SPS COMMERCE

INFINITE RETAIL POWER™

FULFILLMENT

NAPA

# NAPA CTA Distribution Center

WebForms Reference Guide

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# Introduction

Welcome to the **NAPA CTA Distribution Center 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 NAPA CTA Distribution Center.

# 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

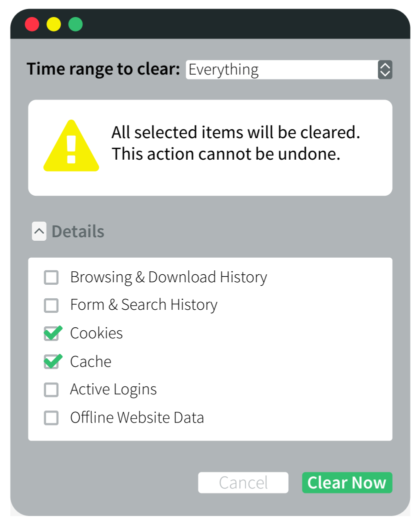
**Java** is one feature you will need to ensure you have downloaded and updated on your computer so that you can work in your WebForms account. How do you download Java?

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.

**Free Java Download**

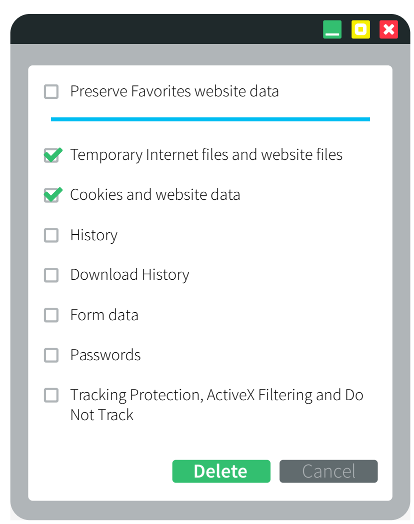
Do you have Java but your forms seem to be not loading? You may be having an issue related to an outdated version of Java or an overcrowded cache of temporary internet files. Please follow the below steps, close out of your browser, re-open and re-try after completion.

## 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:

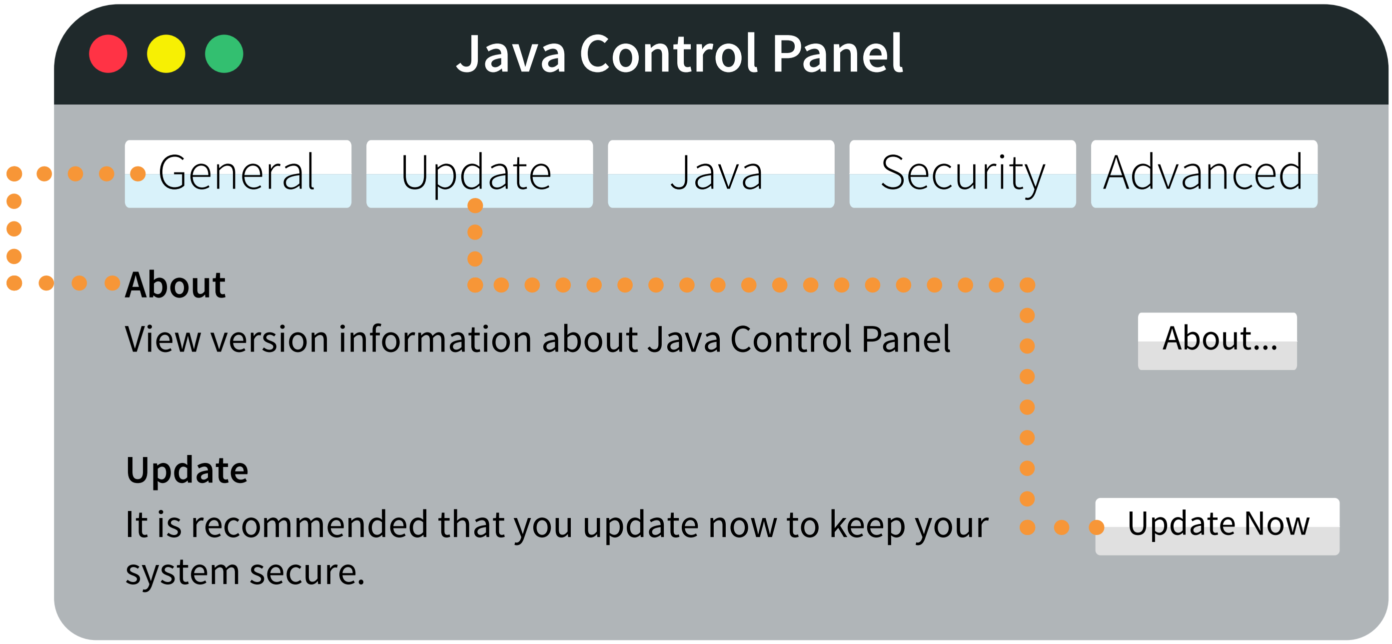
PC-users: Start menu > Control Panel > Programs > Java

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.*




**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 log into 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 Commerce**

Username

Password

**Login**

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

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.

**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 NAPA CTA Distribution Center.

**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.

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

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. It is best practice to have at least two recipients set up to receive email notifications. Once complete click save and close.*

**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 NAPA CTA Distribution Center and any other trading partner you are connected with.

| Status | Sender | Type | Date |
|---|---|---|---|
| | **Napa** | **Purchase Order** | **04/14/2016 19:13:08 CST** |

The **Sent** folder will house any document you sent to NAPA CTA Distribution Center or any other trading partner.

| Status | Receiver | Type | Date |
|---|---|---|---|
| | Napa | Shipment | 04/14/2016 21:48:12 CST |

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.

| Status | Receiver | Type | Date |
|---|---|---|---|
| | Napa | Invoice | 04/14/2016 20:16:27 CST |

To view your Purchase Order you can click on **Sender**, **ID** or **Date** links - 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 NAPA CTA Distribution Center sent you and organizing it into a reader-friendly format.

