SPS COMMERCE

INFINITE RETAIL POWER™

FULFILLMENT

Forwarding Purchase Orders WebForms Reference Guide

February 2016

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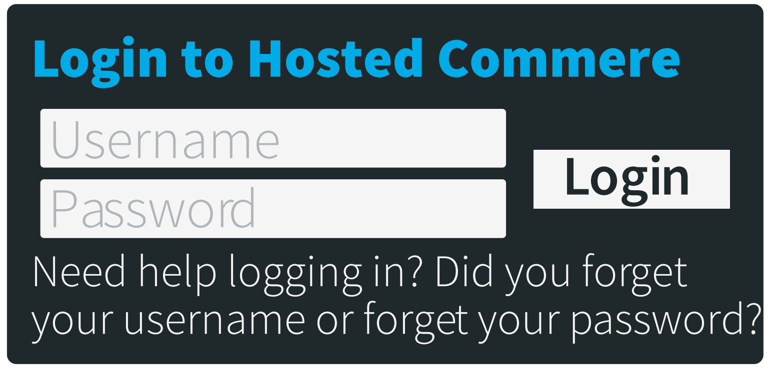
Accessing WebForms

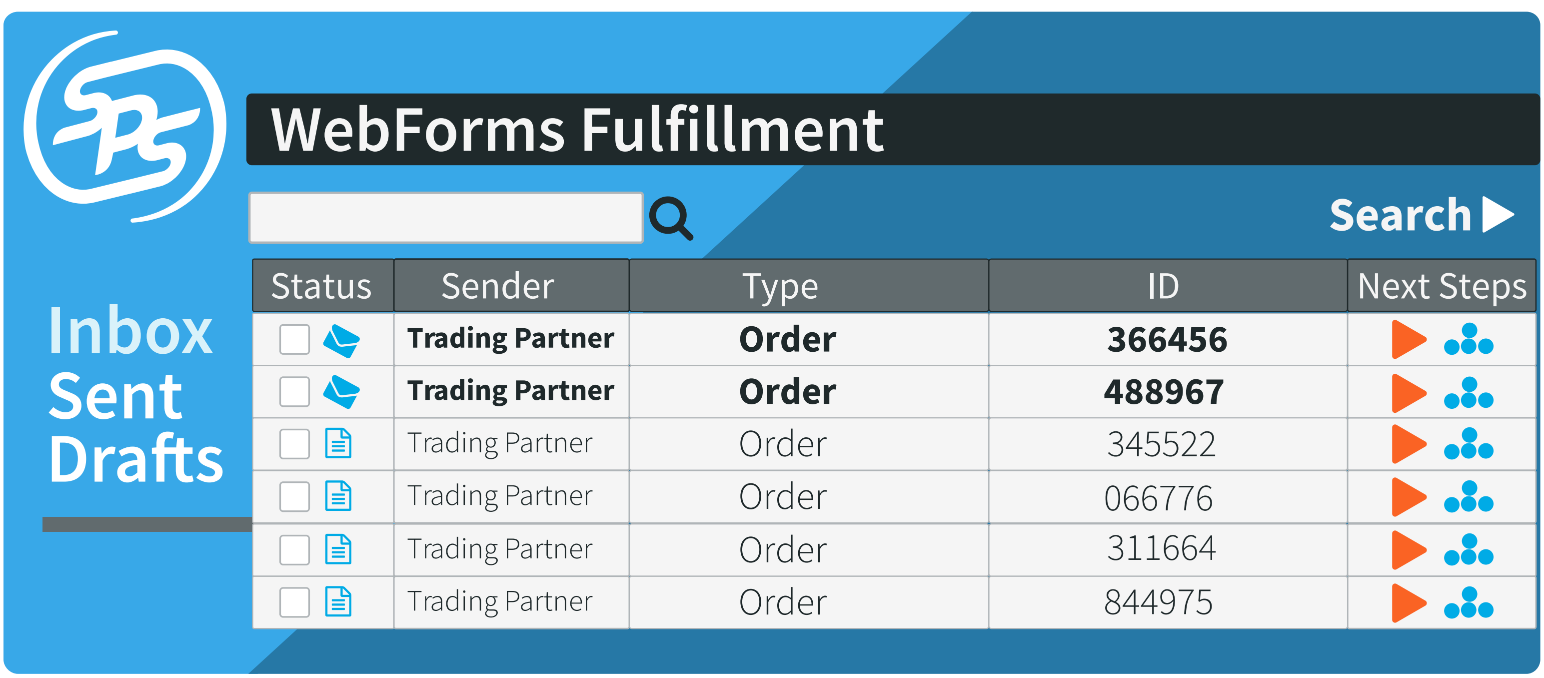
To access your WebForms Fulfillment account:

