EDI 860 - Purchase Order Change Request

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Overview

The EDI 860 Purchase Order Change Request document is used when a customer needs to request changes to an existing order that they previously submitted as an 850 Purchase Order. This can include changes to the order and its sales lines, as well as sales line additions and cancellations, and changes to sales line cross dock information. These are imported as pending change requests, which can then be reviewed and accepted or rejected as applicable.

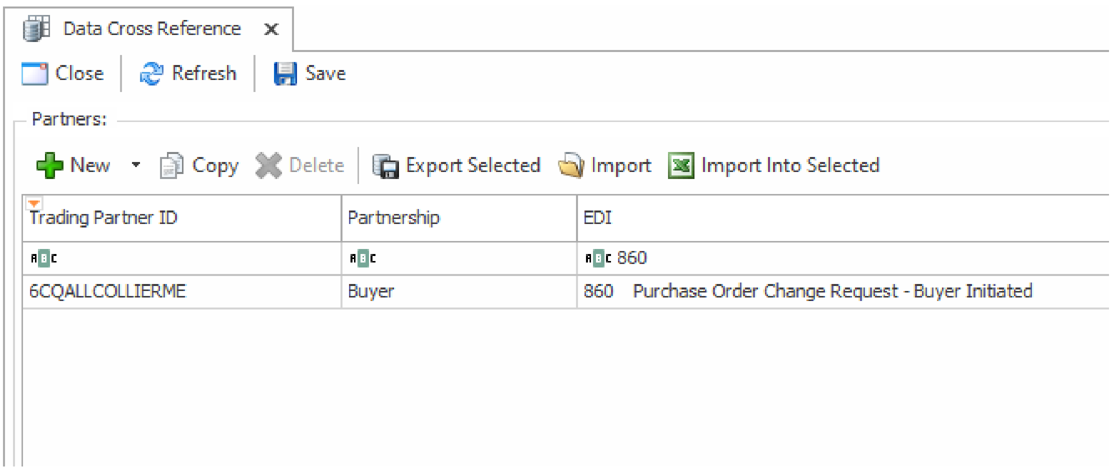
Prerequisites

Before continuing with EDI 860 setup, make sure EDI is properly configured in SalesPad by reviewing the following documentation:

- EDI Installation
- EDI Processing
- Data Cross Reference
- Business Object Mapping
- EDI Server Connection Setup
- EDI Trading Partner Setup Steps

Data Cross Reference

Select the EDI tab in the ribbon and open the Data Cross Reference screen.



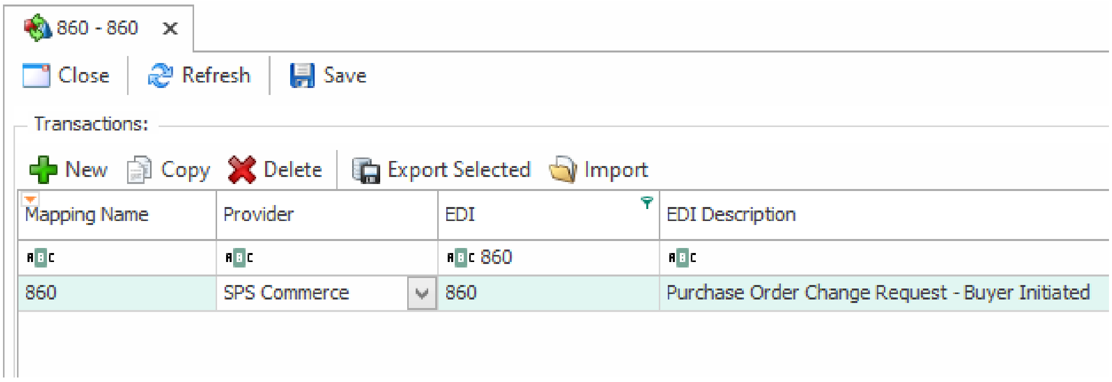
It is likely that the Trading Partner used on incoming 860 documents already exists in the Data Cross Reference setup, because the sales document that needs to be updated was originally created by an inbound 850 for that same Trading Partner. If this is the case, select the trading partner's row and make sure the 860 is also selected in the EDI column.

