SPS COMMERCE

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WEBFORMS FULFILLMENT USER GUIDE

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WebForms

Welcome

Welcome to the WebForms Fulfillment 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.

Please watch the WebForms Navigation and Features training video for additional training.

Please review all the information before you begin. If at any point you have questions, contact Customer Support.

EDI Basics

EDI is a standard electronic format for business data exchange between organizations. There are many EDI documents, some of the most common documents for your business are listed below. The links below will open training videos for the respective document.

EDI Document	Document Description
850	Purchase Order - a retailer sends a PO to a supplier to order an item from that supplier.
855	Purchase Order Acknowledgment - a supplier sends a PO Acknowledgment to accept, change, or reject the PO from the retailer.
860	Purchase Order Change - a retailer sends a PO Change to a supplier to change a previously sent Purchase Order.
865	Purchase Order Change Acknowledgement - a supplier sends a PO Change Acknowledgement to accept or reject a PO Change.
856	Advance Ship Notice - a supplier sends a shipping notice once items have shipped.
810	Invoice - a supplier sends an Invoice to the retailer once the requested shipment has been sent.
846	Inventory Advice - a supplier sends Inventory Advice to inform your trading partner of your available inventories.
997	Functional Acknowledgement - a Functional Acknowledgment confirms that the trading partner has received the document. It does not confirm anything more than the receipt of the document. This document is not visible to vendors in WebForms.

What is WebForms?

WebForms is a service that enables non-EDI capable businesses to use a standard web browser to exchange electronic documents with trading partners over the Internet.

WebForms is a simple web site, allowing you to input the information necessary to trade electronically with your business partner. The information that you provide is translated into an Electronic Data Interchange (EDI) format and then sends it to your business partner. WebForms allows trading partners to use online forms to send and receive data for documents such as purchase orders and invoices.

WebForms utilizes XML and Java technology to generate forms directly from a database, checking against business rules prior to transmission to ensure data integrity. This e-commerce technology increases accessibility and ease of use for non-technical personnel - all without the purchase of a software application!

Minimum Requirements

Operating System: Windows 7, Windows 8, or Mac 10.6 (or greater)

Processor: 1.5 Ghz Intel Pentium IV (or equivalent)

RAM: 2 GB RAM

Internet Connection: Broadband (DSL/Cable)

Internet Browser: IE 10 or greater; Mozilla Firefox 16.0.2 or greater

Java: JRE 8 or greater

A laser or thermal printer is required for printing barcode labels and WebForms documents

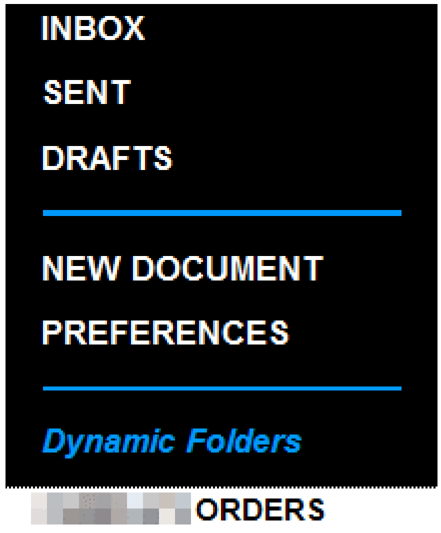
WebForms Icon Guide

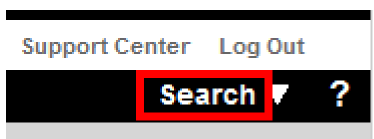
Below is a list of icons used in WebForms. Use this guide as a tool to help you understand the meaning of each icon.

- Accept - This icon applies only to PO changes
- Archive Document
- Auto-Complete
- Delete
- Document read/acknowledged
- Document Error/Failure
- Download Document
- Edit or Work with this Document
- FedEx Shipping Label
- Flag a document
- Mark as Read
- Page Forward
- Page Backward
- Next steps in the document process
- New/Unread document/unacknowledged
- Print
- Print Pick List/Warehouse Documents
- Print Shipping Labels
- Print UPS Labels
- Print Packing Slip
- Reject - This icon applies only to PO changes
- Related Documents
- Resend Document
- Send
- Sort/Ascending/Descending
- Template
- Void UPS Shipment

WebForms Navigation Bar Buttons

The navigation bar allows you to move quickly between different WebForms functions and features.





The six buttons of the navigation bar are defined as follows:

Inbox - contains inbound documents sent from your trading partner(s)

Sent - contains copies of outbound documents that have been sent to your trading partner(s)

Drafts - contains documents that have been saved

New Document - assists you to send return documents

Preferences - edit several default settings and access the Item Master

Dynamic Folders - these are quickly accessible saved searches.

Search - provides a window to search for documents

WebForms Inbox

All incoming documents are stored in the **Inbox**. Unread documents are displayed in bold. Documents that have been viewed are displayed in a non-bold font. Documents displaying the icon are unread. Documents displaying the icon have been viewed.

Please watch the WebForms Navigation and Features training video for additional training.

The **Inbox** is organized into rows and columns. Rows include individual document records. Columns provide document information. Use the arrows to sort by column. See Sorting for more details.

NOTE: To view or hide columns, see Preferences.

Search by Document ID – type in a document ID to search for a specific document. Click the magnifying glass or hit the **Enter** key to perform the search.

Definitions:

Status - Indicates the place of the document within the work cycle, such as **Read**, **Unread**, or **Errored**; sort arrows allow for viewing documents by **Status**

Sender - The name of the trading partner that has sent the document; sort arrows allow for viewing documents by trading partner

Type - Indicates the kind of document that is being viewed, such as purchase order or product forecast

ID - A unique number that has been assigned to the document; sort arrows allow for viewing documents by ID number

> **NOTE:** Should your trading partner use additional identification information that cannot be entirely displayed, such as a release number, that additional identification information can be displayed by using the mouse to "hover over" a particular ID. Should additional identification information be present, a small dialogue display window will appear as long as your cursor is over it.

Label - A user-created label used to identify or mark documents. See Labeling Documents for more details.

Date - Date and timestamp of when the document posted to your site; sort arrows allow for viewing documents by date

Next Steps - Allows for viewing a list of return documents to be completed for that particular document and trading partner

Use the toolbar at the bottom of the window to perform the following actions:

Print the selected document(s)

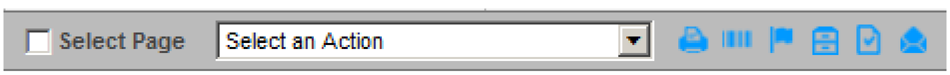
Print labels and warehouse documents

Flag the selected document(s)

Archive the selected document(s)

Accept a PO Change

Mark the selected document(s) as read



To Open a Document

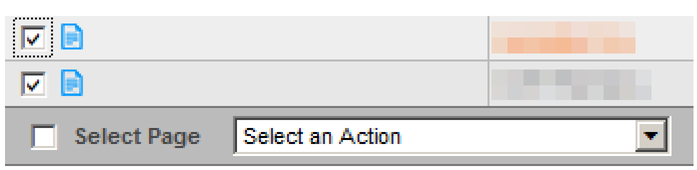
1. Click on either the icon or icon under the **Status** column and the correlating document from that row will open in a secondary window.

or

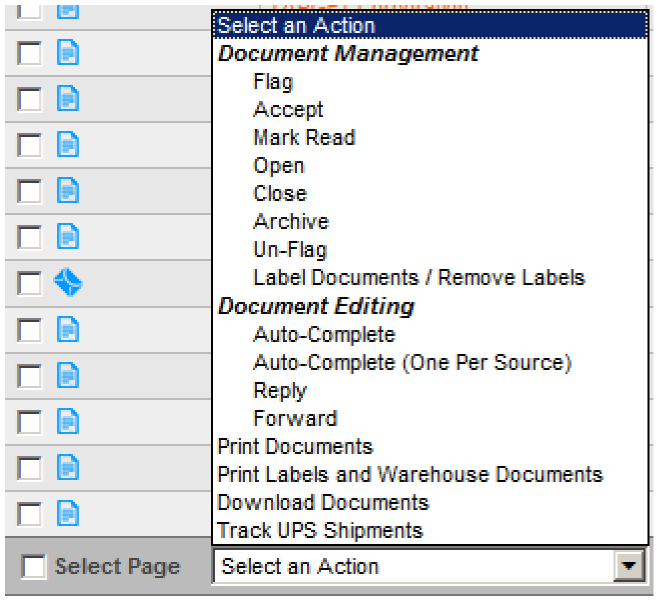
2. In the Sender column, click on the **trading partner name** for the document that you want to open. The correlating document from that row will open in a secondary window.

To Perform an Action on Multiple Documents at One Time

1. Place a check mark in the box in the **Status** column of the document(s) that you want to view.



2. Choose an option from the **Select an Action** pick-list in the lower-left of the window (below the **Status** column). Learn more about the Select an Action menu in this training video.



NOTE: To use the **Select an Action** menu on multiple documents, each document must be on the same screen. Please see the **Documents Per Page** or the **Search** sections of this manual for more information on how to have all desired documents on the same screen.

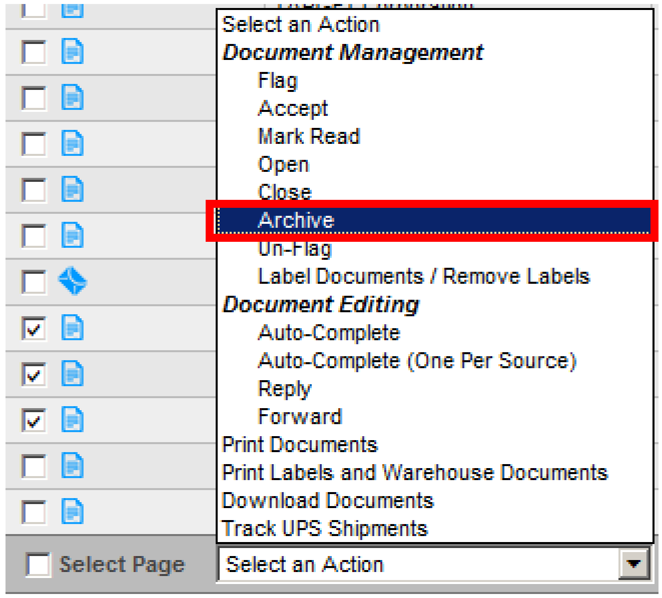
Archive Documents

Archiving documents removes them from your inbox.

Learn how to archive a document by viewing this training video.

1. Select the document(s) you wish to archive.
2. Click the **Archive** button on the bottom tool bar.

3. You may also use the Select an Action drop-down menu and click **Archive**.

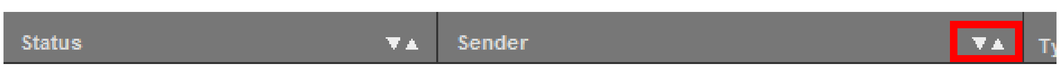


RELATED: Unarchive a document

Sorting

Each column has two arrows next to the column title. Use these arrows to sort by that column.

1. Click the down arrow to sort ascending by name.

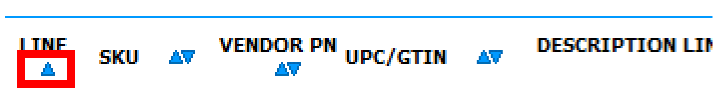


2. Click the up arrow to sort descending by name.

Sorting Documents

Open documents have sorting options as well. Any open document may be sorted by any columns with sorting arrows next to it. This sort feature allows you to sort by any column within a document.

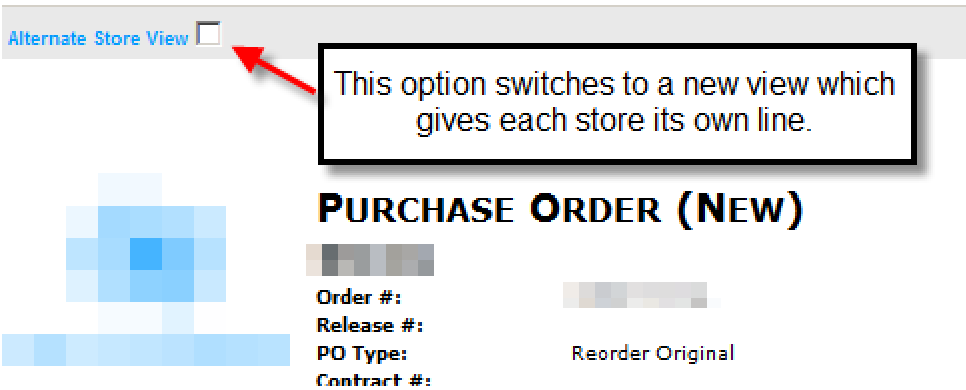
NOTE: This feature may not be available to users with a custom style sheet.



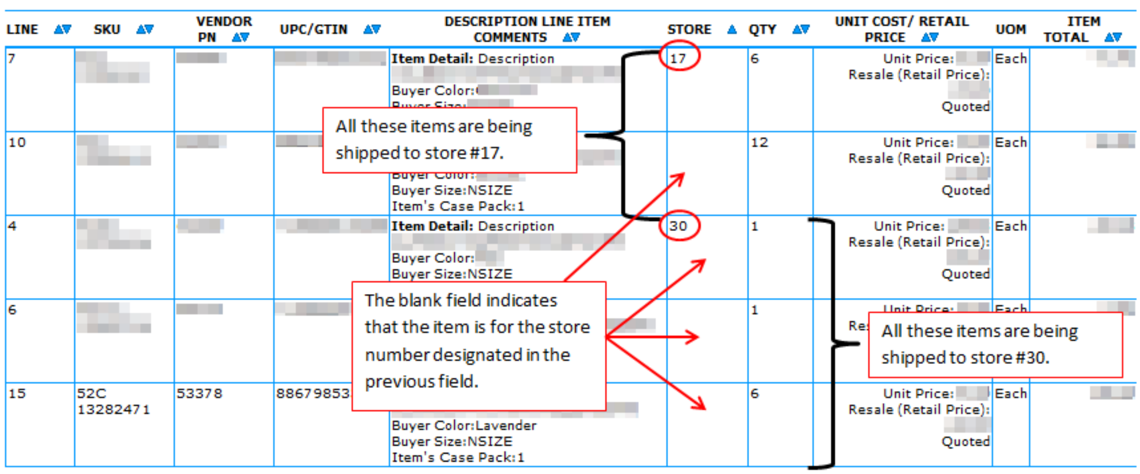
You may now sort your order information by any of the columns with the ▲▼ arrows next to it. Click on the up ▲ arrow to sort ascending, and the down ▼ arrow to sort descending.

<u>Alternate Store View</u>

This option lists a line item by store location. In this view there is only one store per line.



NOTE: This feature may not be available to users with a custom style sheet.



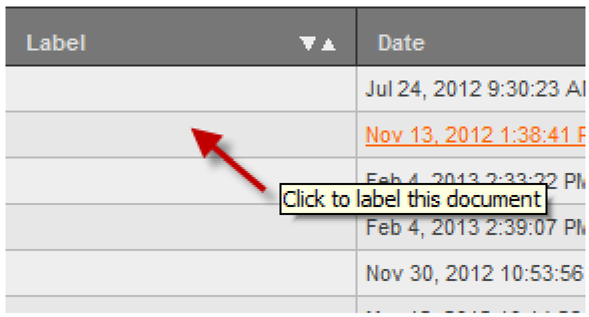
Labeling Documents

Add document labels as desired to add specific user-driven detail to documents. Labels may be up to 25 characters long.

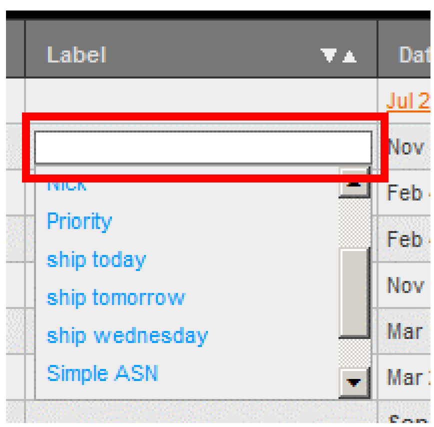
NOTE: See Search for information on searching by label.

To edit a single document label, view this training video, or follow the instructions below:

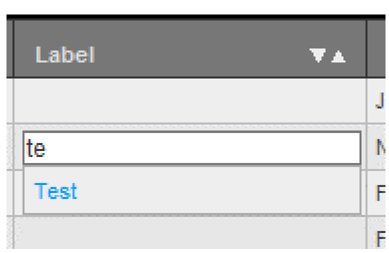
1. Move the mouse cursor over the **Label** field.



2. Click in this field to open the label text box.



3. Type the desired label name. If the name already exists, it will appear below the text box. Click it to use the existing label name. Click the **X** to delete the label.

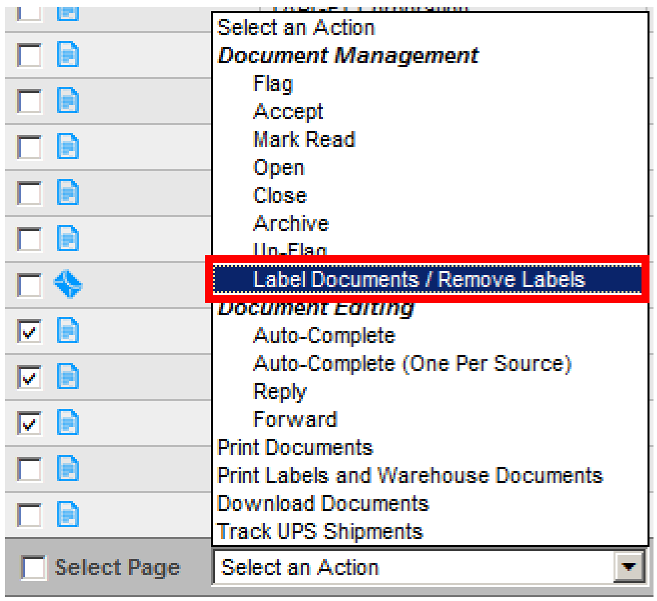


To edit the label for multiple documents at once:

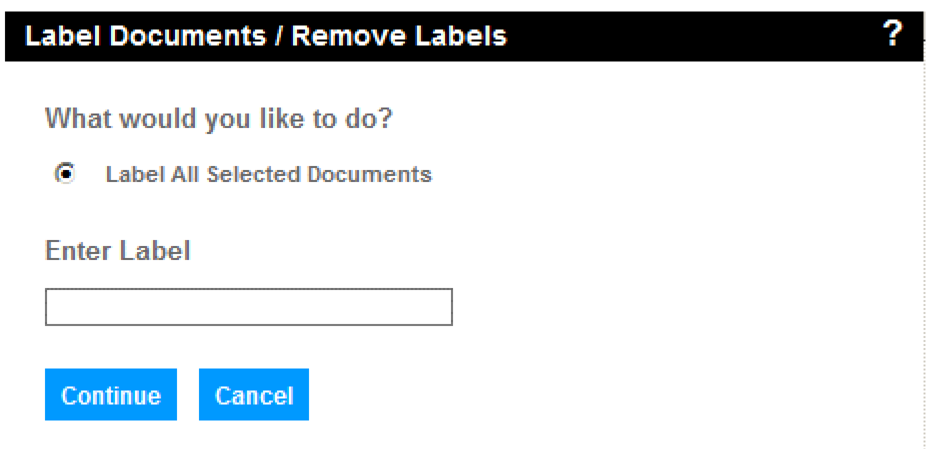
1. Select the desired documents by checking the status box for each desired document.

2. Click the **Select an Action** menu at the bottom of the screen.

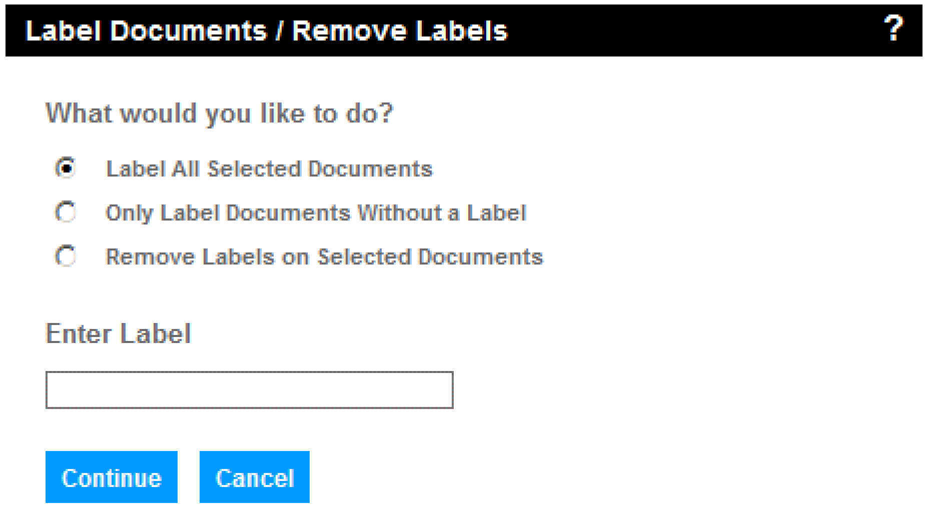
3. Click on **Label Documents / Remove Labels** menu item. Learn more about the Select an Action menu in this training video.



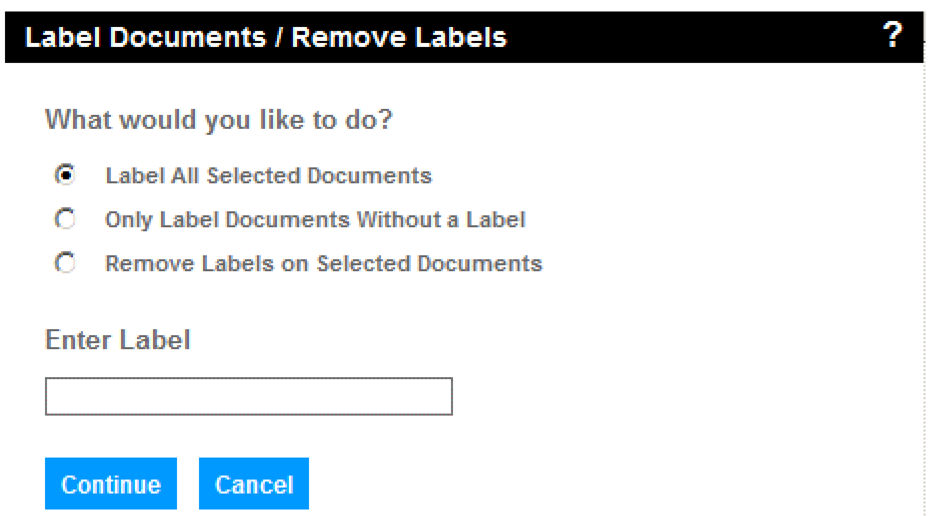
4. The Label Documents / Remove Labels window will appear.



