



## EDI Server Connection Setup

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### 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.

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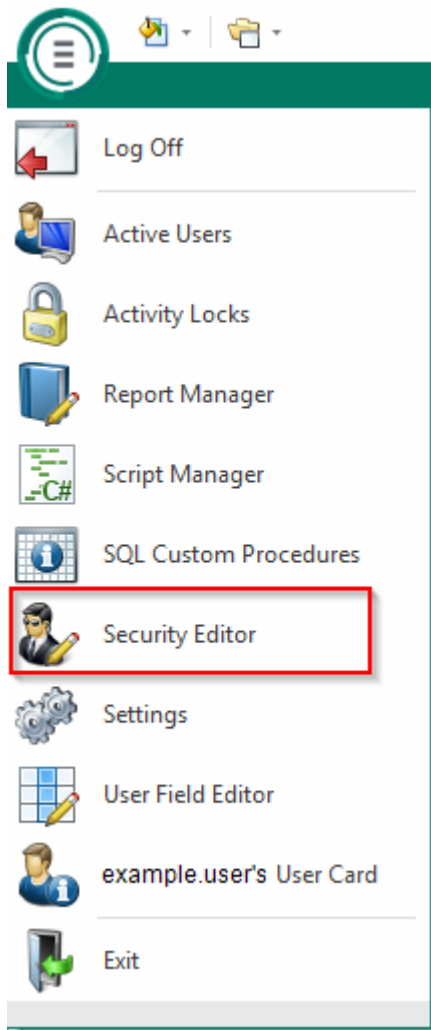
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### Connection Setup

#### Security

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

Navigate to the **Security Editor**.

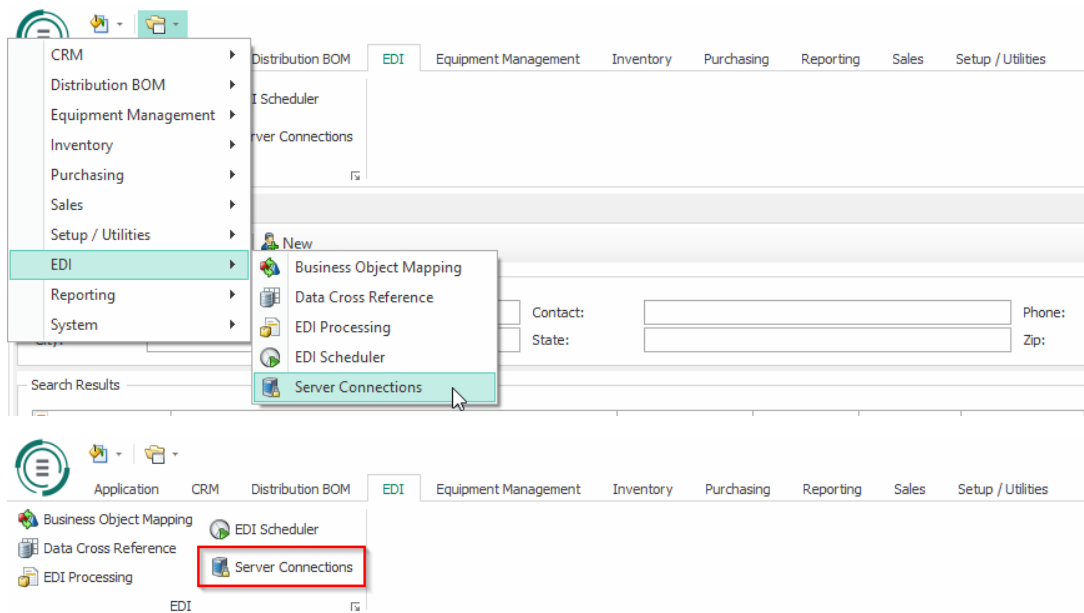


Search for “EDI server connections.” Enable this security for the groups that should have access.

| Security  |   |
|---|---|
| <input checked="" type="checkbox"/> Select All  | <input type="checkbox"/> Select None  |
| <input <="" td="" type="button" value="Copy From..."/> <td><input type="text" value="EDI server connections"/> <input type="button" value="Search"/></td> | <input type="text" value="EDI server connections"/> <input type="button" value="Search"/> |
| Access  | Name  |
| <input type="checkbox"/>  |   |
| <input checked="" type="checkbox"/>   | 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**.