1. Navigate to **www.spscommerce.net**
2. Enter your username and password.
3. Click **Login**
4. Click **WebForms Fulfillment** to access WebForms.



SPS COMMERCE **WebForms Fulfillment**

You will be brought to your **Inbox**, which houses all documents, such as Purchase Orders, received from your trading partners.



The **Sent** mailbox includes all documents that have been sent from your WebForms account to your trading partners, for example, Forwarded Purchase Orders. **Drafts** stores all documents that have been saved prior to sending. Any document can be saved and does not need to be sent immediately upon creation.

When a document first appears in your account, it will be in a **bold** font, indicating that it is in an unread status. Once you open a document, or manually mark it as read, then it will switch to a read status, and will no longer be in bold.

Status	Sender	Type	ID	Next Steps
	Trading Partner	**Order**	**366456**	

Status	Sender	Type	ID	Next Steps
	Trading Partner	Order	366456	

To view a document, click on the **Sender**, **Document ID**, or **Date**. This will load the ***stylesheet***, which is a clean view of your document. The information that you see is what SPS Commerce received from your trading partner. We've translated the raw data to make it readable.

SPS COMMERCE

Purchase Order

Trading Partner

Order #: 844975

PO Type: Stand Alone Order Original

PO Date: 02/14/2016	**Requested Delivery:** 04/28/2016
Requested Ship: 04/18/2016	**Cancel Date:** 03/30/2016
Vendor #: 4998221	**Department Number:** 876

Ship To:
Location ID: 463
Retail Trading Partner
1442 Main Street South
Minneapolis, MN 55414

Vendor:
Location ID: 4998221

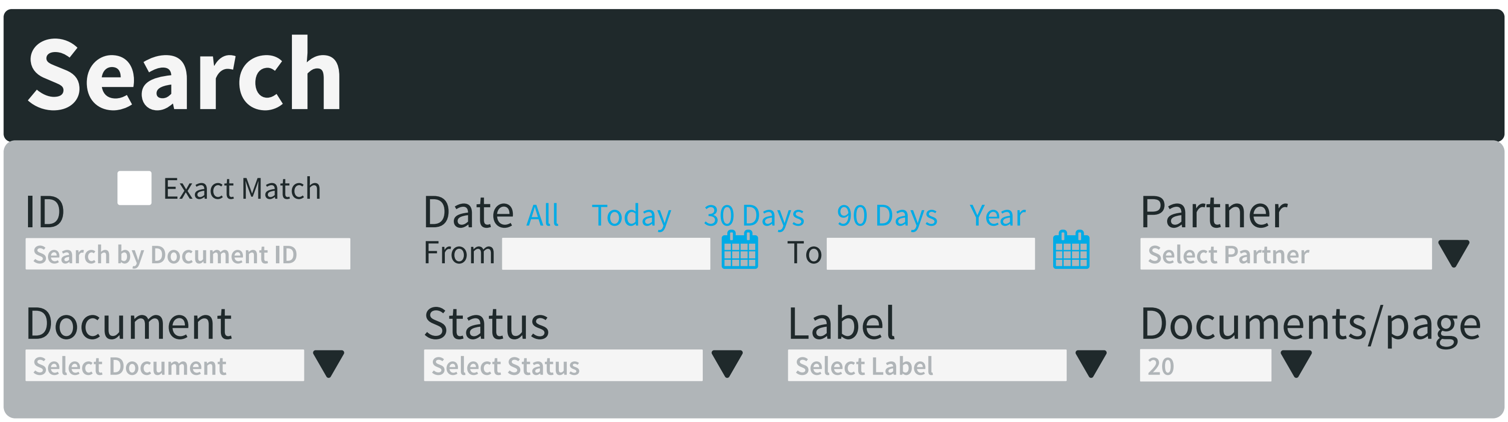
LINES	KU	UPC/GTIN	DESCRIPTION LINE ITEM	UNIT COST	QTY	UOM

