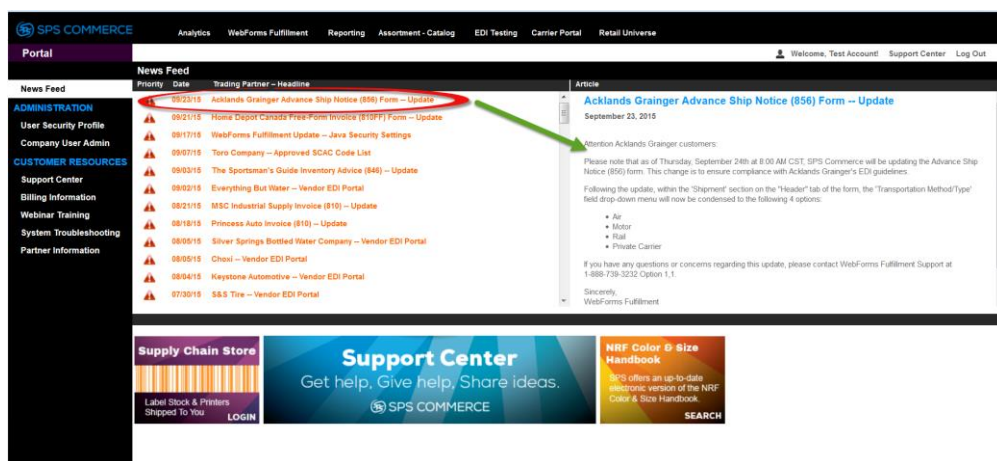
For a video walk-through of the above, please follow these links:

- [Unable to Load Forms](#)
- [Clearing Temporary Internet Files](#)
- [Check and Update Java](#)

WebForms Navigation

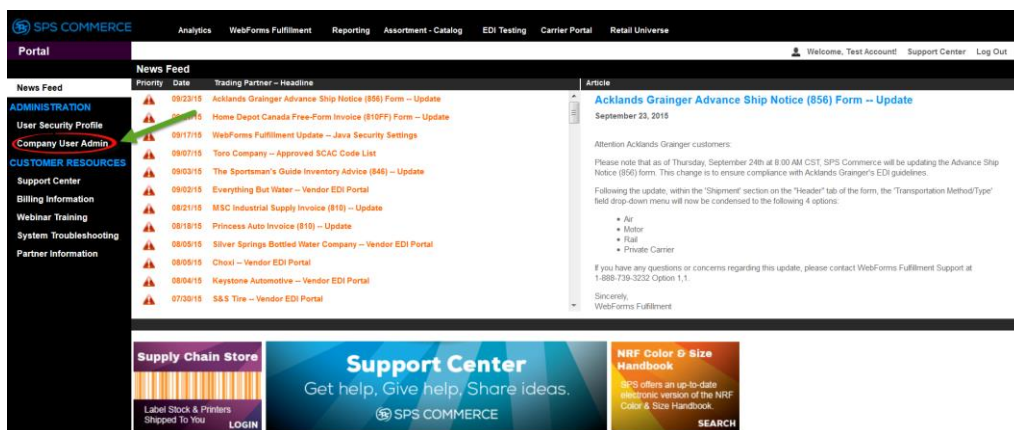
To log into your WebForms account please navigate to www.spscommerce.net and use your login credentials that were provided to your system administrator by your dedicated analyst.

Once logged in, you will see your home screen you will see the News Feed. This is where your trading partner updates can be found. If you click on the title on the left, the article will appear on the right.



The screenshot shows the SPS Commerce WebForms Fulfillment portal. The left sidebar contains navigation links under 'ADMINISTRATION' (User Security Profile, Company User Admin) and 'CUSTOMER RESOURCES' (Support Center, Billing Information, Webinar Training, System Troubleshooting, Partner Information). The main area is titled 'News Feed' and contains a table of updates. A red circle highlights the first row: 'Acklands Grainger Advance Ship Notice (856) Form -- Update'. A green arrow points from this row to the 'Article' section on the right, which displays the full details of the update, including a date of September 23, 2015, and instructions for customers regarding the 'Advance Ship Notice (856) form'.

