

How do I setup a new Trading Partner?

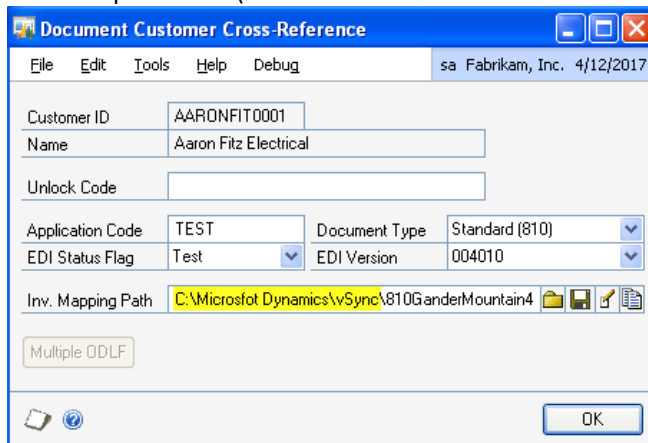
After you have filled out and sent in the Trading Partner order form, one of two things will happen:

- 1) If we have the partner in our library the kit will be emailed to you.
- 2) If we do not have the kit in our library we will ask you for the EDI specifications so that we can develop them. Once development has been completed, the kit will be emailed to you.

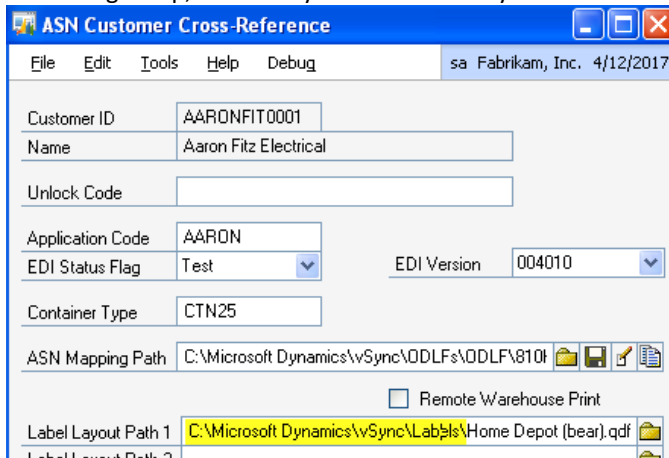
The Trading Partner kit will contain all of the Gentran templates, vSync maps (i.e. ODLFs), and label files that are requested and/or required for that trading partner.

When you receive the kit, unzip the folder and save the files to their directories. The following is where these files are typically located:

- Gentran Server templates – C:\GENSRVNT> RegtransObj or TransObj
- Gentran Director templates – C:\Program Files\CommerceConnection32> RegtransObj or TransObj
- ODLFs – To verify where your ODLFs are located, see the Mapping Path on one of the existing ODLF setup windows (accessible from the Customer Cross Reference>Documents/ASN):



- .QDFs (Labels) – To verify where your label files (qdfs) are located, see the Label Layout paths on an existing setup, or create your own directory:



After the files have been saved, you're ready to setup the partner. This is broken up into two sections, **Gentran** and **vSync/GP**.

Gentran® Setup

How to register Templates (aka Translation Objects)

- 1) Register the templates by clicking on this button:



- 2) A list of current templates (aka Translation Objects) will open. Click **New**
- 3) Browse to the directory where you save the templates, highlight them, and click **Open**
If you get the following error: "A translation object with the same description is already registered..." click **Yes**. Close out of the window.

How to setup a new Trading Partner in Gentran (also see page 9 "How to setup a new Gentran Trading Partner by using the Copy feature" section at the end of this manual)

- 1) Click on **Partners** to the right of the desk.
- 2) Click on **New** to open the **Partner Definition** window.
 - a. **Profile ID**-Unique description of the partner. Avoid non-alphanumeric characters.
 - b. **Name**- Name of the Trading Partner.
 - c. **EDI Code**- Interchange ID for the Trading Partner (Your customer's Sender/Receiver ID; don't include the qualifier)
 - d. **Application Code**-Use the same description that you used for the profile ID.
 - e. **Comm. Profile (Director)/ Default Mailbox (NT)**-Type of communications you will be using for the Trading Partner.
- 3) Click on **Save**.

