SetSightXS
EDI Maintenance Tool

SetSightXS Introduction

This tool is used to assist users in resolving their most common EDI issues. SetSightXS facilitates communication between a customer support representative and clients as well as their trading partners. SetSightXS generates emails that contain a base of relevant information so that a request can be researched or completed based on the supplied details. The details are unique to the type of request.

Common Requests

For most request types, at least one email is generated upon submission of the request. SetSightXS handles the request types listed in Table 1:

Request Type	Description
Create New User	Creates a new SetSightXS user.
Carbon Copy	Creates emails to facilitate sending EDI Carbon Copies.
Report Missing Data	Reports data missing from reports.
Request Original Data	Request to trade data directly with a retailer on behalf of a supplier.

Table 1: Requests

Create New User

To create a new SetSightXS user:

1. On the SetSightXS home screen (www.SetSightXS.com) click the **Click to create a new user account** link as shown in Figure 1.

Figure 1: SetSightXS Login Screen

2. Complete fields and click **Create User** as shown in Figure 2.

Figure 2: Create User

3. Enter your *Full Name* and *Company Name* and click **Finish** as shown in Figure 3.

Figure 3: Name and Company Details

4. Once the account has been activated an email will be sent to the address specified on the Create User screen. Click **Continue,** as shown in Figure 4, to return to the main SetSightXS screen.

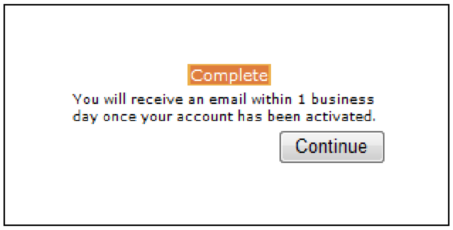


Figure 4: Completion Confirmation.

Request Carbon Copies

To request carbon copies:

1. Select **Request carbon copies** from the **Trading Partners** dropdown menu as shown in Figure 5.

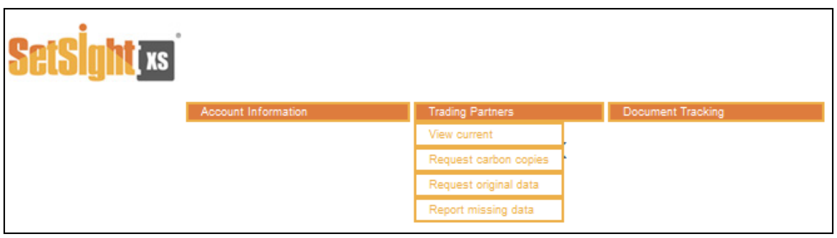


Figure 5: SetSightXS Menu Bar

2. This screen briefly explains what is necessary to request carbon copies. Clicking the first link will take you to a page to send an email to the factory explaining who WinRep is, and why the rep firm wants to receive carbon copies (step 3). The second link is for after you have the EDI information from the factory. Click this link to enter the information (step 4).

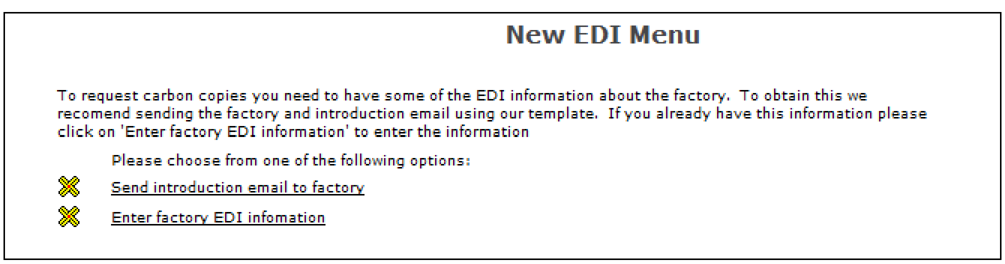


Figure 6: EDI Menu

3. Figure 7 shows the email template to send to the factory. This can be changed, and at a minimum the supplier's name should be added.
   Add the sender's name to the end of the email. The *From* field is populated with

the email address of the user that is logged into SetSightXS, but this can be changed. Click **Send** to send the email. A sample of this email is shown in email #2.

