EDI 846 Item Registries Inventory Lookup

Cavallo Support - 2024-12-03 - EDI

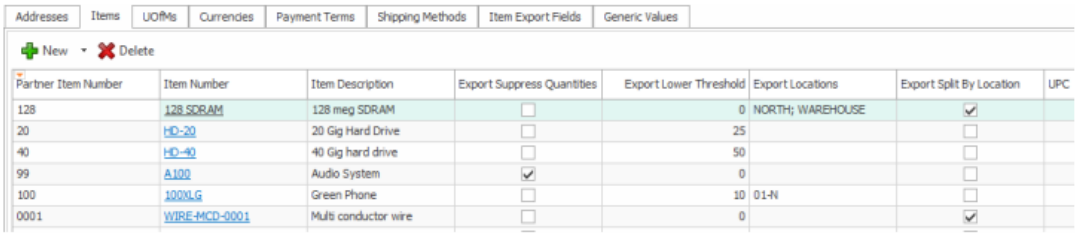
Inventory Report Quantity Logic

Overview

New functionality has been introduced to control how inventory quantities are sent for EDI 846 (Item Registries) xml files, and for csv/xls/xlsx files.

Setup

In the Data Cross Reference Items tab, 4 new columns have been added. These fields control how the quantities are calculated.



Partner Item Number	Item Number	Item Description	Export Suppress Quantities	Export Lower Threshold	Export Locations	Export Split By Location	UPC
128	128 SDRAM	128 meg SDRAM	☐	0	NORTH; WAREHOUSE	☑	
20	HD-20	20 Gig Hard Drive	☐	25		☐	
40	HD-40	40 Gig hard drive	☐	50		☐	
99	A100	Audio System	☑	0		☐	
100	100XLG	Green Phone	☐	10	01-N	☐	
0001	WIRE-MCD-0001	Multi conductor wire	☐	0		☑	

- Export Suppress Quantities: If checked, quantities for this item will be reported as 0 on the inventory report.
- Export Lower Threshold: If specified, if the reported quantity would be lower than this threshold, 0 is reported instead.
- Export Locations: Sites to report quantities from. Leave blank to include all sites.
- Export Split By Location: If checked, the quantity for this item in each site will be reported separately.

In the Data Cross Reference, the Item Export Fields tab has been added. This will control what data gets included in the csv/xls/xlsx inventory report.



Column Name	Business Object	Field Name	Static Value	Script
Item Number	InventoryByLoc	Item_Number		
Quantity to Send	InventoryByLoc	Onhand		
Item Type	ItemMaster	Item_Type		
UPC	EDICrossReferenceItem	UPC		
Item Description	ItemMaster	Item_Description		
MSRP	ItemMaster	List_Price		
Expected Receipt Date				DateTime expected = inventoryLocati...
Condition			New	

- Column Name: The header for the column when generating the file.

- Business Object: When pulling in a value from SalesPad Desktop, this specifies the business object to pull the data from. The options are:
    - InventoryByLoc
    - ItemMaster
    - EDICrossReferenceItem
- Field Name: When pulling in data from SalesPad Desktop, this specifies which field in the business object to pull the data from.
- Static Value: A constant value to send for all rows.
- Script: A custom calculation for the value to send. In the script, the value to send must be set to the "output" parameter.

Inventory Report Generation Automation

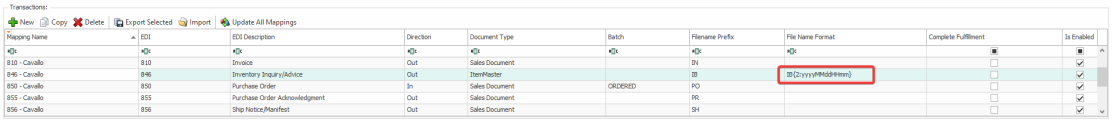
Overview

New functionality has been introduced to allow EDI 846 (Item Registries) files to be generated and sent automatically.

Setup

Automated EDI 846 File Generation

In the EDI Business Object Mapping screen, we've added the File Name Format column to the Transactions grid. This controls how the file name gets generated.