Company user admin is where you can enable email notifications to be sent when a document is received from McLendon Hardware.



This screenshot is similar to the previous one but highlights the 'Company User Admin' link in the left sidebar with a green circle and a green arrow. The main content area remains the same, showing the 'News Feed' table and the 'Acklands Grainger Advance Ship Notice (856) Form -- Update' article.



SPS COMMERCE Analytics WebForms Fulfillment Reporting Assortment - Catalog EDI Testing Carrier Portal Retail Universe

Portal Welcome, Test Account! Support Center Log Out

Company User Admin + Add New User (Additional fees may apply)

Username sadupawu Edit Remove

News Feed

ADMINISTRATION

User Security Profile

Company User Admin

Click the edit icon.

User Account Info

WebForms permissions for user: sadupawu

Account Settings:

Display Name: Example Name Email Address: example@123.com

Form Permissions:

Choose a trading partner: McLendon Hardware Inc

Trading Partner	EDI Form	Permissions	
McLendon Hardware Inc	Purchase Order	Read ReadWrite None	
	PO Acknowledgement	Read ReadWrite None	
	PO Change	Read ReadWrite None	
	Advance Ship Notice	Read ReadWrite None	
	Shipping Label	Read None	
	Packing Slip	Read None	
	Invoice	Read ReadWrite None	
	Pick List	Read None	
	Remittance Advice	Read ReadWrite None	
	Inventory Advice	Read ReadWrite None	
	Select a permissions action		

Save Close

Enter in the e-mail address in the rectangular box. Each time a document posts to your WebForms account, an automated email is sent out. You can add or remove recipients here, with each email address separated by a single space. There is a 150 character limit. If you reach that limit, you might want to create a distribution e-mail that multiple users can access. It is best practice to have at least two recipients set up to receive email notifications. Once complete click save and close.

SPS COMMERCE Analytics WebForms Fulfillment Reporting Assortment - Catalog EDI Testing Carrier Portal Retail Universe

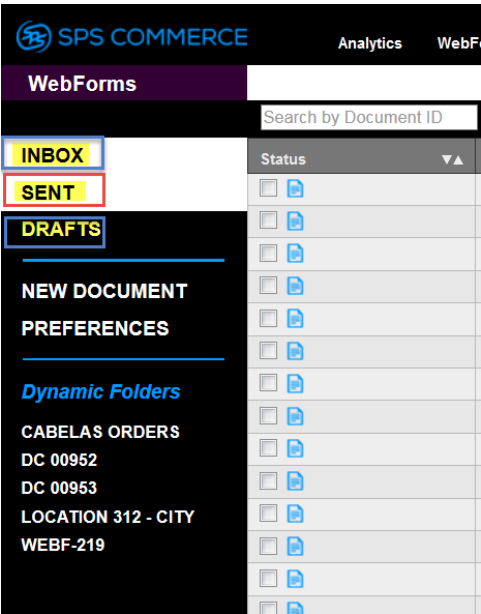
Portal Welcome, Test Account! Support Center Log Out

News Feed

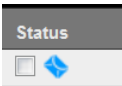
Click on WebForms Fulfillment in the navigation bar to access your Inbox to view your orders.

Inbox/Sent/Drafts

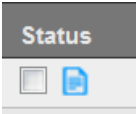
The inbox will house all documents sent from McLendon Hardware and any other trading partner you are connected with.



The Sent folder will house any document you sent to McLendon 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 icon will be an icon that looks like 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.