If this is a new Trading Partner, click the New button to add a new trading partner and set the following columns: Trading Partner ID, Partnership, Customer Num, and Warehouse. Make sure that 860 is selected in the EDI column, and that Is Enabled is checked.

From there, the rest of the Data Cross References need to be added. For more information on setting up Data Cross References, refer to the following documentation: Data Cross Reference.

Business Object Mapping

Select the EDI tab in the ribbon and open the Business Object Mapping screen.



Click the New button to add a new row and set the following columns:

Column	Value
Mapping Name	Name of the 860 transaction mapping
Provider	SPS Commerce
EDI	860
Schema Name	OrderChanges
Direction	In
Document Type	Sales Document
Document Subtype	Sales document type and ID in SalesPad
Trading Partners	Trading partners to which the mapping applies (trading partners are configured in the Data Cross Reference screen)
Is Enabled	Make sure this is checked.

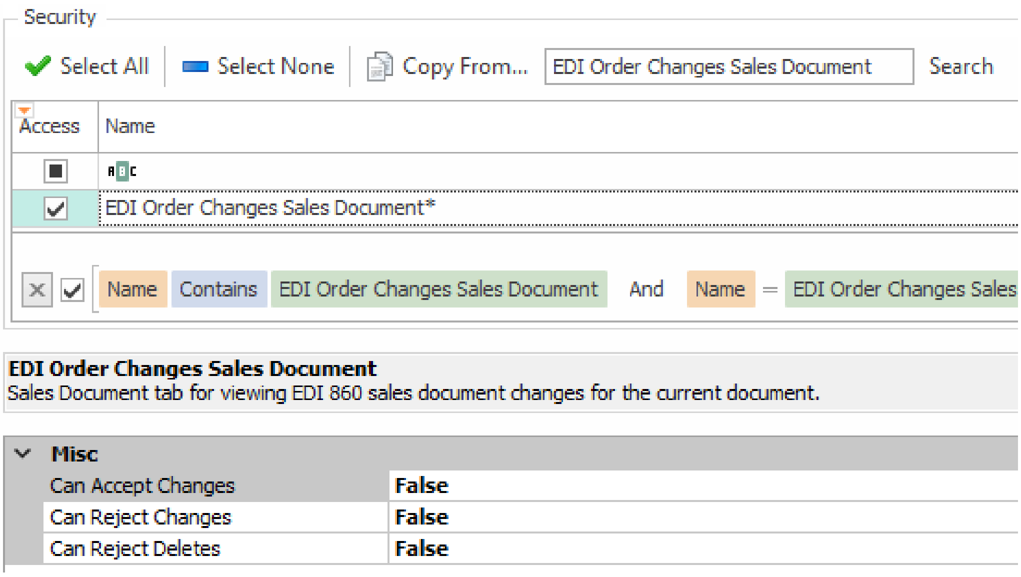
The Elements section of this screen should become enabled and display default mappings which outline the most common way to set up a basic 860. This should be reviewed and updated as needed to match the expected structure with the Trading Partner. For more information on setting up the Business Object Mapping, refer to the following documentation: Business Object Mapping.

Security Editor

Open the Security Editor by going to Modules -> System -> Security Editor and make sure the following plugins are enabled as needed:

- EDI Order Changes Sales Document
- EDI Order Changes Sales Line Items
- EDI Order Changes Cross Dock Sales Line