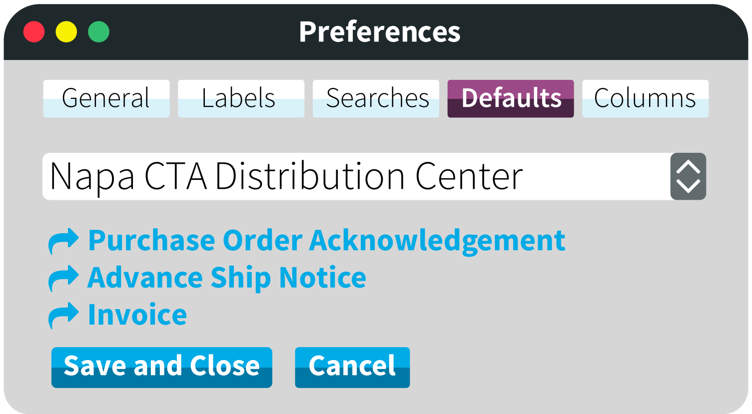
## Defaults

Defaults are a great way to reduce the amount of manual entry that each form requires. Any information that will remain the same across transmissions of each document can be set as a default. Each form's defaults will be managed separately and are editable in your WebForms account.

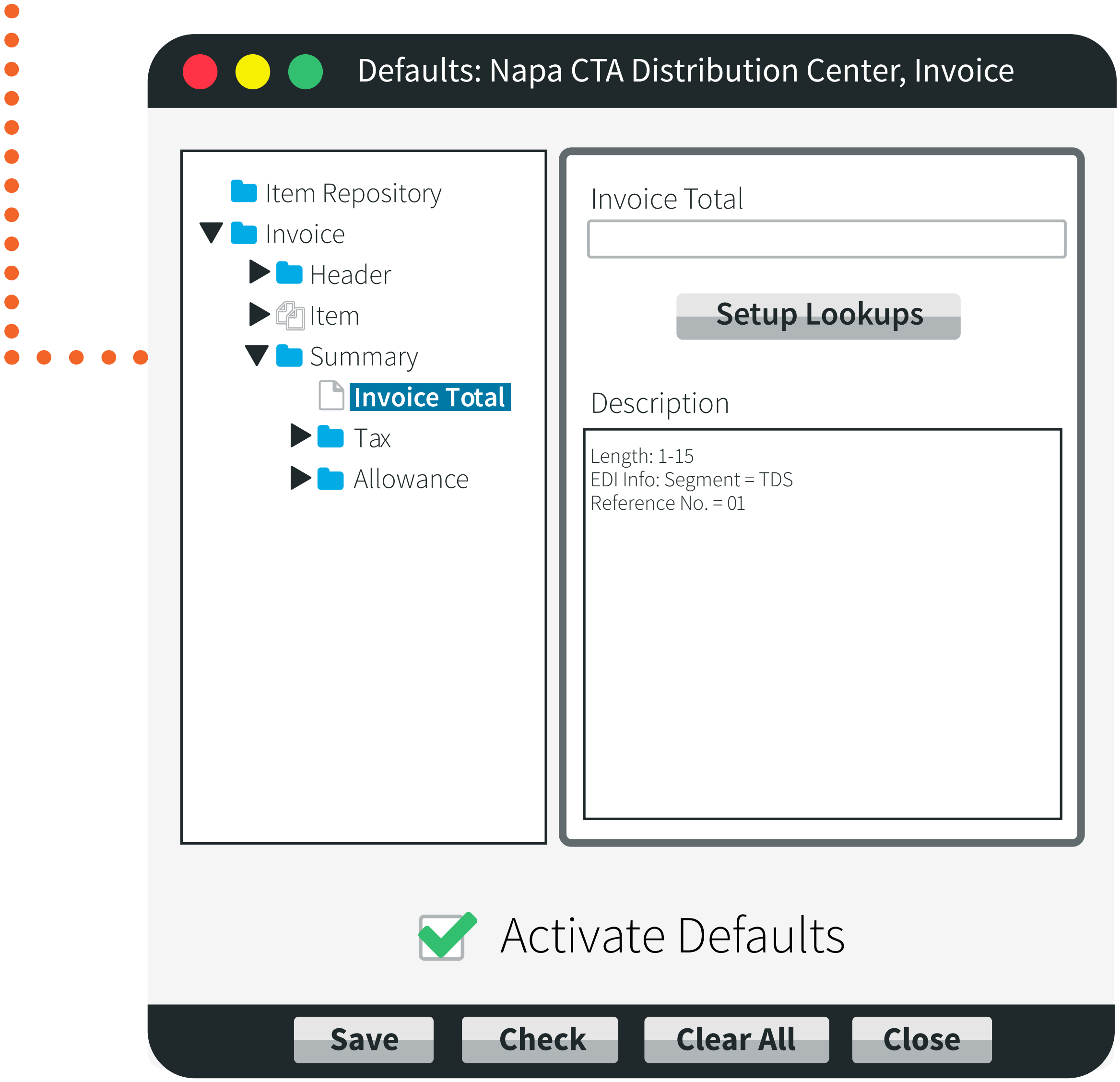
To access the defaults menu, click on **Preferences** from the left-hand side of the WebForms Inbox.

**NEW DOCUMENT PREFERENCES**

A new window will pop up. Choose the **Defaults** tab and be sure that **NAPA CTA Distribution Center** is the partner listed in the dropdown menu. You will then have the option to click on any form for NAPA CTA Distribution Center.




Choose the form that you want to default and the default menu will open up. Click on the folder tree to open up different fields.




When you have all of the fields that need to be defaulted filled out, click the **Activate Defaults** button at the bottom of the window and then click save.

# Purchase Order Acknowledgement

NAPA CTA Distribution Center requires suppliers to return an 855 for all Purchase Orders.

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.