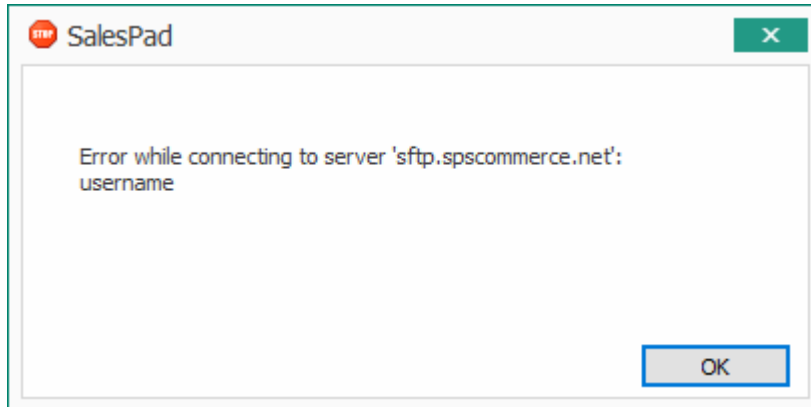
Once the Server Connections screen is open, click the **New** button to add a blank entry in the Servers section of the screen. Fill out the fields with the appropriate information based on the column headings.

- *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.

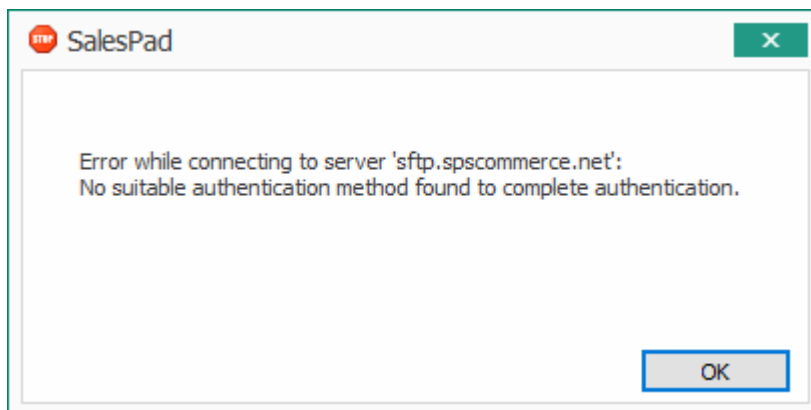
\* Denotes items that will default to the correct value.

### Testing Connection

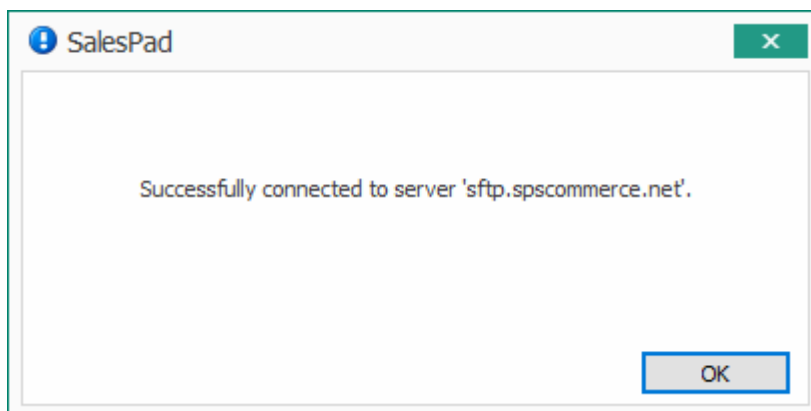
Now that the provided information has been entered, the connection can be verified from within the Server Connections screen. Save the connection by clicking the **Save** button and then click the **Test Connection** button. A message will appear letting you know whether the connection was successful 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



Error received when server connection credentials are incorrect



Error received when server connection credentials are correct