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EDI 846 Item Registries Inventory Lookup

Megan De Freitas - 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.

Addresses	Items	UOMs	Currencies	Payment Terms	Shipping Methods	Item Export Fields	Generic Values
+ New - Delete							
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	<input type="checkbox"/>	0	NORTH; WAREHOUSE	<input checked="" type="checkbox"/>	
20	HD-20	20 Gig Hard Drive	<input type="checkbox"/>	25		<input type="checkbox"/>	
40	HD-40	40 Gig hard drive	<input type="checkbox"/>	50		<input type="checkbox"/>	
99	A100	Audio System	<input checked="" type="checkbox"/>	0		<input type="checkbox"/>	
100	100XLG	Green Phone	<input type="checkbox"/>	10	01-N	<input type="checkbox"/>	
0001	WIRE-MCD-0001	Multi conductor wire	<input type="checkbox"/>	0		<input checked="" type="checkbox"/>	

- 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.

Addresses	Items	UOMs	Currencies	Payment Terms	Shipping Methods	Item Export Fields	Generic Values
+ New - Delete Export Import							
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 = inventory.locat...			
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.

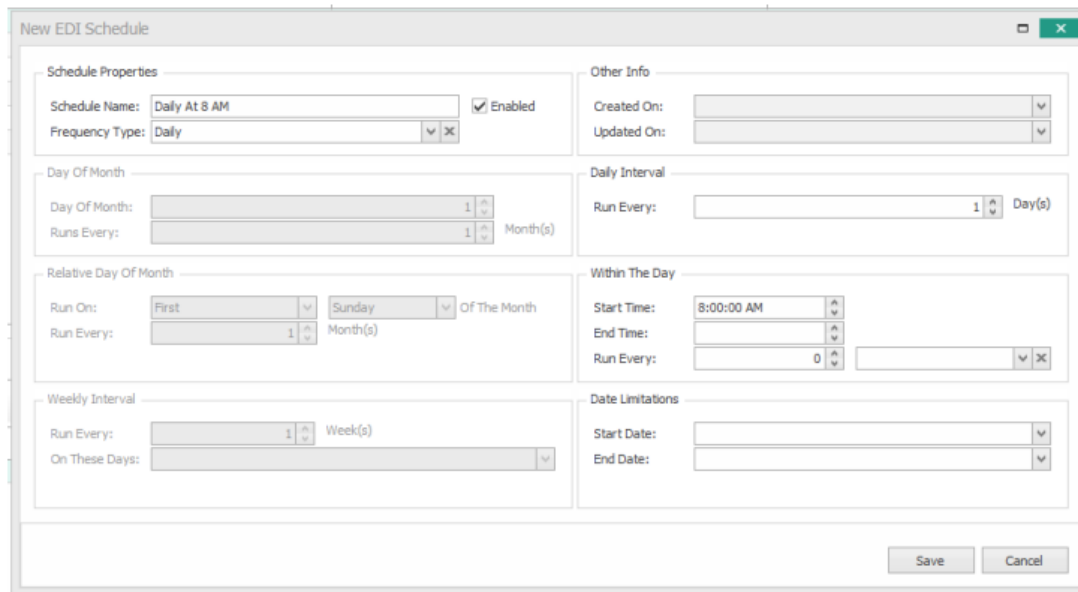
Transactions									
Mapping Name	EDI	EDI Description	Direction	Document Type	Batch	Filename Prefix	File Name Format	Complete Fulfillment	Is Enabled
810 - Cavallo	810	Invoice	Out	Sales Document		IN		<input type="checkbox"/>	<input checked="" type="checkbox"/>
846 - Cavallo	846	Inventory Inquiry/Advice	Out	ItemMaster		IS	810-yyyyMMddhhmm	<input type="checkbox"/>	<input checked="" type="checkbox"/>
850 - Cavallo	850	Purchase Order	In	Sales Document	ORDERED	PO		<input type="checkbox"/>	<input checked="" type="checkbox"/>
855 - Cavallo	855	Purchase Order Acknowledgment	Out	Sales Document		PO		<input type="checkbox"/>	<input checked="" type="checkbox"/>
856 - Cavallo	856	Ship Notice/Manifest	Out	Sales Document		SH		<input type="checkbox"/>	<input checked="" type="checkbox"/>

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.

