

Knowledgebase > SalesPad > EDI > EDI Server Connection Setup

# **EDI Server Connection Setup**

Megan De Freitas - 2025-06-11 - EDI

# Overview

Before using SalesPad EDI, you must set up the Server Connection. This connection is what connects SalesPad Desktop to SPS Commerce, allowing the two programs to communicate. This allows the receiving and sending of EDI documents between the two systems.

In this document, you will learn how to connect SalesPad EDI to SPS Commerce.

Note: The credentials required for the connection setup will be provided by SPS Commerce.

# **Table of Contents**

- <u>Overview</u>
- <u>Connection Setup</u>
  - <u>Security</u>
    - <u>Connection Setup</u>
    - Testing Connection

### **Connection Setup**

#### Security

Before you can access the Server Connections screen, you must enable the proper securities.

Navigate to the Security Editor.

	🕗 =   🔁 =
$\mathbf{\overline{\mathbf{\nabla}}}$	
<b>~</b>	Log Off
	Active Users
	Activity Locks
	Report Manager
-C#	Script Manager
0	SQL Custom Procedures
₹	Security Editor
Č.	Settings
	User Field Editor
8	example.user's User Card
P	Exit

Search for "EDI server connections." Enable this security for the groups that should have access.

Security -							
🗸 Select Al	I Select None	🚬 Copy From	EDI server connections	Search			
Access	Name						
<ul> <li>Image: A start of the start of</li></ul>	EDI Server Connections						

# **Connection Setup**

Once the EDI Server Connections security is enabled, navigate to the Server Connections screen. To do this, either navigate to the EDI Category from the **Modules** dropdown and select **Server Connection**, or open the EDI tab in the ribbon and select **Server Connection**.

6	- 🕾 - 🖉	_									
	CRM •	Distributi	ion BOM	EDI	Equipment Managemen	t Inventory	Purchasing	Reporting	Sales	Setup / Util	ities
	Distribution BOM  Equipment Management Inventory	I Schedu rver Con	ler nections								
	Furchasing F		12								
	Sales										
	Setup / Utilities	🔓 Nev	w								
	EDI	🚯 В	usiness Ob	oject Ma	apping						
	Reporting •	D 🗊	ata Cross I	Referen	ce Contra						D
	System 🕨	👌 El	DI Processi	ing	Contac						Phone:
		- Гран Б	DI Schedul	er	State:						Zip:
- S	earch Results	S S	erver Conr	nections	5	1		1		1	
	D 🌯 - 📄 - Application CRM	Distributi	ion BOM	EDI	Equipment Managemen	t Inventory	Purchasing	Reporting	Sales	Setup / Uti	lities
<ul> <li></li> <li><td>Business Object Mapping Data Cross Reference EDI Processing</td><td>DI Schedu Gerver Con</td><td>ler nections</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></li></ul>	Business Object Mapping Data Cross Reference EDI Processing	DI Schedu Gerver Con	ler nections								

Once the Server Connections screen is open, click the **New** button to add a blank entry in the Servers section of the screen. Fill out the fields with the appropriate information based on the column headings.

- Description Name for the connection. Used to differentiate between multiple connections.
- Host Name The server address for connecting to SPS Commerce.
- *Port* The port number for connecting to SPS Commerce.
- Username SFTP username provided by SPS Commerce.
- Password SFTP password provided by SPS Commerce.
- \**Provider* SPS Commerce
- \*Connection Renci SSH.NET
- Server Directory Upload Live directory where outbound documents (855. 856, 810) will be sent from SalesPad.
- Server Directory Download Live directory where inbound documents (850) will be sent from SPS Commerce.
- Server Directory Upload Test Test directory where outbound documents (855. 856, 810) will be sent from SalesPad.
- Server Directory Download Test Test directory where inbound documents (850) will be sent from SPS Commerce.
- File Location Directory where received and sent EDI XML documents will be stored for live.
- File Location Test Directory where received and sent EDI XML document will be stored for test.
- *Test Mode* Determines whether the connection is designated as test vs live. A test connection will utilize the test directories.
- *Is Enabled* Determines whether the connection is enabled and will be used for connecting to SPS Commerce.

\* Denotes items that will default to the correct value.

### **Testing Connection**

Now that the provided information has been entered, the connection can be verified from within the Server Connections screen. Save the connection by clicking the **Save** button and then click the **Test Connection** button. A message will appear letting you know whether the connection was successful or it failed. You will also receive a message if any of the required fields are missing.



Error received when server connection is missing a required field

📼 SalesPad 🛛 🗙	
Error while connecting to server 'sftp.spscommerce.net': No suitable authentication method found to complete authentication.	
ОК	

Error received when server connection credentials are incorrect

SalesPad	x
Successfully connected to server 'sftp.spscommerce.net'.	
	Ж

Error received when server connection credentials are correct