Gentran Server

Profile ID:	<input type="text"/>	Save
Name:	<input type="text"/>	Exit
EDI Code:	<input type="text"/>	Help
Application Code:	<input type="text"/>	
Default Mailbox:	<input type="text"/>	New Mailbox
Default E-mail Address:	<input type="text"/>	Edit Mailbox

Gentran Director

Profile ID:	HOMEDEPOT	Save
Name:	Home Depot	Exit
EDI Code:	1234567890	Help
Application Code:	HOMEDEPOT	
Comm. Profile:	GENTRAN Tutorial	

How to setup the Inbound Relationships for the new Trading Partner

- 1) Highlight the Partner you just created and click on **Inbound**
- 2) Click on **New** and enter a name for the inbound document (Usually version followed by document type i.e. 4030 850).
- 3) Click on **Save**. Then choose the standard in the **Standard** drop down box.
- 4) X12 typically represent retail\850
- 5) UCS typically represents grocery\875
- 6) Choose the **Version**
- 7) Choose the **Transaction Set** (if the document you are setting up does not appear (i.e. 850,875,864, etc.), you did not correctly register the template for that document)

Gentran Server

Gentran Director

- 8) Click on the **Translation** button.
- 9) Select the appropriate templates.
- 10) If you are setting up the 850/875 (EDI POs), set your Export File Name path to be the same as an existing 850 or 875 setup. This has to match the file path that you have configured in GP (from the vSync Main window Setup>SOP>Paths>Purchase Order)
- 11) Click on **Save**.

Gentran Server

Gentran Director

- 12) Click on the **Groups** button
- 13) Click **New** and enter a description (i.e. 4030 850)
- 14) Click **Save**
- 15) Click **Select**
- 16) Click on the **Interchanges** button
- 17) Click **New and** enter a description (i.e. 4030 850)
- 18) Click **Save**
- 19) Click **Select.**
- 20) Click on the **Advanced** Button. At the bottom of the window select the appropriate **Test Indicator**. Typically this will be set to Test initially, and then changed to Production after testing has passed (see How to change a customer from Test to Production FAQ for more information)

- 21) Click on **Save**, and repeat the process for all other inbound documents.

How to setup the Outbound Relationships for the new Trading Partner

- 1) Highlight the Partner and click on **Outbound**
- 2) Follow the same steps listed for the inbound setup. The differences are:

The Translation window looks different because you will need an Import template for the 810/880 (Invoices) , 856 (ASN), etc (anything exported out of GP)


The **Groups** and **Interchanges** setup require an extra step.

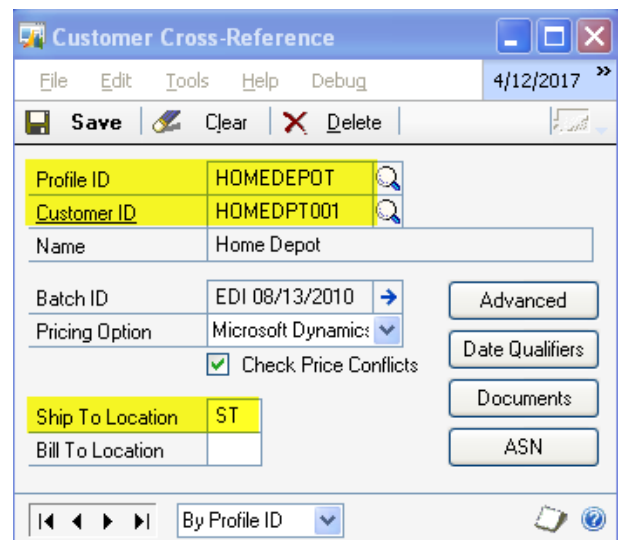
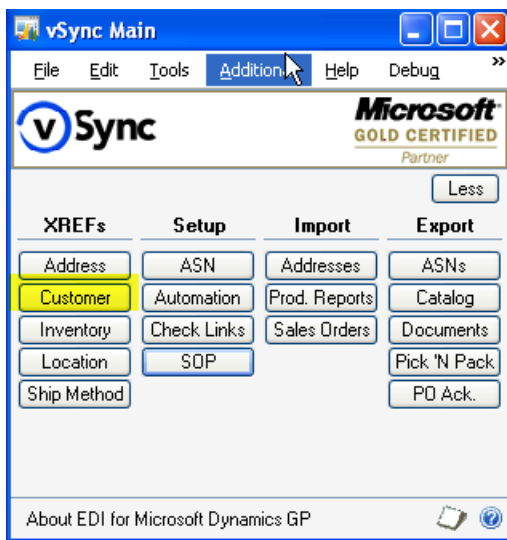
Groups: After setting up the Description, you have to go into Envelope and type in the Sender/Receiver IDs.