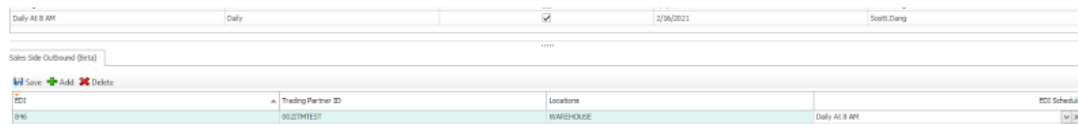


The "New EDI Schedule" dialog box is used to configure the schedule for an EDI process. It contains several sections:

- Schedule Properties:** Includes "Schedule Name" (set to "Daily At 8 AM"), "Frequency Type" (set to "Daily"), and an "Enabled" checkbox.
- Other Info:** Includes "Created On" and "Updated On" date pickers.
- Day Of Month:** Includes "Day Of Month" and "Runs Every" (set to 1) with up/down arrows, and a "Month(s)" dropdown.
- Relative Day Of Month:** Includes "Run On:" (set to "First"), "Sunday" (set to "Of The Month"), and "Run Every" (set to 1) with up/down arrows, and a "Month(s)" dropdown.
- Weekly Interval:** Includes "Run Every" (set to 1) with up/down arrows, and "On These Days" (set to "Week(s)").
- Daily Interval:** Includes "Run Every" (set to 1) with up/down arrows, and a "Day(s)" dropdown.
- Within The Day:** Includes "Start Time" (set to "8:00:00 AM"), "End Time", and "Run Every" (set to 0) with up/down arrows, and a "Day(s)" dropdown.
- Date Limitations:** Includes "Start Date" and "End Date" date pickers.

Buttons for "Save" and "Cancel" are located at the bottom right.

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



Job	Trading Partner ID	Locations	EDI Schedule
EDI	8027WHEST	80402HOUSE	Daily At 8 AM

- 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

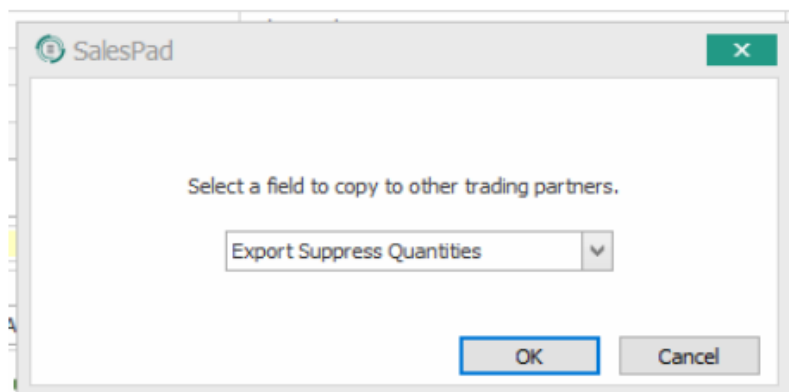
Overview

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.

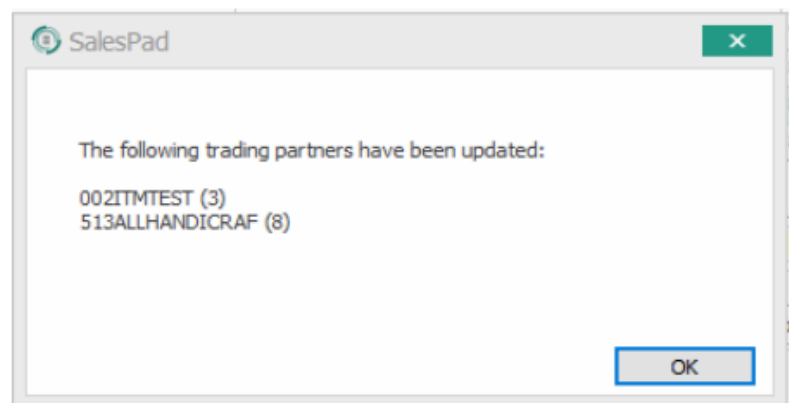
Select any number of items you want to roll down. Then right-click the grid and select "Copy To Other TPs".