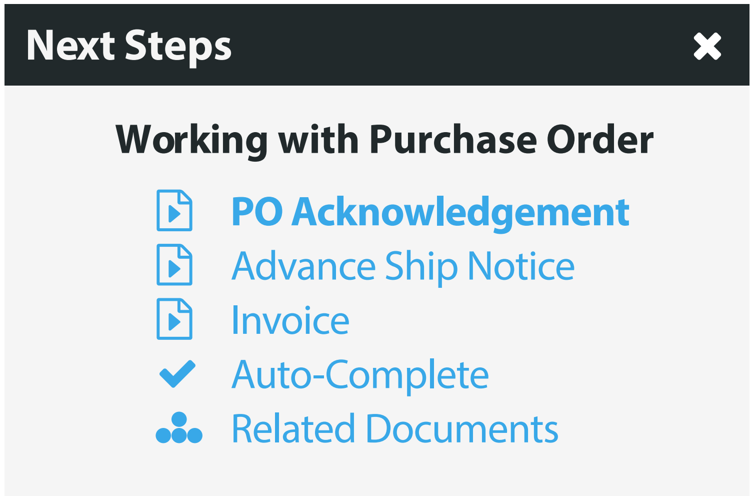
All items are defaulted to a status of "item accepted". This status will be used for any items that will be shipped from the order, whether or not they are shipped in full, partially back ordered or fully backordered.

Suppliers are only required to change the item acknowledgement status when the item is cancelled because the item has a bad part number or is no longer available for purchase.

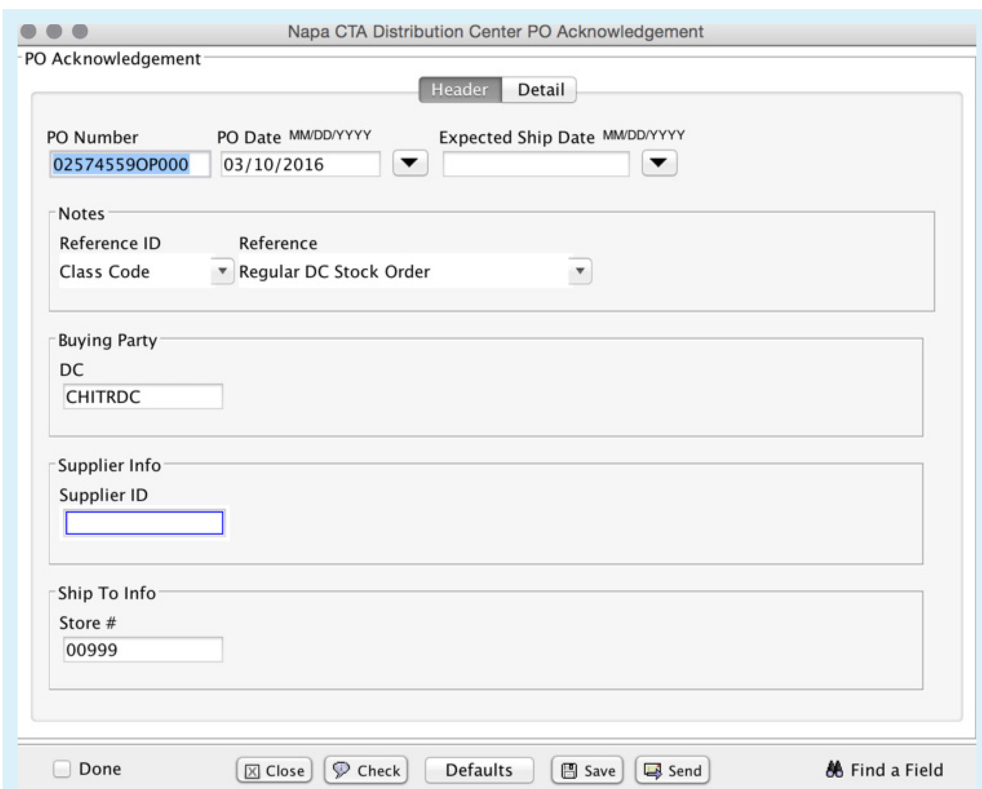
If an item is sent on the 855 as cancelled, the item will be removed from the order in NAPA CTA Distribution Center's system. However, it is imperative that the supplier follow up with NAPA CTA Distribution Center about why the item was cancelled to avoid further purchasing discrepancies.

If no cancellations are being made, the supplier is not required to change any information on the 855 and can simply send the document.

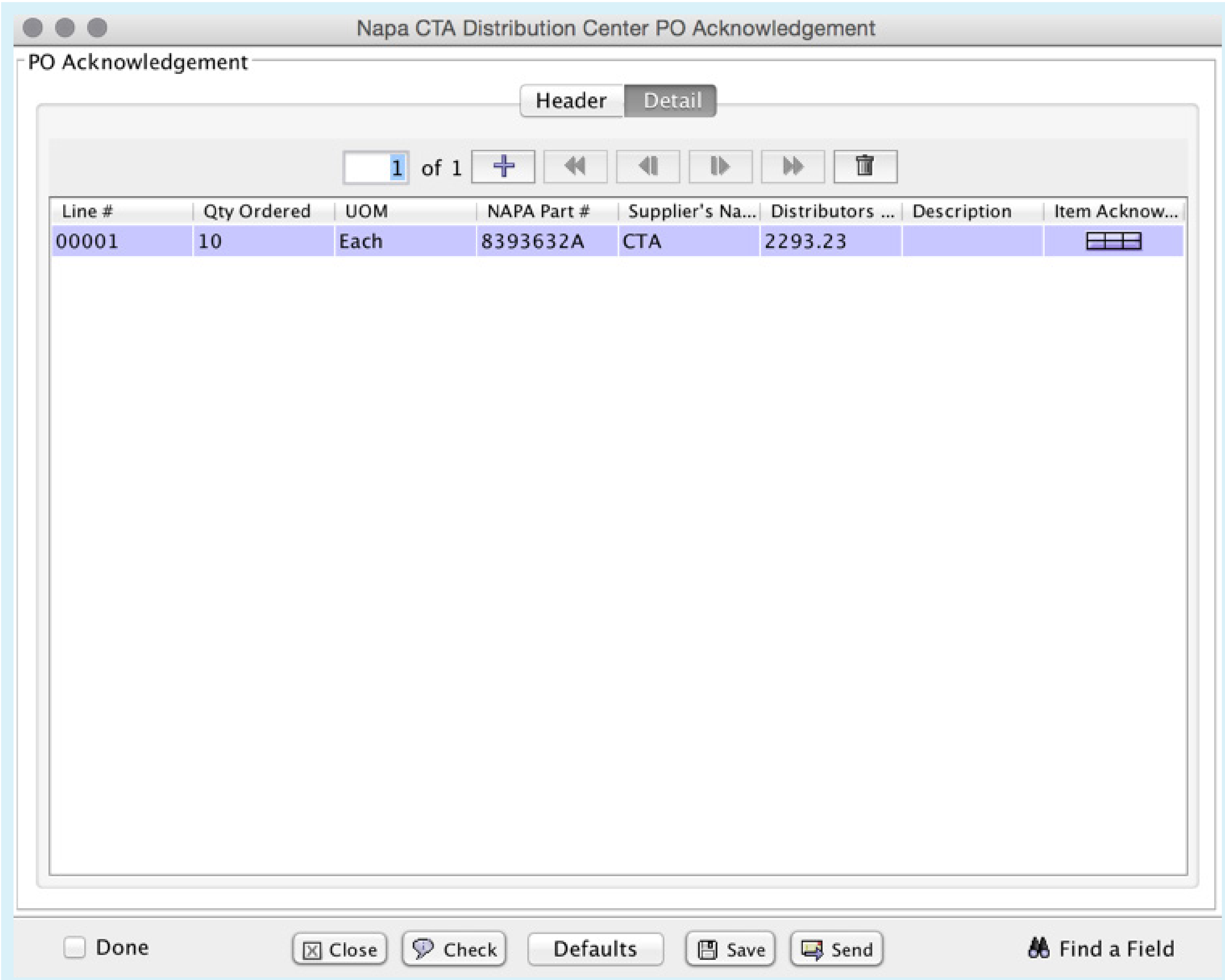
To access the Purchase Order Acknowledgement, click the orange **Next Steps** triangle from either the top right-hand corner of the Purchase Order style sheet, or by locating the icon from the Next Steps column in the WebForms Inbox. Click **Purchase Order Acknowledgement** from the Next Steps window.