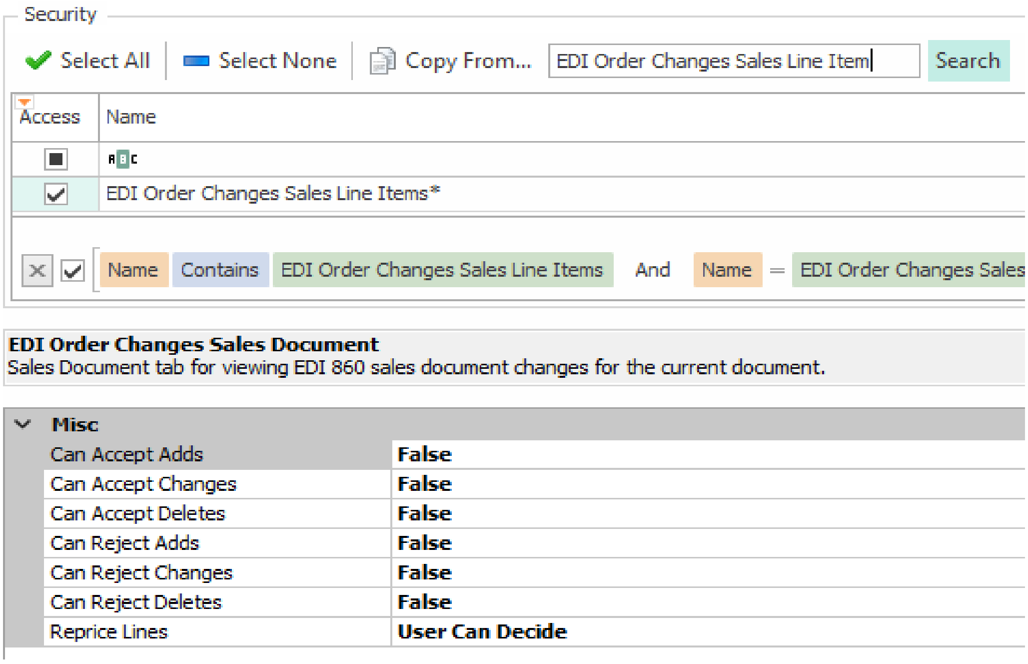
Update sub-securities as needed for each. Save all changes, log out, and log back in for changes to take effect.



Can Accept Changes - Allows a user to accept changes to sales documents. Default: False

Can Reject Changes - Allows a user to reject changes to sales documents. Default: False

Can Reject Deletes - Allows a user to reject delete requests to sales documents. Default: False



Can Accept Changes - Allows a user to accept changes to sales line items. Default: False

Can Reject Changes - Allows a user to reject changes to sales line items. Default: False

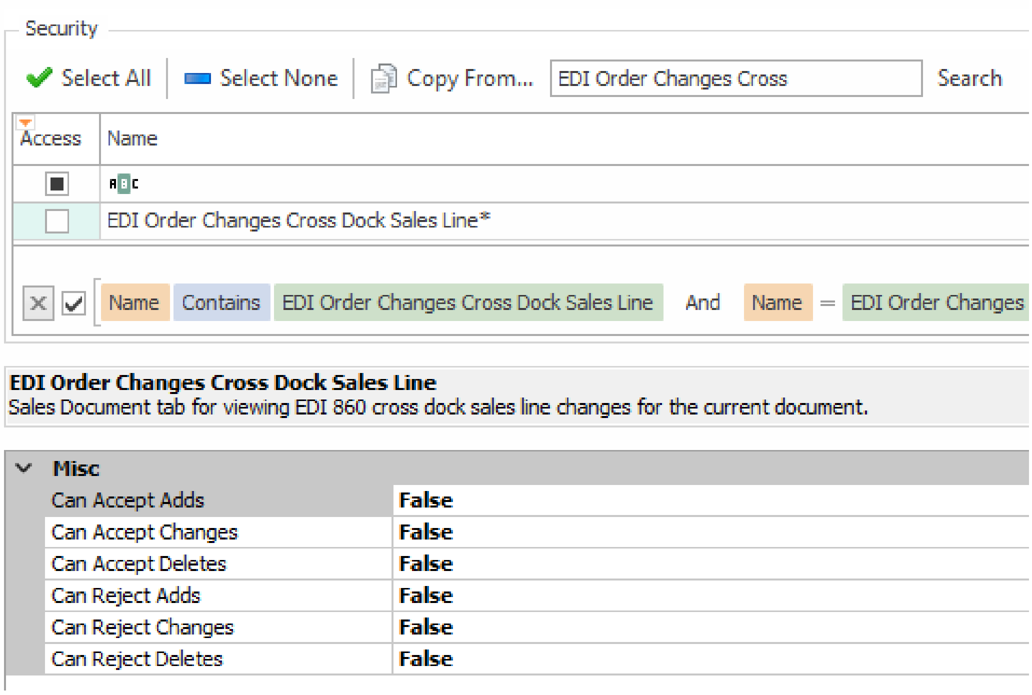
Can Accept Deletes - Allows a user to accept delete requests to sales line items. Default: False

Can Reject Deletes - Allows a user to reject delete requests to sales documents. Default: False