Addresses	Items	UOMs	Currencies	Payment Terms	Shipping Methods	Item Export Fields	Generic Values			
<div><div>New</div><div>Delete</div></div>										
Partner Item Num...	Item Number	Item Description	UPC	EAN	GTIN	Export Locations	Export Lower Thr...	Export Split By Lo...	Export Suppress ...	Item Class Code
128	128 SDRAM	128 meg SDRAM					0	<input type="checkbox"/>	<input type="checkbox"/>	RETAIL
20	HD-20	20 Gig Hard Drive					25	<input type="checkbox"/>	<input type="checkbox"/>	RM-ACT
40	HD-40	40 Gig hard drive					50	<input type="checkbox"/>	<input type="checkbox"/>	RM-ACT
99	A100	Audio System					0	<input type="checkbox"/>	<input type="checkbox"/>	
100	100XLG	Green Phone					10	<input type="checkbox"/>	<input type="checkbox"/>	RETAIL
0001	WIRE-MCD-0001	Multi conductor wire					0	<input type="checkbox"/>	<input type="checkbox"/>	RETAIL
SQD	SQD-S1	SQD Green Phone...					0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
2A	2-A3284A	Dual Core Server					0	<input type="checkbox"/>	<input type="checkbox"/>	
KIT	SQD-KIT	kit for testing					0	<input type="checkbox"/>	<input type="checkbox"/>	
KIT2	SQD-KIT-2	kit 2, with differe...					0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
256	256 SDRAM	256 meg SDRAM					0	<input type="checkbox"/>	<input type="checkbox"/>	
60	HD-60	60 Gig hard drive					0	<input type="checkbox"/>	<input type="checkbox"/>	RM-ACT
HARD	HARD DRIVE	Hard Drive					0	<input type="checkbox"/>	<input type="checkbox"/>	RM-ACT
1A	1-A3483A	SDMM EDO 72					0	<input type="checkbox"/>	<input type="checkbox"/>	MEMORY-1
FAX	FAX-SHP-2100	Standard UN-210...					0	<input type="checkbox"/>	<input type="checkbox"/>	FG-STD
1-A3561A	1-A3561A	Multi-Core Processor					0	<input type="checkbox"/>	<input type="checkbox"/>	CPU-MEMO-1

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".

AddressesItemsUOMsCurrenciesPayment TermsShipping MethodsItem Export FieldsGeneric Values

NewDelete

Partner Item Num...	Item Number	Item Description	UPC	EAN	GTIN	Export Locations	Export Lower Thr...	Export Split By Lo...	Export Suppress ...	Item Class Code
WREMC001	WRE-MCD-0001	Multi conductor wire			SQD1		0	<input type="checkbox"/>	<input type="checkbox"/>	RETAIL
XLG	1000LG	Green Phone			SQD2		50	<input type="checkbox"/>	<input type="checkbox"/>	RETAIL
128	128 SDRAM	128 meg SDRAM			SQD3			<input type="checkbox"/>	<input type="checkbox"/>	RETAIL
2-A3284A	2-A3284A	Dual Core Server						<input type="checkbox"/>	<input type="checkbox"/>	SERVERS-2
KIT	SQD-KIT	kit for testing					0	<input type="checkbox"/>	<input type="checkbox"/>	
KIT2	SQD-KIT-2	kit 2, with differe...					0	<input type="checkbox"/>	<input type="checkbox"/>	
256	256 SDRAM	256 meg SDRAM	789				0	<input type="checkbox"/>	<input type="checkbox"/>	
20	HD-20	20 Gig Hard Drive					0	<input type="checkbox"/>	<input type="checkbox"/>	RM-ACT
40	HD-40	40 Gig hard drive					0	<input type="checkbox"/>	<input type="checkbox"/>	RM-ACT
60	HD-60	60 Gig hard drive					0	<input type="checkbox"/>	<input type="checkbox"/>	RM-ACT
HARD	HARD.DRIVE	Hard Drive					0	<input type="checkbox"/>	<input type="checkbox"/>	RM-ACT
SIM	1-A3483A	SIMM EDO 72					0	<input type="checkbox"/>	<input type="checkbox"/>	MEMORY-1
FAX	FAXX-SHP-2100	Standard UX-2100...					0	<input type="checkbox"/>	<input type="checkbox"/>	PG-STD
sqdwire	WRE-MCD-0001	Multi conductor wire					0	<input type="checkbox"/>	<input type="checkbox"/>	RETAIL

Copy To Other TP's
Copy To Other Items

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

SalesPad

Select a field to copy to other items on this trading partner.

Export Lower Threshold

OK

Cancel

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