EDI 870 - Order Status Report

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Overview

The EDI 870 Order Status Report document is used to send periodic updates on the status of an order to the customer.

Prerequisites

Before continuing with EDI 870 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

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 outbound 870 documents already exists in the Data Cross Reference setup, because the sales document that needs to send status updates 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 870 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 870 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 see the following documentation: Data Cross Reference.

Business Object Mapping

Select the EDI tab on 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 870 transaction mapping
Provider	SPS Commerce
EDI	870
Schema Name	OrderStatusReports
Direction	Out
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 870. This should be reviewed and updated as needed to match the expected structure with the Trading Partner. For more information on Business Object Mapping, set the following documentation: Business Object Mapping.

Security Editor

Open the Security Editor by going to Modules -> System -> Security Editor and make sure the Sales Document EDI 870 plugin is enabled for all user groups who may need to use this functionality. Update the sub-security as needed. Save all changes, log out, and log back in for changes to take effect.

Review Batch - When forwarding through workflow, sales documents will be sent to this batch if EDI transaction fails.

Usage

Open a sales document that is valid for this Trading Partner, such as having the specified customer and warehouse. Select the EDI 870 - Order Status Report plugin from the sales document actions menu.

This plugin will use the configuration for the associated Trading Partner to generate the 870 XML document, assigning all fields based on their mappings. The file will be saved to the

designated FTP server folder. If any issues occur, a prompt will display relevant error information, which can also be referenced on the EDI Processing screen.

The EDI 870 plugin can also be configured to run automatically in workflow when orders pass through a particular workflow queue, so that the 870 XML can be generated and sent automatically as part of workflow.