

Episode 1: Mapping Manager – Q&A

QUESTIONS AND ANSWERS

<p>Could you provide a summary of what Mapping Manager is, what its primary use is, and how it can be valuable to customers/users?</p>	<p>The TrueCommerce Mapping Manager tool is a paid add-on that provides users with functionality to modify integrated transaction maps used by Transaction Manager with drag-and-drop simplicity in a user-friendly, streamlined environment, eliminating the need for a TrueCommerce representative to complete the task.</p> <p>With Mapping Manager, users can easily modify Token Mapping, create Lookup Tables, and Line Item Conversions for importing transactions into Transaction Manager. Users can also create Token Mapping, Lookup Tables, and Header Item Conversions for transactions that are exported from Transaction Manager.</p>
<p>How long has Mapping Manager been available?</p> <p>How do I know if I already have it?</p>	<p>Mapping Manager has been available for about one year.</p> <p>It would show as an available application in your TrueCommerce Foundry primary navigation menu (left panel) if it was activated for you. If you previously had access to the Integration Mapping Tool, you should now have access to Mapping Manager.</p> <p>If you do not currently have access to Mapping Manager, contact your TrueCommerce Account Manager. If you are unsure of who that is, you can find their name and contact information by clicking Account Management in the Foundry primary navigation menu and then selecting Account Overview from its drop-down menu.</p> <p>NOTE: Once Mapping Manager is made available to you, you may need to contact your Foundry Administrator who can define your level of access for your account.</p>
<p>If we have Transaction Manager, is there a need for Mapping Manager?</p>	<p>See the response to the first question on the first page of this document.</p>
<p>Can I get pricing for Mapping Manager?</p>	<p>To obtain Mapping Manager pricing, contact your TrueCommerce Account Manager.</p> <p>If you are unsure of who that is, you can find their name and contact information by clicking Account Management in the Foundry primary navigation menu and then selecting Account Overview from its drop-down menu.</p> <p>NOTE: Once Mapping Manager is made available to you, you may need to contact your Foundry Administrator who can define your level of access for your account.</p>
<p>Once we have Mapping Manager, will we see what TrueCommerce has mapped for us already?</p>	<p>Yes. As you start to make adjustments, all currently mapped global settings are in place for each field by default.</p>



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<p>How do you navigate to Users and Roles to create a new user, and what level of access do you need to have to accomplish it?</p>	<p>The following links will navigate you to articles where you can learn about Users and Roles navigation and instructions on how to create a new user.</p> <ul style="list-style-type: none"> • Foundry: Managing Users Assigned to a Role (Admin) • Transaction Manager: User Account Settings, Permissions and Roles • Foundry: Roles Overview <p>Each TrueCommerce Foundry user must have a user account to log in to the platform. The Foundry Administrator can define the level of access a user has when creating each user account.</p>
<p>Can we default Multiple Ship-to values for Export?</p>	<p>Yes. If you know the field that your Ship-To code needs to export to and you want to simply send a value, specifically, to, say, Target, to export to the Ship-To code, any of the Partner Token fields can be hard-coded.</p> <p>If the Ship-To code for Target always needs to be TAR123, you can type it into the Partner Tokens (tab) grid on your Partner Mapping page and click Save. Every Purchase Order for Target with that Ship-To code in place will then be exported.</p> <p>You can also drag-and-drop from the Partner Token fields into the Partner Mapping grid fields.</p> <p>NOTE: An additional webinar on Mapping Manager specific to Creating Lookup Tables is slated for December 1, 2022. You can register for the training by clicking the following link:</p> <ul style="list-style-type: none"> • TrueCommerce Webinar Series: Fall 2022
<p>Can we look up tabs by clicking as we make the changes; for example, for a Purchase Order (PO/850)?</p>	<p>Each tab for the inbound Purchase Order is represented in Mapping Manager.</p> <p>This means that if you look at the Purchase Order in the Inbox or Received folder on the Transactions page in Transaction Manager, you will see the same tab names within Mapping Manager when you make your changes.</p>
<p>Where do we find the current version number for your Business System Plug-in (BSP)?</p>	<p>You can view this in your Saved XBSP (Options > Save XBSP from the primary action bar in Mapping Manager) or if you Deploy a change, the version number will be displayed to you at that point.</p> <p>Additionally, TrueCommerce has all of the versions of your BSP for any changes you made, as well as the data of which users made the change. Contact Support Services for more information.</p>