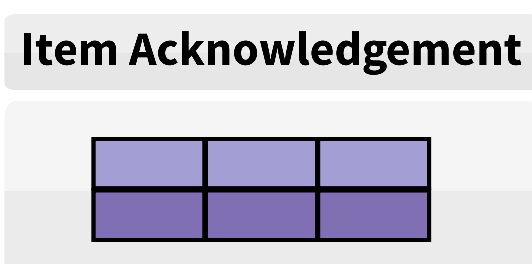

Once the form loads, you will see fields outlined in blue. These are the mandatory fields that NAPA CTA Distribution Center requires you to complete. The only field that is required on the Header tab is the **Supplier ID**. *This will be provided to you by NAPA CTA Distribution Center and may be set as a Default.*



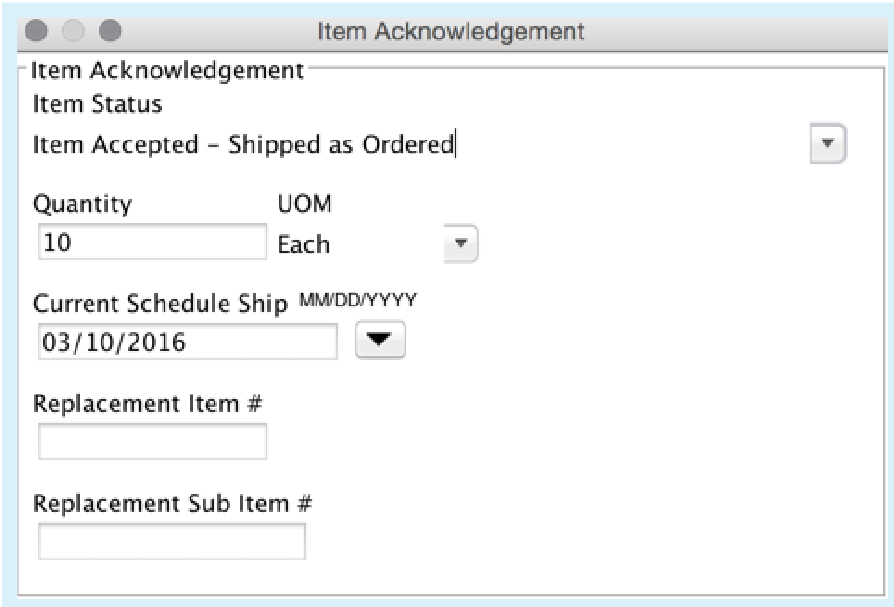
Once the Header tab is complete, navigate to the Detail tab. Once there, you will see all of the items from the Purchase Order listed.




Click the purple Item Acknowledgement button in the far right-hand column of a particular Line Item.

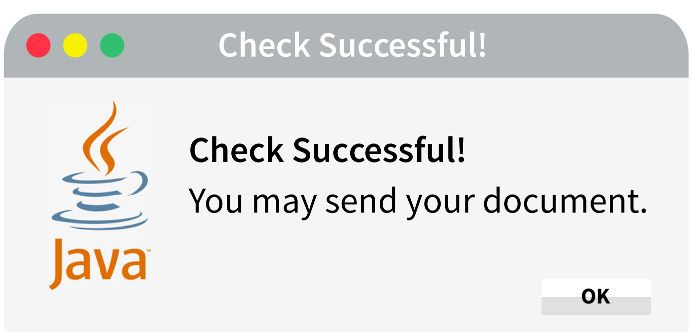


On the new window, the Item Acknowledgment status will be defaulted to ***Item Accepted - Shipped as Ordered***. If you need to change the status because of a cancelled or changed Item, click into the **Item Status** drop-down menu to see a list of the available acknowledgment types.




Choose the acknowledgement type that corresponds to your scenario. When you have chosen the best option, simply close the Item Acknowledgement window and return to the main Purchase Order Acknowledgement form.

Upon completing the Purchase Order Acknowledgement, click the **Check** button at the bottom of the form. If you receive a "check successful" message, you are ready to send the document by clicking the **Send** button. If you missed a mandatory field, you will receive an error box indicating the error. Click on the error message to see where, on the form, the error is.