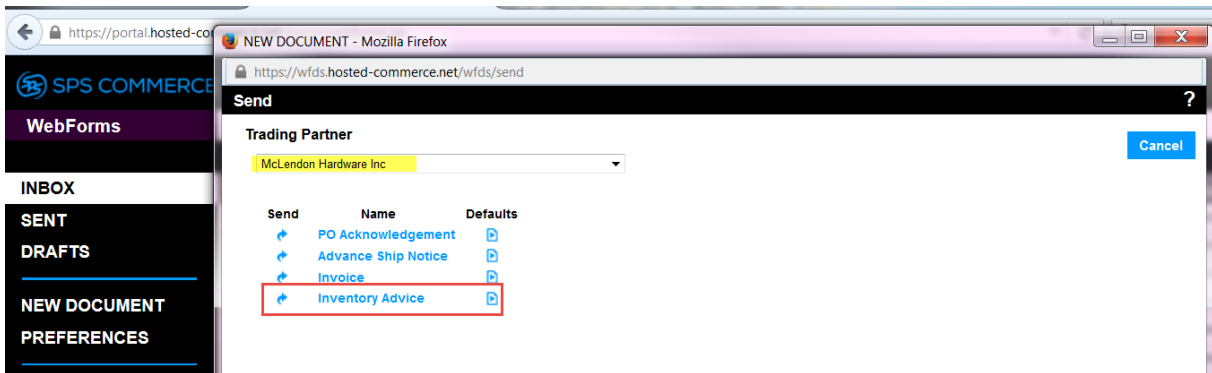
The drafts folder will house any document you SAVED that may still need additional information added to it before it is ready to be sent.



846-Inventory Advice

- The 846 Inventory Advice should be sent at least once per day representing available inventory (this does not have to be inventory allocated to McLendon Hardware).
- The files are to represent corporate level quantities regardless of the number Ship-From locations a supplier has or can be at the suppliers' unique Ship-From location level.

To open up an Inventory Advice you will navigate to the left hand column, below Drafts you will see [New Document](#). Click on New Document, this will open up a box. From the Trading Partner dropdown select McLendon Hardware Inc. and click on Inventory Advice.





When the form loads you will be required to fill in the boxes that are outlined in blue. The header page only requires one box, Unique Reference Number. This number can be whatever you track this form with in your own system. Some people use the date so they can track each day the document has been sent.

McLendon Hardware Inc Inventory Advice

Inventory Advice

Header Detail

Unique Reference Number Report Date MM/dd/yyyy Internal Vendor Number

10/20/2015

Done Close Check Defaults Save Save As Template Send Find a Field

The order tab is where you will enter your items. You will want to complete this form in full to what inventory McLendon needs to see, you can click on save as template and save it as a template to utilize every day.

McLendon Hardware Inc Inventory Advice

Inventory Advice

Header Detail

3 of 3

Assigned ID	McLendon Part #	Vendor's Catalog #	UPC #	Distributor's Part #	Product Description	Quantity Available	UOM	Available Date (M...	Projected Available Inve...	UOM	Projected Avail...
12345	45678	987654321			Black Item	50.0	Each	10/28/2015	150.0	Case	11/05/2015

Done Close Check Defaults Save Save As Template Send Find a Field



The screenshot shows a web application window titled "McLendon Hardware Inc Inventory Advice". It contains a table with the following data:

Assigned ID	McLendon Part #	Vendor's Catalog ...	UPC #	Distributor's Part ...	Product Description	Quantity Available	UOM	Available Date (M...	Projected Available Inve...	UOM	Projected Avail...
	12345	45678	987654321		Black Item	50.0	Each	10/28/2015	150.0	Case	11/05/2015

At the bottom of the form, there are several buttons: "Done", "Close", "Check" (highlighted with a red box), "Defaults", "Save", "Save As Template", and "Send".

You want to be sure to always click the CHECK button at the bottom of your form to check to make sure all the mandatory fields that are required to be filled in are entered in. Please note this does not check your document for data integrity or spelling so you still need to be sure to enter in accurate information.

If there is an error on the form or a field is not filled in you will receive an error box notifying you of the error. If you click on the text in the error box, it will highlight the spot on the form that it is referring to.

The screenshot shows an "Errors" dialog box with a list of error messages. A red arrow points from the "UOM is mandatory" message to the "UOM" column in the table below. The table data is the same as in the previous screenshot.

Errors:

- [Unique Reference Number] is mandatory
- [McLendon Part #] is mandatory
- [Vendor's Catalog #] is mandatory
- [UPC #] is mandatory
- [Product Description] is mandatory
- [Quantity Available] is mandatory
- [UOM] is mandatory**
- [Available Date] is mandatory
- [Projected Available Inventory] is mandatory
- [UOM] is mandatory
- [Projected Available Inventory Date] is mandatory

The "Check" button at the bottom of the form is also highlighted with a red arrow.