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<p>What does the little circular arrow on some of the lines do?</p>	<p>The circular arrow is a “Reset field to default global settings” button. This function allows you to set back to global settings after you make a change to a field but later want to reset it.</p>
<p>What is a “Term”?</p>	<p>The Term sub-tab can be found under the Tools tab in the left pane under the Mapping tab for Partner Maps within Mapping Manager.</p> <p>Terms can parse out the individual terms fields required on an EDI transaction, based on the invoice date and the terms description being passed in on an import into Transaction Manager. This is most commonly used for invoices being imported into Transaction Manager.</p> <p>When listed in Token Mapping within Mapping Manager, Terms fields will start with a D (for example, “[D:Discount Days Due]”, and so on.</p>
<p>How do you create a formula that depends on multiple fields (For example, A=X, B=Y, then set C field to Z)?</p>	<p>The recording of the first webinar of the Fall 2022 training series includes a Related Article, entitled “Understanding Mapping Manager Functions.” This document can assist you with questions you may have about specific formulas, and it is located here:</p> <ul style="list-style-type: none"> • TrueCommerce Webinar Series: Fall 2022 <p>Once you navigate to the article, scroll to the table of webinars and click the above-mentioned Functions article in the ‘Related Articles’ column.</p>
<p>What does the “Unlock Project” button do?</p>	<p>If at any point while a user is working within Mapping Manager they switch to Transaction Manager, the system will keep Mapping Manager locked as that user. When that user completes their modifications within Mapping Manager, they can click the Unlock Project button in the action bar to log out of it and then continue to work in Transaction Manager.</p>
<p>How do I generate ODLF files for my business system/ERP?</p>	<p>ODLFs are separate from Mapping Manager. They are their own entity because they are local files saved on your local system.</p> <p>Because ODLFs are very specific to the Microsoft Dynamics Great Plains (GP) market, TrueCommerce recommends that you reach out to your Dynamics Support team or if you are in the middle of an active project, express to your Integration Specialist your desire to create and modify your own ODLFs, as they can provide guidance in helping you through the process.</p>
<p>Does this also work with add-ons such as Accellos?</p>	<p>If you are not using the TrueCommerce Foundry/Transaction Manager platform(s), Mapping Manager will not be available.</p>

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	<p>Accellos is an add-on sold by TrueCommerce to work with Microsoft Dynamics AX.</p>
<p>Does the 'Reset' button work on each line?</p>	<p>The Token Mapping Reset button reverts any changes made to a token mapping line back to its original values.</p> <p>Note that you cannot reset if you already clicked the Save button.</p>
<p>Can changes I make be rolled back?</p>	<p>Clicking the Rollback button under the Options drop-down on the primary action bar, in Token Mapping, or in Lookup Tables within Mapping Manager will revert the latest changes you have made back to the previous value or settings.</p>
<p>Is the Function "wizard" available in the latest version of Mapping Manager?</p> <p>Will it permit me to drop a field we need for ease of syntax?</p>	<p>Mapping Manager has a large list of functions available to be found here:</p> <ul style="list-style-type: none"> • TrueCommerce Webinar Series: Fall 2022 <p>Using the "Build Custom Formula" option and these listed functions and the drag and drop feature for pulling fields into this window you can make advanced functions and the guide should help you with their syntax.</p>
<p>Is there a function that will check the Ship-to ID from the inbound...?</p>	<p>The recording of the first webinar of the Fall 2022 training series includes a Related Article, entitled "Understanding Mapping Manager Functions." This document can assist you with questions you may have about specific formulas, and it is located here:</p> <ul style="list-style-type: none"> • TrueCommerce Webinar Series: Fall 2022 <p>Once you navigate to the article, scroll to the table of webinars and click the above-mentioned Functions article in the 'Related Articles' column.</p>
<p>What is/are the benefit(s) of using Link Back? What if the Link Back for Ship-to does not exist? Can the Ship-to from the file be used?</p>	<p>Link Back tokens are designed to pull data directly from an inbound document that is present in the Inbox or Received folder on the Transactions page in Transaction Manager and then pass that data onto an outbound document being imported. The benefits are that your business system does not have to store the data, as it will just be stored in Transaction Manager.</p> <p>TrueCommerce can use functions to pull a Link Back token when it exists. If it does not exist, we can use a field from your file upon import.</p> <p>The "@SWITCH" statement from the "Understanding Mapping Manager Functions" document can accomplish this for you. This document can also assist you with other questions you may have about specific formulas. It is located here:</p> <ul style="list-style-type: none"> • TrueCommerce Webinar Series: Fall 2022