5. If the all the documents are already labeled, the **Remove Labels on Selected Documents** option will appear in the window, as shown below.



6. If some of the documents are labeled and some unlabeled, the **Only Label Documents Without a Label** option will appear in the window, as shown below.



7. Type in the label name and click **Continue** to save the label name, or **Cancel** to cancel the label change.

Next Steps

Next Steps provides a list of all available return documents that can be generated from the source document as determined by your trading partner business rules. These are generally listed in the order they would be required by your trading partners in their business rules.

Click on the **Next Steps** icon for the document that you will be working with. For additional information, refer to the Completing Return Documents section later in this reference guide.

Here is a list of commonly required documents that you may see available in your next steps options:

Purchase Order Acknowledgement (POA) - While the required content may vary, this document allows you to communicate any changes you require to be able to ship this order such as an update to the quantity you have available or your actual expected ship date. Some retailers may require this document even if no changes are required.

Advanced Ship Notice (ASN) - This document is delivered prior to your shipment receiving its destination point. The ASN typically communicates the content of each box or pallet, the tracking number or bill of lading, the delivery method, and expected ship arrival date. Please consult your trading partner's vendor compliance material for further information regarding this document.

Invoice (INV) - Like its paper counterpart the invoice indicates the monetary amount your trading partner owes for a given order in accordance with your agreed payment terms. Automating this process allows your trading partner to more quickly deliver your payment.

Click on the **Next Steps** icon on the far right end of the row containing your purchase order or in the upper right-hand corner of your opened purchase order.

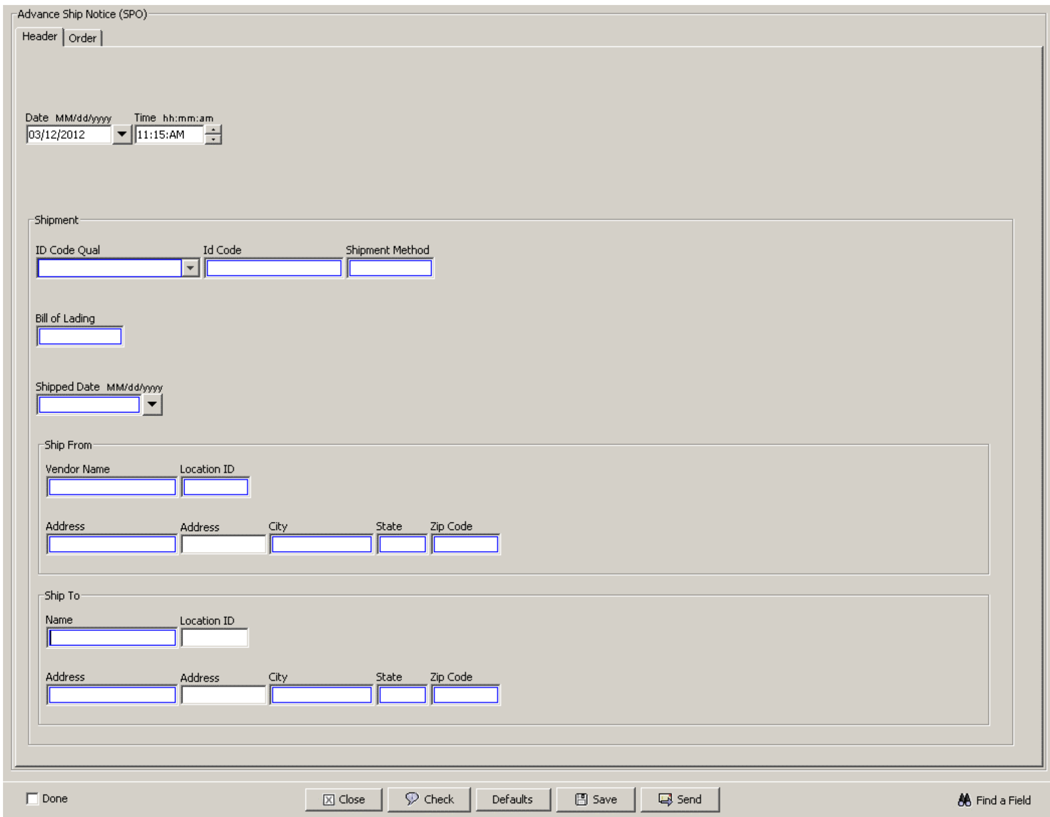
See the sections for Auto Complete and New Document for advanced tools that can be used to generate return documents.

NOTE: Please close all new windows once you are finished in the window.

Completing Return Documents

The data entry applet opens for the selected document. This applet includes the following three windows. Complete the document fields outlined in blue. These are the required fields. Significant buttons and options are defined in the following step.

Contact Customer Support with questions regarding specific data entry fields.



Please note that the tab names (Header, Select PO, and Summary) may vary based on your trading partners.

You may type in fields with drop-down menus and the field will auto-fill for you.

Significant buttons and options of the data entry applet include:

Done

Closes the original document so that no subsequent return documents may be created unless the document is re-opened. This will remove the document from the **New Documents** menu.

Close

Closes the document without saving changes (unless the document was saved prior to closing).

Check

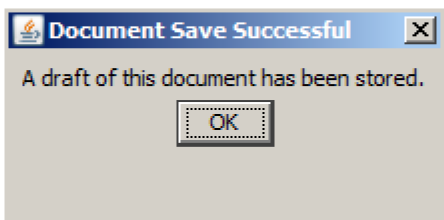
Verifies that all mandatory fields have been completed.

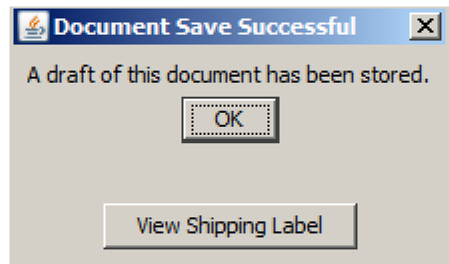
Defaults

Opens the defaults window. NOTE: Setting defaults from the data entry applet does not set defaults for the open document-only subsequent documents.

Save

Saves the document to the **Drafts** folder. After you click save, a window will appear stating the save was successful. If the document in progress is a shipment, you will be able to preview the shipping label.



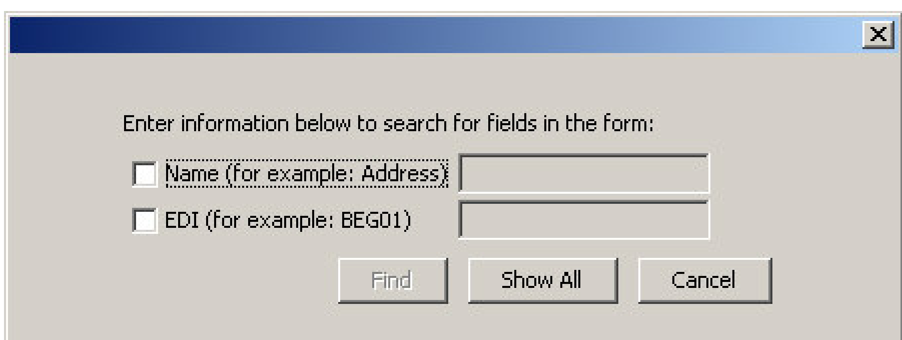


Send

Sends the document to the specified trading partner and moves this document to the Sent folder.

Find a Field

Searches for a particular field name or EDI segment using the search window below; search options include **Name** and **EDI**.



To complete the **Find a Field** window:

1. Select either the **Name**, **EDI**, or both check-boxes.
2. Complete entry of the Name and/or EDI fields.

3. Select the appropriate button.

   Search
   Searches for results that match the criteria specified in the Name and EDI fields, displaying the results one field at a time

   Show All
   Searches for results that match the criteria specified in the Name and EDI fields, displaying a list that contains all the fields matching the criteria

   Cancel
   Ends the search and returns to the data entry applet

4. Once you have completed data entry, click on the **Check** button at the bottom of the document to verify that all required fields are populated.
5. You may either **Save** then **Close** to save the document as a draft.
6. Click **Send** to return the document and exit the applet.

NOTE: Please close all new windows once you are finished in the window.

Printing From WebForms

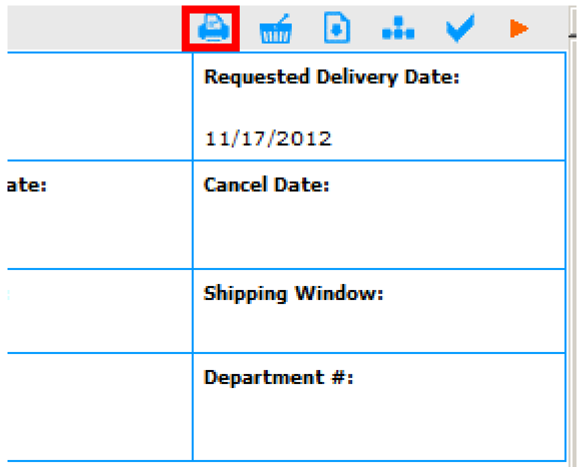
Whether you want to print a WebForms document or you need to print bar code labels, printing from WebForms is simple and convenient. When printing a document, you can either print from an open document or directly from the Inbox. For printing bar code labels or warehouse documents, print either from the **Shipping Labels** option from the Next Steps menu, **Saved** document(s), or the Next Steps of **Sent** documents to your Sent folder.

Important note for Firefox users

These options are explained more in depth in the following examples:

Printing From an Open Document

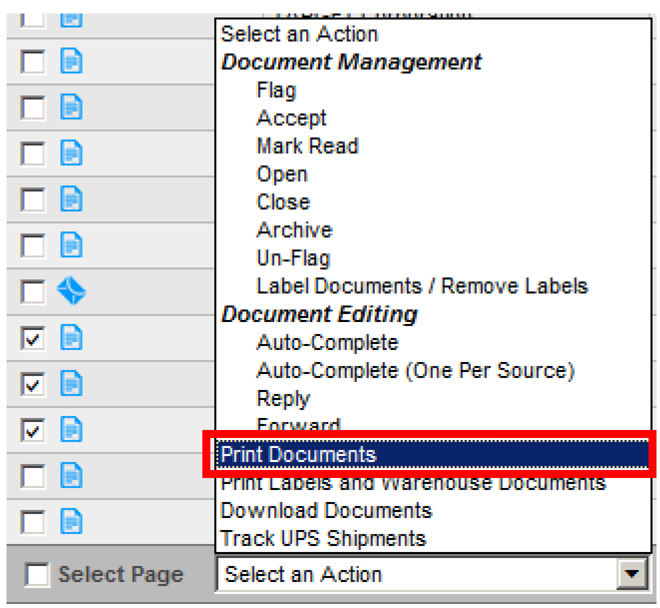
1. Click on the **Print** icon of an open document. This option is only available for a document that is already open.



2. The **Print** window displays. Select the appropriate options and click the **Print** button.

Printing From the Inbox

1. Place a check mark in the box under the **Status** column for the document that you want to print.
2. Select the **Print Documents** option from the **Select an Action** pick-list in the lower-left of the window (below the **Status** column). Learn more about the Select an Action menu in this training video.



3. The **Print** window displays. Select the appropriate options and click the **Print** button.

Printing Barcode Labels

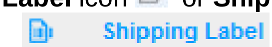
Some trading partners require that you use the UCC-128 bar code labels on your shipments. For best results, you will want to use a laser or thermal printer to print your labels from your WebForms site. After you have saved or submitted your shipping notice, follow the steps below to print the UCC-128 bar code labels.

Bar code labels can be printed as many times as needed. You can print bar code labels from saved or a submitted ship notices. Saved documents are found in the **Drafts** folder. Submitted documents are found in the **Sent** folder. Select the ASN(s) to be used for the labels.

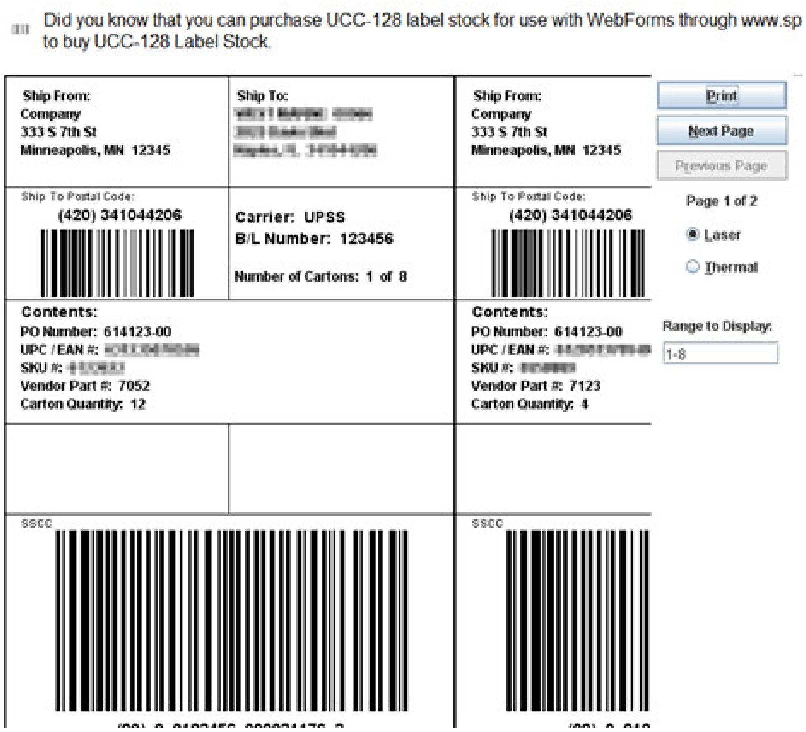
NOTE: If any changes are made change any cartons on the ASN, the entire sequence of barcode labels needs to be re-printed not just the label relating to the affected carton, because the barcode sequence will no longer match the original set.

NOTE: It is recommended that you print your bar code labels before submitting your ASN to your trading partner. This will allow you the opportunity to correct any errors you might encounter while packing your shipment.

1. Click on the Next Steps icon for that document.
2. Click on the **Shipping Label** icon or **Shipping Label**.



3. The Label Print screen will appear, similar to the one below.



a. Select the printer type (Laser or Thermal).

For Thermal Printers:

Please refer to the Thermal Printing Guide on the Portal, and skip to step 10 below.

For Laser Printers:

Change the paper size to **Legal** if printing to a laser printer. Set **Orientation** to **Portrait**.

a. If you need to print a specific label, you will want to indicate which label or labels to display in your **Range to Display** field. Type in the number or numbers of the labels you would like to print (1-4 or 1, 3, 4).

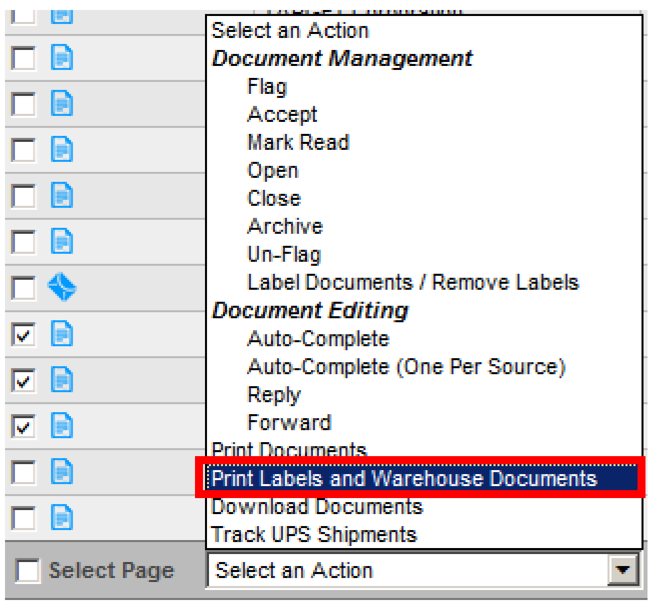
b. View additional pages by clicking **Next Page**.

c. Print labels by clicking **Print**.

Printing Warehouse Documents

Warehouse documents, or pick lists, may be viewed and printed via the **Select an Action** menu, Next Steps, or from within the document.

Select the document and then click on **Print Labels and Warehouse Documents** in the **Select an Action** drop-down menu. Learn more about the Select an Action menu in this training video.

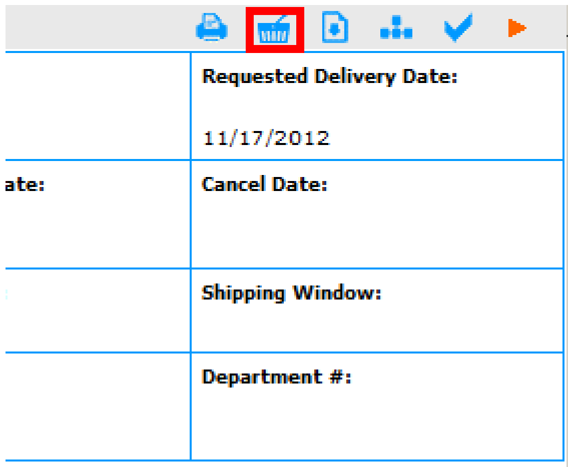


or

Click on the Next Steps icon for that document. Then select **Pick List** from the Next Steps menu.

or

Click on the Pick List button from within the PO.



The Pick List will appear. Click the **Print** button to print the Pick List.

Date

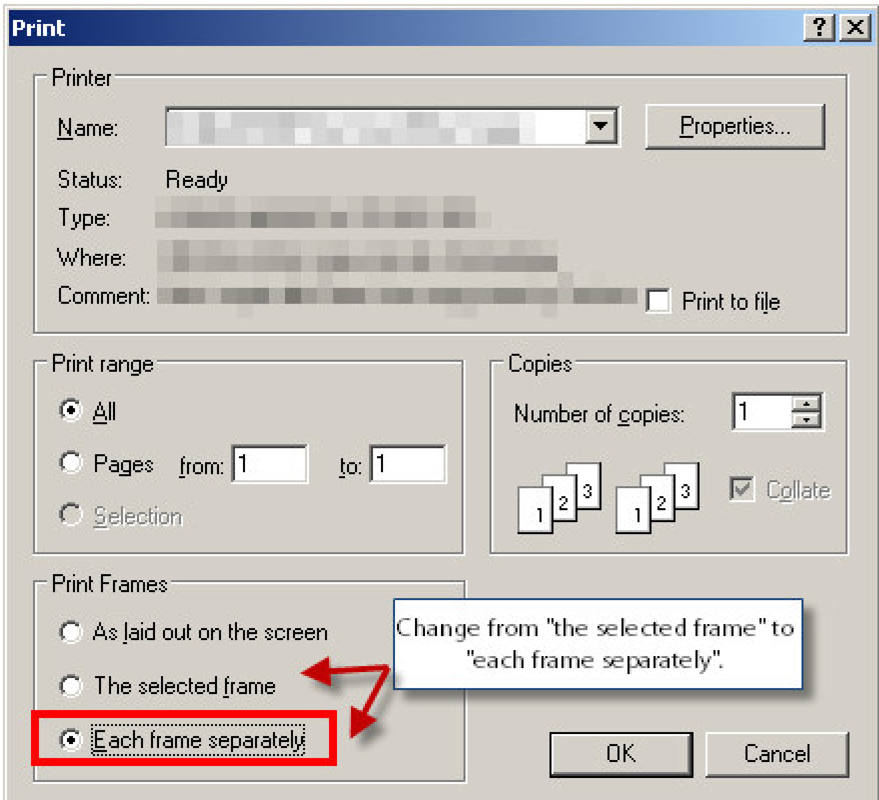
Friday, March 01, 2013 10:13:06 AM

Trading Partner	Order Number
[illegible]	4440014

LINE SEQUENCE #	VENDOR PART #	UPC/EAN	GTIN	UPC CASE CODE	PART NUMBER	PART DESCRIPTIONS	QTY	UOM	QTY PICKED
1	[illegible]	NA			[illegible]	[illegible]	1.0	Each	

Important note for Firefox users:

When printing from the Firefox web browser, you must change the **Print Frames** selection in the **Print** window. By default the setting is 'The selected frame' but you must change this to 'Each frame separately.'

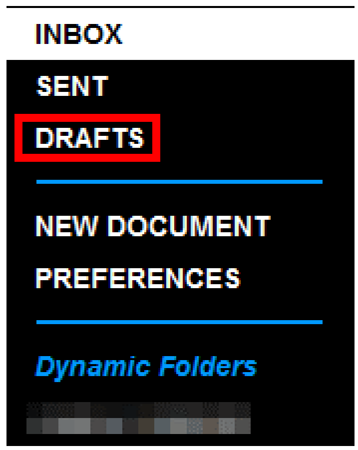


Drafts

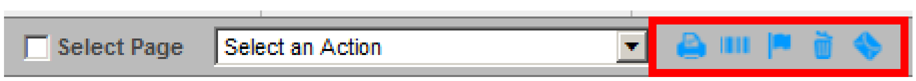
WebForms will allow you to save unsent documents in the **Drafts** folder. You can easily initiate documents and retrieve them at a later date for completion. Look for the **Save** button at the bottom of each document to save your work.

To View a Document Draft:

1. Click the Drafts button in the navigation bar at the top of the window.



2. Click on the icon or trading partner name to open a document.
3. Use the bottom tool bar to perform the following actions:



Print the selected document(s)

Print labels and warehouse documents

Flag the selected document(s)

Delete the selected document(s)

Send the selected document(s)

NOTE: Deleted draft documents may not be recovered.

Sent

Documents you send are moved to the **Sent** folder. You may requeue documents from the Sent folder. If you subscribe to UPS Carrier Integration services, you may view tracking information from the Sent folder.

Documents not shown in your Sent folder may have been removed from your view in accordance with your monthly mailbox settings. These documents can still be found using the Search feature for up to 12 months after the original PO date. Documents will automatically be archived after a period of 12 months. See the Preferences section of this guide for instructions to change the default Months in Mailbox setting.