Once you get a check successful you can then send your document.

The screenshot shows a "Check Successful!" dialog box with the following text:

Check Successful!

You may send your document.

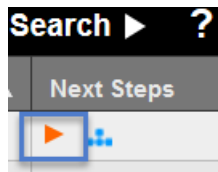
OK

855-Purchase Order Acknowledgment

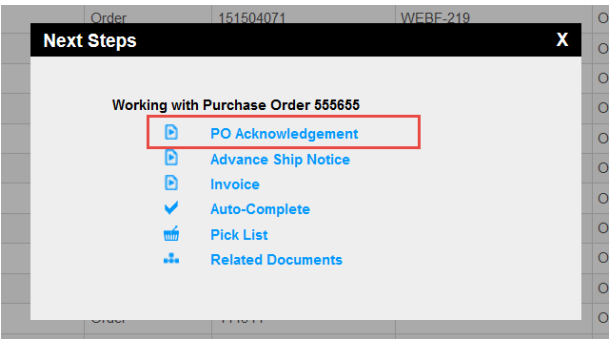
- McLendon Hardware requires suppliers to return an 855 for all Purchase Orders within 1 business day of the receipt of the order.
- The 855 information will be used to assist with the visibility of the order within the supplier's systems/order fulfillment process; this includes reporting on the status of the order and any discrepancies on the order.
- When sending the 855 all items from the original order must be included in the line item detail, even if the order is being accepted or rejected in its entirety.

To view your purchase order you can click on Sender, ID or Date, whatever turns to an orange font when hovering over it. This will open what we call a style sheet in a new tab. The style sheet is our way of taking the information McLendon Hardware sent you and organizing it into a reader-friendly format.

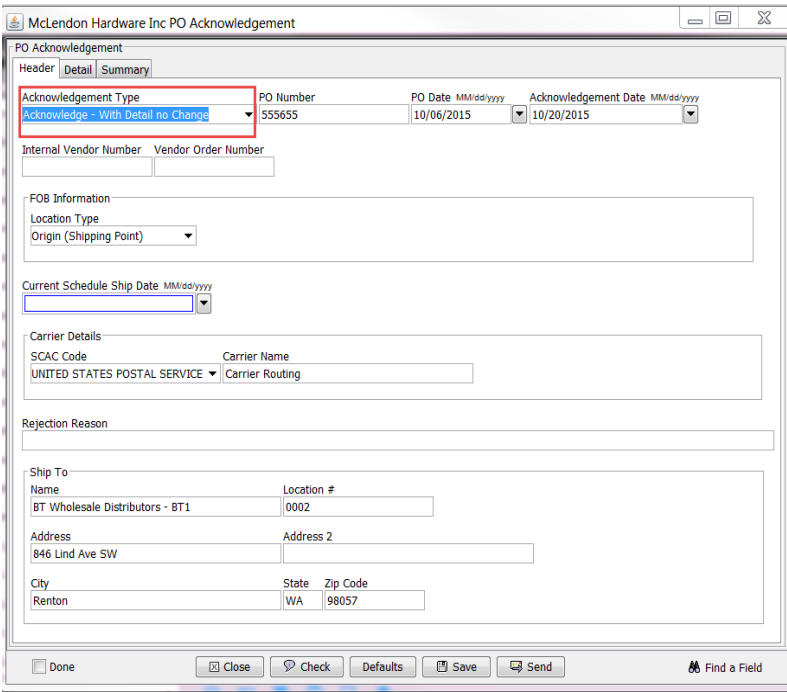
To access your purchase order acknowledgment you will want to click on the orange next steps triangle either from the style sheet in the top right hand corner or from your inbox in the Next Steps column.



The next steps box will pop up and provide you a list of options to choose from, you will want to select PO Acknowledgment.

