

Episode 5: Transaction Manager (Overview) - Q&A

QUESTIONS AND ANSWERS

<p>Referring to the Item Catalog in Transaction Manager, how do the fields that get populated get set up?</p>	<p>If, for example, you are looking to capture the weight and it is on the Purchase Order (PO), it should be captured. If not, then you can open a ticket with TrueCommerce Support via Account Management in the Foundry platform to request that.</p>
<p>Is there a way that only the Purchase Orders (850s) and ASNs can display for me so I do not have to scroll to find a new order?</p>	<p>If you just want to filter for, say, POs, click the vertical ellipses on the EDI Document Number column on the Transactions page and use the Filter functions to show just the 850s.</p> <p>If there are multiple different transaction types on the Transactions page, you can filter on EDI Document Number for the transaction you are looking for. That way, you will only get that report in your Transactions InBox.</p>
<p>How can we set up a PO Acknowledgement (855) to automatically be sent back upon receipt of the PO (850)?</p>	<p>We recommend opening a support ticket for that for your relationship with your trading partner just to ensure you are compliant.</p> <p>Click Trading Partners in your Foundry primary navigation, then click the trading partner you prefer and select Preferences Transactions from the action bar.</p> <p>On the Transaction Setup page, click the Automation tab, then select the Auto-Created Transaction you prefer to automate from the corresponding drop-down list in the grid.</p> <p>Every time a PO comes in, if you have the Auto-Created Transaction indicated as the 855, the 855 will now be automatically generated for you. You can also check the Auto-Send box for that Auto-Created Transaction in the grid; otherwise, the transaction will sit in your OutBox until you or one of your team members opens the OutBox and fills in the blanks for the transaction, then sends it out to your trading partner.</p>
<p>The items added in the catalog are just the ones that will be used during testing phase, correct?</p> <p>Also, do they need to be added prior to the start of testing?</p>	<p>We do recommend that we do have at least some. If the integration is dependent on it, then yes, the Item Catalog will have to be populated by the customer. Otherwise, if raw data is provided or we have sample orders, we may already have that pre-populated because it does consume it. But if there are any items that you are looking to test with that are not on there, typically, you will receive an error as you try to import or export, and then you can just easily go into the item catalog and then populate those values.</p>
<p>How do I determine what file the Raw data is?</p>	<p>From the Foundry primary navigation menu, click Transactions to view the InBox, then click your specific transaction to open its details.</p>

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	<p>On the Transaction Details page (your “read-friendly” version of the transaction information), click the Search button and enter the specific search value you want to search on into the search field. The system will highlight the found value within the Transaction Details.</p> <p>If you want to perform an EDI Segment/Element Search, indicate the corresponding radio button in the Search area and enter the specific search value you want to search into the search field.</p> <p>Otherwise, once the Search is open, all you have to do on the Transaction Details page is click Search, then hover over any field to see what the Raw EDI Segment/Element is, or your EDI qualifier.</p>
<p>Is the item status column (active, discontinued, inactive) in the Item Catalog and if not, is it possible to add it?</p>	<p>No.</p> <p>Typically, whatever we have in the Item Catalog should be active. You want this to be as up-to-date as possible to ensure that you have the integration working as cleanly as possible.</p> <p>Currently, TrueCommerce does not include an option to identify if an Item is active, discontinued, or inactive.</p>
<p>Will the Alias affect Trading Partner mapping?</p>	<p>No, the Alias is just your internal renaming of the Trading Partner, and you can change that as often as you want, but it will not affect the back-end mapping at all.</p>
<p>How do I view a segment used on the human readable EDI form?</p>	<p>Open a transaction on the Transactions page (Inbox) to view the Transaction Details, click the Search button, then enter the Segment (for example N1) in the corresponding field in the Transaction Details Search and click Find Next... it will take you anywhere that N1 appears and highlight the raw data fields in your readable format.</p>
<p>I am working on the issues with Inventory for one of our customers that threw an error and it is not showing up in the Inventory list. TrueCommerce is working on this issue.</p> <p>If we receive Raw EDI data, is there a way to test to see if the data sent will work, or do they need to send it?</p>	<p>You will need to send it to your TrueCommerce Support contact.</p> <p>At this time, customers cannot manually review POs but we at TrueCommerce can review them on our end.</p>
<p>Can we move and save the columns in the Item Catalog?</p>	<p>Yes.</p> <p>If, for example, you wanted to move the ‘Amount’ column in the Transactions InBox, you can click on the column heading</p>

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	<p>and then drag it to the left or right to the location that you prefer. You would then select Options Configuration Save Configuration from the action bar to save the column configuration.</p> <p>Similarly, if you wanted to add or remove columns using the vertical ellipses to the right of each column heading on the Transactions InBox page, you can click the ellipses next to any column, then check the columns you want to include and/or uncheck the columns you want to exclude from the drop-down filtering and select Options Configuration Save Configuration from the action bar to save the column configuration.</p>
<p>Could you please show again how to get to templates?</p>	<p>Click Trading Partners in the Foundry primary navigation menu, select the trading partner you prefer, and then on the Transaction Setup page, click the specific map you prefer to template. You will only be able to template Outbound documents. So, if you were going to template the Ship Notice/Manifest – Standard, you would click that transaction and then click the Template button in the action bar.</p> <p>On the Template page, you can hard-code your values for each tab (Main, Shipment Detail, Shipping, EDI). Things like Unit of Measure (UoM), Vendor #, Remit To addresses, and Ship To addresses can be templated.</p>
<p>For the Item Catalog, what do we do if a field we want is not populated?</p>	<p>If, for example, you are looking to capture weight, as long as it's on the Purchase Order, it should be captured. If not, you can open a ticket with TrueCommerce Support Services to request it.</p>
	<p>You can.</p> <p>If you click on the transaction on the Transactions page, then select Options Upgrade Standard Upgrade, that will upgrade the transaction in place. It is essentially letting you know that a mapping change came in after that order was received.</p>

MISCELLANOUS (NOT NECESSARILY RELATED TO WEBINAR TOPIC)

<p>We just went live with TrueCommerce.</p> <p>Where should I start to get the appropriate training?</p>	<p>If your project remains open with your dedicated TrueCommerce Implementation representative, they should be able to provide you with follow-up training, whether it be with themselves or the Implementation Support team. Contact TrueCommerce Implementations about anything for which you feel you need more training.</p> <p>Otherwise, you can find Guided Tutorials via Foundry Help or trainings on TrueCommerce University.</p>
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Will there be more webinars soon?

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 Winter, Fall and Summer Webinar Series articles, which include links to register for upcoming webinars or past/recorded and upcoming webinars:

- [TrueCommerce Webinar Series: Winter 2023](#)
- [TrueCommerce Webinar Series: Fall 2022](#)
- [TrueCommerce Webinar Series: Summer 2022](#)