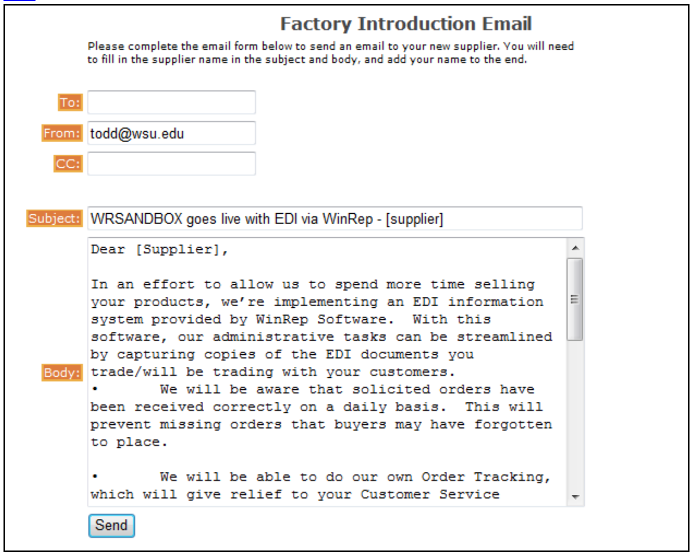


Figure 7: Factory Introduction Email Customization

4. Complete the form fields shown in Figure 8 regarding the data you are looking to receive and the trading partner's information. Click the **Submit** button to continue.

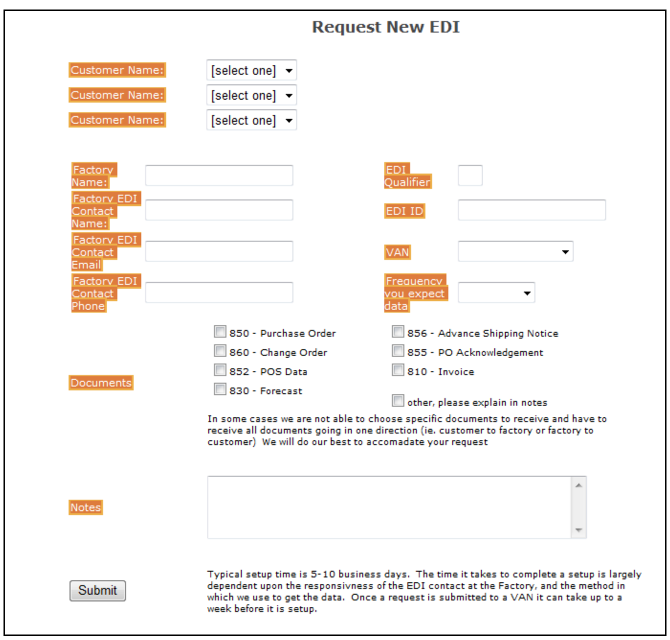


Figure 8: New EDI Request Details

5. An email similar to email #3 is sent to the user confirming their request.

Report Missing Data

This form is only to be used for data that you have received in the past, but are no longer receiving. For example, "I've been getting copies of PO's from Best Buy for ACME Electronics for 6 months, but I did not receive a PO last week."

To report missing data:

1) Select **Report missing data** from the **Trading Partners** menu shown in Figure 1.