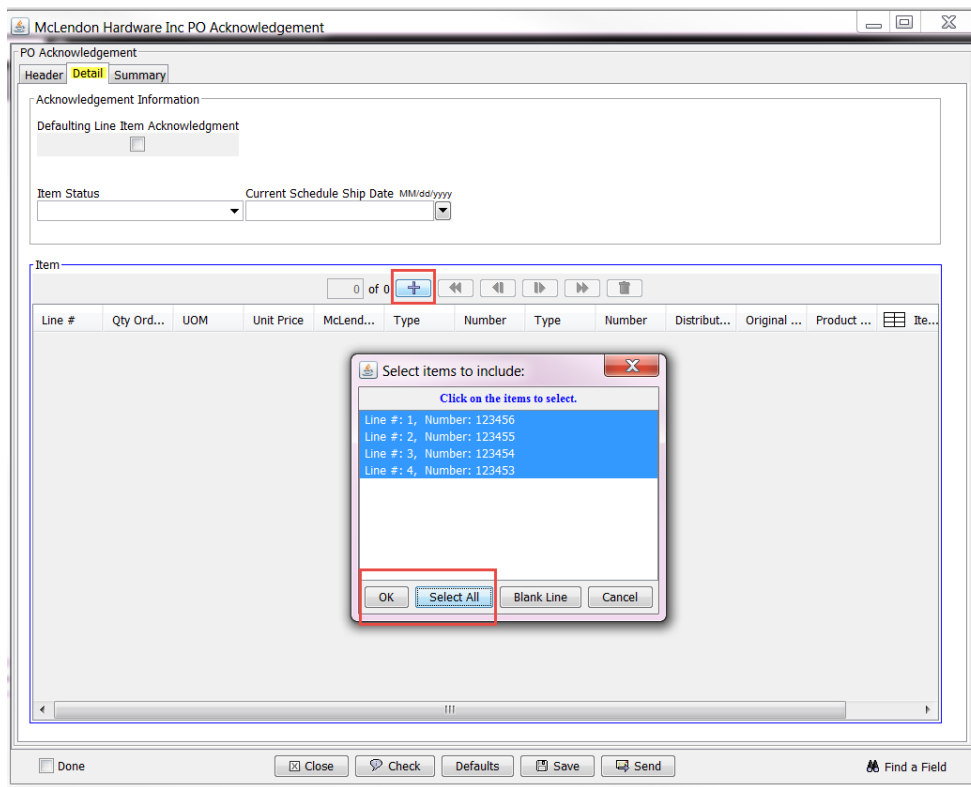


Once your form loads you will see boxes outlined in blue, these are the mandatory fields you are required to enter. Acknowledgment Type has a drop down to select which type of Acknowledgment you will be sending, if you are accepting the PO in full you will choose Acknowledge-With Detail No Change. If you have an item on backorder or you need to reschedule the ship date you will select Acknowledge-With Detail and Change and fill in the ship date.





Once the header tab is completed you will then navigate to the detail tab. Once there, click on the plus sign under Item, a box will pop up with the line items, select all and then ok.



Once the line items source in, click into the item acknowledgment box for each line item to indicate what type of acknowledgment it is. An additional box will pop up, click the plus sign and a line will source in. Item Status has a drop down that gives a list of the different acknowledgment types. If you select anything else aside from Item accepted you will need to enter in the quantity, UOM and current scheduled ship date. If you reject the line, you will need to fill in the rejection reason.