Forwarding a Purchase Order

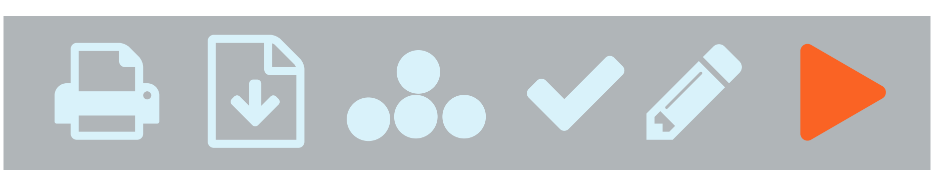
To forward a Purchase Order, first search for the Purchase Order you would like to forward:

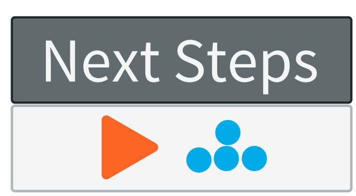
1. **Quick Search**: Use if you have the exact Purchase Order number; enter it in the **Search by Document ID** field at the top of the WebForms Inbox.

2. **Advanced Search**: Use to the **Search** function (in the top right-hand side of the WebForms Inbox) to search by ID (partial or exact match), Date, Partner, Document, Status, and/or Label.

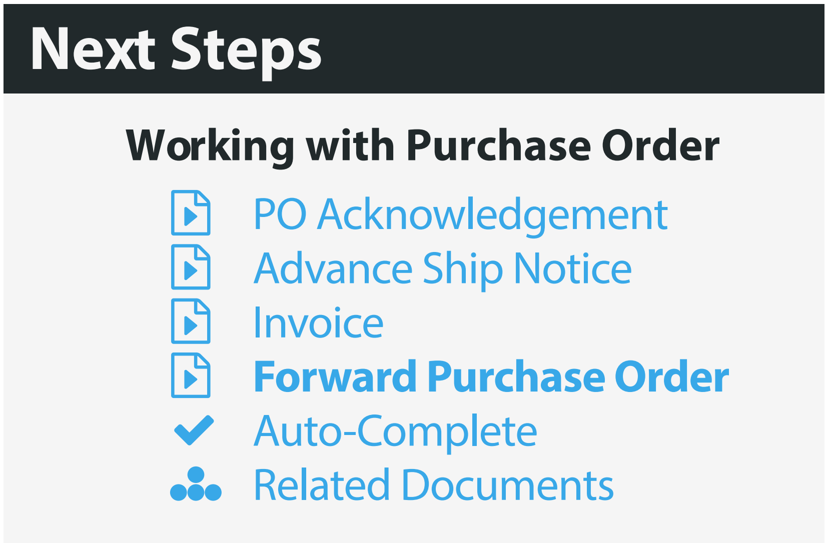


Click on the **Sender**, **Receiver**, **ID**, or **Date** to load the Purchase Order ***stylesheet***. To generate the Forward Purchase Order, choose the orange Next Steps triangle from the right of the Purchase Order number in the Inbox, or in the upper right-hand corner of the Purchase Order stylesheet.