Use the bottom tool bar to perform the following actions:

 Print the selected document(s)

Print labels and warehouse documents

 Flag the selected document(s)

 Archive the selected document(s)

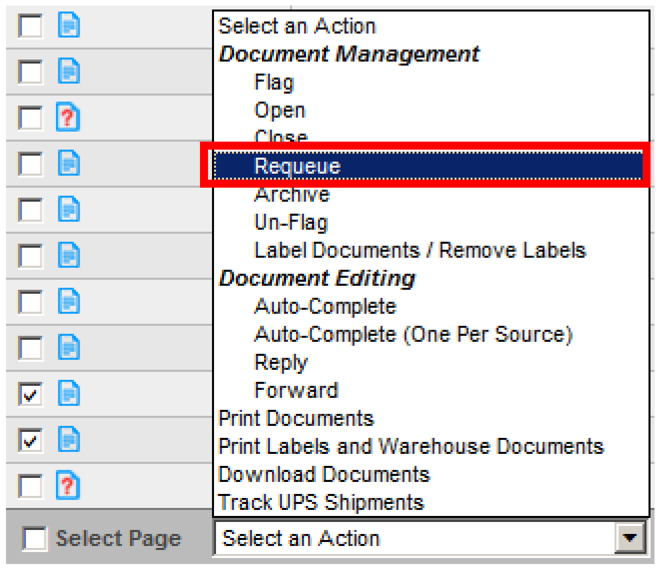
Learn more about the Select an Action menu in this training video.

NOTE: Sent documents may be deleted from the Sent folder, but deleting sent documents will not affect their delivery. Use the Search feature to recover deleted documents.

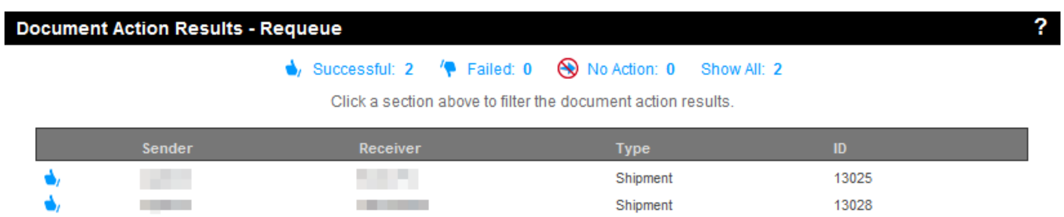
Requeue Documents

You may requeue documents from the Sent folder if it is necessary to re-send documents to a trading partner.

1. Select the document(s) to requeue.



2. The Document Action Results window will appear with the results. The top of the window shows if the requeue was successful or if it failed.

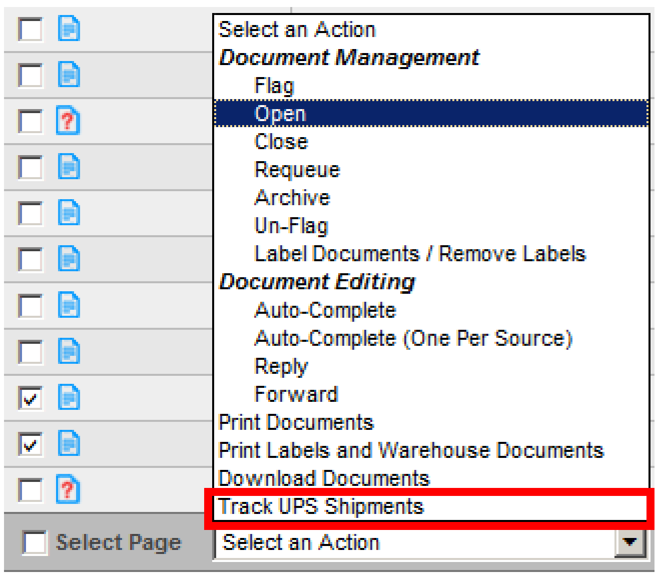


UPS Carrier Integration

You may view tracking information using the Track UPS Shipments action in the Select an Action drop-down menu.

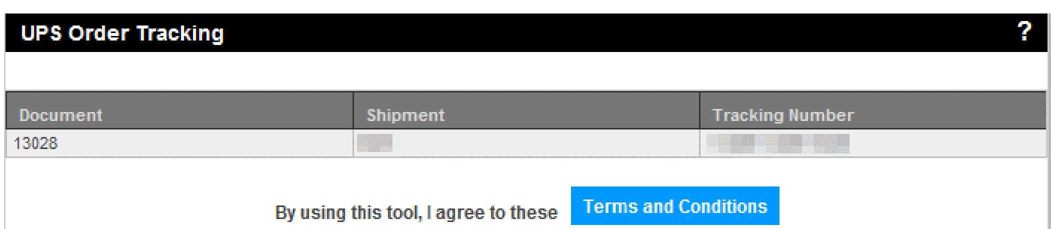
1. Select a shipment, or shipments, in the Sent folder.

2. Click the Select an Action drop-down menu and click on Track UPS Shipments. Learn more about the Select an Action menu in this training video.



3. The UPS Order Tracking window will appear.

4. Click the tracking number to view the UPS Shipment Tracking Summary.



NOTE: Click **Terms and Conditions** if you wish to view the UPS terms and Conditions.

5. The UPS Shipment Tracking Summary will appear.

UPS Shipment Tracking Summary ?

To see a detailed report, please select the Details button.

Tracking Number	Status
[illegible]	Delivered On:2013-03-01 Delivered To:KANSAS CITY ,MO64112 US Service Type: GROUND Success

Details

Tracking results provided by WebForms via UPS.

By using this tool, I agree to these Terms and Conditions

6. Click **Details** to view the UPS Shipment Tracking Detail.

UPS Shipment Tracking Detail ?

Tracking Number	Status	Delivery Information
[illegible]	Success	Delivered On:
		Shipped or Billed On: 2013-03-01
		Delivered To: US
		Signed By:
		Service Type: GROUND

Date & Time	Location	Activity
2013-03-01 14:51:23	US	BILLING INFORMATION RECEIVED

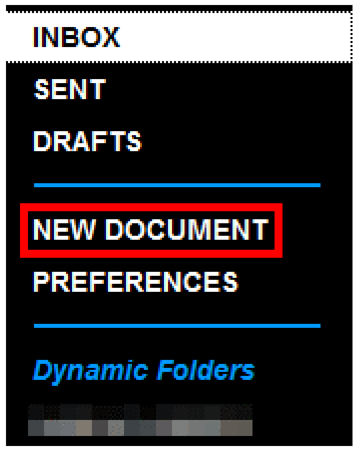
Tracking results provided by WebForms via UPS.

By using this tool, I agree to these Terms and Conditions

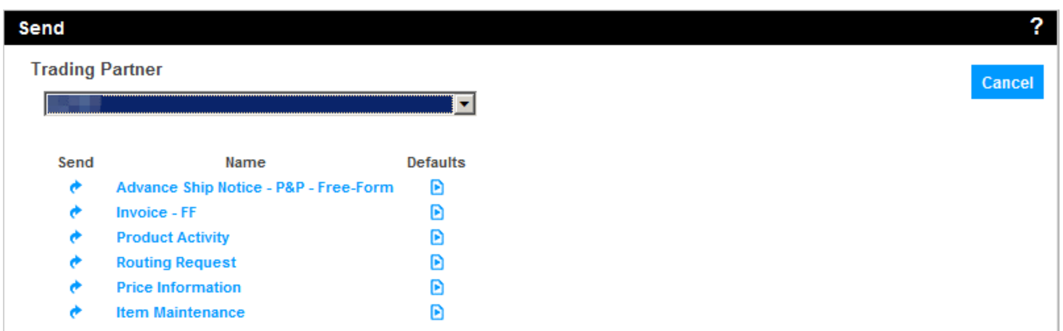
New Document

The **New Document** option allows you to generate return documents by displaying a list of open POs for a specified trading partner and document type. If there is no related document for your order, for example a vendor-managed inventory requires a Free Form Document.

1. To access the **New Document** window click **New Document** the button in the navigation bar on the left.

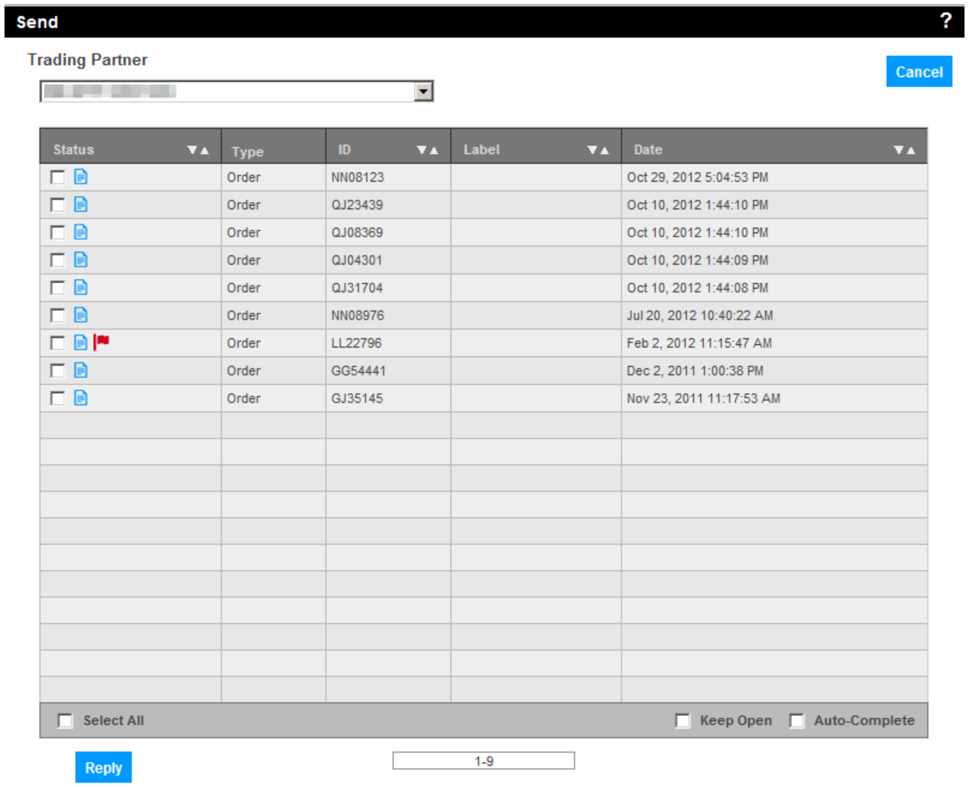


2. Select the desired trading partner from the drop-down list at the top of the window.

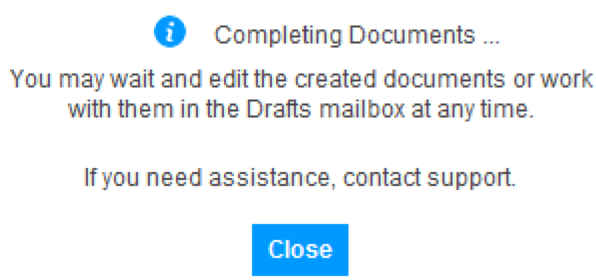


3. Open documents will display once a trading partner has been selected. The window includes three columns: **Send**, **Name**, and Defaults.
4. Click the arrow in the **Send** column, or click on the **Name**, next to the document type you wish to complete and send. The following window will open, allowing you to select the open source documents to be included. Refer to the section on Auto-Complete for additional information on using the Auto-complete option

NOTE: This list contains all open purchase orders. If you do not close your orders through the **Select an Action** menu or by clicking **Done** when completing a return document, POs that have already been acknowledged, invoiced, or shipped will appear in this list.



5. Check the box in the **Status** column to select the source document(s). If you wish to Auto-Complete the selected document(s) put a check in the box in the bottom right-hand corner. See the WebForms Auto-Complete section for details regarding the auto-complete function.
6. Click **Reply**. The following message displays.



NOTE: Setting Defaults allows you to pre-populate specific document data entry fields, eliminating the need for you to enter repetitive data. For example, if you always ship from the same address, you can set a default so that when that particular document is accessed, the Ship From address is pre-populated. Refer to the Setting Defaults section for additional details on working with defaults.

7. If you checked the Auto-Complete box, the Quick-Edit screen may appear if there are fewer than ten fields to complete in a document.

8. If you did not select Auto-Complete, the data entry applet will now open for Completing Return Documents. The data entry applet will also appear if there are more than ten fields to complete in a document.

Creating a Free Form Document

Not all business models follow the traditional document exchange of purchase order, purchase order acknowledgment, then ASN and Invoice. For example, in some relationships a vendor replenishes the inventory of their product by making periodic stops and then invoices for the quantity they delivered. In this scenario the vendor does not have an original document from which to generate a return document. This is when a "Free Form" return document must be generated.

View this training video to learn how to create a Free Form document.

NOTE: Not all retailers permit this document type and if a source document was received it must be used in lieu of the free form option.

If a free form option is available it will be listed in the list of documents available by trading partner in the New Document tab.

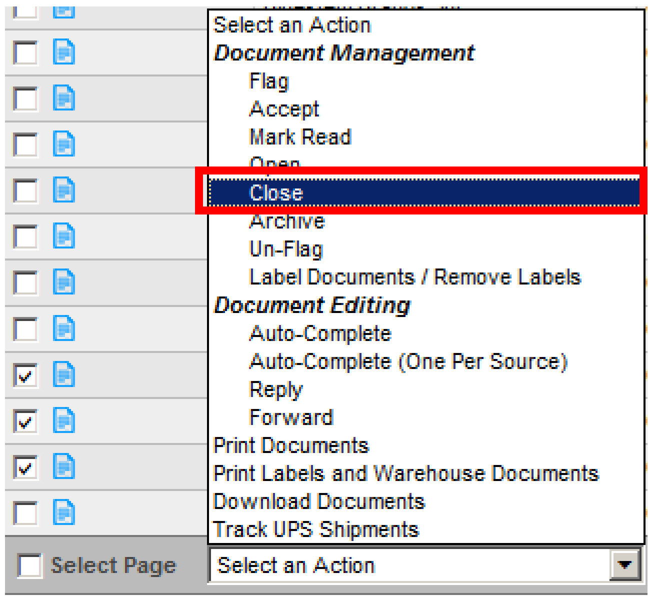
1. Click on the Next Steps icon to the left of the free form document you would like to create.
2. As shown in the Completing Return Documents section, the Java applet will open and you will be presented with a blank form. Again all fields outlined in blue are mandatory.
3. Complete all mandatory fields, click on **Check**.
4. Click on **Save** or **Send**.

NOTE: This applet for the free form documents has an additional option at the bottom for **Save as Template**. Saving as a template allows you to work from that saved point to complete subsequent documents until the template is deleted. The template can be found in your **Drafts** box and will be shown with an icon indicating that it is a template. To work with the template simply click on Next Steps and select **Edit**. If you send from a template the template will remain in your **Drafts** box and the individual document will go to your Sent folder.

To Close Completed Orders

Closing completed orders will close the document to further processing. Close does not delete. Closed documents can be found using Search.

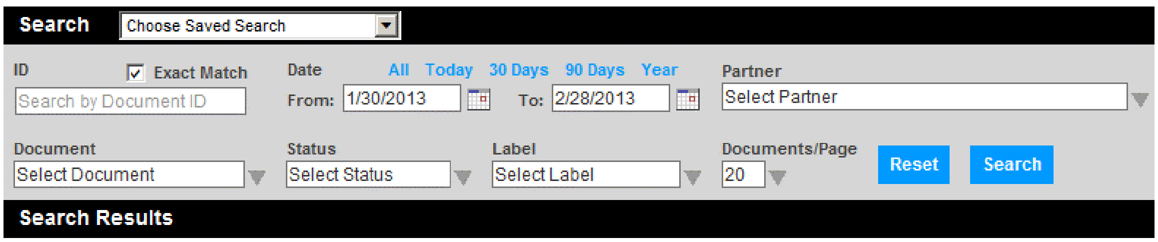
1. You may close an order while creating return documents by checking the **Done** box on the **Summary** screen. Please see Completing Return Documents for more details.
2. Place a check mark in the box under the **Status** column.
3. Select the **Close** option in the **Select an Action** pick-list in the lower-left of the window (below the **Status** column). Learn more about the Select an Action menu in this training video.



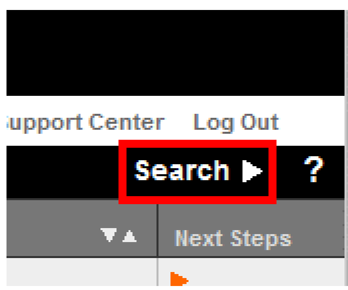
Search

The **Search** window will display a query (search) window. There are five search options – **Date**, **Document**, **ID**, **Partner**, and **Status**. You may select one or multiple options for your search criteria.

Learn more about the available search options in this training video.



1. Click the **Search** button in the navigation bar at the top of the window to access the **Search** window.



2. To search by a specific option place a check-mark the appropriate check-box for the filter or filters to be used.

   Search options include:

ID: Enter the ID # of the document (invoice #, PO#). If searching for multiple IDs, separate the IDs using a comma.

NOTE: The **Exact Match** check-box to search by a specific ID # is checked by default. Uncheck the box if you are using a partial ID.

Date: Enter dates in both the **From** and the **To** fields.

All - Click this to clear the date filter and search without any date parameters.

Today - Click this to set the **From** and **To** date filters to today's date.

30 Days - Click this to set the **From** date filter to the past 30 days and the **To** date filter to today's date.

90 Days - Click this to set the **From** date filter to 90 days ago and the **To** date filter to today's date.

Year - Click this to set the **From** date filter to 1 year ago and the **To** date filter to today's date.

Partner: Highlight the name of the trading partner in the box.

Document: Highlight (click on) the name of the specific document from those listed in the text box.

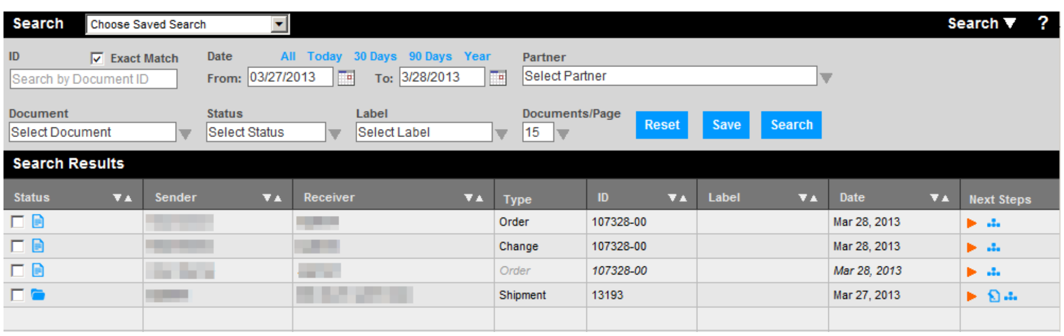
Status: Allows you to easily search for documents by their current status on your site - e.g. **Flagged**, **Read**, **Accepted**, etc.

Label: Search by document label. The label field is a user defined field.

Documents/Page: This sets the number of documents per page for the results screen.

NOTE: In the drop-down lists (**Document**, **Partner**, and **Status**) multiple criteria can be selected by using the **Ctrl** or **Shift** keys.

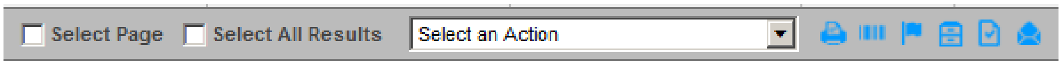
1. Click off the menu or hit the **enter** key to set the search parameter and clear the menu.
2. Once the search criteria have been specified, click on the **Search** button.
3. Documents that match the search criteria are displayed in the **Search Results** window – as shown below. Click the **Search** button if you would like to refine your search results or complete another search. The criteria that were selected for the previous search will be retained upon returning to the **Search** window.



NOTE: To save the search filter settings, see Save Search.

4. To open the document, click on either the document status icon, the **Originator** name, **Sender**, **Receiver** name, **ID**, or **Date**. The document opens for review. You can close the document and return to the **Searchbox** or **Search** windows. You can also leave the document open and return to the **Searchbox** or **Search** windows to locate other documents. Multiple documents can be opened during the same login.

5. At the bottom of the Search window is the **Select All Results** checkbox. This box allows you to Select an Action for results on all pages. Learn more about the Select an Action menu in this training video.



Use the blue icons to perform the following actions:

- Print the selected document(s)
- Print labels and warehouse documents
- Flag the selected document(s)
- Archive the selected document(s)
- Accept a PO Change
- Mark the selected document(s) as read

NOTE: There are some limitations on the number of documents that any Action may perform. If you attempt an action on a document that exceeds the limit, you will receive an error message.

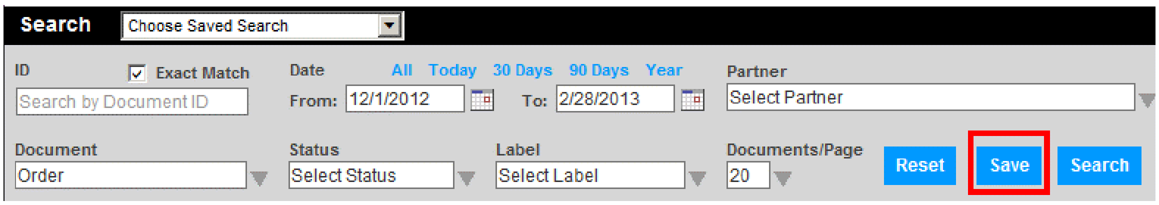
Action	Limit
Print Documents	200
Print Labels and Warehouse Documents	200
Reply	200
Forward	200
Download Documents	200
Auto-Complete	2,000
Auto-Complete (One Per Source)	2,000
Mark Read	3,000
Accept	3,000
Open	3,000
Close	3,000
Flag	3,000
Un-Flag	3,000
Track UPS Shipments	3,000

Save Search

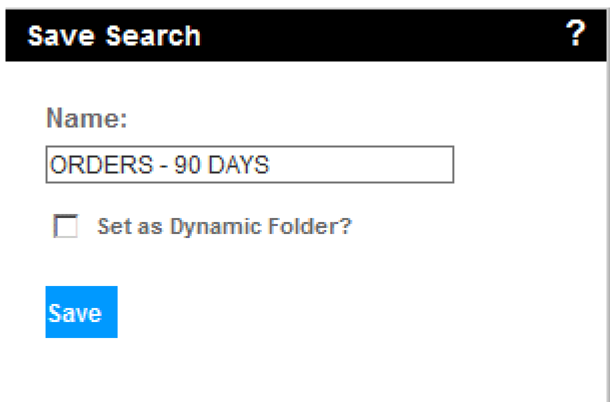
Saved Searches are saved, filtered view of WebForms documents that automatically update as documents are added or modified to meet the search criteria. **Dynamic Folders** are saved searches that appear on the WebForms sidebar for quick access. See Preferences to manage saved searches and dynamic folders.