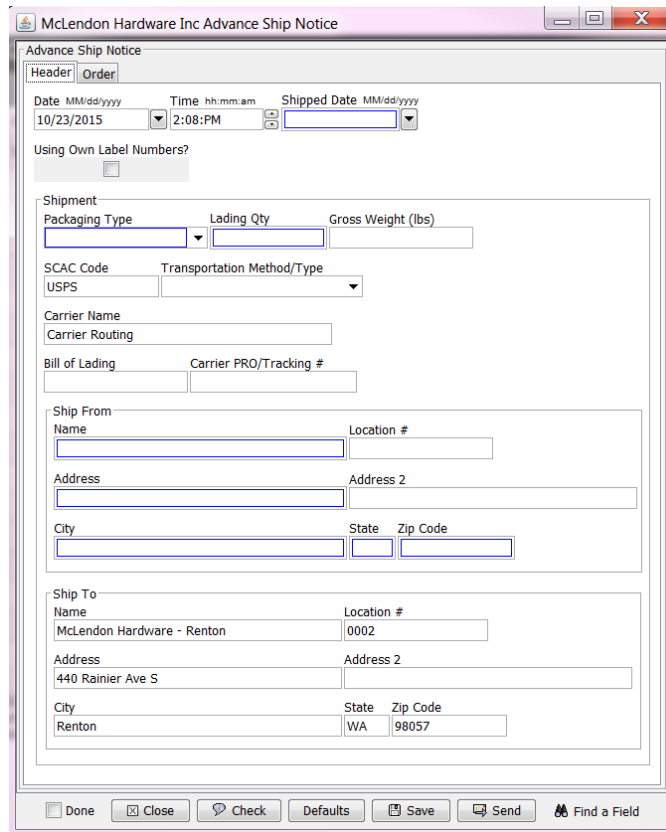


Once complete, click the Check button at the bottom of the form, if you receive “check successful” you are then ready to send the document.

If you missed a mandatory field, you will receive an error box indicating the error, if you click on the error it will highlight the field on the form for you.

856-Advance Ship Notice

To access your ASN you will navigate to your inbox, off of the order, click the orange next steps triangle, and then select Advance Ship Notice.



Fill in all the boxes that are outlined in blue. You will need to fill in either the Bill of Lading field or the Carrier Pro/Tracking # field, they are either-or fields which is why they are not outlined in blue. Once the header tab is complete then navigate to the order tab.



McLendon Hardware Inc Advance Ship Notice

Advance Ship Notice

Header Order

1 of 1

PO Number 222322 PO Date 10/06/2015 Vendor Number Mark For Location #

Tare / Pack Info

1 of 1

Hierarchical Level Code Variety, Single or Multi Item per Pack

Item Info

0 of 0

Line #	McLend...	Type	Number	Type	Number	Distribut...	Shipped.
--------	-----------	------	--------	------	--------	--------------	----------

Done Close Check Defaults Save Send Find a Field

Click the plus sign under Tare/Pack Info and select whether you will be shipping Tare (pallet) or Pack (carton). You will select Single if you are putting one SKU in your carton or on your pallet, multiple if you are putting more than one SKU into the pack/tare. Then 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, fill in the quantity per carton fields.

