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Episode 3: Transaction Manager - Full Transaction Cycle (Q&A)

Questions and Answers	
When I click on a transaction within the grid on the Transactions page in Transaction Manager, another window opens. When I close the transaction, it remains locked and I cannot send. I then have to log out and then log back in to send. **How can I close it without it becoming locked?**	If you are using the Transaction Manager cloud solution and <u>not</u> the desktop solution, you may need to clear your web browser cache and history, close out of all of your browser windows, and then start again. When the cursor is still on the transaction it will remain locked. **NOTE**: TrueCommerce recommends use of Google Chrome as your web browser.
How can I make subfolders in the InBox and Received folders?	On the Transactions page, highlight the main Transaction folder (**Inbox**, **Received**, **Outbox**, or **Sent**) to which you desire to add a subfolder, then click **Options > New Folder** on the actions bar. Enter a name for your folder in the field provided on the Add Folder pop-up, then click the **OK** button. Click the main folder (to which you just added the subfolder) to expand it and view your newly-created subfolder.
Is there a list somewhere of what the various icons mean next to the transactions within the grid? **Why does a red X appear on transactions in the Sent folder but not the Outbox?**	An updated was made since the document was received History of the document (click to view) Document was sent in Test mode (Typically utilized when a client is just finding out their compliance. Sending documents in test mode is practiced to ensure everything is copacetic before a client goes "live" with using Transaction Manager). **NOTE**: If no icon displays it means the document was sent in the Production environment. Trading partner has sent baseline requirements for return documents from their vendors. Required fields must be completed in the Transaction Details before you can send the document back to the partner.
How do I change invoices that I sent from Test to Production mode? The client is still receiving the invoice regardless of the mode.	To change the status of your transaction, navigate to the **Trading Partner** page from the primary navigation menu in Foundry, then click the desired partner name and select **Preferences > Transactions**. Under the Status tab, you can select the drop-down beside the Invoice and change it from **Test** to **Production**.

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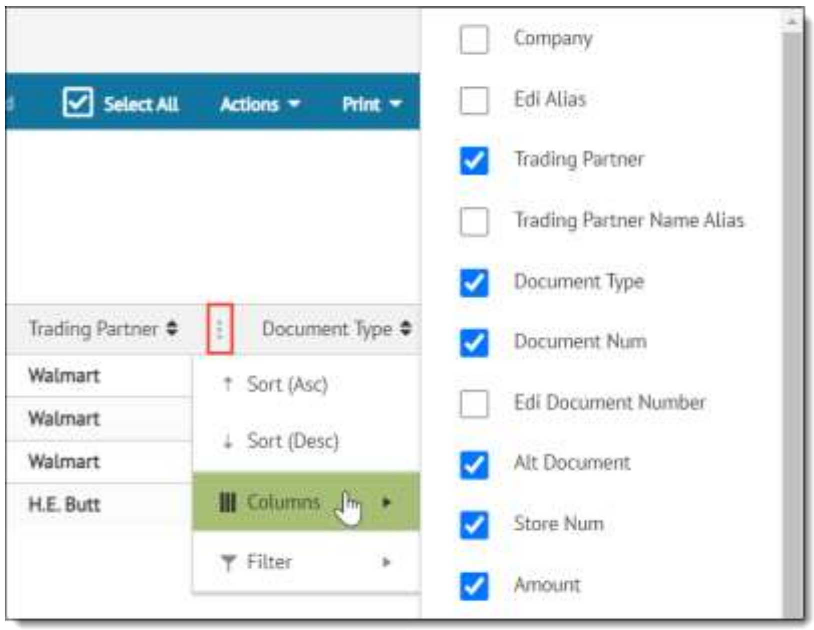
How do I customize columns in the Transactions grid?	If you mean how do you add or remove columns from the Transactions grid, you can click the horizontal ellipses on the right of any existing column to view the Sort (Asc or Desc), Columns, and Filter options. Click **Columns** to view the available columns that can be shown or hidden. Checking the box next to a column name will ensure it is displayed in the grid. 
If an update to an exported Purchase Order (PO) is sent, is it possible to update the PO in the business system? Is it possible to replace the original PO with the new one?	There are a number of business systems that handle the PO Change request. Your TrueCommerce Manager can discuss these with you. To view their contact information, click **Account Management** in your Foundry primary navigation menu.
Is there a simple way to print the raw data for a PO?	Yes! Say, for example, you want to print a standard PDF. First, click the desired document in the Transactions grid, then select **Print > PDF** from action bar. This will display the legible PDF on one page. Alternatively, if you prefer to print the Raw EDI, select **View > Raw EDI** and then Select All of that content, copy it,