NOTE: When the **To:** date is set to the current day, saved searches will automatically update the **To:** date to the current day for future searches. For example, a search for **From:** 1/1/XX **To:** [Current day] will always roll to 1/1 to the current date. Any other date range will remain fixed.

1. Click on **Save** to save the current search parameters for future searches.

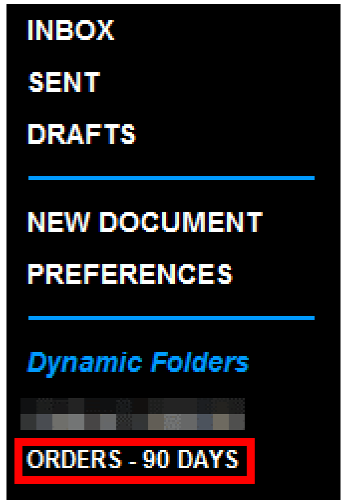


2. The Save Search window will appear.



3. Type the name of the search in the **Name** field.
4. To enable this search on the sidebar, click the **Set as Dynamic Folder** box.
5. Click **Save**.

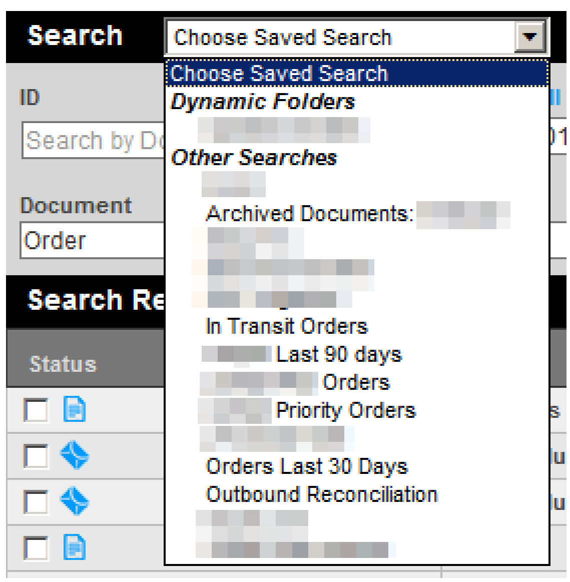
6. The saved search now appears on the sidebar.



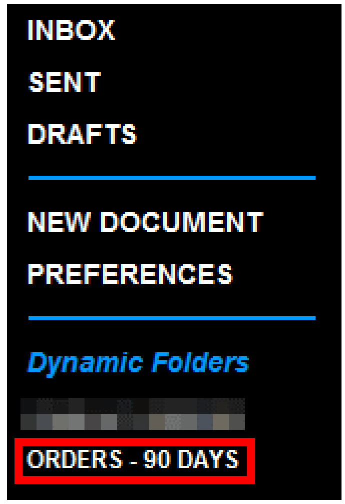
To edit saved searches, open [Preferences].

To Access saved searches:

1. Saved searches are available in the **Choose Saved Seaches** drop-down menu in the Search window.



2. Saved searches may also be set as **Dynamic Folders**, which may be accessed anywhere within WebForms, by clicking on the search in the sidebar.

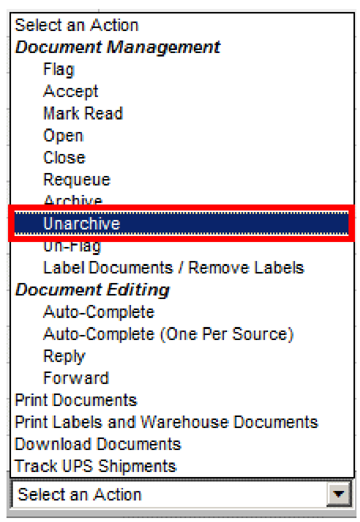


Unarchive Documents

Unarchiving a document moves a document back to your inbox.

1. Select the document(s) to unarchive.

2. Click the Select an Action drop-down menu. Select **Unarchive**. Learn more about the Select an Action menu in this training video.



3. The document is now in your inbox.

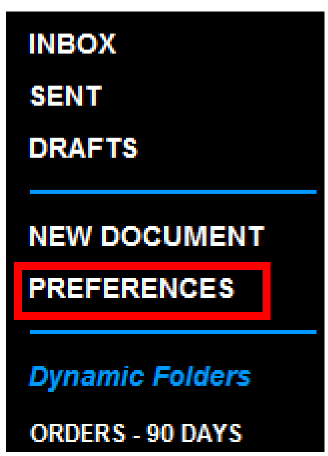
RELATED: Archive documents

Preferences

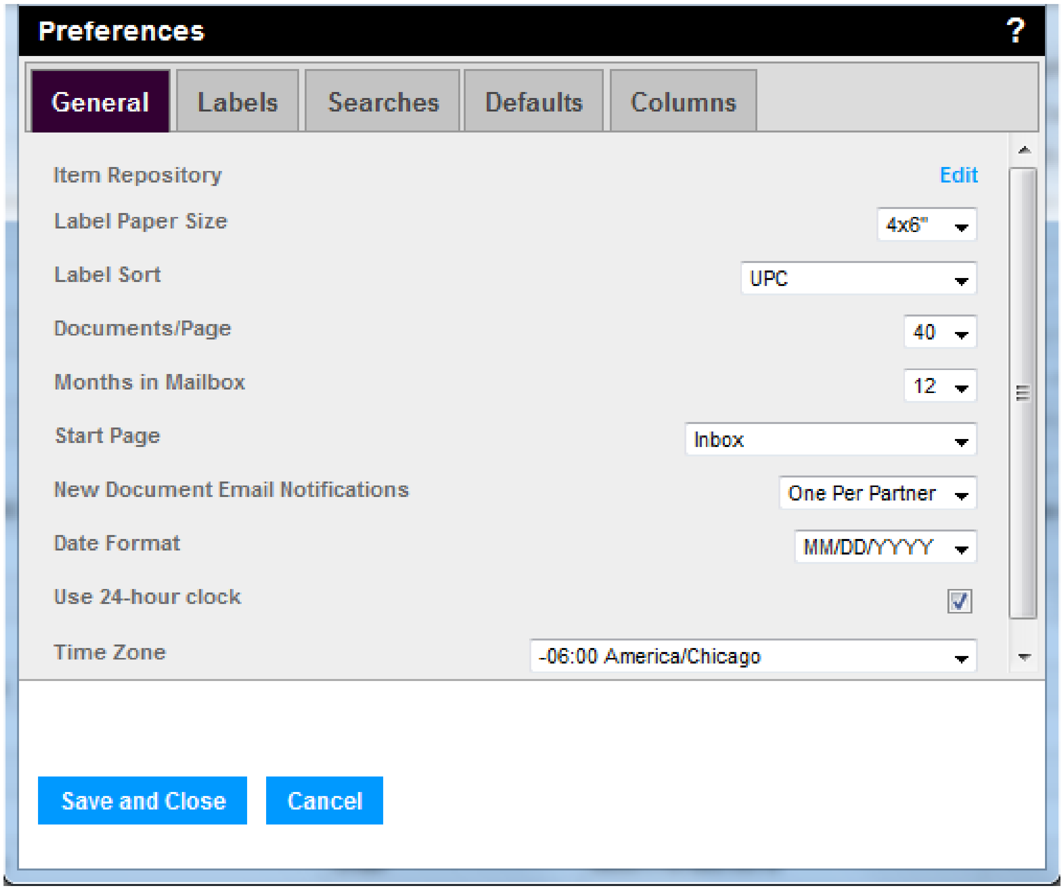
The WebForms Preferences page allows you to customize some aspects of your workflow. These customizations include:

- Set the default paper size.
- Set the label sorting method.
- Adjust the number of documents you see on each page of your WebForms mailbox.
- Set the length documents are stored in your mailbox.
- Change your start page at login.
- Set your email notification preferences.
- Set the date format, clock, and timezone.
- Create and customize document labels.
- Manage searches.
- Set Defaults.
- Customize columns.

1. To access the Preferences page, click the Preferences button in the WebForms toolbar.



2. The Preferences page will open in a new window.



3. There are five tabs at the top of the Preferences window:
   - General
   - Labels
   - Searches
   - Defaults
   - Columns

Preferences - General

The General preferences allows you to make changes to the Item Repository, printer type, documents per page, and months in mailbox.

NOTE: Click **Save and Close** to save changes before exiting the Preferences window.

Item Repository - The **Item Repository** allows users to add and edit Item information for repeated use when completing data entry. Once a user specifies **Item details** within the Item Master, they are available to automatically populate form fields during subsequent completion of EDI documents. This reduces the time spent on data entry and the possibility of errors. Click here for more information on the Item Repository. Click **Edit** to open the Item Repository.

Label Paper Size - Select the appropriate label paper size: 4x6, legal, or A4.

Label Sort - Use the drop-down selector to set the label sorting by Default (ASN line item number), UPC, SKU, or Vendor Part Number.

Documents / Page - Use the drop-down selector to select the desired number of documents to appear on each page. The available range is 15 to 40 (in increments of 5).

Months in Mailbox - Use the drop-down selector to select the desired number of months documents remain in the inbox. The available range is 1 to 12 months (1, 2, 3, 4, 6, 9, 12).

Start Page - Use the drop-down selector to select the desired landing page when opening WebForms. The options include: inbox, sent, drafts, search, and your dynamic folders.

New Document Email Notifications - Use the drop-down selector to set the new document email notifications to be sent one per partner, or to aggregate all documents into one email.

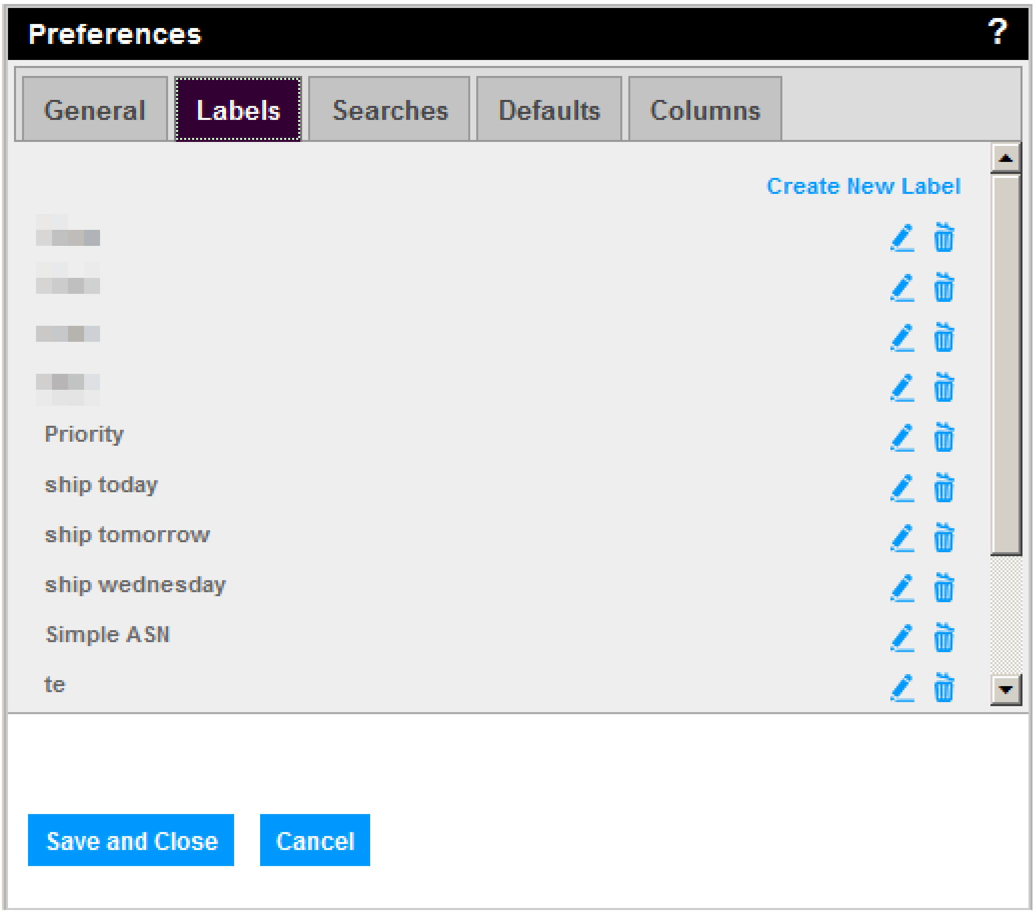
Date Format - Use the drop-down selector to set the preferred date format: MM/DD/YYYY, DD/MM/YYYY, or YYYY-MM-DD.

User 24-hour clock - Check the option to use a 24 hour timestamp.

Time Zone - User the drop-down selector to set the preferred time zone.

SPS COMMERCE

Preferences - Labels



The Labels tab allows you to manage the document labels across your company's WebForms users.

NOTE: Click **Save and Close** to save changes before exiting the Preferences window.

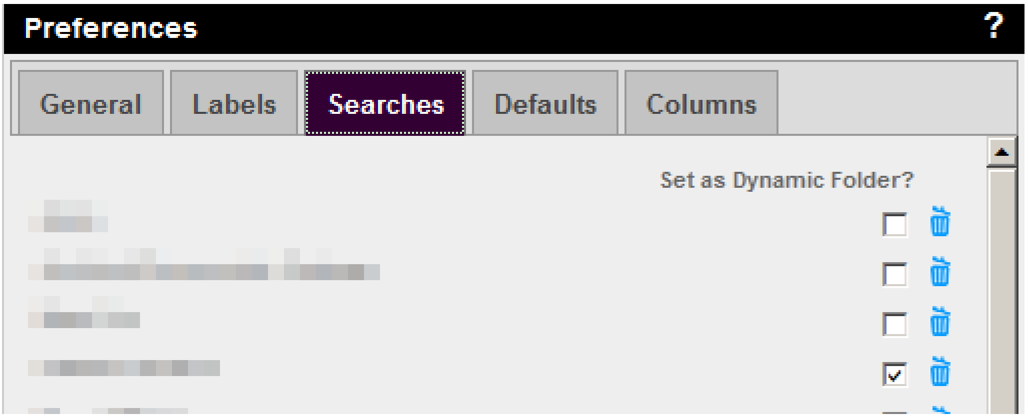
1. Click **Create New Label** to create new labels.

NOTE: Creating a label does not assign the label to any documents. See Labeling Documents for how to label a document.

2. Click the Rename icon to rename an existing label.
3. Click the Delete icon to delete an existing label.

SPS COMMERCE

Preferences - Searches

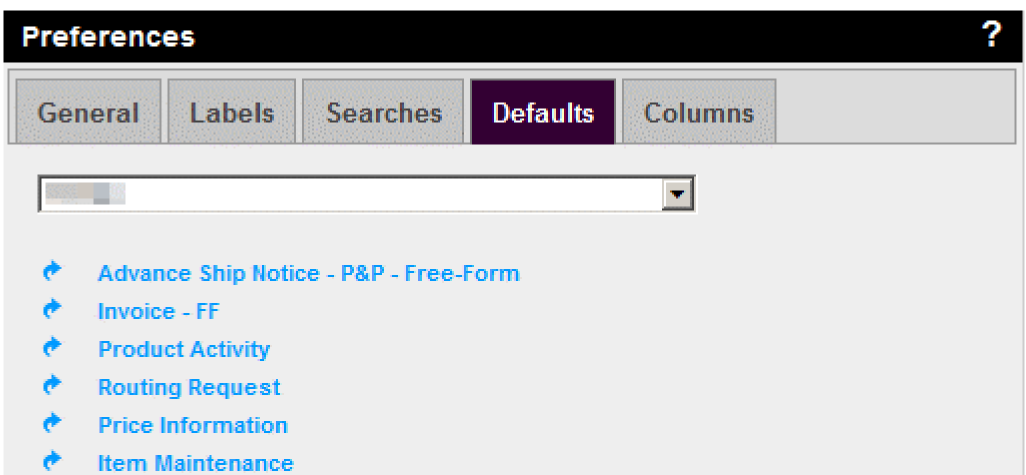


The Searches tab allows you to manage saved searches associated with your user ID.

1. Check the box associated with the search to set as a dynamic folder. See Save Search for more details on this feature.
2. Click the Delete icon to delete saved searches.

NOTE: Click **Save and Close** to save changes before exiting the Preferences window.

Preferences - Defaults

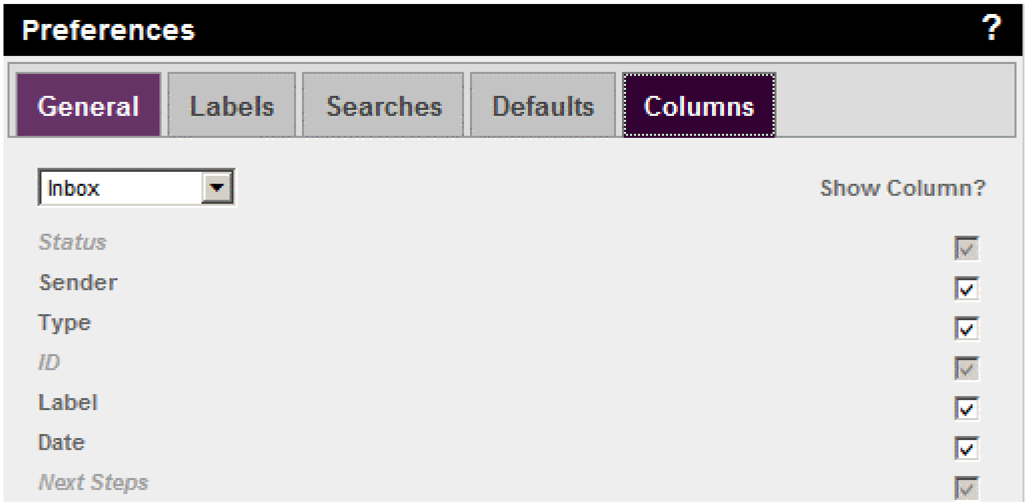


Defaults - Setting defaults allows you to automatically enter information in a field without manually inputting it. Click here for more information on Setting Defaults.

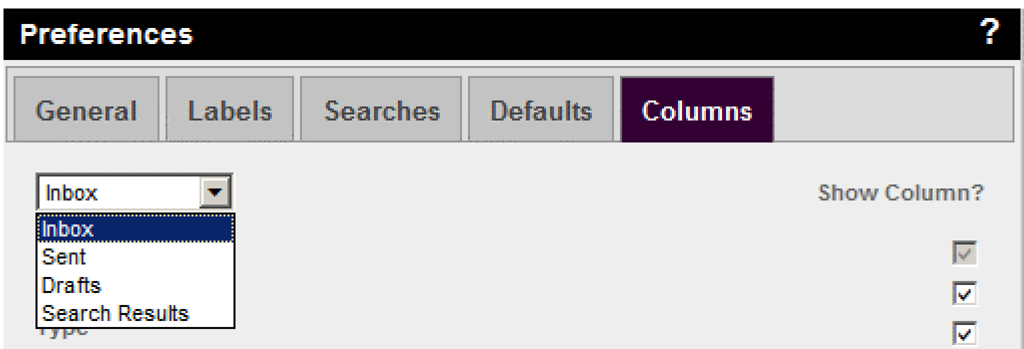
1. Use the drop-down menu to select the trading partner. Available documents will appear listed below.
2. Click on the document name to make changes to the defaults for the selected document associated with the specified trading partner.

NOTE: Click **Save and Close** to save changes before exiting the Preferences window.

Preferences - Columns



Click the drop-down menu to select the page view to customize. The available options are:



White Check Boxes may be unchecked, to hide the column for the selected page view.

Gray Check Boxes may not be unchecked, and will always appear for the selected page view.

Item Repository

The **Item Repository** allows users to add and edit Item information for repeated use when completing data entry. Once a user specifies **Item details** within the Item Repository, they are available to automatically populate form fields during subsequent completion of EDI documents. This reduces the time spent on data entry and the possibility of errors.

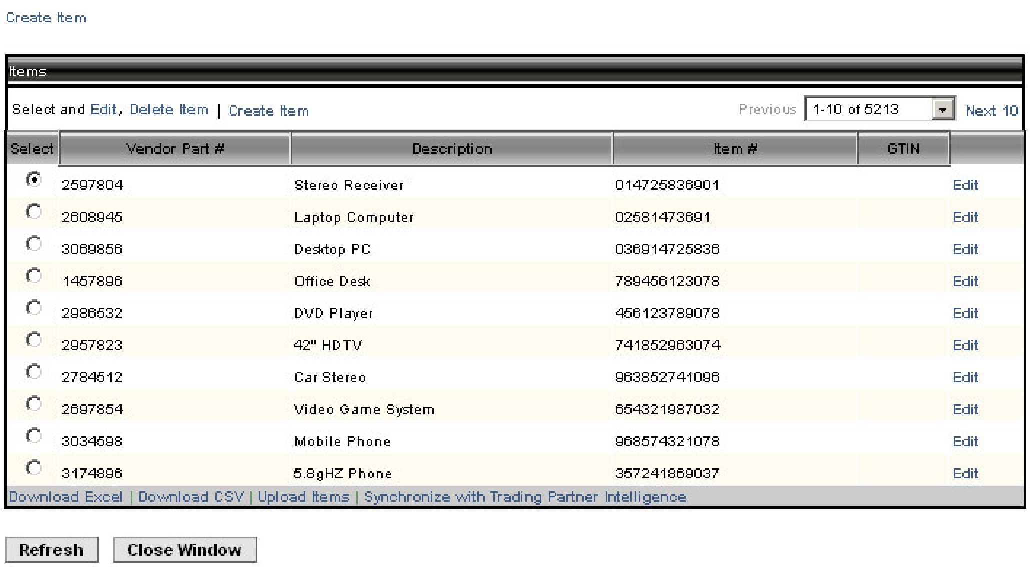
To learn how to use Item Repository, view this training video.