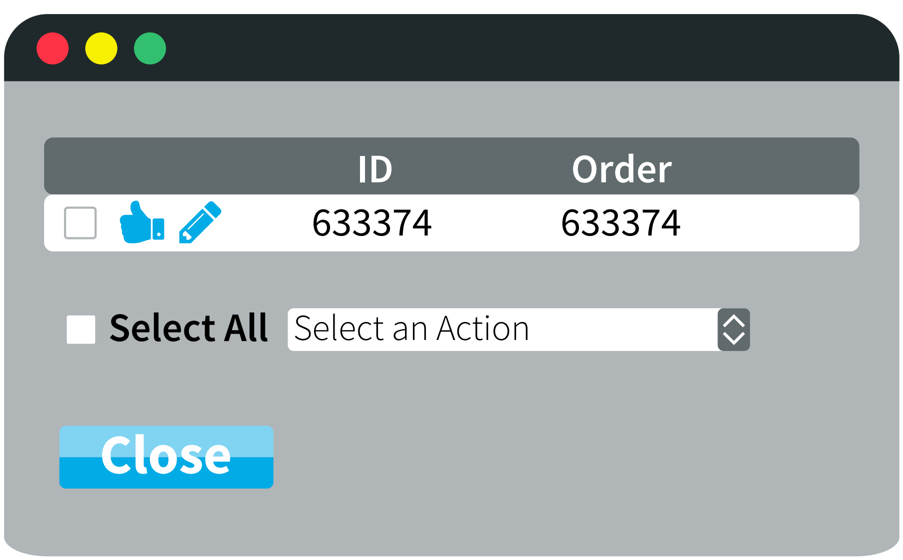


From the Next Steps dialogue window, click **Forward Purchase Order**.



Note: If you have multiple Trading Partners who receive the Forwarded Purchase Orders, you will need to select the specific Trading Partner from the **Address Book for Forward Purchase Order** drop-down menu.

A window will pop-up when complete. This is where you add any missing required information before sending. The ***Quick-Edit*** window will not show any fields that were automatically completed when the Forward Purchase Order generated, nor will it show any blank, non-mandatory fields. If there are too many fields that still need to be filled out, the Quick-Edit screen will say: *Additional data entry required*.



From the ***Select an Action*** menu on Quick-Edit screen, you have the option to **Edit**, **Save**, or **Send** the document.

Editing the document will load the Forward Purchase Order form. Editing a Forward Purchase Order is discussed in detail in the next section.