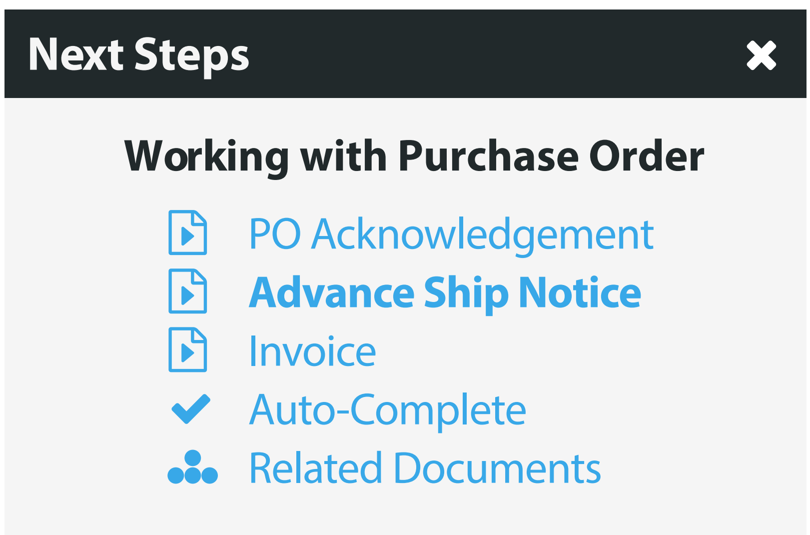


# Advance Ship Notice

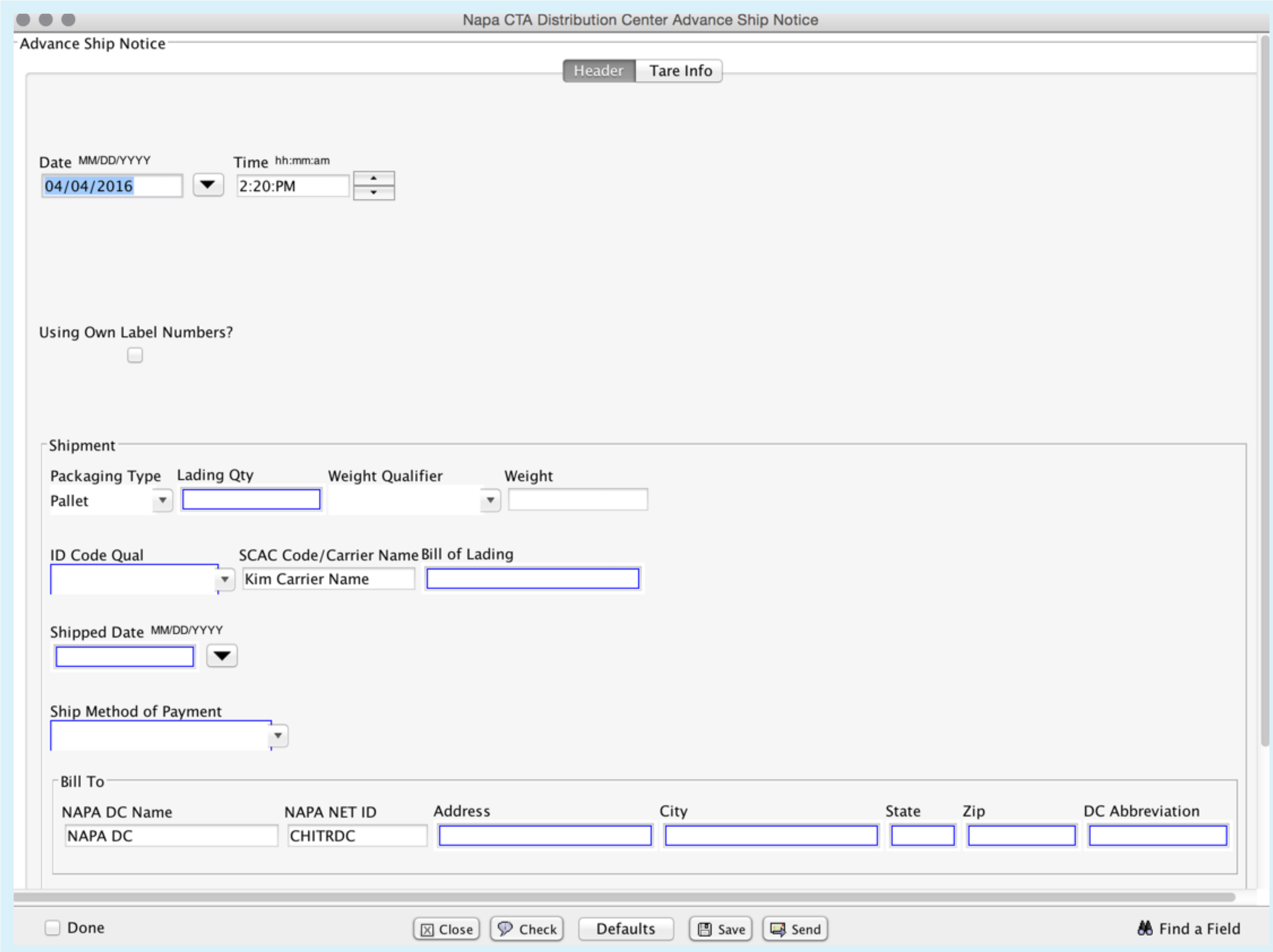
The Advance Ship Notice should represent a single shipment (Ship-To location).

Suppliers will be expected to include all Purchase Orders physically in a single shipment within a single Advance Ship Notice data feed.

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 by locating the icon from the Next Steps column in the WebForms Inbox. Click **Advance Ship Notice** from the Next Steps window.