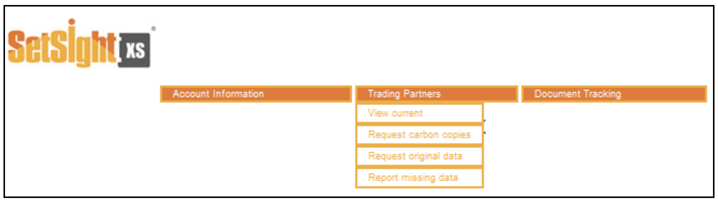


Figure 1: SetSightXS Menu Bar

2) Choose the Customer and Factory that the data was for and then check the boxes for the documents that you are missing.
   If you know any information about why you stopped receiving data, please enter that in the notes section in Figure 2. For example, "My factory told me that they were switching VAN's)". Click **Submit** to continue.

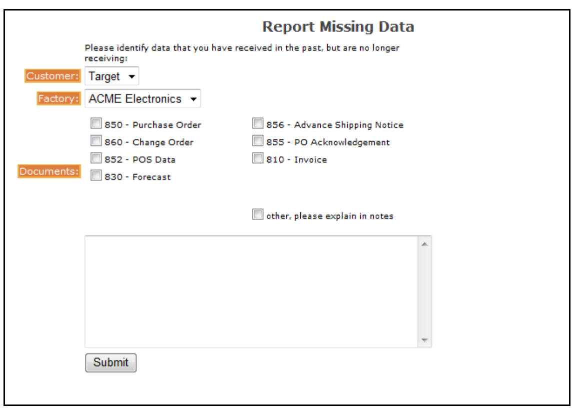


Figure 2: Missing Data Details

3) An email similar to email #4 is sent.

Request Original Data

This form is to be used to request to trade original EDI with a customer or factory. Typically you will be acting as a factory and would like to receive orders directly from the customer

To request original data:

1. Select **Request original data** from the **Trading Partners** menu shown in Figure 3.

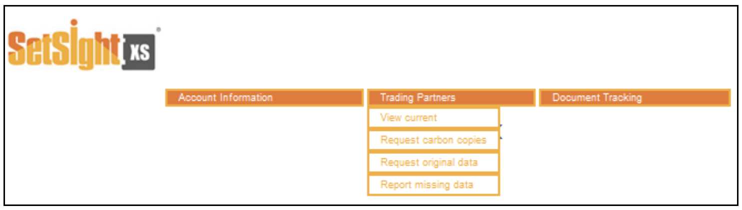


Figure 3: SetSightXS Menu Bar with Request original data Highlighted

2. Complete the form shown in Figure 4 with the information regarding the data you'd like to send/receive directly from a retailer.

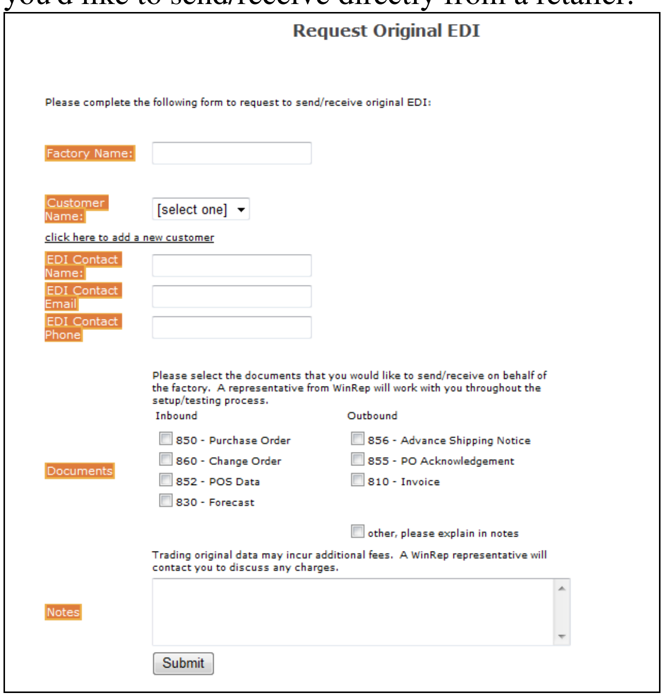


Figure 4: Request Original EDI Details

3. Click the **Submit** button to continue. A confirmation email will be sent similar to email #5.

Cancel Carbon Copies

This form is to be used when you no longer wish to received carbon copies of EDI documents.