Interchanges: After setting up the Description, you have to go into Envelope and type in the Sender/Receiver IDs and qualifiers. *Also note there is another Test Indicator on this window.



Microsoft Dynamics GP® Setup

Setting up the Customer Cross Reference

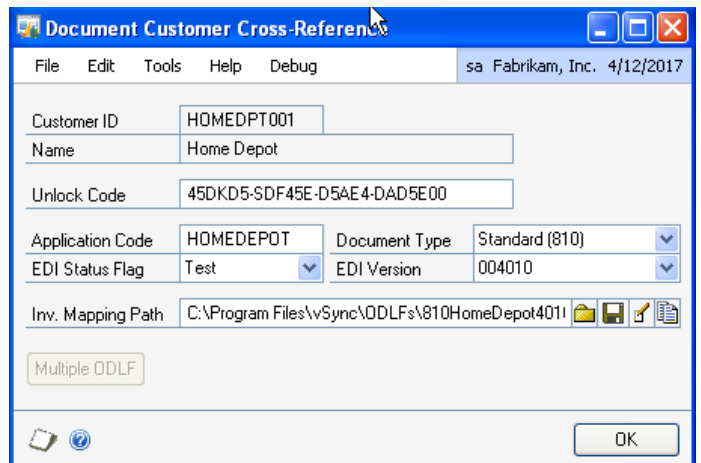
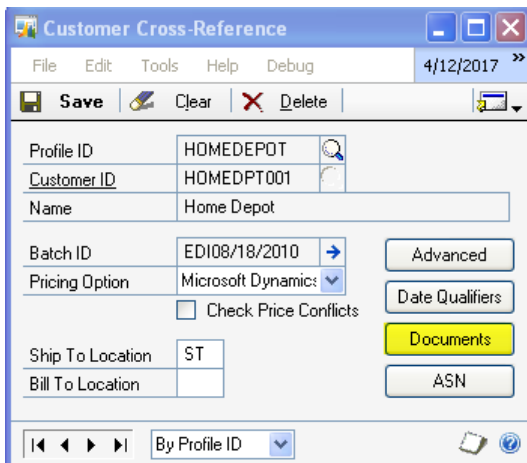
- 1) Open the vSync Main Window and click on **Customer**.
- 2) Type in the **Profile ID** (has to match the Profile ID from Gentran)
- 3) Select your GP Customer ID
- 4) Key in the **Ship To Location** qualifier (can be found in the N1 02 segment from the EDI order); typically it's ST. If this doesn't match what's being sent on the order, you will receive a "Location Cross Reference not found" error.
- 5) Select your business processes
- 6) For more information about the fields on this window (or any), click on the  button.





Setting up the Invoice Unlock Code

- 1) Click on **Documents** from the Customer Cross Reference
- 2) Copy/type in the Unlock code for the invoice that was included in the trading partner kit
- 3) Type in the **Application Code** (has to match the Application Code in Gentran)
- 4) Select the appropriate Test/Production flag (has to match the flag in the Gentran invoice setup for this partner)
- 5) Select the appropriate Document/Transaction Type
- 6) Select the version for the transaction
- 7) Browse to where you saved the Invoice ODLF by clicking the folder icon  in the Inv. Mapping Path field
- 8) Select the ODLF and then click Save 
- 9) Click OK

Note: If you get the following error: *Extraction Code #####-#####-#####-#####-##### is not valid for customer....* Then either the unlock code is incorrect, or the Document Type and/or Version don't match the ODLF.