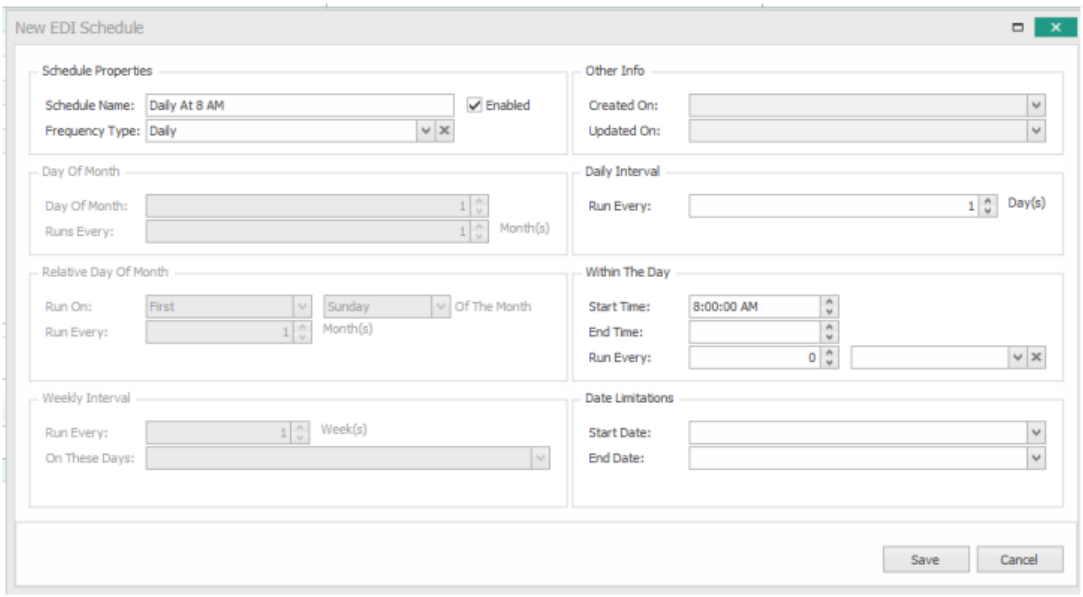


The parts of the format are:

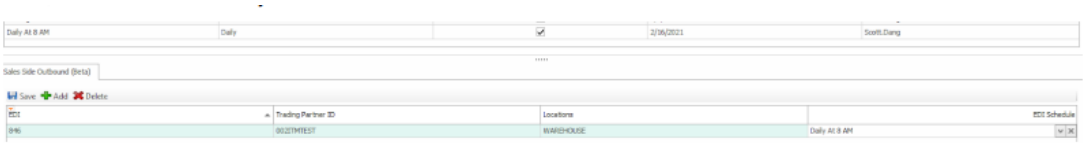
- {0} - File name prefix for the mapping type.
- {1} - Unique number generated for the mapping type.
- {2} - Current date/time.

".xml" will automatically be appended to the end of this file name.

EDI 846 has been added as an option for the Sales Side Outbound functionality in the EDI Scheduler. To use this to automatically generate and send 846 (item registry) files, first set up a schedule. This is the same type of schedule that can be set up to control how often EDI files are retrieved from SPS. For example, the picture below is set up to run every day at 8 am.



Then, add that schedule to a job in the Sales Side Outbound tab.



- EDI: What type of file to send. The only options so far are 846 and 852.
- Trading Partner ID: Which trading partner to generate the file for and send to.
- Locations: Limit inventory to which locations. Leave blank to include inventory in all locations.
- EDI Schedule: Assign a schedule to control how often a file is generated and sent.

Now, while EDI Process (or the EDI Service) is running, these files will be sent out according to the schedule.

EDI Cross Reference Item - Field Rolldown Across Trading Partners

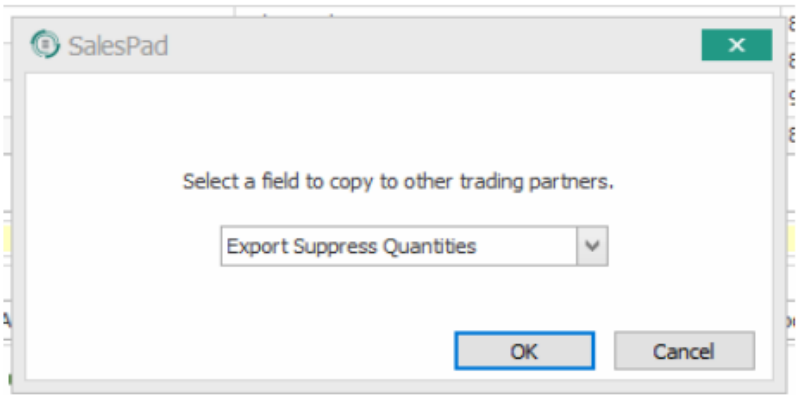
Overview

Values of a field in the EDI Cross Reference Item tab for one trading partner can now be copied to all other trading partners with the same item.