To request that carbon copies be cancelled:

1. Select **Cancel carbon copies** from the **Trading Partners** menu as shown in figure 5.

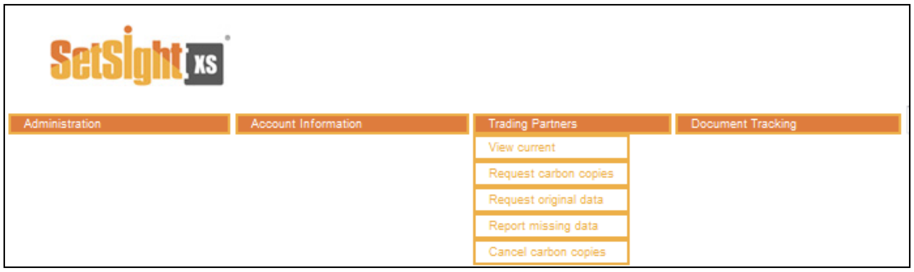


Figure 5: SetSightXS Menu Bar showing Cancel carbon copies on Trading Partners menu

2. Complete the form in figure 6 with the information about the data you no longer wish to receive.

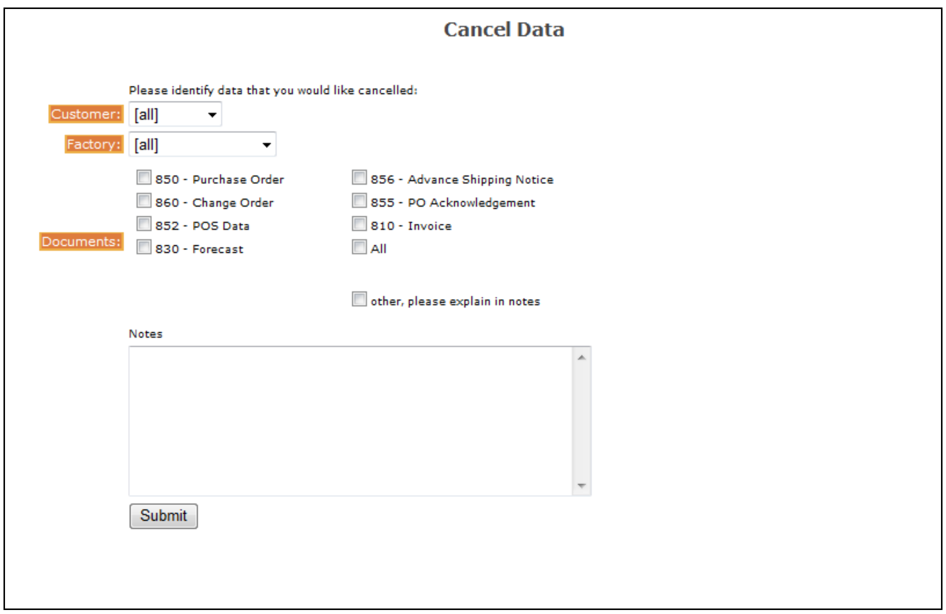


Figure 5: SetSightXS form to be completed to cancel carbon copies

3. Click the submit button. You will receive an email similar to email #6.

Repost data

Follow these steps when you need to have data imported to WinRep again. This is commonly used when a PO was manually changed and you need to revert back to what was submitted via EDI.

1. Locate the data you want to repost by using document tracking or by searching for a reference number.
2. Click the GS# for the document you are interested in
3. You will now see list of all transactions (ST's) in that GS
4. You can either repost one ST or all the ST's in the GS
    a. To repost one ST, click the select link to display the full text of the ST and then click the repost link in the upper right
    b. To repost all the ST's in the GS; click the repost link in the upper right without any ST's selected and viewable on the screen. To unselect all ST's you will need to go back a page and start again.
5. Click Ok to confirm repost
6. The reposted data will be processed and viewable in WinRep in about 15 minutes

Email Samples

SetSightXS send out emails similar to the following five samples.