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<p>What do the 'T' and 'F' mean at the beginning of a mapped field?</p>	<p>T = Token (an actual field from the EDI document); F = Lookup Table.</p> <p>The recording of the first webinar of the Fall 2022 training series includes a Related Article, entitled "Understanding Mapping Manager Functions." This document can assist you with questions you may have about specific formulas, and it is located here:</p> <ul style="list-style-type: none"> • TrueCommerce Webinar Series: Fall 2022 <p>Once you navigate to the article, scroll to the table of webinars and click the above-mentioned Functions article in the 'Related Articles' column.</p> <p>NOTE: A webinar specific to Mapping Manager and Creating Lookup Tables is slated for December 1, 2022. The registration link for that webinar is available in the Fall Webinar Series article.</p>
<p>What do you recommend would be a good exercise to learn the strings and formulas?</p> <p>Any documentation on formulas and conditional statements/examples in particular would be appreciated.</p>	<p>The recording of the first webinar of the Fall 2022 training series includes a Related Article, entitled "Understanding Mapping Manager Functions." This document can assist you with questions you may have about specific formulas, and it is located here:</p> <ul style="list-style-type: none"> • TrueCommerce Webinar Series: Fall 2022 <p>Once you navigate to the article, scroll to the table of webinars and click the above-mentioned Functions article in the 'Related Articles' column.</p>
<p>Can we add new trading partners to Mapping Manager?</p>	<p>No, but you can contact your Sales Account Manager to assist. As soon as your Account Manager adds the new trading partner to Transaction Manager, it will also appear in Mapping Manager for you to be able to adjust.</p> <p>If you do not currently have access to Mapping Manager, contact your TrueCommerce Account Manager. If you are unsure of who that is, you can find their name and contact information by clicking Account Management in the Foundry primary navigation menu and then selecting Account Overview from its drop-down menu.</p>
<p>How do I edit or enter a trading partner Test EC Identifier?</p>	<p>Adding a new EDI ID of any kind to a partner will need to be added within TrueCommerce's internal network configuration.</p> <p>Contact your Sales Account Manager to get this in place, or if you are unsure about this and have questions, you can always reach out to the TrueCommerce Support Services team for guidance.</p> <p>NOTE: If you are unsure of who your Sales Account Manager is, you can find their name and contact information</p>

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	by clicking Account Management in the Foundry primary navigation menu and then selecting Account Overview from its drop-down menu.
Can Mapping Manager map data to the Foundry > Transaction Manager > Sent box?	As the Sent folder on the Transactions page of Transaction Manager contains documents that have already been transmitted, these documents cannot be modified. You can copy sent documents back into the Outbox to be sent again; however, the same document will simply be copied from the sent folder into the Outbox without accounting for changes made in Mapping Manager. To see reflected changes you will need to import a new document into the Outbox.
What does the 'Map as Link Token' setting do?	<p>The Map as Link Token checkbox setting under the Mapping > Tokens tab > ellipses pertains to Item Linking. Item Linking allows data at the item level of an inbound transaction to be linked (rather than stored) from and populated from the transaction being imported into Transaction Manager. The Link value must match a value in your import file, and also match to a value on the originating transaction found in the Transaction Manager Inbox or Received folder in order for item linking to occur.</p> <p>On Import documents, select the Map as Link Token checkbox to link a token back to the originating inbound document and pull the value from it.</p>
Can we export or back up the Map settings prior to making changes?	<p>TrueCommerce accomplishes this for you.</p> <p>An intricate XML file of all the different mapping fields and setup data can be created using the Options > Save XBSP option in Mapping Manager. Every BSP that is modified in Mapping Manager is automatically backed up on the Transaction Manager side.</p> <p>If you make a change that you don't want to keep, simply contact TrueCommerce Support and they can perform the Rollback for you.</p>
Can you copy a test map over to the Production side?	<p>Each instance of Transaction Manager that you own has its own set of mapping changes within Mapping Manager.</p> <p>To copy changes from a Transaction Manager Test instance over to a Production instance would require that you log into the Production instance and access Mapping Manager from there to repeat those changes. You can also submit your changes to our Support Services team or your Project Integration Specialist to make those changes to both at the same time, as TrueCommerce has the ability to roll out changes to multiple instances using our back-end system.</p>
How does Mapping Manager find the correct trading partner DUNS to assign on an Invoice?	You can utilize Link Back tokens to pull the DUNS number from an associated inbound document found in the Transaction Manager Transactions Inbox or Received folder.