Setting up the ASN Unlock Code

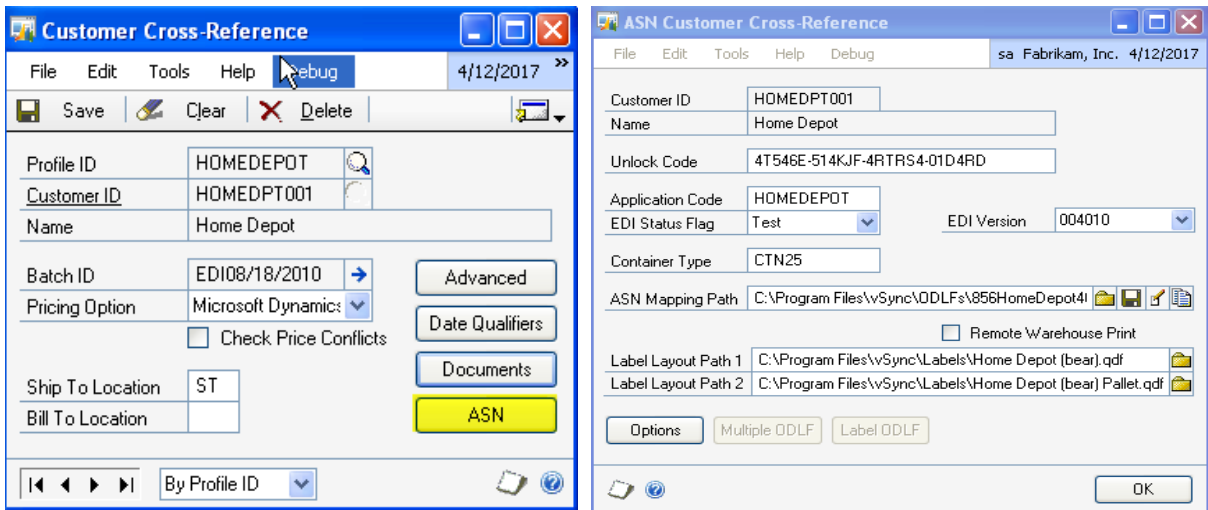
- 1) Click on **ASN** from the Customer Cross Reference
- 2) Copy/type in the Unlock code for the ASN that was included in the trading partner kit
- 3) Type in the **Application Code** (has to match the Application Code in Gentran)
- 4) Select the appropriate Test/Production flag (has to match the flag in the Gentran invoice setup for this partner)
- 5) Select the version for the transaction
- 6) Type in CTN25 for the Container Type unless shipping items directly on a pallet without using cartons then use PLT96.
- 7) Browse to where you saved the ASN ODLF by clicking the folder icon  in the ASN Mapping Path field
- 8) Select the ODLF and then click Save 
- 9) Check Remote Warehouse Print if your third party warehouse prints your labels, or if you need to email them. When selected, the Label Layout Path fields are disabled and a Label Text Path field becomes available:


	<input checked="" type="checkbox"/> Remote Warehouse Print
Label Layout Path 1	C:\Program Files\vSync\Labels\Home Depot (bear).qdf
Label Text Path	C:\Program Files\vSync\Labels\Home Depot.txt

****OR****

- 10) Browse to where you saved the Label (.qdf) file by clicking the folder icon  in the Label Layout Path 1 field (for carton labels) and/or Layout Path 2 (for pallet labels)
- 11) Click OK

Note: If you get the following error when trying to save your ASN ODLF: *Extraction Code #####-#####-#####-#####-##### is not valid for customer...* Then either the unlock code is incorrect, or the Document Type and/or Version don't match the ODLF.

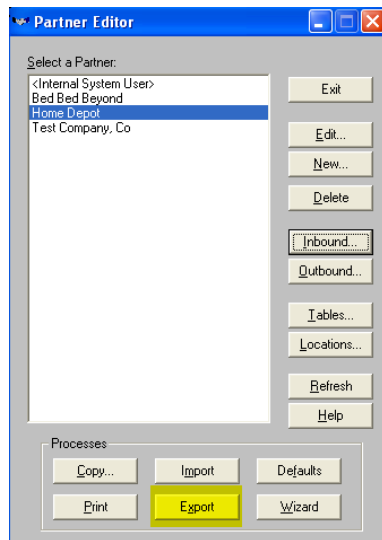


For more information on setting up Cross References, please click on the  button from any vSync window. Also, please reference the FAQs on our website at www.vsync.com/mycustomercenter.