NOTE: Instructions on using the Item Repository are found here.

To access your **Item Repository**, click Preferences and then the **Edit** link for the **Item Repository** section.

You may also access the **Item Repository** from the folder tree in your Defaults window.

The **Item Repository** window opens.



Create Item

Items

Select and Edit, Delete Item | Create Item — Previous 1-10 of 5213 Next 10

Select	Vendor Part #	Description	Item #	GTIN	
(selected)	2597804	Stereo Receiver	014725836901		Edit
	2608945	Laptop Computer	02581473691		Edit
	3069856	Desktop PC	036914725836		Edit
	1457896	Office Desk	789456123078		Edit
	2986532	DVD Player	456123789078		Edit
	2957823	42" HDTV	741852963074		Edit
	2784512	Car Stereo	963852741096		Edit
	2697854	Video Game System	654321987032		Edit
	3034598	Mobile Phone	968574321078		Edit
	3174896	5.8gHZ Phone	357241869037		Edit

Download Excel | Download CSV | Upload Items | Synchronize with Trading Partner Intelligence

Refresh | Close Window

Available options in the **Item Repository** include:

Edit - Opens the Edit Item window for making changes to item default values

Delete Item - Deletes the item that is currently selected

Create Item - Creates a new item

Download Excel - Download item data into a Microsoft Excel formatted document

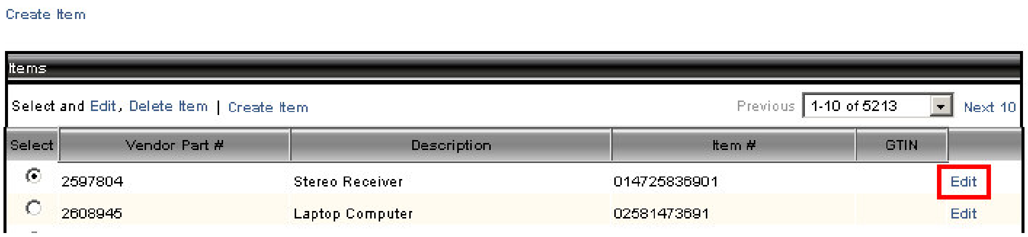
Download CSV - Download item data into a Comma Separated Values (CSV) formatted document

Upload Items - Upload item data using an Excel or CSV formatted file

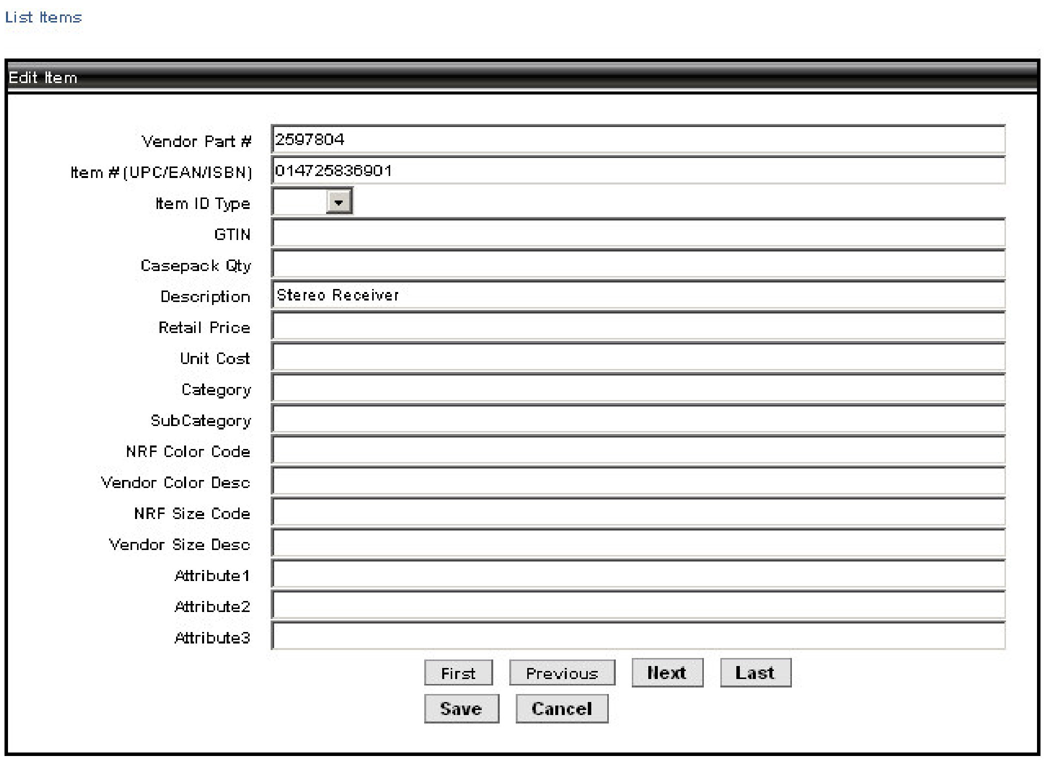
Synchronize with Trading Partner Intelligence - Synchronize item data with Trading Partner Intelligence

To edit an item:

1. Click the radio button in the line of the item that you want to edit.
2. Click the **Edit** link. The **Edit Item** window displays.

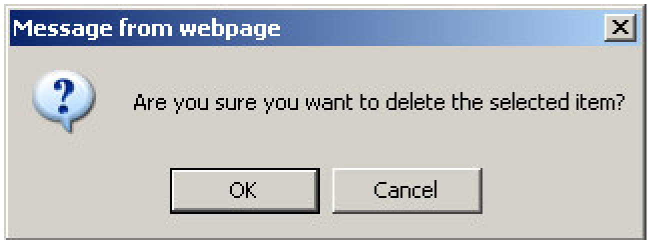


3. Make changes to the item details. Click **Save** to save your changes. Click **Cancel** to return to the **Item Master** window without saving changes. Use the **First**, **Previous**, **Next** and **Last** buttons to move through the list of items in the **Item Repository**.



To delete an item:

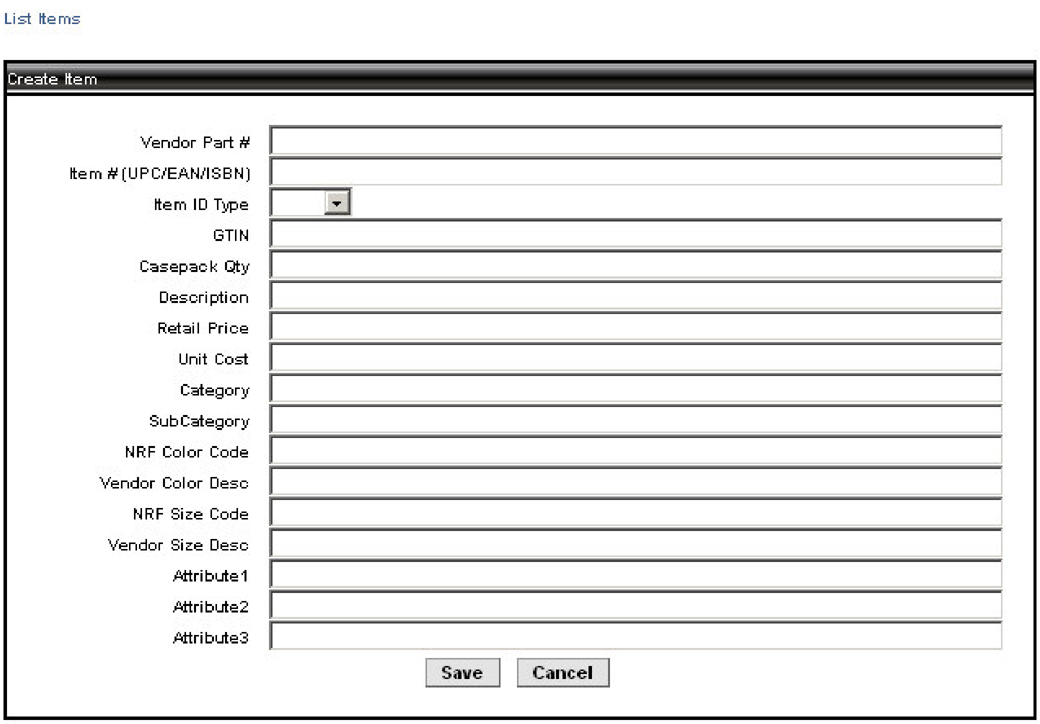
1. Click the **Delete Item** link. The following window displays:



2. Click **OK** to delete the item. Click **Cancel** to return to the **Item Repository** window without deleting the item.
3. Deleted item data will reappear in the Item Master after TPI synchronization if it is included in the TPI database.

To create an item:

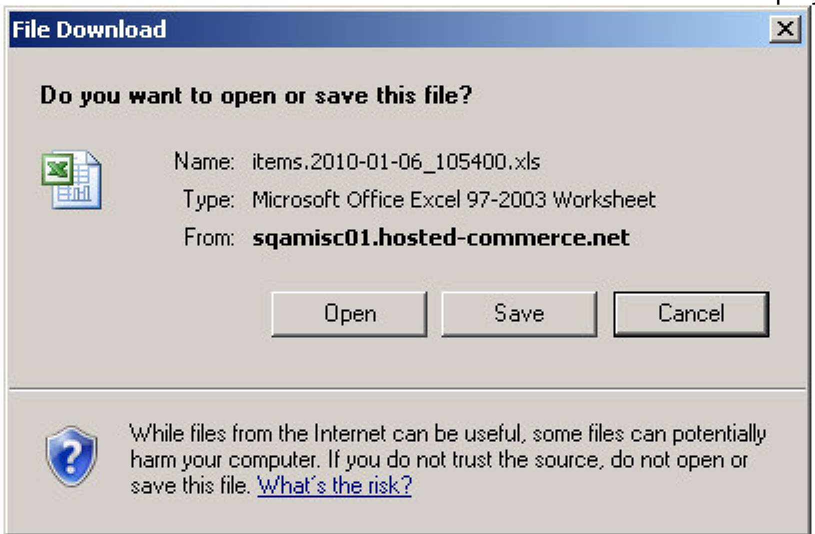
1. Click the **Create Item** link. The **Create Item** window displays.



2. Make changes to the item details. Click **Save** to save your changes. Click **Cancel** to return to the **Item Repository** window without saving changes.

To download item data to Excel:

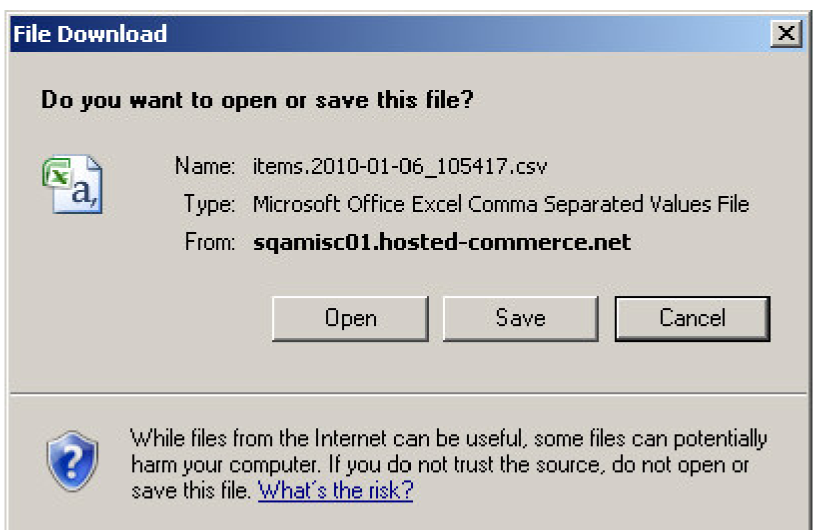
1. Click the **Download Excel** link. The **Download Excel** window displays.



2. Click **Open** to open the file in Microsoft Excel.
3. Click **Save** to save the file to your PC.
4. Click **Cancel** to cancel the download.
5. The spreadsheet will be blank if no item data is already loaded into the Item Master. If item data is already loaded, it will be included in the download.

To download item data in CSV format:

1. Click the **Download CSV** link. The **Download CSV** window displays.

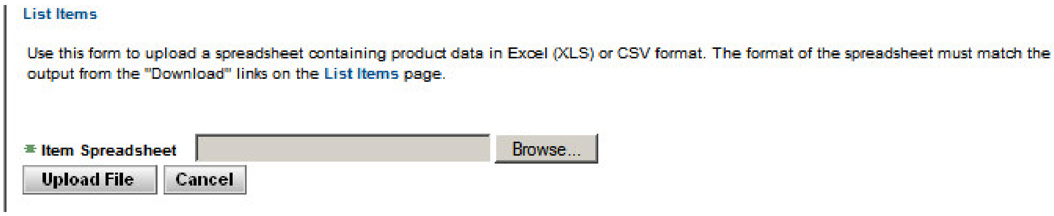


2. Click **Open** to open the file in the default application (Excel in this example).
3. Click **Save** to save the file to your PC.

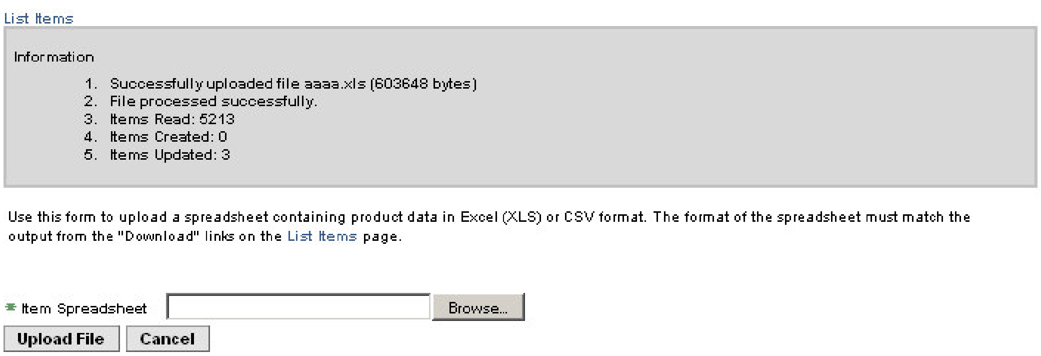
4. Click **Cancel** to cancel the download.
5. The spreadsheet will be blank if no item data is already loaded into the Item Master. If item data is already loaded, it will be included in the download.

To upload item data in Microsoft Excel or CSV format:

1. Click the **Upload Items** link. The **Upload Items** window displays.



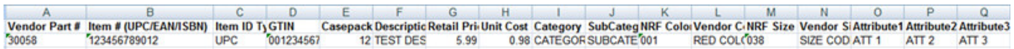
2. Click **Browse** to select the file to upload.
3. Click **Upload File** to upload the selected file.
4. Once the upload is complete, a report screen will list the items that were changed.



5. Click **Cancel** to return to the main Item Master screen.

File Requirements:

- The first row should contain only the header description, as shown below, or be blank.



A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
Vendor Part #	Item # (UPC/EAN/ISBN)	Item ID Ty	GTIN	Casepack	Descriptic	Retail Pri	Unit Cost	Category	SubCateg	NRF Colo	Vendor C	NRF Size	Vendor Si	Attribute1	Attribute2	Attribute3
30058	123456789012	UPC	001234567	12	TEST DES	5.99	0.98	CATEGOR	SUBCATE	001	RED COL	038	SIZE COD	ATT 1	ATT 2	ATT 3

- The item data should begin in the second row.
- Data should correspond to the header descriptions below.

Header Column	Header Description
A	Vendor Part #
B	Item # (UPC/EAN/ISBN)
C	Item ID Type
D	GTIN
E	Casepack Qty
F	Description
G	Retail Price
H	Unit Cost
I	Category
J	SubCategory
K	NRF Color Code
L	Vendor Color Desc
M	NRF Size Code
N	Vendor Size Desc
O	Attribute1
P	Attribute2
Q	Attribute3

6. You may download a blank spreadsheet by using the **Download Excel** or **Download CSV** links. The spreadsheet will be blank if no item data is already loaded into the Item Master. If item data is already loaded, it will be included in the download.

To synchronize with Trading Partner Intelligence:

1. Click the **Synchronize with Trading Partner Intelligence** link.

Create Item

Items

Select and Edit, Delete Item | Create Item — Previous 1-10 of 5213 Next 10

Select	Vendor Part #	Description	Item #	GTIN	
◉	2597804	Stereo Receiver	014725836901		Edit
○	2608945	Laptop Computer	02581473691		Edit
○	3069856	Desktop PC	036914725836		Edit
○	1457896	Office Desk	789456123078		Edit
○	2986532	DVD Player	456123789078		Edit
○	2957823	42" HDTV	741852963074		Edit
○	2784512	Car Stereo	963852741096		Edit
○	2697854	Video Game System	654321987032		Edit
○	3034598	Mobile Phone	968574321078		Edit
○	3174896	5.8gHZ Phone	357241869037		Edit

Download Excel | Download CSV | Upload Items | Synchronize with Trading Partner Intelligence

Refresh Close Window

2. Click **Synchronize** to synchronize the file data.
3. If data is in both the Item Master and TPI, the Item Master data is assumed to be correct. Deleted item data will reappear in the Item Master after TPI synchronization if it is included in the TPI database.
4. If TPI has the correct data, and Item Master is incorrect, delete the Item Master record and then synchronize to update the Item Master record.
5. Click **Cancel** to cancel the synchronization.
6. When finished working in the **Item Repository**, click the **Close Window** button to exit and return to the **Defaults** window.

   NOTE: Instructions on using the Item Repository are found here.

Defaults

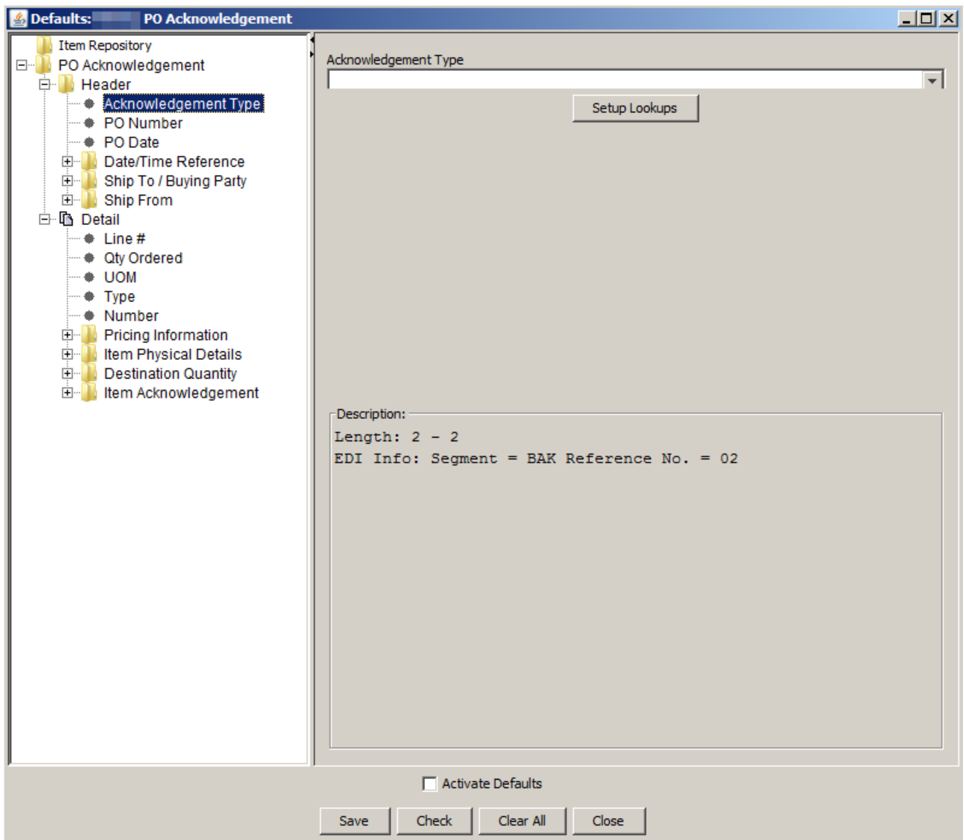
Setting defaults allows you to automatically enter information in a field without manually inputting it.

Learn how to use Defaults by viewing this training video.

1. Click on Preferences**.**
2. Click on the Defaults tab.
3. Select the appropriate trading partner, then click the link for the appropriate document.
4. The Defaults tool will open in a new window.

5. Select the desired trading partner and then click on the icon in the **Defaults** column, next to the document type with which you wish to set new defaults.
6. Use the file folder tree on the left side of the window to select the section of the form for which you will be creating defaults. The file folder tree corresponds with the data entry fields on the specified document. Folders shown with a to the left may be expanded to display additional fields.

NOTE: Defaults should be set for those fields in which information is static on every one of the specified documents you will be sending, i.e. Ship From address, payment terms, etc.



7. The right side of the window will display the default options for that field. Some fields use drop-down boxes, others require you to type in the desired default setting for that field.

NOTE: Not all fields may be able to have default settings.

8. Continue to click on each additional field for which you would like to provide defaults until complete.

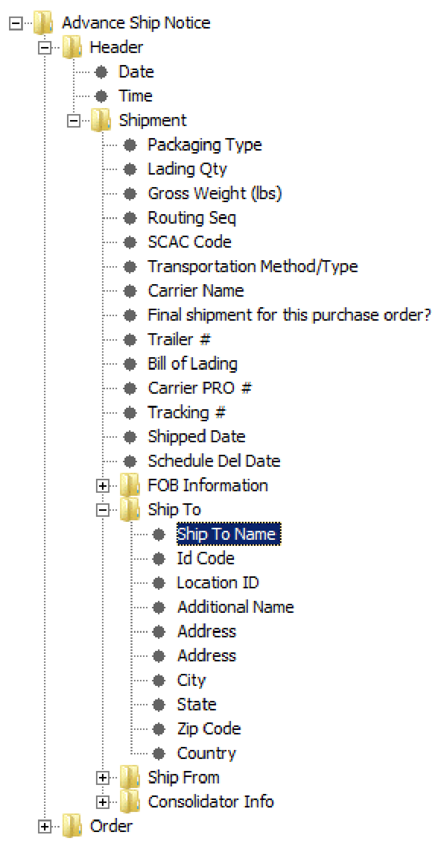
9. Use the **Check** button at the bottom of the form to check for errors. Like the **Check** feature in your individual forms, this only checks that the data you entered meets the character length requirements.
10. Place a check-mark in the **Activate Defaults** check-box
11. Click on the **Save** button to save defaults to the form.
12. Click the **Cancel** button to exit the **Defaults** window without saving any changes.
13. Click the **Clear All** button to delete all field entry and start over.
14. To close the **Defaults** window click on either the X in the upper right-hand corner of the window or the **Close** button at the bottom right of the window.