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<p>Is Link Back good to use for this?</p>	<p>This will help to eliminate the need to store the DUNS number in your business system.</p> <p>TrueCommerce can also pull the DUNS number from your business system or flat file from the field of your choosing.</p>
<p>Can you map different rejection reasons for trading partners?</p>	<p>Yes. TrueCommerce can map rejection reasons based on the trading partner's specifications. Those reasons can be dynamic based on the information pulled from your business system, if needed.</p>
<p>In the former Integration Mapping Tool, we could see the file definitions that were imported and exported.</p> <p>Is it possible to see them in Mapping Manager?</p>	<p>This is a feature that has not yet been migrated into Mapping Manager but it will be soon!</p>
<p>Can I use Mapping Manager to take a customer PO/850, create a header and line text file, and then import a sales order into our business system?</p>	<p>This is a description of TrueCommerce's flat file integration. If you would be interested in having this accomplished, contact your Sales Account Manager and they can guide you through the purchase process.</p> <p>NOTE: If you are unsure of who your Sales Account Manager is, you can find their name and contact information by clicking Account Management in the Foundry primary navigation menu and then selecting Account Overview from its drop-down menu.</p>
<p>If changes are made but not Deployed, will Mapping Manager save the changes when I close out of it, or do all changes need to be deployed in a single editing session?</p>	<p>Yes. Changes that are made and Saved are not technically deployed until you click the Deploy button.</p> <p>The changes will remain saved even following logout but not actually sent to the system until the action of clicking Deploy is performed.</p>
<p>Can flat file import/export customers utilize Mapping Manager as well?</p>	<p>Absolutely. You can select your business system on the Projects page in Mapping Manager, then click Edit. If you are a flat file customer, the columns on your comma separated values (CSV) file or all of the fields on your fixed position or XML file would show on the Edit (Mapping) page within the Row/Column Selection field.</p>
<p>I would like to learn more about mapping and creating tables.</p>	<p>You can register for the December webinar training, Mapping Manager, Part Two: Lookup Table Creation, now!</p>
<p>Could you include training on Line Item Conversion rules in Mapping Manager in a future webinar?</p>	<p>This topic is under discussion and consideration for future trainings and if confirmed as such, TrueCommerce will provide communications about an upcoming training specific to Line Item Conversion rules.</p>

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MISCELLANEOUS questions asked during training (NOT specific to Mapping Manager)

<p>Will a trading partner know if a Purchase Order does not arrive in their Foundry?</p>	<p>Yes. TrueCommerce sends a Functional Acknowledgement (997) back to the sender each time a transaction is received successfully. The 997 is the 'receipt' that goes out to the trading partner. You can see when and what time your Purchase Orders were acknowledged by looking in the 'Date Ack' column in both the Transaction Manager Inbox and Received folders.</p> <p>Customers can also see when THEIR outbound documents are received by the trading partner. In the Sent folder, there is also a 'Date Ack' column which provides them with exactly when their trading partner received their document.</p>
<p>How or why do POs duplicate on EDI?</p>	<p>The following article provides insight into how and why duplication occurs. There is a wealth of information located at https://help.truecommerce.com:</p> <ul style="list-style-type: none"> • Transaction Manager: Same Transaction Exported Multiple Times
<p>Is there a monthly or annual fee to be on EDI and Advanced Ship Notices (ASNs)?</p>	<p>You can request this kind of information from your Account Manager. If you are unsure of who that is, you can find their contact information by clicking Account Management in your TrueCommerce Foundry primary navigation menu (left panel) and then selecting Account Overview from its drop-down menu.</p>
<p>How do I get my trading partners on ASNs? Do they have to sign up?</p>	<p>There are several resources about Advanced Ship Notices (ASNs), including an entire training series on ASNs available via https://truecommerceuniversity.com.</p> <p>With respect to trading partners, the following article (link) may be of assistance. Note that this article contains several links to other helpful resources about ASNs, including more about ASNs and trading partners:</p> <ul style="list-style-type: none"> • Transaction Manager: What is an 856 ASN and How Do I Create It?
<p>We are interested in participating in any tutorials or trainings on setting up our trading partners.</p>	<p>Excellent! Our Fall Webinar Series article includes links to register for several upcoming trainings.</p> <ul style="list-style-type: none"> • TrueCommerce Webinar Series: Fall 2022
<p>Please include Scheduler in an upcoming webinar.</p>	<p>Thank you for the suggestion! Following the Fall Webinar Series, we will curate and coordinate a Winter series that may include a training session on Scheduler. You can keep on the lookout for any upcoming (or past/recorded webinars) by searching the Help Articles under the question mark icon in the top right of the screen when you are logged into Foundry.</p>

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Meanwhile, following are the Fall and Summer Webinar Series articles, which include links to past/recorded and upcoming webinars:

- [TrueCommerce Webinar Series: Fall 2022](#)
- [TrueCommerce Webinar Series: Summer 2022](#)