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	and save it to a file (in Notepad, Word, or another preferred application). You can also navigate to **Account Management > Account Overview** via the primary navigation menu in Foundry to view Outbound documents that you sent.
When we receive a new PO, should we be turning it around to tell the buyer we received the PO?	Many Trading Partners want to have a PO Acknowledgment sent to them, but not all of them. Contact your Trading Partner to see if this is a requirement.
When I am receiving POs in Production they switch to Test mode at the point that I turn the documents around. Should I contact my Account Manager to attempt to address this?	Your outbound transactions need to be updated within Transaction Manager from Test to Production. To change the status of your transaction, navigate to the **Trading Partner** page from the primary navigation menu in Foundry, then click the desired partner name and select **Preferences > Transactions**. Under the Status tab, you can select the drop-down beside the Invoice and change it from **Test** to **Production**. 
When I turnaround orders I lose the line numbers in the Items tab and have to re-enter them all manually. Is there a way to reload that?	Yes! If your Trading Partner is live, contact the TrueCommerce [Support team](). They can submit a mapping request to have the line numbers carry over from one transaction to the other.
When I receive an order, can I export it as an Excel doc?	Yes! To do this, double-click on the desired order within the Received folder on the Transactions page to open the order (Transaction) Details, then select **View > History Report** from the action bar. A Generating Report pop-up will display, then show the Transaction History Report for the order. To export it to Excel, select **File > Export** from the action bar. The order will be downloaded in Excel format to your computer.
Regarding the Accounts Payable function: If a vendor is not EDI compatible, is there an option to scan an Invoice	TrueCommerce has the ability to receive transactions via email and have them generated within Transaction Manager or sent from Transaction Manager. We recommend you reach out to your Account Manager on this question. Their contact information can be found under **Account Management** in the Foundry primary menu.

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using Optical Character Recognition (OCR)?	
Is there a way to simultaneously open two different tabs in Transaction Manager in order to compare one transaction to another and be able to see both at the same time? **Can you open multiple POs simultaneously to view the RAW data?**	Yes! From the Foundry primary navigation menu, navigate to **Administration > System Configuration**, then uncheck the Single Window box. Afterwards, when you double-click on a transaction, it will open in another tab.
Is there a way to send multiple documents simultaneously? Is this something we can set up? **When we select more than one file, each file is overwritten by the next order. The system yields an error about a unique name. How do we assign a unique file name?**	Yes! From the Foundry primary navigation menu, click **Business System**. On the Business System page, click the desired company name to navigate to the System Setup screen. Here, you will see the Export File Type Names section. You can select the **Use Unique File Name** checkbox. Additionally, you can go to the Export File Custom Naming section below it and choose additional information to make the file name unique outside of just using the unique date/time.
Is there a way to refuse a PO? Sometimes, we update our pricing and the client sends a PO with the old pricing. Is there a way to notify the client through TrueCommerce?	It depends on your Trading Partner. If you are not sure how the partner is expecting to see the data, you could get a charge back or a rejection, for example. Therefore, it is essential that you communicate with your partner directly before you send anything back. TrueCommerce does have documents you can send for that data; often, it is the PO Acknowledgement (EDI 855). Additionally, the Functional Acknowledgement (EDI 997/Receipt) is sent automatically by the system. The 855 notifies the partner of whether you can or cannot fulfill an order. Under **Template > Main** tab, choose what kind of Acknowledgement you are sending back (Ack Detail – no change; Ack Detail with change available for 855) and also provide **Item > Status** (Item Accepted – Price Changed). If you are sending back a change, you must provide a status for it.
If the Transaction Type name in the Outbox is different from the Transaction Type name	Contact the TrueCommerce Support team on this, as there may be an option to have this scenario reviewed by our Mapping team in order to rename it.