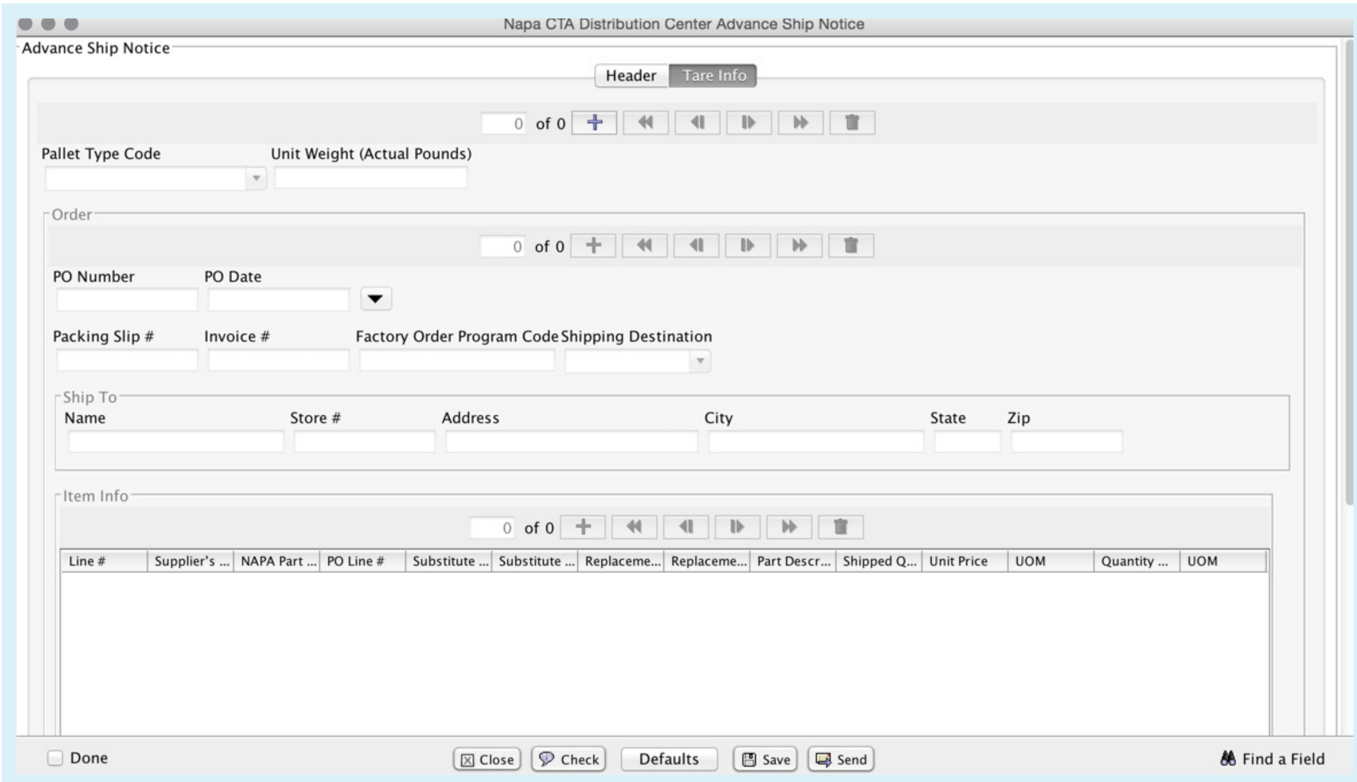

As with previous forms, any field highlighted in blue is mandatory and is required to be filled out. Any information that will remain the same across all shipments may be set as a Default.



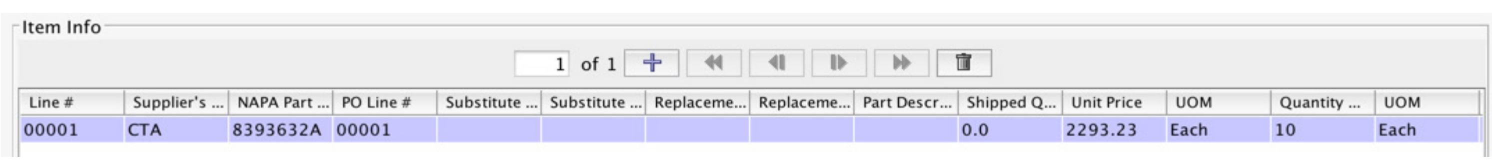

Please note: the **Lading Quantity** is the total amount of cartons or pallets shipped. Choose either **Carrier Name** or **SCAC Code** from the drop-down ***ID Code Qual*** menu and then enter in the corresponding name or SCAC code in the corresponding field.

Once the Header tab is complete, navigate to the **Tare Info** tab.

Click the plus sign at the top of the **Tare Info** tab. Doing this will source in the Order information.



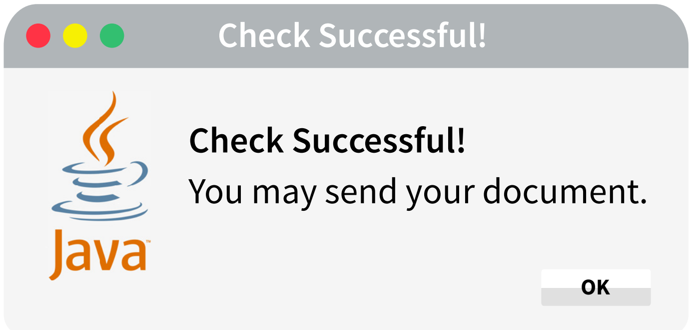

Within the ***Order*** section, enter your Packing Slip number in the **Packing Slip #** field. NAPA CTA Distribution Center's address is required and may be set as a default. Click the plus sign under the ***Item Info*** section and select the items that will be going into the Pack/Tare. If your shipment is split between multiple tares, only add the items that are on this particular tare.




If you need to send more than one pallet or carton with additional SKUs, click the plus sign at the top of the **Tare Info** tab and repeat the same steps listed above.

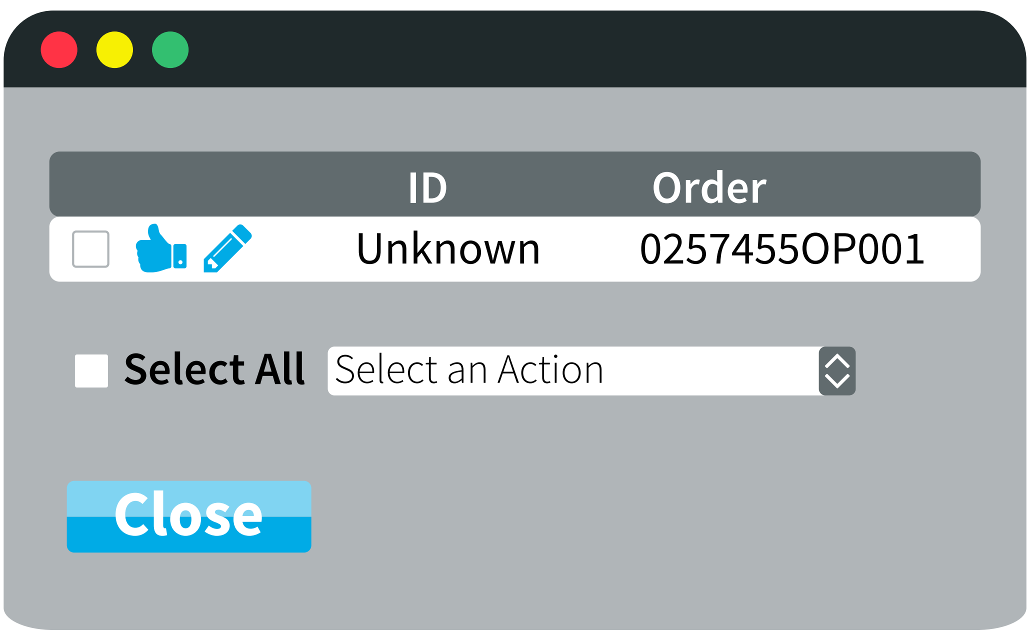
***Please note***: *The ASN will track item quantities that you have added to previous tares or previous ASNs. If the* ***Shipped Quantity*** *is sourcing in as 0, you have already shipped this item in full. If you have shipped a partial quantity of an item, the remaining balance will source in.*