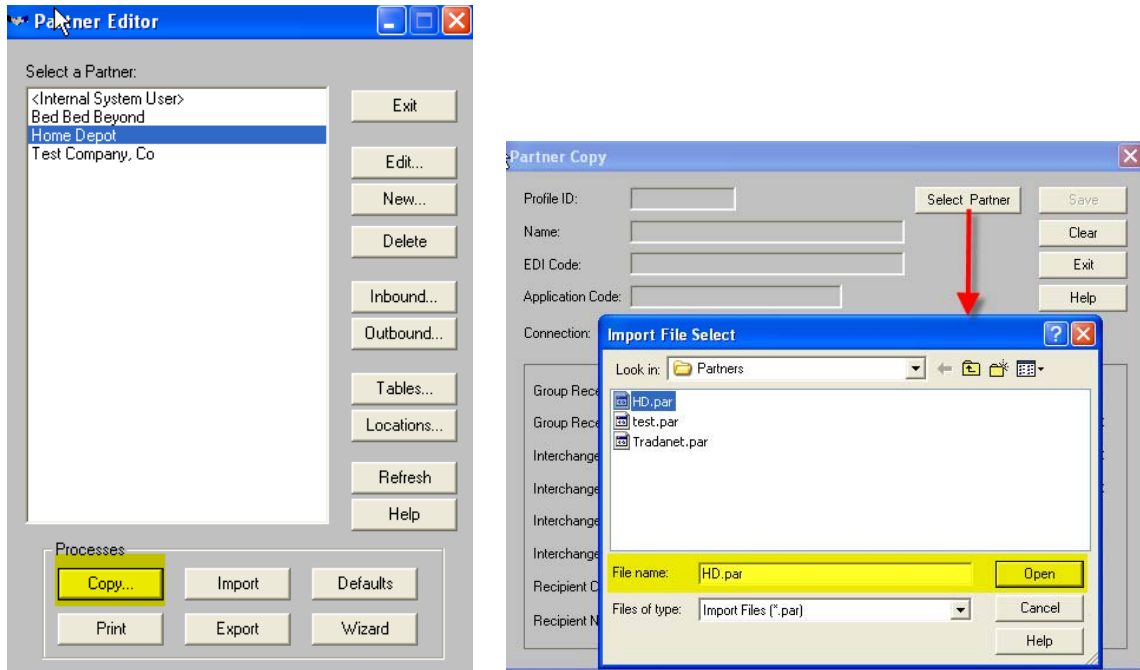
How to setup a new Gentran Trading Partner by using the Copy feature

If you are setting up a new trading partner who uses the same version and transaction(s) as an existing one, you can export out the settings for the existing one, copy it, and import it as a new one.

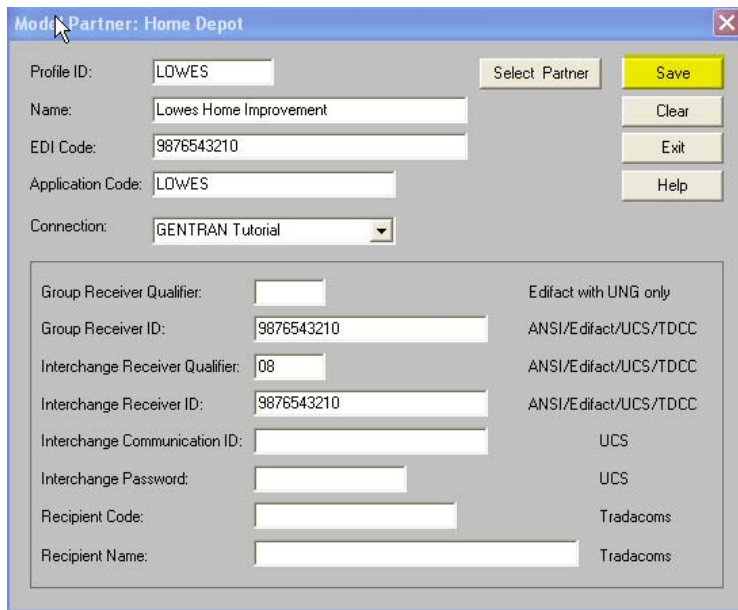
- 1) Select the Trading Partner you want to copy from.
- 2) Click Export
- 3) Name the file and click **Save**



- 4) Click **Copy**
- 5) Select the file saved from the previous step



- 6) Fill in the appropriate information for the new partner that you are setting up. The fields keyed in below show which ones to fill out.
- 7) Click **Save**



Now Lowes Home Improvement is setup as a partner, and if I go into the Inbound/Outbound setups I will have the same transactions setup for them as I do with Home Depot.