Email 1 – New account activation

> Your SetSightXS account activation complete.
>
> Your SetSightXS account has been activated and you may login using the user name and password you selected.
>
> http://www.SetSightXS.com
>
> Thanks,
>
> WinRep Support

Email 2 – Supplier introduction

> Dear [Supplier],

In an effort to allow us to spend more time selling your products, we're implementing an EDI information system provided by WinRep Software. With this software, our administrative tasks can be streamlined by capturing copies of the EDI documents you trade/will be trading with your customers.

- We will be aware that solicited orders have been received correctly on a daily basis. This will prevent missing orders that buyers may have forgotten to place.
- We will be able to do our own Order Tracking, which will give relief to your Customer Service department.
- We can run custom MIS reports at any level of detail to be used as selling tools.
- We will be able to provide our Store Reps with immediate PO details, allowing them to locate orders at the store level and get product to the sales floor more quickly.

In order to proceed, I need only three things from you:

1. Your okay
2. An EDI contact person's name, number & Email address
3. The name of the VAN you use and your EDI Qualifier/ID.

A representative from WinRep will be working with your EDI contact to get copies in place.

Thank you for your cooperation as we get started using WinRep Software.

Sincerely,

Email 3 – Carbon copy request

Your EDI request has been received by WinRep. We will contact you with any questions we may have during the setup process. Please keep in mind that this typically takes 5-10 business days to complete.

--------------Submitted request--------------

New EDI Request from Excellent Reps
User: todd
Email: todd@winrep.com
Customer: Office Depot - 08:ODEP001

Factory: ACME Electronics

Contact name: John Freedman
Contact email: JFreedman@acme.com
Contact phone: 456-823-4200

Qualifier: 12
ID: 4568234972
VAN: Sterling

Data expected: Weekly

Documents:
850
860
852
810

Email 4 – Report missing data

Your EDI request has been received by WinRep. We will contact you with any questions we may have as we prepare for testing.

--------------Submitted request--------------

Client: Excellent Reps
User: todd
Email: todd@winrep.com
Customer: Best Buy A
Factory: Abcron

Docs:

Email 5 – Request original data

Your EDI request has been received by WinRep. We will contact you with any questions we may have as we prepare for testing.

--------------Submitted request--------------

New Original EDI Request from Excellent Reps

Factory: ACME

Customer: Office Max - 14:185122629OMX
Contact name: Joe Smith
Contact email: jsmith@acme.com
Contact phone: 123-456-7890

Documents:
850
860
810
856

Notes:

Email 6 – Cancel carbon copies

Your EDI request has been received by WinRep. We will contact you with any questions we may have.

--------------Submitted request--------------

Cancel EDI Request from Excellent Reps

Factory: ACME

Customer: Office Max - 14:185122629OMX
Contact name: Joe Smith
Contact email: jsmith@acme.com
Contact phone: 123-456-7890

Documents:
850
860
810
856

Notes:

Trading Partners – View Current

To view details about each of your existing trading partners select *View current* from the *Trading Partners* menu. This will give you a list of the trading partners that you are setup to trade EDI with. There are three filters at the top of the page to help you locate a particular trading partner.

- VAN – Displays all trading partners that use the selected VAN
- Role – Filters the list by role as a customer or factory
- Active – Displays only active or inactive trading partners

The filters always default to *[all]*.