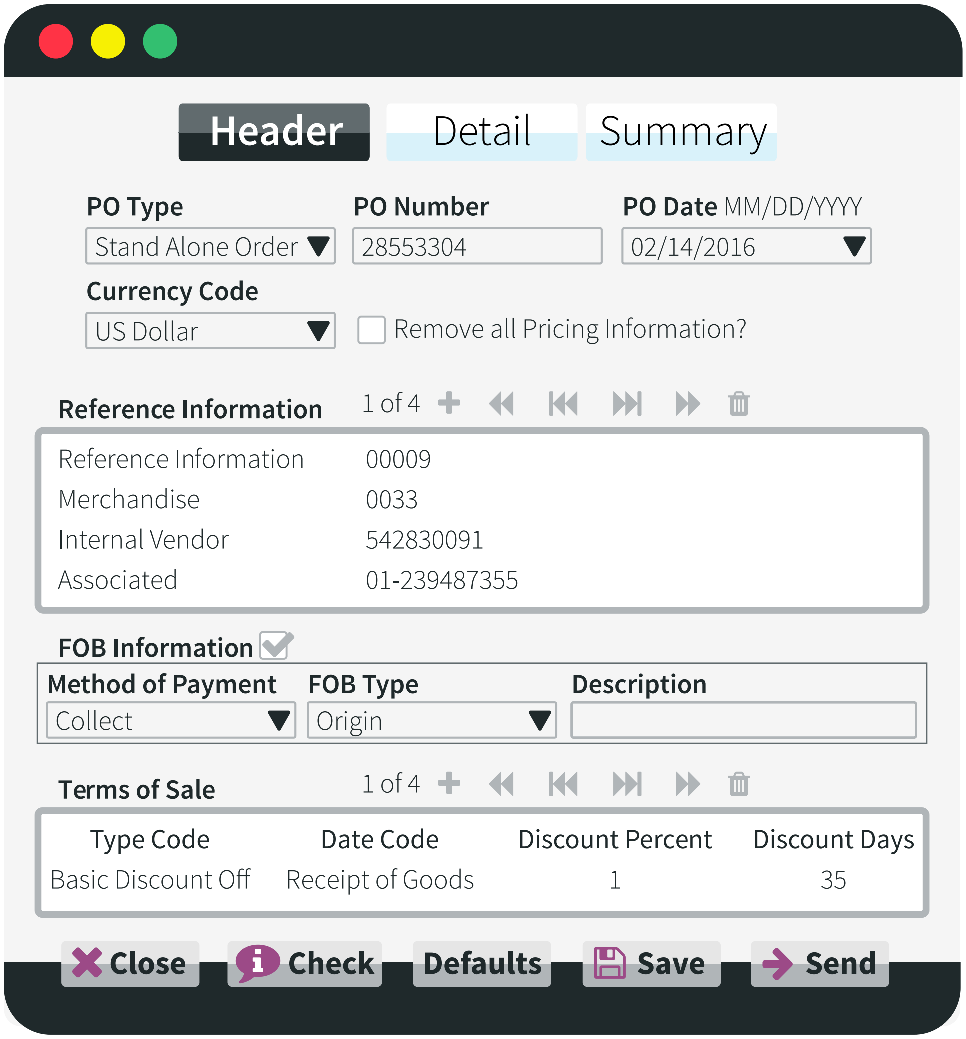
Saving the Forward Purchase Order will save a copy of the document in your Drafts folder, and can be sent, or edited and then sent at a later time.

Sending the document from the Quick-Edit window will send the document exactly as-is, including additions from the Quick-Edit window, to your trading partner.

Editing the Forward Purchase Order

You may either click the Edit pencil to the left of the Forward Purchase Order ID, or **Additional Data Entry Required** to open the form for editing. Information that may need to be edited includes addresses, quantities, or prices.

The Forward Purchase Order form will typically have two tabs: a **Header** tab, and a **Detail** or **Order** tab. The **Header** tab contains general Forward Purchase Order information, such as dates, reference information, freight terms, address information, terms of the Forward Purchase Order, and carrier details.