Upon completing the Advance Ship Notice, click the **Check** button at the bottom of the form. If you receive a "check successful" message, you are ready to send the document by clicking the **Send** button. If you missed a mandatory field, you will receive an error box indicating the error. Click on the error message to see where, on the form, the error is.

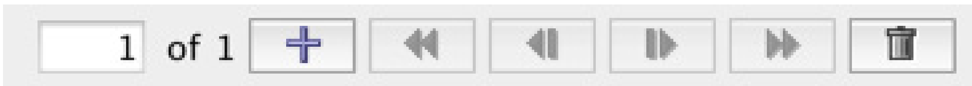



To create an Advance Ship Notice containing multiple Purchase Orders going to one Ship To location, navigate to your WebForms Inbox and follow the below steps:

1. Check the Status box next to the Purchase Orders you wish to work with.
2. With the Status boxes selected, navigate to the bottom of the page and click **Select an Action** drop-down menu.
3. Choose **Auto Complete** from the menu.
4. Choose **Advance Ship Notice** from the new window.



Use the Edit (pencil) icon to complete the mandatory fields outlined in blue per the same steps as above. On the **Tare Info** tab, the number of pages at the top indicates how many Tares you will be shipping. The number of pages in the Order section indicates how many Purchase Orders are included on this Advance Ship Notice.




To toggle between Orders, use the forward and backward arrows. All Purchase Orders will be put under one Tare during the ***Auto Complete*** process. To add in more Tare repetitions, click on the plus sign button at the very top of the Tare Info tab. You will need to manually add or delete items that are included on each Tare, as every item will source in.

## Pallet Labels

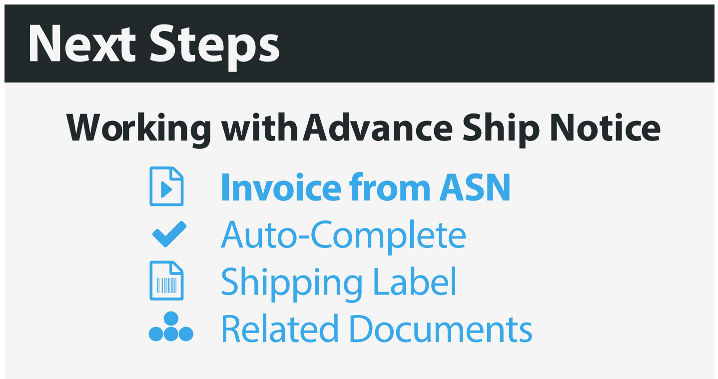
Your Pallet Labels will be accessible to you when you have completed an Advance Ship Notice. To view the Pallet Labels, navigate to the **Sent** folder and click the orange Next Steps arrow from the Advance Ship Notice that was sent. Choose Shipping Label from the Next Steps pop-up. Labels may be printed from the new window that appear


### Next Steps

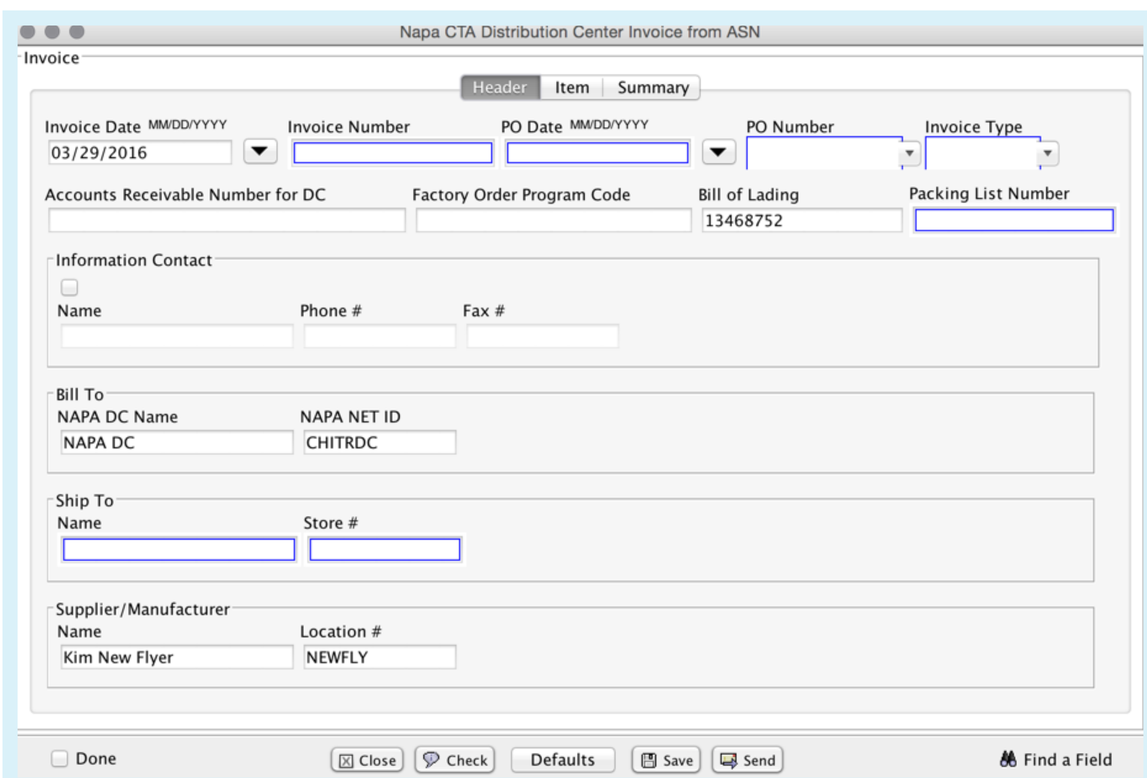
**Working with Advance Ship Notice**

- Invoice from ASN
- Auto-Complete
- Shipping Label
- Related Documents

To create the Invoice, click the orange **Next Steps** triangle from the sent Advance Ship Notice located in the Sent folder. Choose **Invoice from ASN** from the Next Steps window.