McLendon Hardware Inc Advance Ship Notice

Advance Ship Notice

Header Order

1 of 1

PO Number 222322 PO Date 10/06/2015 Vendor Number Mark For Location #

Tare / Pack Info

1 of 1

Hierarchical Level Code Variety, Single or Multi Item per Pack

Pack Multiple

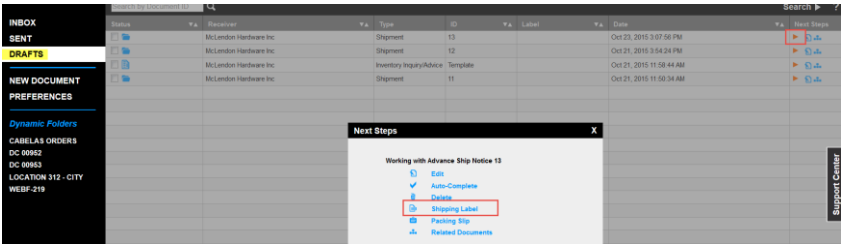
Item Info

4 of 4

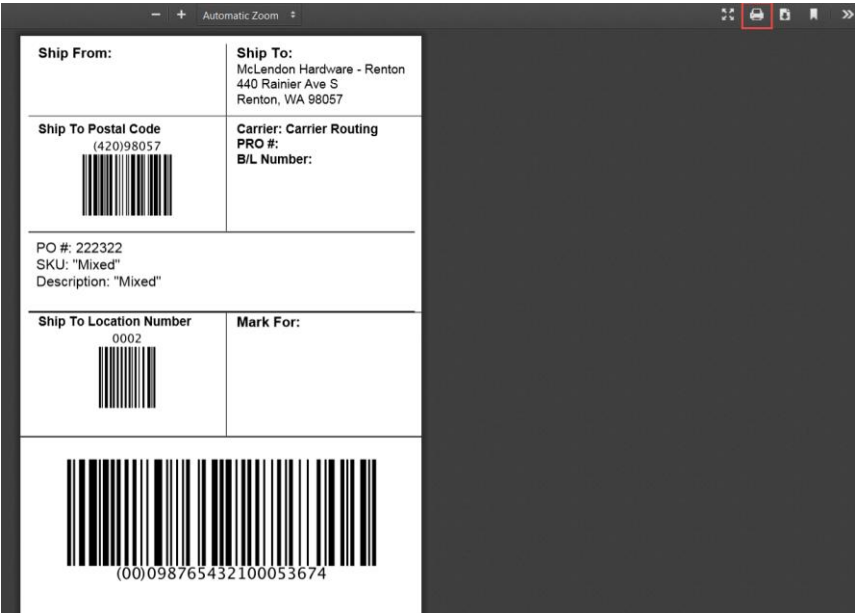
Line #	McLend...	Type	Number	Type	Number	Distribut...	Shipped ...	UOM	Qty per Ca...	Unit Price	Product D...	Seri...
1	123456	Vendor's C...	111111	UPC #	100111111...		2	Each	2	2.0	test	
2	123456	Vendor's C...	222222	UPC #	100222222...		2	Each	1	2.0	test	
3	123454	Vendor's C...	333333	UPC #	100333333...		2	Each	2	2.0	test	
4	123453	Vendor's C...	444444	UPC #	100444444...		2	Each	1	2.0	test	

If you need to send more than one carton or pallet you will need to click the plus sign again under Tare/Pack Info and follow the same steps listed above. Once everything is filled in, click the Check button at the bottom of the form to check your document to ensure all mandatory fields that are required are filled in. Once checked successfully you can then either save or send your document.

You are required to send your shipments with a UCC-128 Shipping label on the outside of the carton or pallet. To access your shipping label you can navigate to your drafts folder or sent folder (whether you saved or sent your ASN) and then click on the orange next steps triangle off of the ASN and select shipping label.

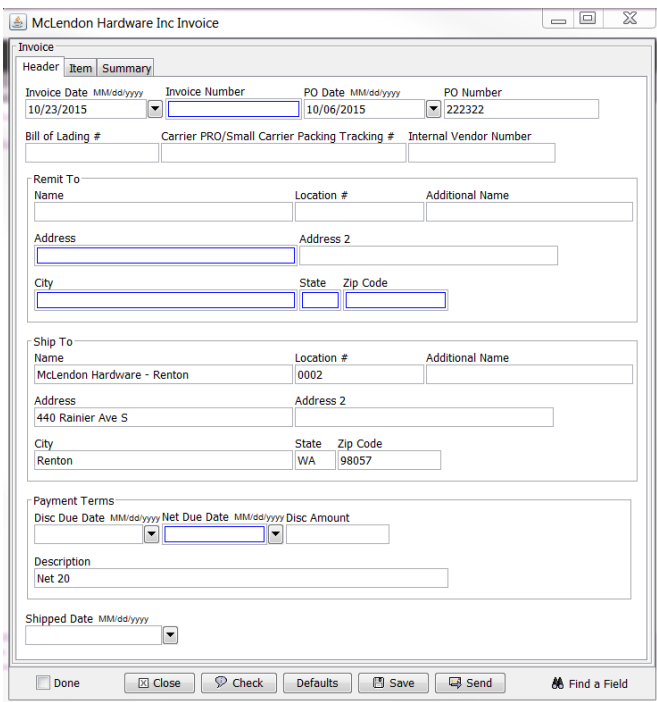


The labels will load in a new tab where you have access to print them by clicking on the print icon in the top right hand corner of the page.



810-Invoice

To create an invoice navigate to the inbox and click on the orange next steps triangle off of the order and select Invoice. You will need to fill in all of the boxes outlined in blue.



The invoice number can be a unique number that you use to track the document in your system. Fill in the Bill of lading or Carrier Pro/Tracking #. After filling in the header tab navigate to the item tab. Click the plus sign at the top of the page, a box will pop up with the line items from the order, click 'select all' then 'ok'.