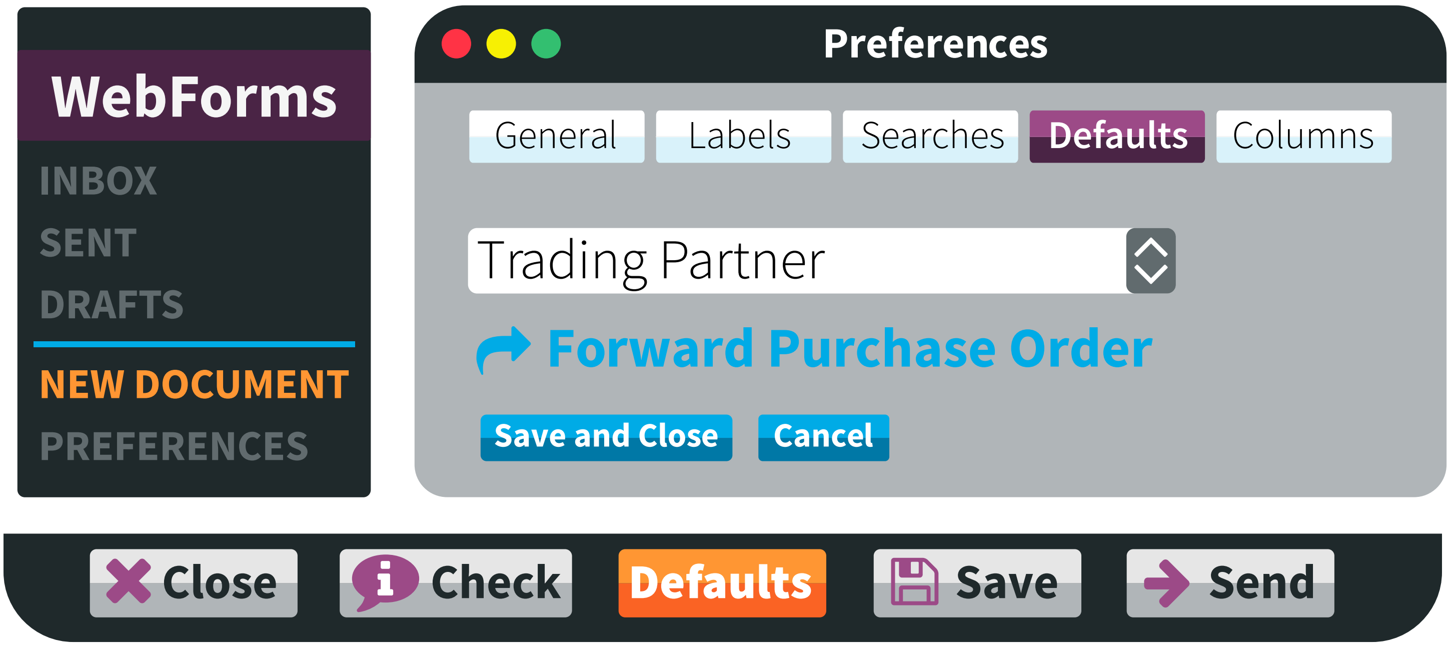


The **Detail** or **Order** tab will contain all line item information from the Purchase Order. This is where you can update quantities and prices if needed. If you would like to remove all prices from the Forward Purchase Order, check the ***Remove all Pricing Information?*** box at the top of the **Header** tab. You must check this box prior to navigating to the **Detail** or **Order** tab in order to remove pricing information. To apply this is a rule to to all Forward Purchase Orders for a particular trading partner, you may set a ***Default*** to check the box automatically each time you load a form. *If you don't have this option, please speak with your SPS Representative for more information on how to remove pricing.*

Remove all Pricing Information?

Defaults

Defaults you set are trading partner and form specific, and can be sent for any and all fields that will stay the same each time you forward a Purchase Order for that trading partner. You can access **Defaults** from the form, **New Document**, or **Preferences**.



Common examples of Defaults you may want to set are ***Address Information***, ***Terms***, and ***Pricing***.

Forwarding Multiple Purchase Orders

You are able to forward multiple Purchase Orders at one time by:

1. Checking the **Status** box to the left of all orders you would like to forward
2. Navigating to the ***Select an Action*** toolbar at the bottom of the page
3. Clicking **Forward**.

A window will pop-up when complete. This is where you add any missing required information before sending. This screen will show all Forward Purchase Orders that you selected via check-marks in the Status column. Just like when you forward one Purchase Order, this screen will allow you to add any missing required information before sending.

The ***Quick-Edit*** window will not show any fields that were automatically completed when the Forward Purchase Order generated, nor will it show any blank, non-mandatory fields. If there are too many fields that still need to be filled out, the Quick-Edit screen will say: *Additional data entry required*.

Sending the Forward Purchase Order

To ensure your Forward Purchase Order has been sent to your trading partner, navigate to the Sent folder to verify the document is listed. The document will be bold with an envelope icon in the status column when it is in transit, and will no longer be bold and have a piece of paper icon when it has been received by your trading partner.

Status	Receiver	Type	ID	Next Steps
	Trading Partner	**Forward Order**	**366456**	

Status	Receiver	Type	ID	Next Steps
	Trading Partner	Forward Order	366456	