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within Transaction setup, how do I fix it?	
If a document has an error, where can I find the details of the error from my trading partner?	Some Trading Partners, but not all, will send back a negative Functional Acknowledgement (997). Find the transaction in your **Transactions** 'Sent' folder, then select **View > Transaction History**. Here, you can see the associated 997 back from the Trading Partner. Select that 997 and then once you are in the Transaction View, you can select **View > Raw EDI**. Here, you will see the negative 997 values.
Would the PO Acknowledgement (855) change be relative to the purpose code and partner needs to be setup to accept?	Yes. This could be a condition that is not configured appropriately. You should contact your Trading Partner to coordinate the value.
If I do a turnaround is there a possibility of creating a duplicate order?	You can only create Outbound documents on Turnaround. If your PO is an Inbound document, it is not possible to create another inbound document in your Transactions Outbox.
Won't resending a Sent document cause a duplicate number error?	This can depend on the Trading Partner. Some key off of the Document Number and some key off of the control numbers. It is a case-by-case basis whenever you need to resend a transaction. If your original transaction failed on the Trading Partner's side, a 'fixed' with the same Doc Number will typically be accepted. It is always best to contact your Trading Partner to understand their rules.
How long do documents stay in the Transaction folders (Deleted folder)? Do older documents get archived? **In our experience, transactions older than six months are purged from Transaction Manager (Received and Sent folders). Is there a way to expand the timeframe before transactions are purged? Marianna said they stay in Received forever, so**	It is likely that your documents are being automatically archived if they are no longer available after six months.

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just wondering if something has changed?	
I'm having an issue where the business name has not populated for test files I've received. How do I get it to populate so I can import the test POs into my ERP?	This sounds like the Trading Partner is not associated to an ID within Transaction Manager. From the Foundry primary navigation menu, navigate to **Business System** and click the desired company name, then select **Company Configuration > EDI Setup** and ensure the ID associated with the partner is checked.
My turnaround transactions go to the Transactions Outbox. Is this correct, or should I be performing another step?	Yes! This is correct.
Is there a way to hide unused transactions in the transaction turnaround screen?	Navigate to the primary navigation menu and select **Trading Partners**, then click the desired partner on the Trading Partner page. Select **Preferences > Transactions** from the drop-down to view all of the documents you can receive on the Transaction Setup page. The far left column icons are indictors of whether the document is inbound or outbound. Check the box in the Active column to make the outbound document available to you in your turnaround menu or uncheck it to remove it from the turnaround menu (although you can always come back and re-add it later). **NOTE**: This is where you can also set if the document will be in Test or Production mode using the checkbox within the Test/Production column.
If there is mapping in the background, does it overwrite what you put in the template?	Yes, it does.
Will copying to the Outbox to fix a mistake "take back" the incorrect document sent to the Trading Partner? Or does the Trading Partner still see the incorrect document and the revised document?	The Trading Partner will see both.
I have been told not to click the Export button on the action bar but rather to click Actions > Export and	Either way, it is the same functionality. By the way, you can export more than one document if you so choose by clicking the **Ctrl** key on your computer keyboard and

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perform the export that way. Why would that be or what is the difference?	then select multiple documents in the Transactions grid for export before clicking Export or Actions > Export. **NOTE**: This is not the same as Asynchronous Export.
How do I export integration errors to Excel? Is there a way to identify a spoke in particular errors?	Unfortunately, there is no way to do this.
Is it up to the Trading Partner whether you can resend an Invoice?	Yes, it is up to the Trading Partner.
Can you change the order of how things are sorted in the Sent folder (alphabetically, for example, instead of by date)?	The filtering will always default to the Date Sent. If you click on any column you can filter accordingly while in that folder.
What do you do if you click the wrong turnaround? What if you click Shipment instead of post allocation?	You can click the **Back** or **Cancel** button.
Will there be more webinars soon?	Yes! Soon, we will curate and coordinate a Winter series that will include a fresh set of topics. 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. 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