Can Accept Adds - Allows a user to accept additional sales line items. Default: False

Can Reject Adds - Allows a user to reject additional sales line items. Default: False

Reprice Lines - Determines if updated lines should always be repriced, never be repriced, or allow the user to decide when accepting changes. Default: User Can Decide



Can Accept Changes - Allows a user to accept changes to the cross dock sales lines. Default: False

Can Reject Changes - Allow a user to reject changes to the cross dock sales lines. Default: False

Can Accept Deletes - Allows a user to accept delete requests to cross dock sales lines. Default: False

Can Reject Deletes - Allows a user to reject delete requests to cross dock sales lines. Default: False

Can Accept Adds - Allows a user to accept additional cross dock sales lines. Default: False

Can Reject Adds - Allows a user to reject additional cross dock sales lines. Default: False

Importing An 860 Document

Once the above configuration is in place, the EDI 860 can be imported using the EDI Processing screen. In order to properly import an EDI 860 document, the following must be in place:

- An 860 XML document must exist in the designated FTP server folder.

- A sales document must exist in SalesPad that matches the Sales Doc Num that is defined in the 860 document. This sales document must also fit the other specifications for this trading partner, such as having the specified customer and warehouse.

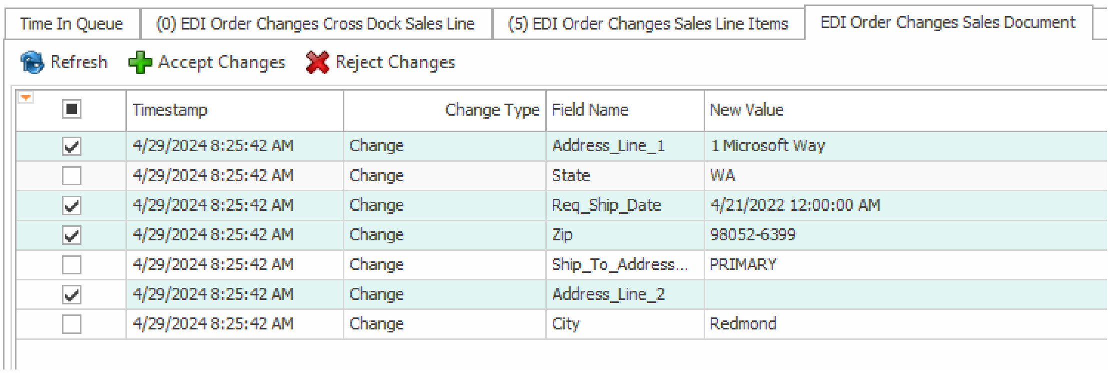
Click the Receive button on the EDI Processing screen to download and process the 860 XML document.

New records will appear in the grids on the screen to indicate the status of the import. If there are any issues, then relevant error information will be included in these records. If all processing was successful, then the records will show a Processed status, and a link to the updated document will be provided in the Document Number column.

Reviewing 860 Change Requests

Sales Document Entry tabs are used to review the pending changes that were requested via the EDI 860 document. The user can then choose to accept or reject each change.

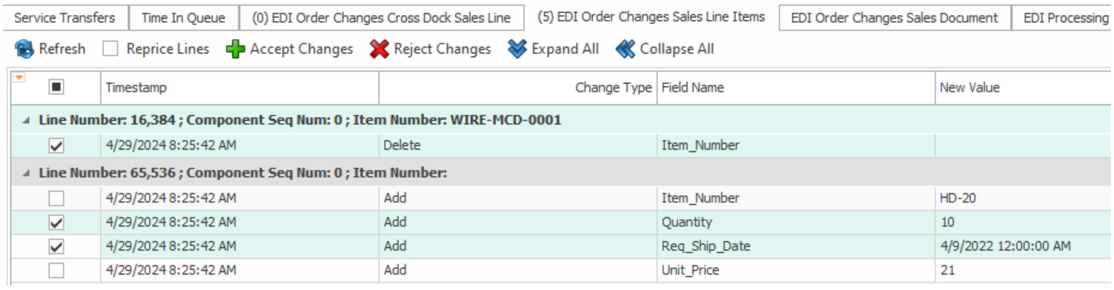
The EDI Order Changes Sales Document tab is used to accept or reject changes to the header information for the sales order. This can include changes to fields like requested ship dates, as well as billing and shipping address fields. Requested changes can be accepted or rejected en masse by checking their checkboxes before clicking the corresponding button.


