

## Winter Webinar 2024, Ep. 2: Trading Partner Auto-Create

### QUESTIONS AND ANSWERS

<p><b>Can you describe a brief scenario where auto-creating this type of transaction in Transaction Manager would come in handy?</b></p>	<p>This may not apply to everyone, but many TrueCommerce customers will auto-accept everything on the Purchase Order (PO). If that is not your case, this scenario will NOT be a good example; however, if you need to create the Purchase Order Acknowledgement (EDI 855) and you want to accept everything the trading partner sends to you, this would be a perfect example.</p>
<p><b>How do you know which version of the EDI 855 is the correct version?</b></p>	<p>Confirm this with your trading partner.</p>
<p><b>When integrated, does Transaction Manager actually check Inventory levels from, for instance, the Dynamics Great Plains (GP) business system in order to confirm that we can ship?</b></p>	<p>No, it is related to the information in Transaction Manager that resides on the PO only.</p>
<p><b>Can logic or mapping be implemented to populate date fields in an EDI 855 based on the PO Date?</b></p>	<p>The only information that can be used is what was within the PO. No additional mapping is involved in creating the auto-create transaction.</p>
<p><b>Does the Trading Partner auto-create feature focus on the upcoming changes to Wayfair, where they will require EDI 855s soon, which will be a big change for those of us not fluent in EDI.</b></p>	<p>For information on the Wayfair/CSN 855 (PO Ack) Initiative, click <a href="#">here</a>.</p>
<p><b>Can you Auto Create more than one transmission; for example, an EDI 855 and an Advance Shipping Notice (ASN/EDI 856)?</b></p>	<p>Yes. Several columns on the <b>Transaction Setup</b> screen   <b>Automation</b> tab can show what has been auto created; for example, an EDI 810, 855, 856, all at once (Auto-Created Transaction, Auto Send, and other columns with the “Auto” designation).</p>
<p><b>What if items are backordered?</b></p>	<p>In the webinar, we selected the <b>Item Status</b> and indicated “Item Accepted”. If we left the Item Status blank it would be in the Transactions <b>Outbox</b> and we could go in and manually open the document, then select “Item Backordered” as the status. It automates the process but then there are still some manual steps involved.</p>
<p><b>What happens if we have to reject a line item due to either Unit of Measure (UoM) or Pricing. In that case, will the Turnaround feature pick up that status?</b></p>	<p>No, it will NOT. It just turns around the data. If we had not templated <b>Item Status</b>, it would have been five lines on the PO and the EDI 855 and we would have to individually mark each line.</p>

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<p><b>If we need to send the scheduled ship date, can we use Mapping Manager to calculate the ship date based on the PO Date?</b></p>	<p>Mapping Manager is NOT involved in the automatic Turnaround.</p>
<p><b>Can we have Transaction Manager create a Warehouse Shipping Order (EDI 940) going to another Trading Partner at the same time as it generates the EDI 855 for the buyer partner?</b></p>	<p>It is possible to manually create a P2P turnaround but NOT to automate it.</p> <p>This was specific to a Turnaround for a specific trading partner. Under the <b>Transaction Setup</b>, there is a Turnaround tab (next to the <b>Automation</b> tab), <b>P2P Turnaround Document</b> type. In addition to the See the “Partner to Partner Transaction Turnaround” topic in the Transaction Manager Online Help within the TrueCommerce Foundry platform and/or read these articles for more information:</p> <ul style="list-style-type: none"> <li>• <a href="#">Transaction Manager: Partner to Partner Turnaround (P2P)</a></li> <li>• <a href="#">Mapping Manager: Configuring Partner to Partner Turnarounds in Transaction Manager</a></li> </ul>
<p><b>Can we change EDI 855 after Auto Create is sent?</b></p>	<p>If for some reason you want to alter the EDI 855 after it is automatically created, I would recommend that you do not select auto send because if the 855 successfully creates, it sends immediately, so there is no changing it.</p> <p>This is just the auto create turnaround feature in Transaction Manager. Depending on your ERP, you could have the EDI 850 exported out of Transaction Manager into your ERP where the 855 is created which allows you perhaps additional functionality, and then you can import the 855 back into Transaction Manager.</p>
<p><b>Can dates populate from an ERP or business system, such as NetSuite?</b></p>	<p>No, the Auto-Create Turnaround feature does NOT communicate with your business system.</p>
<p><b>How can we automate data certain areas/fields within the Transaction Manager screens/pages, like Address, instead of having to type it in over and over again?</b></p>	<p>Addresses can be automated, as long as they are static. Under the <b>Translations</b> drop-down on the action bar, you can use the <b>Item Catalog</b> and <b>Address List</b> to populate information in the template and <b>Save</b> it.</p>
<p><b>What ship date is then sent on this type of PO Ack? The current/today’s date?</b></p>	<p>It would be related to whatever info is on the PO. If the information does not exist on the PO, it would probably display as a <span style="background-color: red; color: black;">red</span> field that would have to be manually entered.</p>



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Depending on the information that is sent on the PO and the information required on the EDI 855... we were able to template those two things on the example we provided during the webinar... if those were NOT a valid scenario, we would still have to manually enter data into the auto-created EDI 855 before we could send it.

In this user's situation, it might be the case where they have to manually enter the ship date.

**Regarding the acceptance, could we make sure that is not templated so that when it creates, it will not send due to missing fields? Then could we simply update the acceptable or price change before manually sending?**

Yes.

If you did NOT, for example, want it to automatically send because you wanted to enter different data... Type is required in the template... you could leave this blank and it would auto-create the EDI 855 in the **Transactions Outbox**, but it would NOT go anywhere because that field is required. So you can then edit the EDI 855, change the price, change the quantity, status, and more of whatever you want, then enter a Type, then send it.

### MISCELLANEOUS QUESTIONS

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