<u>Setup Lookups</u>

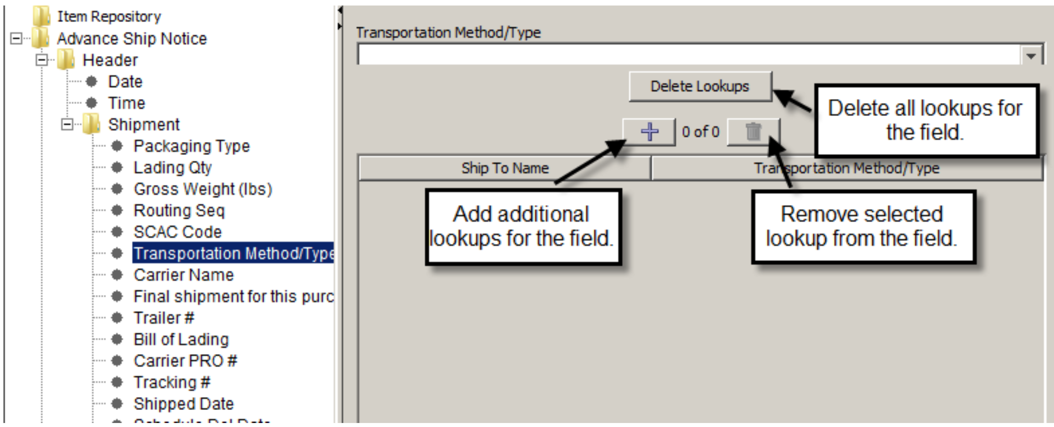
Lookups allow you to conditionally default a specific field based on a given value in another field. If you click on this button you will see a subsequent screen displaying the folder tree again. Locate the field upon which you would like to base your conditional default off of and then click **OK**. Now two columns will display. On the left will be a column showing the original value. On the right you can enter the value you wish to have source in if the original value is present.

One example of this use is if you pack a certain item number in certain quantities. You can have the quantity per carton field based on the vendor number. One repetition would be item #1 where you pack 1 each per carton; a second repetition could be item #2 where you pack 2 per carton.

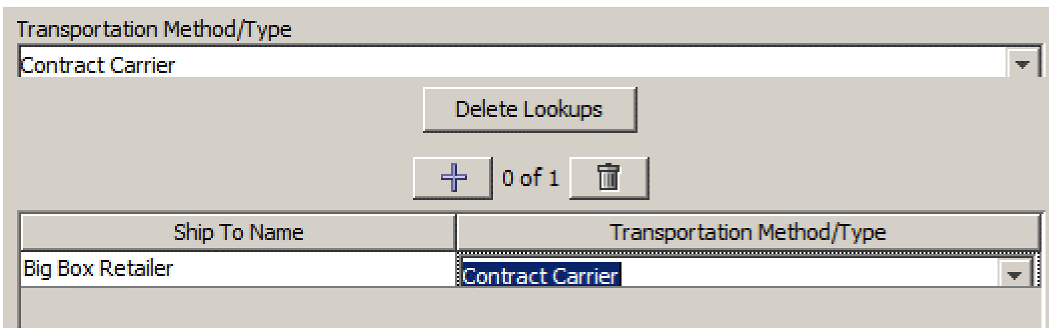
1. Click on **Setup Lookups**.
2. Select the desired key for the lookup. Then click **OK**.



3. Click the  icon to add a lookup for the field.



4. Configure the lookup. In the example below all shipments to 'Acme Co.' will automatically be designated as 'Contract Carrier.'



5. Once your lookups have been established, you may add additional lookups or remove them.
6. Check the **Activate Defaults** box at the bottom of the Defaults window and click **Save** to utilize defaults.

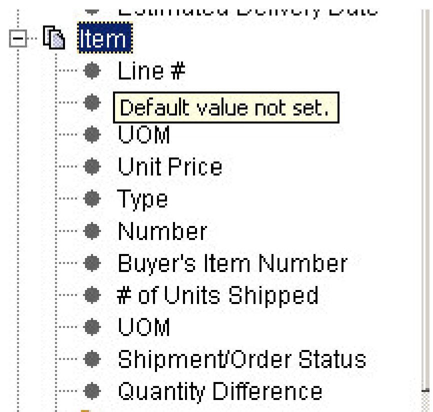
7. Close the Defaults window by clicking on either the X in the upper right-hand corner of the window or the **Close** button at the bottom right of the window.

Using the Item Repository

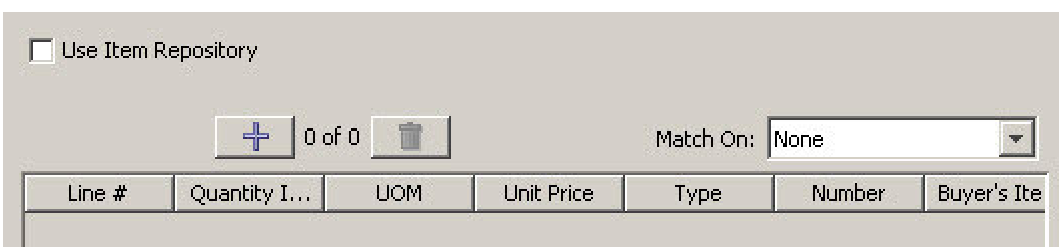
The Item Repository allows users to add and edit Item information for repeated use when completing data entry. Once a user specifies **Item details** within the Item Repository, they are available to automatically populate form fields during subsequent completion of EDI documents. This reduces the time spent on data entry and the possibility of errors.

Follow these steps to utilize the items in your Item Repository.

1. When working in the Defaults window, you have the option of deciding whether or not to use item details that have been added to the Item Repository. To retrieve items that have been added to the Item Master, click the editable lines in the left-hand frame of the window. Pop-up messages inform you whether or not defaults can be set, as shown in the following image.



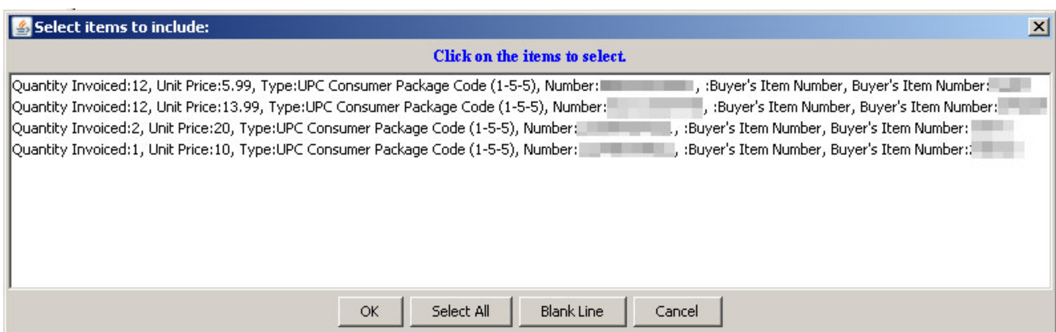
2. The right-hand frame displays contents similar to the following:



3. Click the **Use Item Repository** check-box.

4. Click the **Add**  button. The system retrieves all updated items from the Item Master and returns a list of items that are available for selection. If there are not any items added to the Item Master, or if there are not any qualifying fields to be mapped, then an error message will display that reads **No Item Defaults Available**.

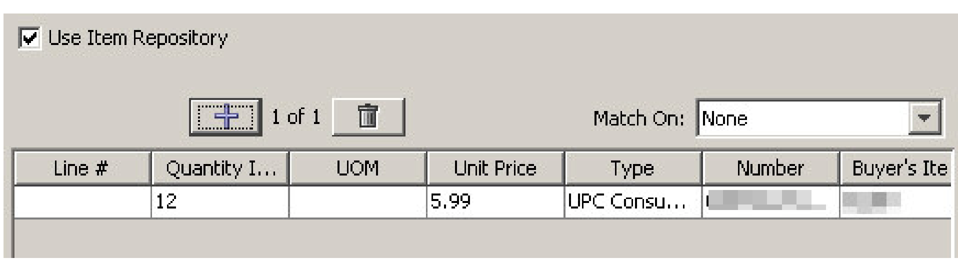
5. Once the item records have been retrieved, a window similar to the following displays.



6. Choose one of the following:

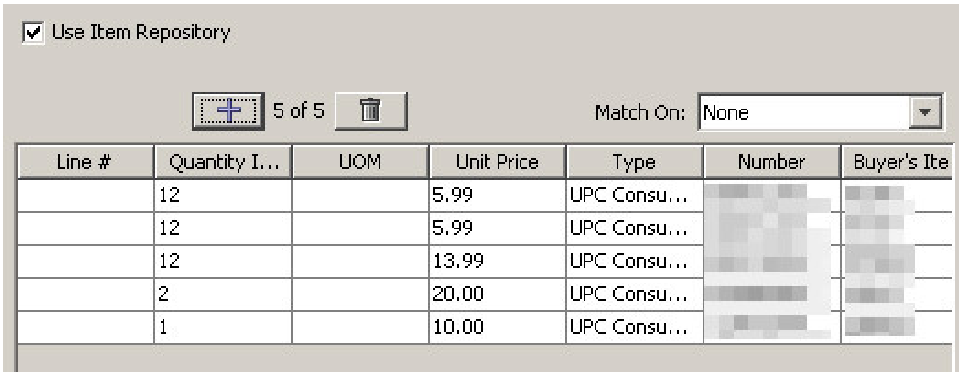
Option 1

Click one or multiple lines and then **OK** to add the selected lines. The right frame of the **Defaults** window redisplays (shown below). Complete entry of the fields and then click the **Save** button to add the values.



Option 2

Click **Select All** to add all line items. The right frame of the **Defaults** window redisplays to include all lines added to the data entry table. Complete entry of the fields and then click the **Save** button to add the values.



Line #	Quantity I...	UOM	Unit Price	Type	Number	Buyer's Ite
	12		5.99	UPC Consu...	[illegible]	[illegible]
	12		5.99	UPC Consu...	[illegible]	[illegible]
	12		13.99	UPC Consu...	[illegible]	[illegible]
	2		20.00	UPC Consu...	[illegible]	[illegible]
	1		10.00	UPC Consu...	[illegible]	[illegible]

Option 3

Click **Blank Line** to add a new line that does not contain any of the edited defaults. Blank fields can either be filled in manually or can be completed through using other types of defaults (static, lookup)

Option 4

Click **Cancel** to exit the window.

7. Save and close the **Defaults** window.

NOTE: **Defaults** must be active to reference your item Master.

8. Now when creating a return document when not using a source document like a purchase order, the portion of the form where you would click on the add  button to add an item, the list for select items will display your entire item repository.

Download Document

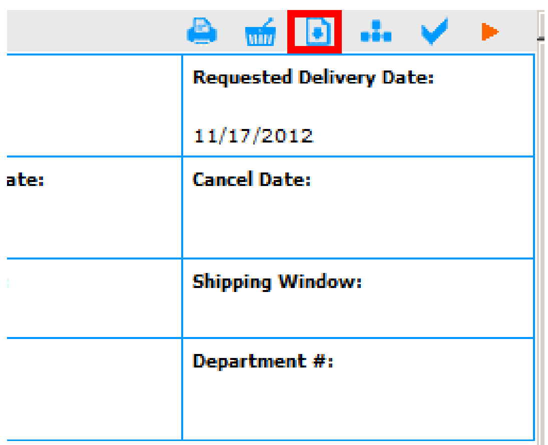
You can download documents from the document view or the folder view.

NOTE: To download documents in a consolidated file, use the select an action menu in the folder view.

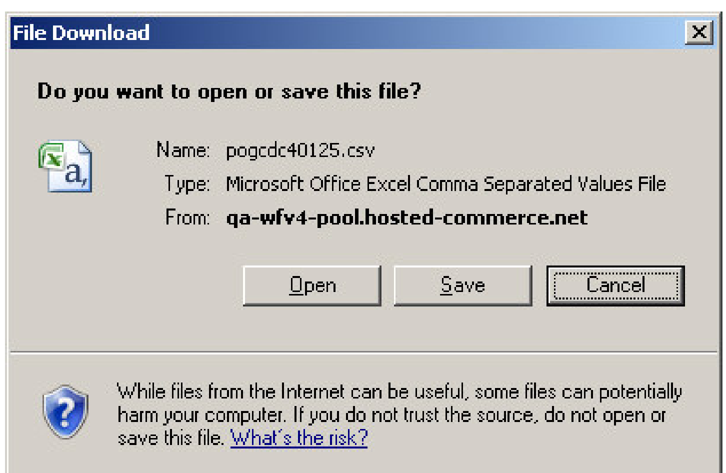
Downloading converts the online view of the document into a CSV file that can be viewed in Microsoft Excel or uploaded to in-house applications.

Download in the Document View

1. While a document is open, click on the **Download Document** icon  in the upper-right corner of the window.



2. The **File Download** window displays listing the document that you clicked for download.



3. Click **Open** to open the file immediately without specifying a folder location. Click **Save** to save the file to a specified folder.

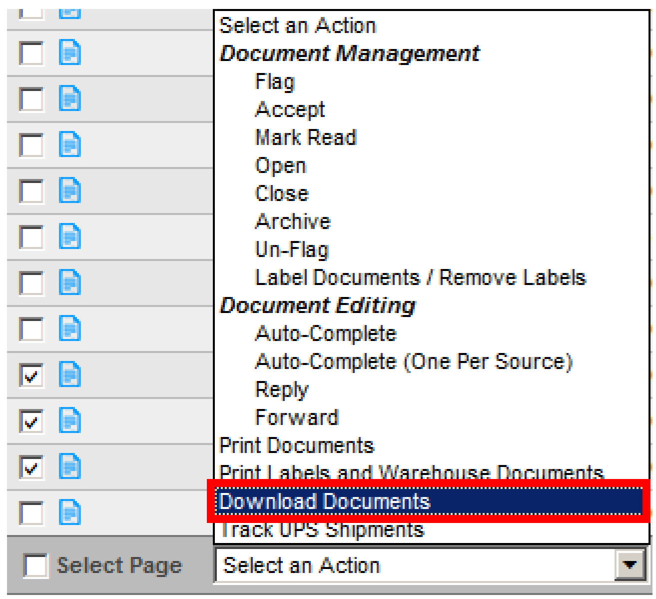
NOTE: The download prompt will vary by browser.

Download in Folder View

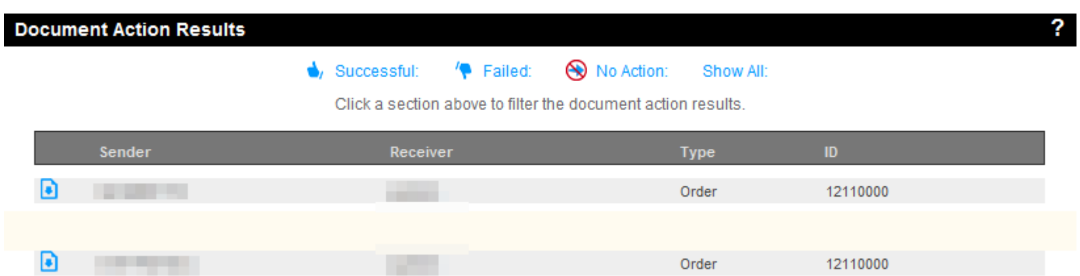
You may also download documents from the Inbox, Sent, or Search views. Use this option to download consolidated documents.

1. Select the document(s) to download from the Inbox, Sent, or Search views.

2. Click the **Select an Action** menu and click **Download Documents**. Learn more about the Select an Action menu in this training video.



3. The **Document Action Results** window will appear with the documents available to download. The documents are listed by type. Documents of the same type may be downloaded as a consolidated document.



4. Click the download document button to download the CSV file(s). To download the consolidated document, click the download document button next to **Consolidated Document Download**.

Auto-Complete

What is the Auto-Complete feature for WebForms?

The Auto-Complete feature for WebForms provides a fast and efficient method for completing EDI documents. Combined with the use of WebForms defaults, the Auto-Complete feature can save time and reduce data entry errors. Refer to the Setting Defaults section for additional details on working with defaults.

How does it work?

The user must first establish default data for a document type in order to use the **Auto-Complete** option. Once defaults have been established, and after specifying a source (i.e. purchase order, etc.) and return document type (i.e. invoice or purchase order acknowledgement), the user then selects **Auto-Complete**. The WebForms application generates a return document and then validates it against your trading partner's EDI specifications. If the EDI specifications are incomplete or if additional fields are required, such as the invoice number or invoice date, the user may wait to complete data entry through the Quick Edit window or edit the draft saved in the **Drafts** folder.

When is the best time to use this feature?

The Auto-Complete feature can be used for all return documents - invoices, purchase order acknowledgements, and ASNs - but some uses are better than others. The following are some important considerations for using the Auto-Complete feature:

1. Be sure that your return document does not require any changes to information such as quantities or price.
2. Using this feature for creating an ASN can pack your cartons in one of two manners based on your default settings. If you select items per carton as single in the Defaults, **Auto-Complete** will create a pack for each line item. If multiple items per carton is the default, all line items will be put in the same pack.
3. This feature can also be used to complete Draft documents. In many cases, you may choose to save a draft of a return document and submit it at a later time. Instead of opening the draft and selecting the **Submit** option of the form, you can simply select the draft(s) to be submitted and then select the **Auto-Complete** feature. If there are additional fields required, such as the bill of lading number or invoice number, you can enter those fields using the Quick Edit window.
4. The Quick Edit window allows the user to enter up to **ten (10) fields**. In cases where there are more than ten (10) fields that the user must enter, a draft of the return document is saved in the **Drafts** folder and a message indicating that the **Auto-Complete** feature did not complete successfully is displayed. If this occurs, you can complete the document by opening the draft, selecting the **Check** option to determine which fields are required, entering the data, and submitting the document.

5. Using the Defaults feature can optimize the **Auto-Complete** feature. Setting defaults for fields such as the **Ship From Address** and **Payment Terms** will reduce the number of fields that need to be completed using the Quick Edit window.

Using Auto-Complete

Auto-Complete can be accessed through Aggregation or the Next Steps menu. No matter which way you access this feature, the steps are the same.

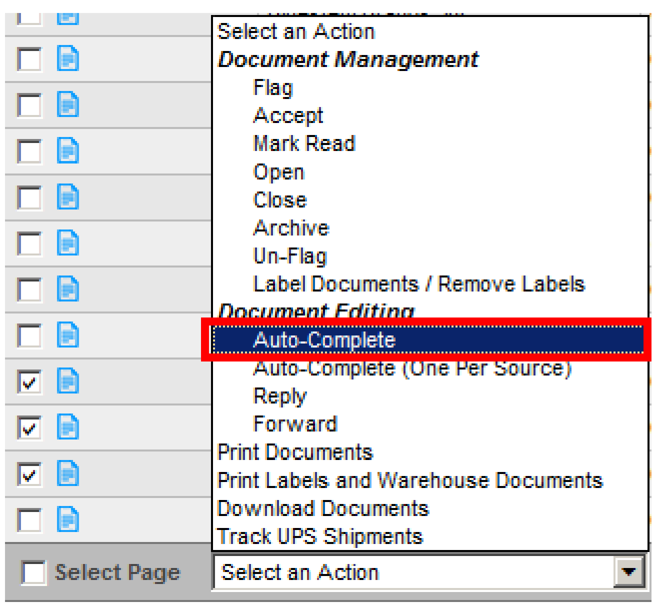
View this training video for instructions on how to use the Auto-Complete feature.

1. Select the source document(s).
2. Select the auto complete option.
3. Select the return document type - PO acknowledgement, invoice, etc.
4. Enter any missing data using the Quick Edit window, if available, or by editing the draft generated and sent to your Drafts folder.
5. Check and save or send the document(s).

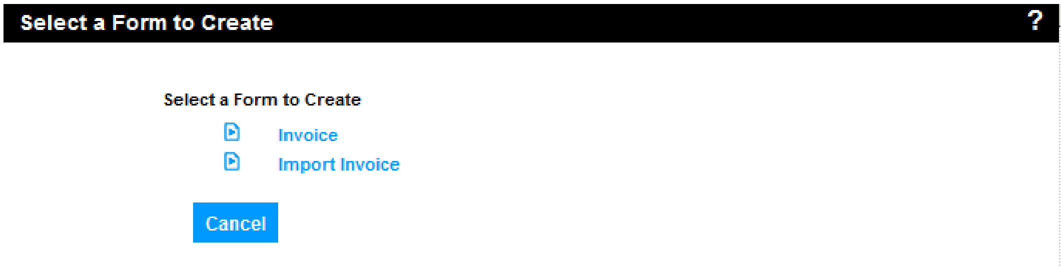
When accessing the feature through Next Steps or select **Auto-Complete (One-Per-Source)**, each source document selected will complete one turn-around document. Selecting this feature from the **New Documents** menu will create one return document for all source documents selected.

Accessing Auto-Complete Using Aggregation

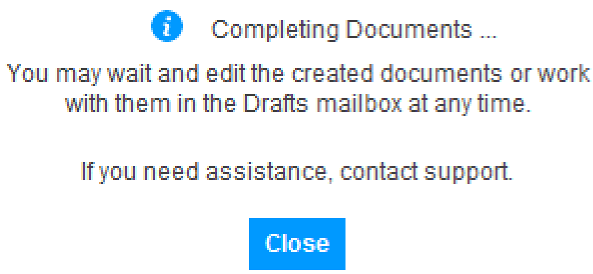
1. When in the Inbox, place a check mark in the box in the **Status** column for the document that you want to work with.
2. Select **Auto-Complete** from the **Select an Action** pick-list in the lower-left of the window (below the **Status** column). Learn more about the Select an Action menu in this training video.



3. The **Select a Form to Create** window displays. Select a return document type. Auto-Complete will begin to create the return documents.