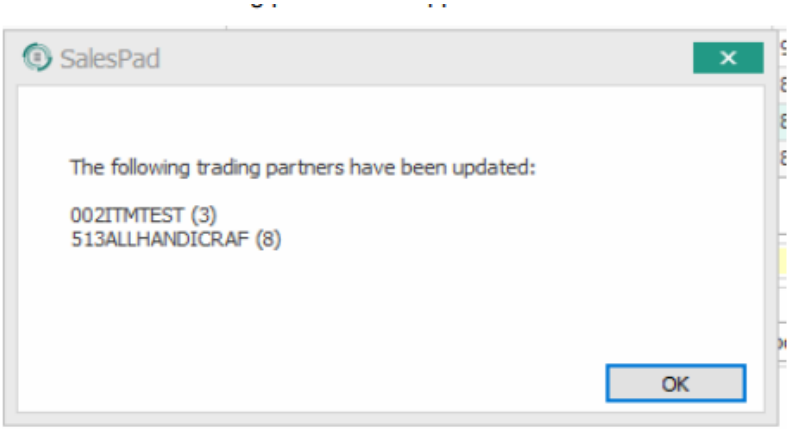
Select any number of items you want to roll down. Then right-click the grid and select "Copy To Other TPs".



In the popup, select the field to roll down and press "OK".



A list of affected trading partners will appear after the value has been rolled down.

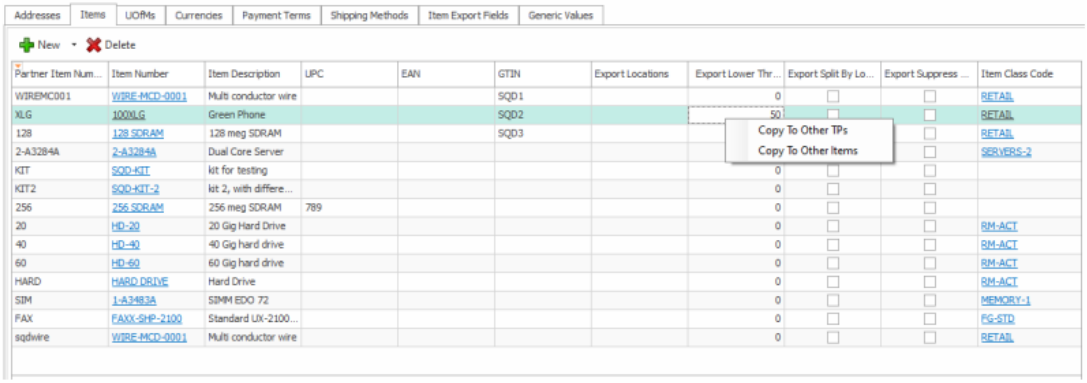


EDI Cross Reference Item - Field Rolldown To Items in a Trading Partner

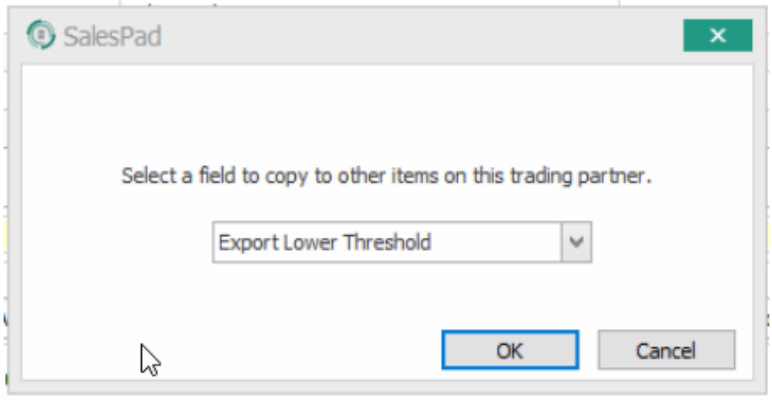
Overview

The value of a field in the EDI Cross Reference Item tab for one trading partner can now be copied to all other items in the same trading partner.

Select the item that has the value you want to roll down. Then right-click on the row and select "Copy To Other Items".



In the popup, select the field to roll down and press "OK".



All of the items in the grid will have been updated with the new value.