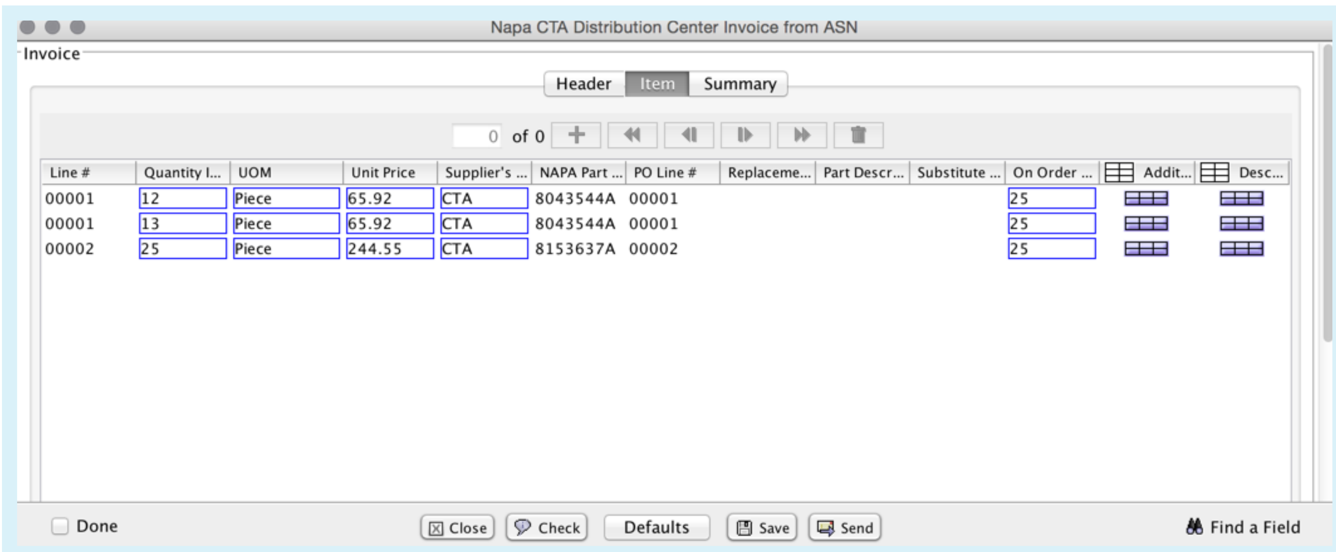



You will need to fill in all of the boxes outlined in blue. Choose the **PO Number** from the drop-down menu. The **PO Date**, **Packing List Number**, and **Ship To** information will source in based on the information entered on the Advance Ship Notice.

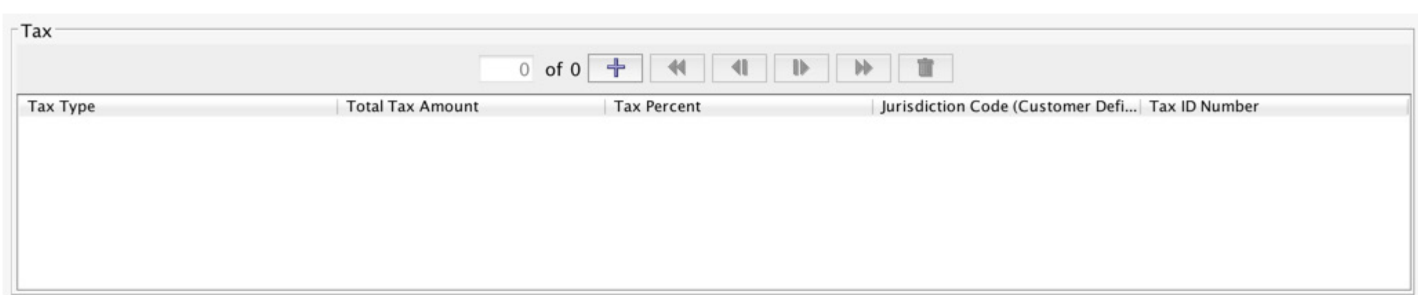


The **Invoice Number** can be a unique number that you use to track the document in your system.

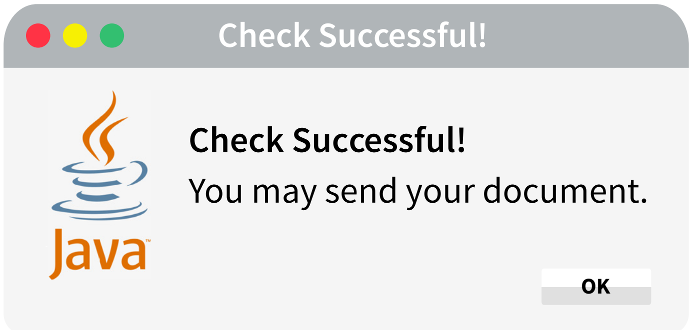
Upon completing all mandatory fields on the Header tab, navigate to the **Item** tab. All items that were shipped for the Purchase Order number that you selected on the Header tab will automatically source in. No additional information is required on this tab.




On the **Summary** tab you will see your Invoice Total. If you need to include an Allowance, Charge or additional Tax, you may do so by  do so by clicking the plus sign button under either the Tax or the Allowance/Charge Information section. Select which type of indicator you will include, the type, the amount, and a brief description.



Upon completing the form, 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 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.

***Please note: you will need to invoice per Purchase Order received.***

## 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**.