4. Auto-Complete will begin to create the return documents.



5. The Quick Edit window displays. Enter data using the Quick Edit window.

Using Quick Edit

In combination with document defaults and Auto-Complete, the **Quick Edit** window is available to the user for completion and addition of required fields that were not defined as part of the standard document layout. For instance, a supplier might prepare 40 ASNs that are complete except for lacking information in three fields – the **Invoice Number**, **Customer ID #**, and **SCAC Code** (shown below in the example **Quick Edit** window). If this supplier had established document defaults, they could then create these 40 ASNs as a batch rather than one at a time. **Auto-complete** will populate the fields that do not change. **Quick Edit** would be used to complete data entry for the unique fields within the ASN.

The process is defined as follows.

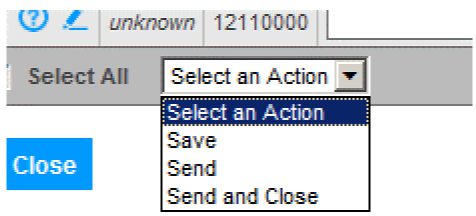
1. Establish document defaults.
2. Use Auto-complete to populate the fixed fields of a set of same documents.
3. Use the **Quick Edit** window (opens automatically) to complete data entry for the fields that were not populated through **Auto-Complete**.

NOTE: Quick Edit is not available for documents that have more than ten undefined fields. Documents with more than ten undefined fields will need to be completed by editing the draft saved in the **Drafts** folder. To make a document available for **Quick Edit**, additional fields (so that there are ten or fewer) will need to be defined in the document defaults.

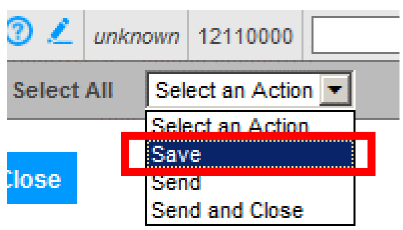
4. To review the documents before saving or sending them, you can click on the document's **ID** value.

5. To perform more detailed edits, click on the **Edit** icon in the upper-left corner of the window.

6. To send a document, place a check mark in the **Select an Action** check-box and select the **Send** option from the **Select an Action** drop-down list. Learn more about the Select an Action menu in this training video.



7. To save a document, place a check mark in the **Select an Action** check-box and select the **Save** option from the drop-down list.

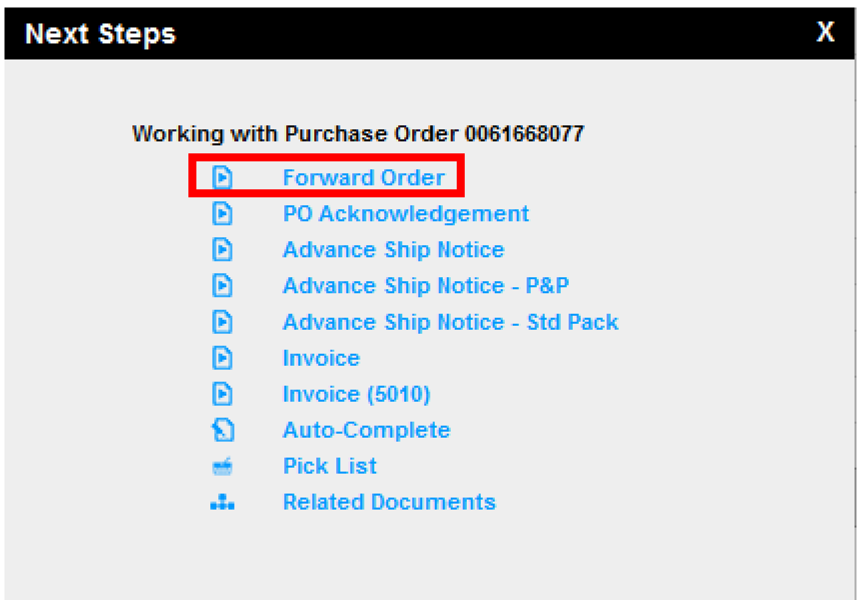


Document Forwarding

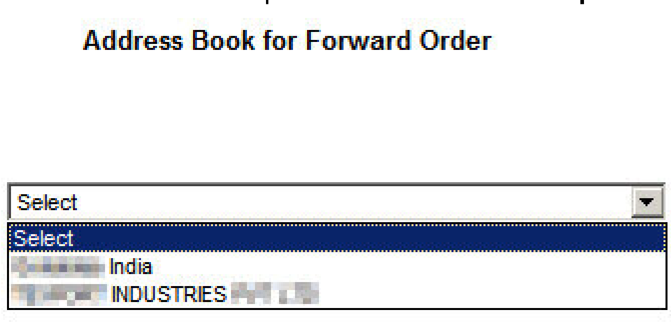
The Document Forwarding feature allows multiple vendors to collaborate in the completion of a document that is received from a retail trading partner. It is used primarily in situations that involve a third-party vendor: For instance, when a retail trading partner submits a purchase order to a vendor who then forwards the purchase order to a factory (or other third-party entity), with the factory then completing the order and sending an ASN back.

Document Forwarding begins in the WebForms Inbox. The process of Document Forwarding is defined in the following steps.

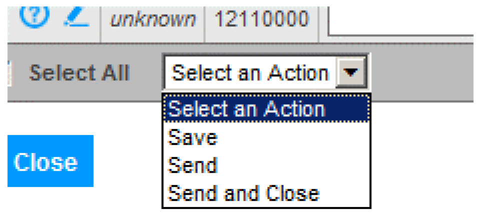
1. From the **Inbox**, click on the document that will be sent to the vendor.
2. The document opens.
3. Click on Next Steps ▶ in the upper-right corner of the document window.
4. The Next Steps window opens. Click on **Forward Order**.



5. Select a vendor from the drop-down list in the **Next Steps Address Book**.



6. The document complete window appears. To edit the document, click the **Edit** icon.



7. The **Java data entry applet** opens. Significant buttons and options of the Java data entry applet include:

Done

Closes the document and removes it from the New Documents menu: If the **Done** check-box is selected and the document sent, the source PO is removed from the POs listed under the Send function for that document type

Close

Closes the document without saving changes (unless the document was saved prior to closing)

Check

Verifies that all mandatory fields have been completed

Save

Saves the document

Send

Sends the document to the specified trading partner

Find a Field

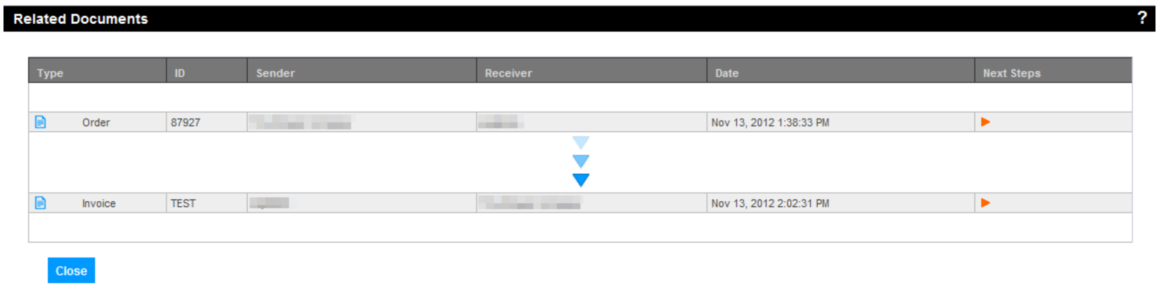
Searches for a particular field name or EDI segment using the search window below; search options include **Name** and **EDI**

For additional explanation refer to the Completing Return Documents topic.

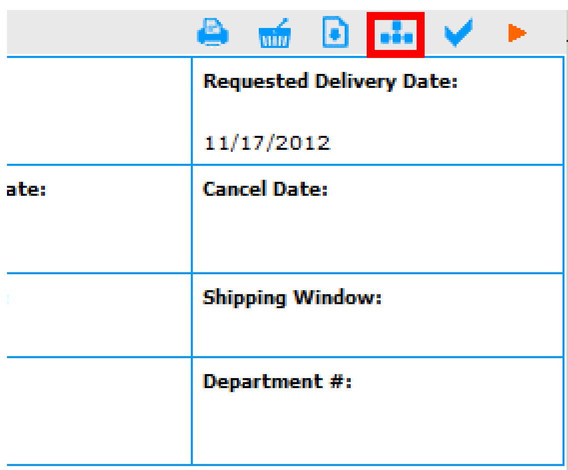
2. When finished, click the **Close Window** button.

Related Documents

The Related Documents icon will display a list of documents that are related to your currently selected document. Use **Related Documents** to find the source document for a return document, or the return documents for a source document.



1. To view Related Documents, click on the Related Documents icon in an open document, as shown below:



2. The Related Documents window will appear.

WebForms Access Control

WebForms Access Control, or **Company User Admin**, is a feature provided to WebForms customers that makes possible the assignment of unique system rights and roles to the accounts within their company, specifying whether or not a user can view, create, save, and edit WebForms data and documents. For example, an employee working in the shipping department of a company using WebForms might need to view or create ASN documents, while also being prohibited from accessing documents and actions outside the scope of their job. In this case, a WebForms user account could be created that provides this employee only with Read/Write access to ASN documents. This allows the employee to view and create ASN documents, but restricts the employee from having additional access

There are three access levels, defined as follows:

Read

Allows a user to view the data contents of a document for a given trading partnership or all trading partnerships; this is necessary to view trading partner data but is not necessary to create documents related to that data

Read/Write

The default assignment, which allows the user to view, create, save, edit and submit the document type for a given trading partnership or all trading partnerships

None

The user has neither Read access nor Read/Write access for a given trading partnership or all trading partnerships

For documents that source from other documents, such as an ASN from a purchase order, it is not necessary to set permissions on the source document. For example, if a user is given read/write access to ASN documents but is not granted any permission to purchase order documents, they are still able to create ASN documents that use a purchase order as a source document. They will not, however, be able to directly open and view the contents of the purchase order document.

Administrator Account

Administrators are important for their role in creating new accounts within their organization. A specific customer contact designated at the time of purchase will assume the Administrator role. You are given one Administrator login.

Access will be regulated by permissions assigned to user accounts at the trading partner/document type level. This feature will allow WebForms customers to control access to trading partners and documents for user accounts they set up through the Administrator Account. Each user account created by a customer through the Administrator Account will have permissions granted for read/write or read-only access at the document level for either all trading partnerships or for a given trading partnership.

The Administrator account has the following capabilities:

Determine recipients of new document email notifications

The Administrator will select who will receive these email communications.

Create user accounts and grant account permissions

The Administrator will be able to grant any and all permissions that the Administrator account has in the WebForms application. (The Administrator account will be set up with all possible permissions for every document/trading partner combination that has been set up for them.) The Administrator account will not be able to grant the right to another user account to have the capability to create, modify or remove other user accounts.

Modify the permissions assigned to a user account

The Administrator account will only have access to user accounts that were created by this account. In other words, the capability to modify user accounts cannot be transferred across Administrator accounts.

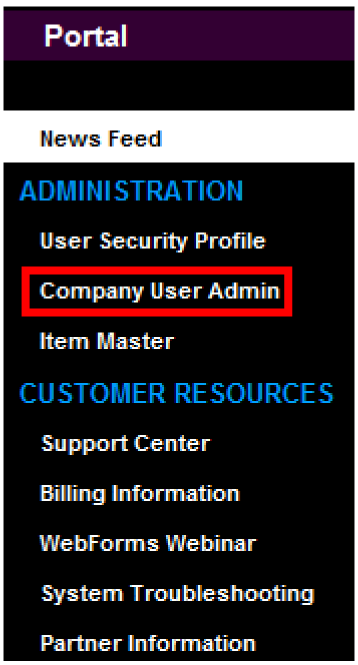
Delete users

The Administrator account will be able to remove a user's permissions in the WebForms application for any account that has been created by the Administrator account.

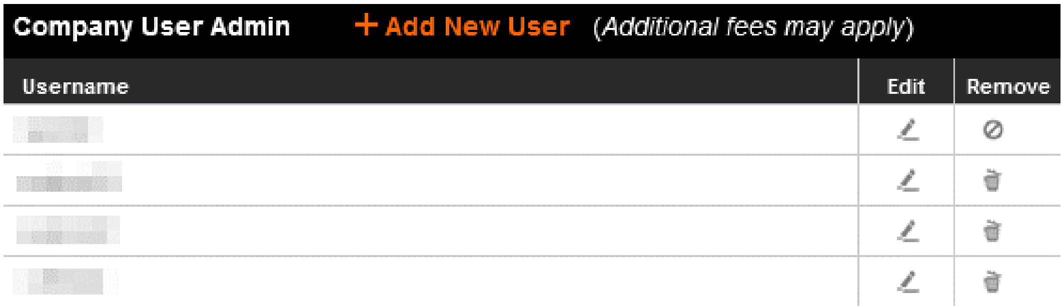
<u>WebForms Self-Administration</u>

1. After logging in to the WebForms application, click on **the Company User Admin** link in the upper-left hand corner of the **WebForms Portal** window.

NOTE: You will only be able to access the **User Administration** window if administrator rights have been assigned to your username and password.



2. The **User Administration** window displays.



3. This is the main window from which to complete WebForms access control administrative tasks.

   Available administration options include:

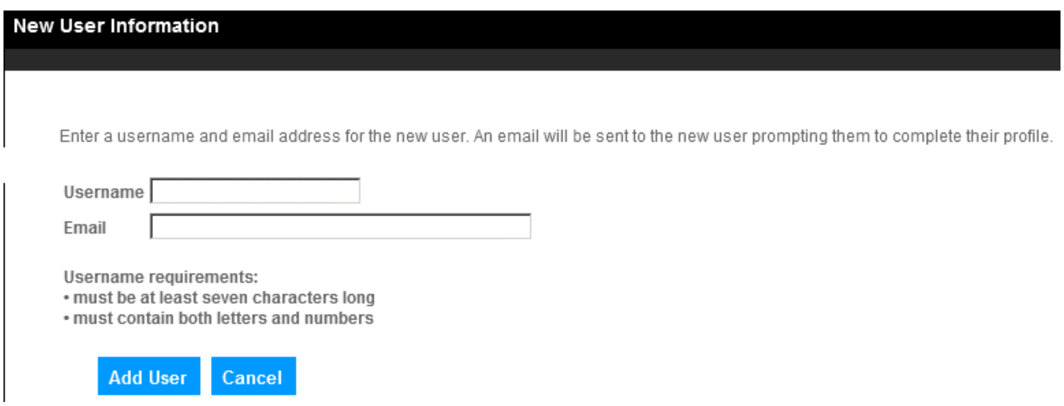
   Adding new users

   Editing users

   Removing users

Adding New Users

1. From the **User Administration** window, click on the **Add New User** button . The **Add New Company User** window displays.



2. Enter a user name in the **Username** field. Username requirements are as follows:

Length - Must be at least seven characters long

Alphanumeric - Must contain both letters and numbers

Restrictions - Cannot contain **%** or **#** characters

3. Enter a password in the **Password** field. Password requirements are as follows:

Length - Must be at least seven characters long

Alphanumeric - Must contain both letters and numbers

Requirements - In addition to letters and numbers, passwords **must contain** at least one special character (!, #, ^, &, etc.)

Restrictions - Cannot contain **spaces**

4. Enter the password again in the **Verify** field. The password will be confirmed if the **Verify** field entry matches the **Password** field entry.

NOTE: Click **Cancel** at any time to exit the **Add New Company User** window. Changes that have been made will be lost upon clicking the **Cancel** button.

5. Click the **Add User** button. The user that was added is provided with account access.

NOTE: Users will access the WebForms portal using the **Username** and **Password** assigned to them by the administrator.

6. The **User Administration** window displays with the new user added to the list.

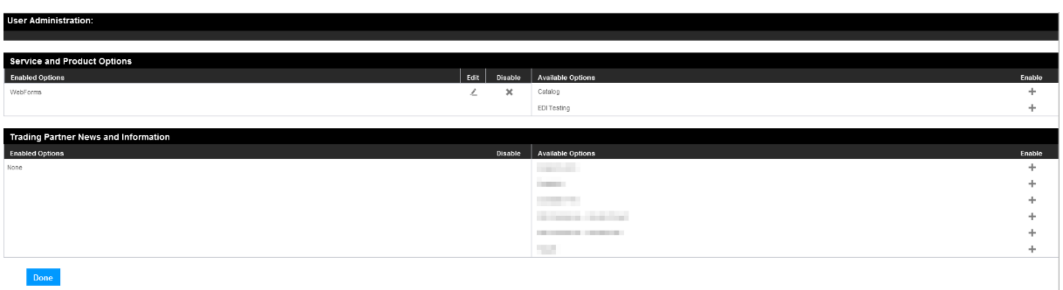
Editing Users

Once a user has been added with access control, the next task is to configure that user with the appropriate access and information options. This task is completed through a series of steps beginning with the **User Administration** window, as follows.

1. From the **User Administration** window, click on the **Edit** button next to the user for whom you will complete access control configuration.
2. The **User Administration for: [user name]** window displays. Enabled Options are on the left side of the window, and available, but disabled options are on the right side of the window. Access categories that are available through this window include:

Service and Product Options

Trading Partner News and Information



3. Access can be enabled (and then edited) or disabled through the configuration available in this window. This is accomplished through making changes in the left-hand **Enabled Options** column and the right-hand **Available Options** column in each category section. Content that has been enabled for the user displays in the **Enabled Options** column. Content that has been provided to the user is in the **Available Options** column.

   Keep the following functions in mind when working in the **User Administration** window.

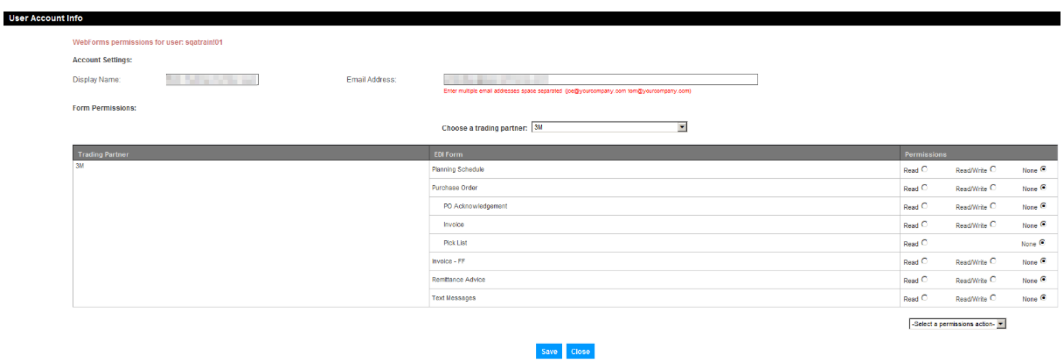
To provide the user with access to content, click on the **Enable** button ✚ in the **Available Options** column.

To edit user access, for instance to allow read only access to some documents but not to all, click the **Edit** button in the **Enabled Options** column.

To restrict the user from being able to access content, click the **Disable** button ✖ in the **Enabled Options** column.

NOTE: The following warning will display after you click the **Disable** button. Click **OK** to confirm that you want to disable access.

4. After clicking the **Edit** button to configure user access, the **User Account** window displays. This window includes options for setting up the user account (**Account Settings**) and for associating that account with access rights for specific trading partner documents (**Form Permissions**). These options are shown in the example **User Account** window provided below.



Account Settings

1. Enter an alias for the account in the **Display Name** field. An alias is a user-friendly pseudonym or nick-name assigned to the account in addition to the username; usernames can be complex due to the alphanumeric requirement; an alias can be shorter or easier to remember, such as Shipping Department correlating with a username of shipper7.

2. Enter the email address(es) for the account in the **Email Address** field. Multiple email addresses can be assigned to one account in cases where more than one person will be receiving account news, completing shared tasks, or viewing account information. Enter multiple email addresses with a single space separating each email address.
3. Proceed to the **Form Permissions** section.

Form Permissions

1. Select a trading partner from the **Choose a trading partner** drop-down list. This is the trading partner for which the administrator will configure user access. The option of **ALL** exists so as to make possible assignment of the same account settings to all trading partners.
2. There are no actions required in the **Trading Partner** or **EDI Form** columns. The **Trading Partner** column identifies the trading partner that is currently being configured. The **EDI Form** column lists the EDI document types for which user access can be established.
3. Specify user access to EDI documents using the radio buttons in the **Permissions** column. Access selections define user access to the EDI documents for the current trading partner(s). The three access options include:

Read - Allows a user to view the data contents of a document for a given trading partnership or all trading partnerships

Read/Write - Allows a user to view, create, save, edit and submit the document type for a given trading partnership or all trading partnerships

NOTE: If a user is assigned either **Read** or **Read/Write** access to a PO, and if an email address assigned to their account, then they are automatically added to the PO notification email list

None - Default assignment that results when a user has neither Read-Only access nor Read/Write access

4. Choose an option from the **Select a permissions action** drop-down list. This is useful when assigning the same rights to an account for all trading partner documents. The options include:

All permissions Read - provides the current used with Read access for all trading partner documents

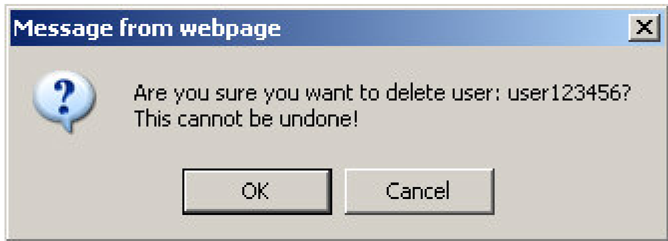
All permissions Read/Write - provides the current used with Read/Write access for all trading partner documents

All permissions None - provides the current used with no access for any trading partner documents

5. Click the **Save** button to save the account changes. Use the **Close** button either to cancel the changes without saving them or to exit the window after saving the account changes.