Time In Queue | (0) EDI Order Changes Cross Dock Sales Line | (5) EDI Order Changes Sales Line Items | EDI Order Changes Sales Document

Refresh | Accept Changes | Reject Changes

■	Timestamp	Change Type	Field Name	New Value
☑	4/29/2024 8:25:42 AM	Change	Address_Line_1	1 Microsoft Way
☐	4/29/2024 8:25:42 AM	Change	State	WA
☑	4/29/2024 8:25:42 AM	Change	Req_Ship_Date	4/21/2022 12:00:00 AM
☑	4/29/2024 8:25:42 AM	Change	Zip	98052-6399
☐	4/29/2024 8:25:42 AM	Change	Ship_To_Address...	PRIMARY
☑	4/29/2024 8:25:42 AM	Change	Address_Line_2	
☐	4/29/2024 8:25:42 AM	Change	City	Redmond

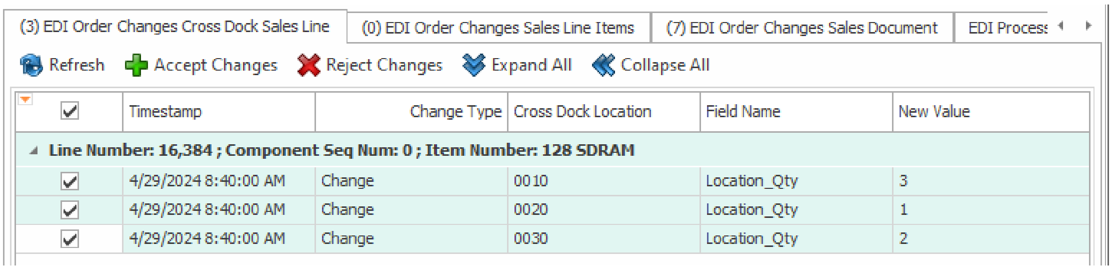
Similarly, the EDI Order Changes Sales Line Items tab is used to accept or reject requested changes to the sales line items for the sales order. Changes for each line are grouped within the grid for easy visibility. If the Reprice Lines checkbox is checked when accepting line changes, each changed line will then be automatically repriced based on the changes.


Service Transfers | Time In Queue | (0) EDI Order Changes Cross Dock Sales Line | (5) EDI Order Changes Sales Line Items | EDI Order Changes Sales Document | EDI Processing

Refresh | Reprice Lines | Accept Changes | Reject Changes | Expand All | Collapse All

■	Timestamp	Change Type	Field Name	New Value
Line Number: 16,384 ; Component Seq Num: 0 ; Item Number: WIRE-MCD-0001				
☑	4/29/2024 8:25:42 AM	Delete	Item_Number	
Line Number: 65,536 ; Component Seq Num: 0 ; Item Number:				
☐	4/29/2024 8:25:42 AM	Add	Item_Number	HD-20
☑	4/29/2024 8:25:42 AM	Add	Quantity	10
☑	4/29/2024 8:25:42 AM	Add	Req_Ship_Date	4/9/2022 12:00:00 AM
☐	4/29/2024 8:25:42 AM	Add	Unit_Price	21

The EDI Order Changes Cross Dock Sales Line tab lets the user accept or reject requested changes to the sales lines' cross dock information. Changes are grouped by sales line item for easy visibility.


(3) EDI Order Changes Cross Dock Sales Line | (0) EDI Order Changes Sales Line Items | (7) EDI Order Changes Sales Document | EDI Process

Refresh | Accept Changes | Reject Changes | Expand All | Collapse All

☑	Timestamp	Change Type	Cross Dock Location	Field Name	New Value
Line Number: 16,384 ; Component Seq Num: 0 ; Item Number: 128 SDRAM					
☑	4/29/2024 8:40:00 AM	Change	0010	Location_Qty	3
☑	4/29/2024 8:40:00 AM	Change	0020	Location_Qty	1
☑	4/29/2024 8:40:00 AM	Change	0030	Location_Qty	2