McLendon Hardware Inc Invoice

Invoice

Header Item Summary

1 of 4

Line #	Quantity L...	UOM	Unit Price	McLendo...	Type	Number	Type	Number	Distributo...	Product ...
1	0.0	Each	2.0	123456	Vendor's C...	111111	UPC #	100111111...		test
2	0.0	Each	2.0	123455	Vendor's C...	222222	UPC #	100222222...		test
3	0.0	Each	2.0	123454	Vendor's C...	333333	UPC #	100333333...		test
4	0.0	Each	2.0	123453	Vendor's C...	444444	UPC #	100444444...		test

Done Close Check Defaults Save Send Find a Field

Navigate to the summary tab and fill in the box 'Number of Units shipped'. Once complete click the check button to ensure all mandatory fields are filled in. Once you receive a 'check successful' you can then send the document.

McLendon Hardware Inc Invoice

Invoice

Header Item Summary

Invoice Total Merchandise Total All Taxes Amount

150.0 150.0

Allowance/Charge Information

0 of 0

Indicator	Type	Amount	Discount/Net Percent	Description
-----------	------	--------	----------------------	-------------

Check Successful

Check Successful!

You may send your document.

OK

Number of Units Shipped (pieces)

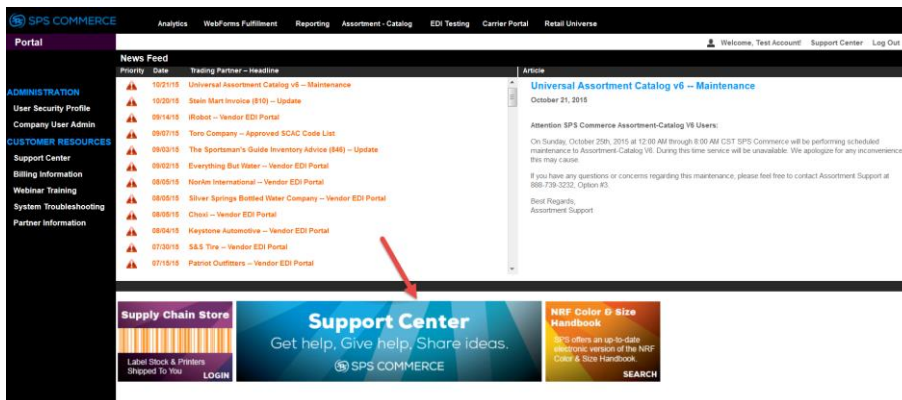
15.0

Done Close Check Defaults Save Send Find a Field

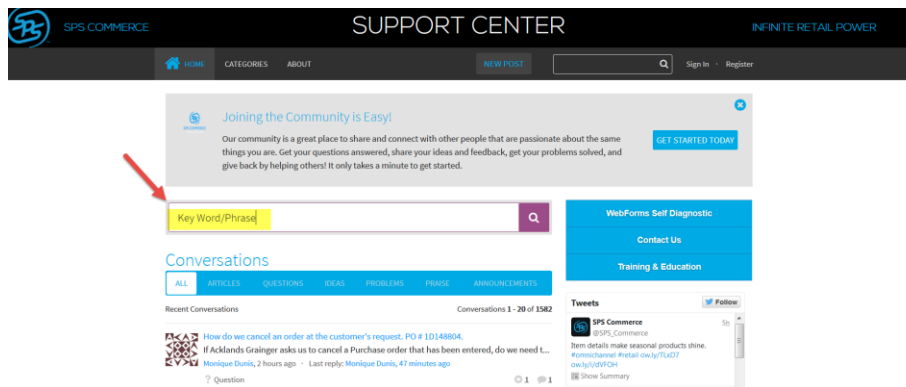


Support Center

The support center is home to a wide variety of training material including videos and answers to common questions you may have. It is a great resource to utilize when searching to find and ask questions. A quick way to access the Support Center is by clicking on the blue banner at the bottom of the home screen of your WebForms account.



Type in a key word, phrase or question in the search bar to find related questions and topics that correlate with your search.



To view a recording of this walk through of McLendon documents click

[McLendon Hardware Webinar](#)