Removing Users

1. From the **User Administration** window, click on the **Remove** button . The following warning message displays.



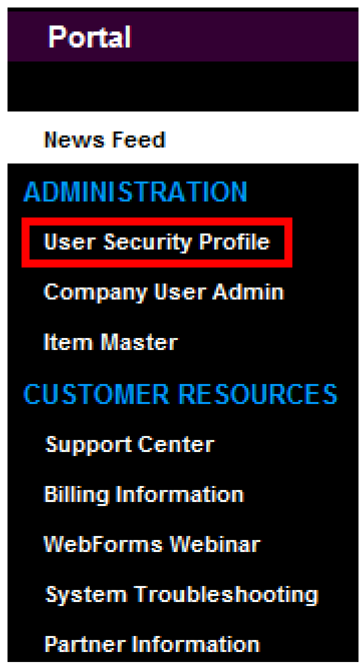
2. Click **OK** to remove the user. Click **Cancel** and return to the **User Administration** window.

User Security Profile

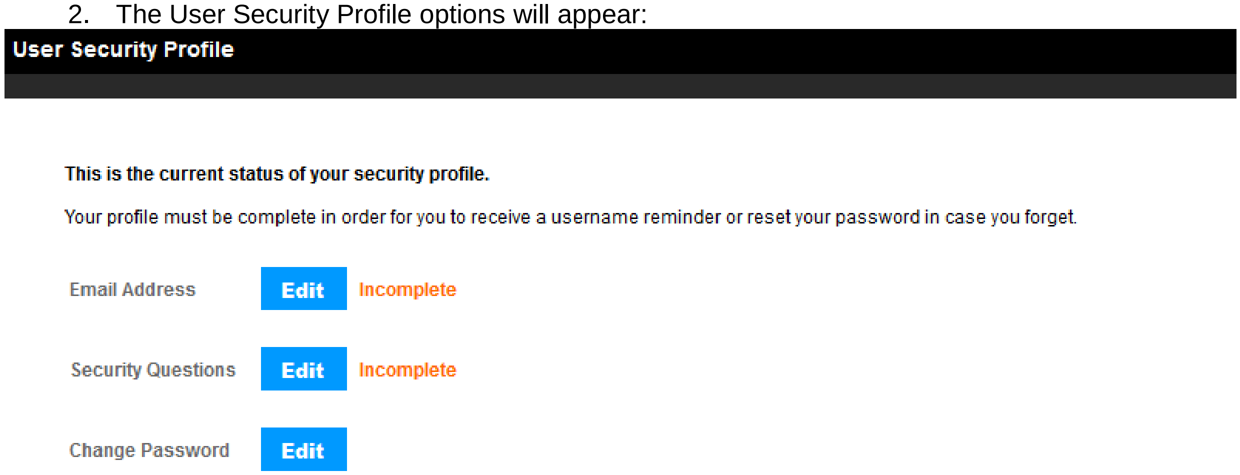
Use the security profile to change the email address assigned to your Portal account and to change your password. This is the email address will be used to send your username reminder or reset your password if you forget it.

Set your security questions to be able to reset your password if you forget it.

1. Click on **User Security Profile** in the **Administration** section of the Portal, as shown below.

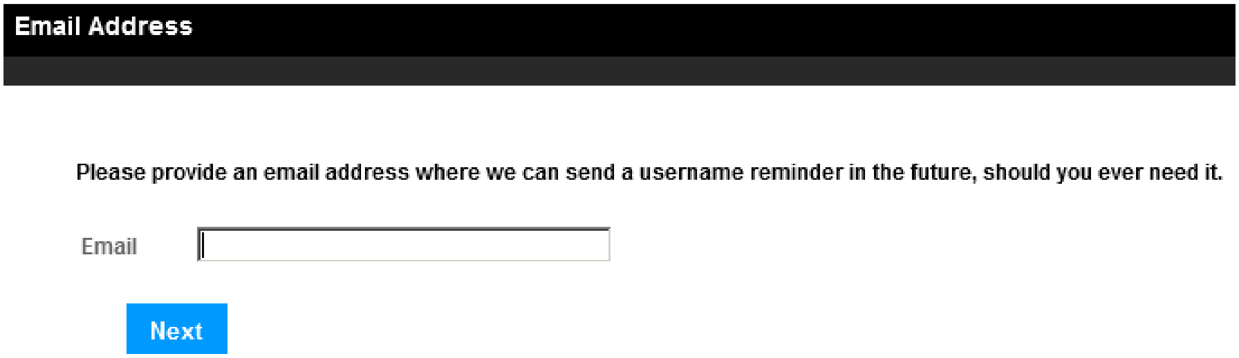


2. The User Security Profile options will appear:



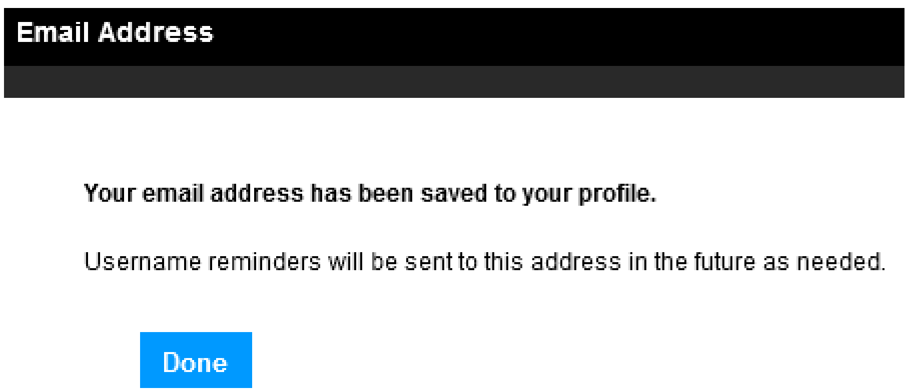
Change Email Address

Click **Edit** to change your email address.



Type your email address in the Email field, and click **Next**.

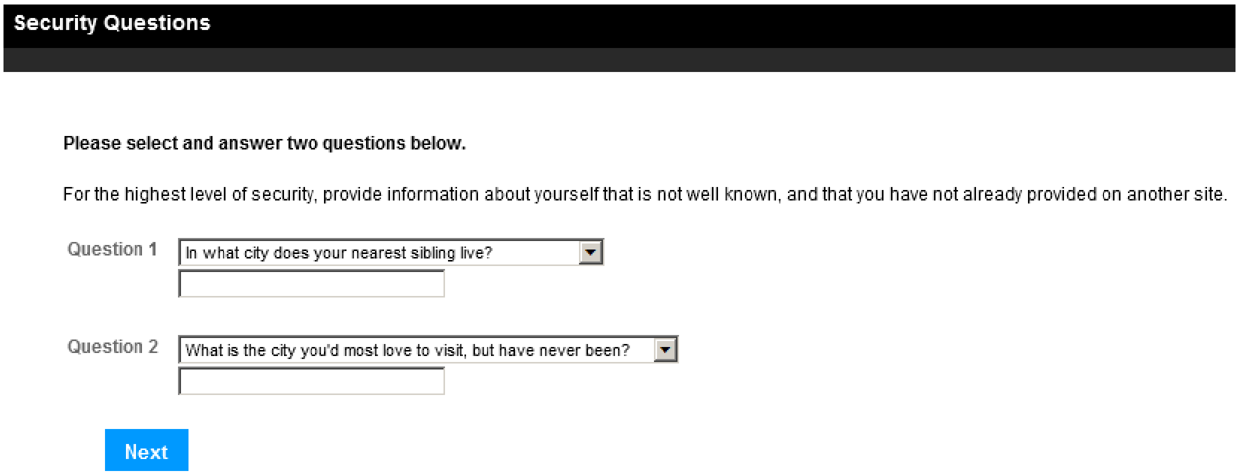
A confirmation window will appear:



Security Questions

Select and answer security questions to be able to reset your password if lost or forgotten.

Click **Edit** to select your security questions and type your answers.

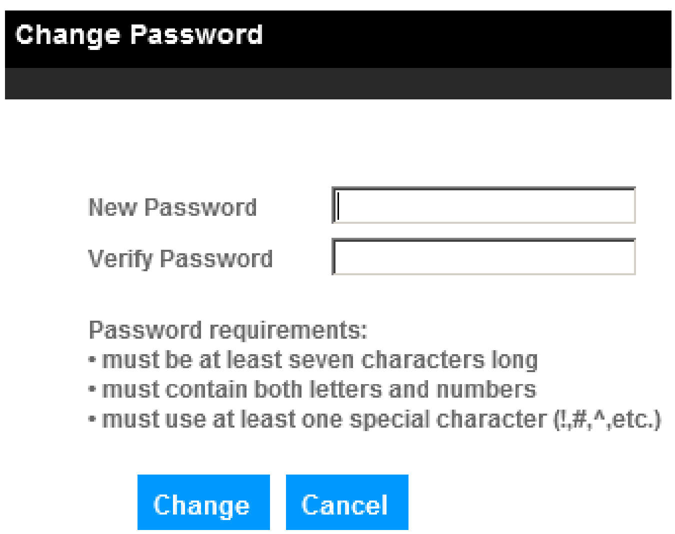


Click **Next** to save the questions and answers.

Change Password

Use this feature to change the password to your Portal account.

Click **Edit** to change your password.



Type your new password in the field, re-type your new password in the **Verify Password** field, and click **Next**.

NOTE: Please observe the password requirements listed on the Change Password screen on Portal.

Carrier Portal

SPS Commerce Carrier Portal allows users to print retailer compliant packing slips, book carrier shipments and print shipping labels. This process is also integrated into the ASN service, allowing easy integration into the packing process.

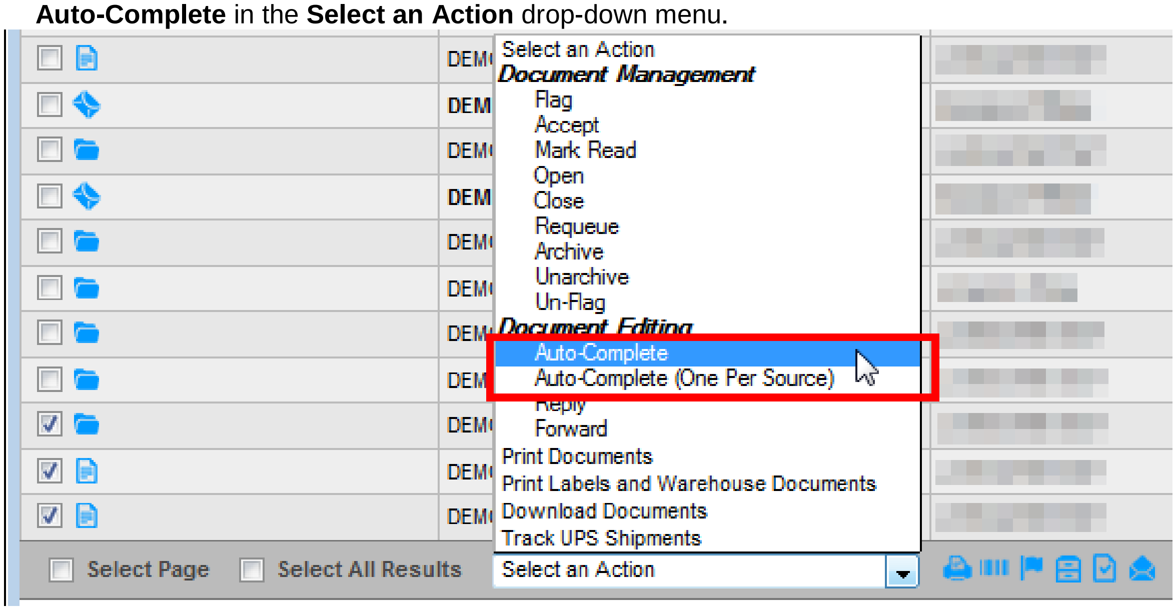
This is the recommended workflow for creating warehouse documents:

1. Select the desired orders from the Find results screen.
2. View Orders, or mark as **Read**.
3. Print Pick Lists if desired.
4. Create FedEx shipments for these orders using Auto-Complete.
5. Print Packing Lists from the FedEx Shipments.
6. Pack cartons and label them as required.

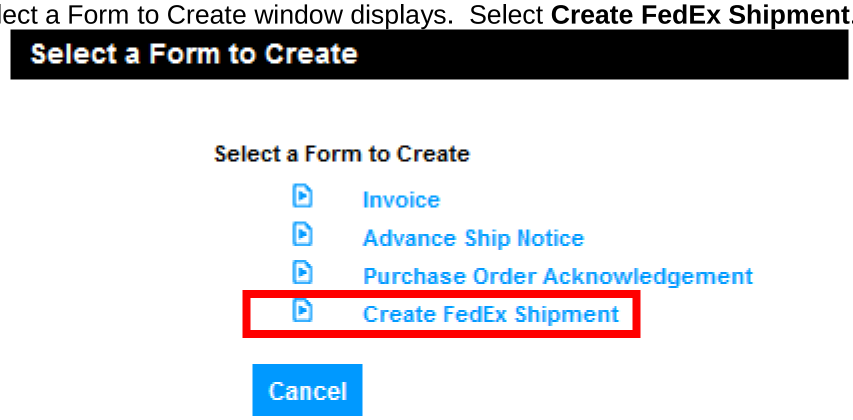
FedEx Shipments

Follow these steps to create a shipment and print a shipping label.

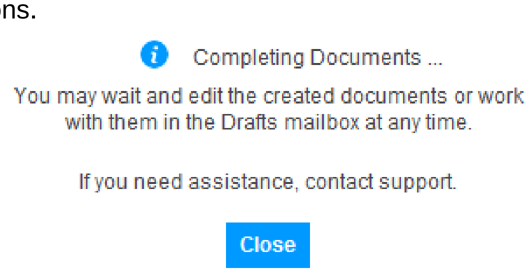
1. Select the source document by checking the box in the **Status** column and then select **Auto-Complete** in the **Select an Action** drop-down menu.



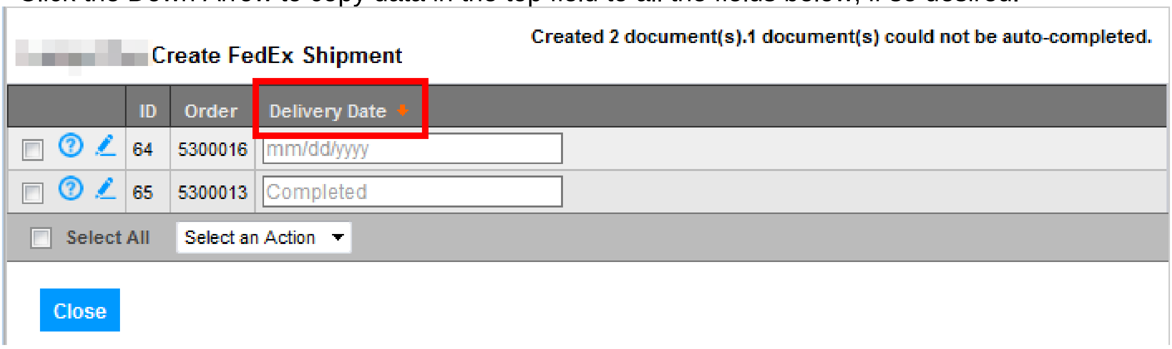
2. The Select a Form to Create window displays. Select **Create FedEx Shipment**.



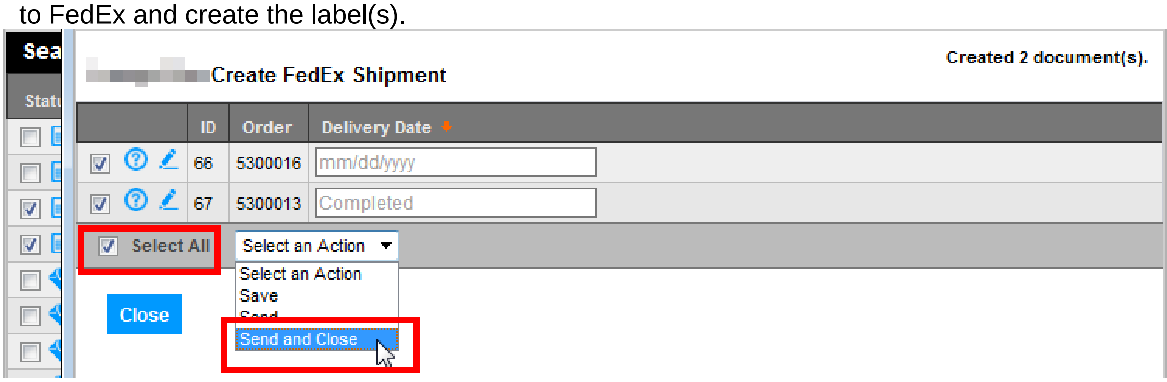
3. Auto-Complete will begin to create the return documents. Order information will be sourced from the PO to complete this process including ship-from address, quantity, weight, and dimensions.



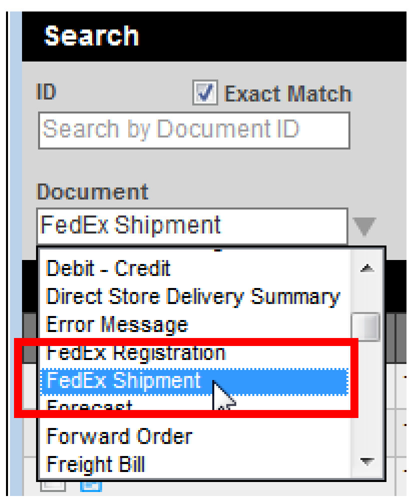
4. The **Quick Edit** window displays if additional information (not sourced from the PO) is required. Enter data as required.
5. Click the Down Arrow to copy data in the top field to all the fields below, if so desired.



6. When you've completed any required data entry, click the **Select All** box and then **Send and Close** from the **Select an Action** drop-down menu. This will submit the data to FedEx and create the label(s).

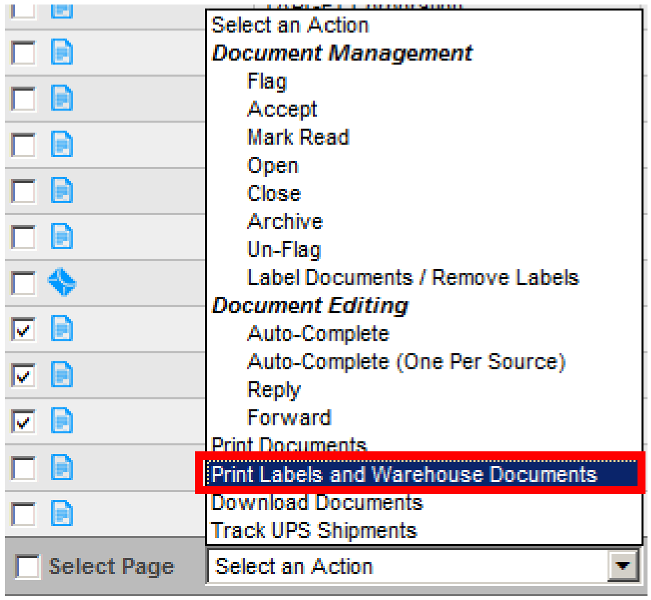


6. Use [Search](#) to locate the FedEx Shipment(s). To narrow the search, you may use the **Select Document** filter and select **FedEx Shipment** to locate only FedEx Shipment documents.



8. Select the desired FedEx Shipment(s) individually, or using the **Select All** box.

9. Use the **Select an Action** menu and select **Print Labels and Warehouse Documents**.

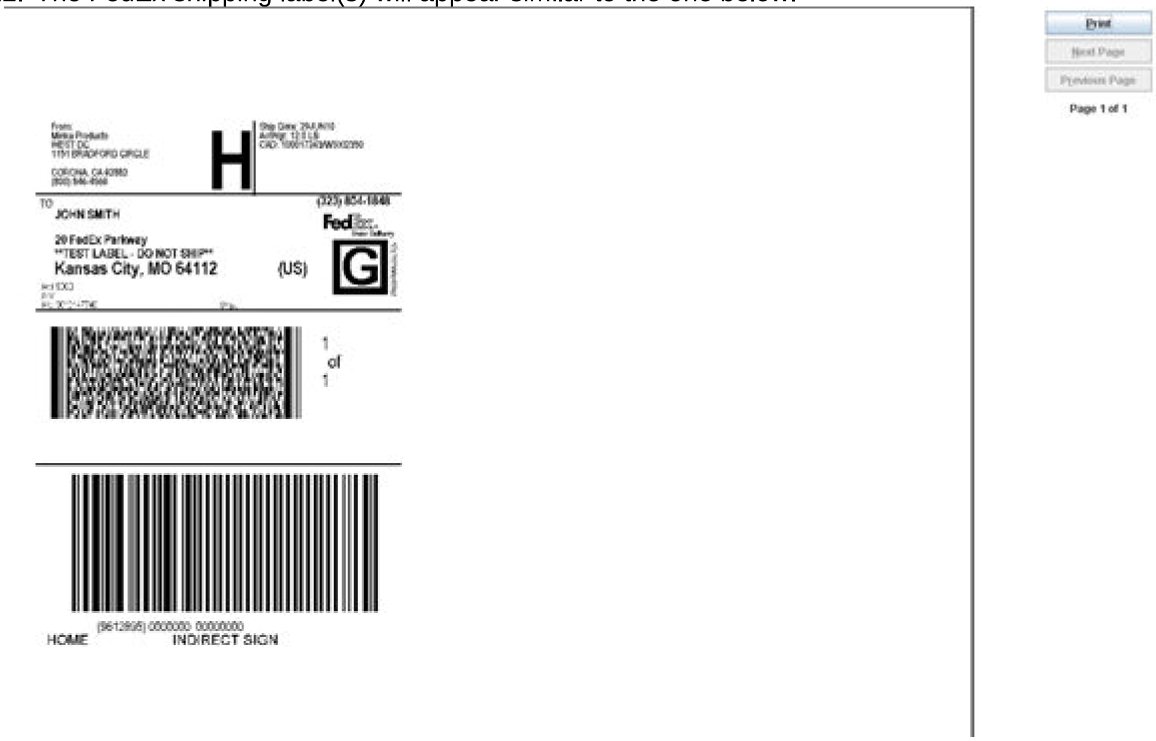


10. The Print Selection window will appear.

NOTE: Prior to creating a FedEx Shipment, Pick List and Packing Slip will be listed. After creating a FedEx Shipment, Packing Slip and FedEx Label are listed.

11. Click **FedEx Label** to see the Print Preview.

12. The FedEx shipping label(s) will appear similar to the one below.



13. Click on **Print** to print the FedEx shipping label(s).
14. Attach the label to the appropriate package(s).
15. Repeat steps 6 - 10 to print Packing Slips.

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