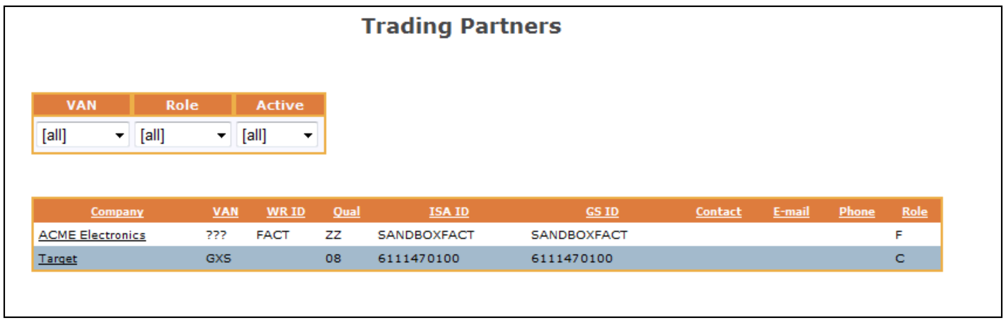


Figure 1: Trading Partners View

You can click on the company name to view more details about that particular trading partner. Here you will also see a list of document specific relationships that are setup for that trading partner. In this example Widget America is setup to receive 850's, 852's and 997's from Best Buy. This does not mean that we will receive those documents, only that if they are sent to WinRep, we will process them automatically. Typically these relationships are not setup until after the first document has been received for a given relationship.

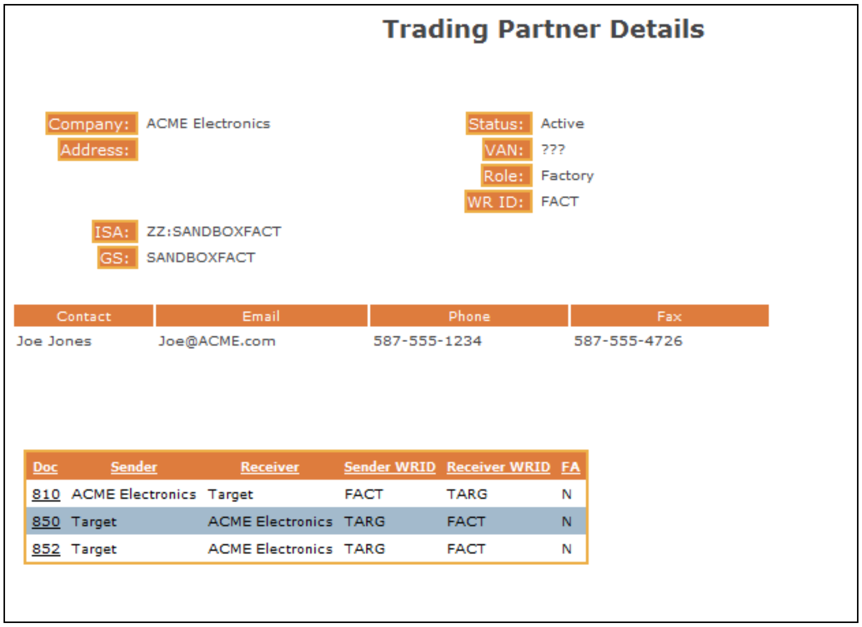


Figure 2: Trading Partners View Screen

Document Tracking – View Data

Clicking 'View data' from the 'Document Tracking' menu will bring you to a screen that displays a listing of documents that you have received. This can be useful if you need to see if a particular document has been received or when it was received. There is a set of filters that can help you narrow in on the data you are looking for.

- Sender – Lists all trading partners, choose the sender of the document.
- Receiver – Lists all trading partners, choose the receiver of the document.
- Doc Type – Choose the type of document you are looking for.
- File Name – There are many different naming conventions in use, and here you can enter all or part of the file name.
- Batch # – Unique number to identify the data internally to WinRep.
- Date Range – Enter a date range to filter based on the date that WinRep received the file.

You may choose to use any combination of filters, or leave them blank to view all data. The most commonly used filters are the Sender/Receiver and Date Range. You may find more information about a file by clicking any of the hyperlinks in the table.

Document Tracking – Find Reference Number

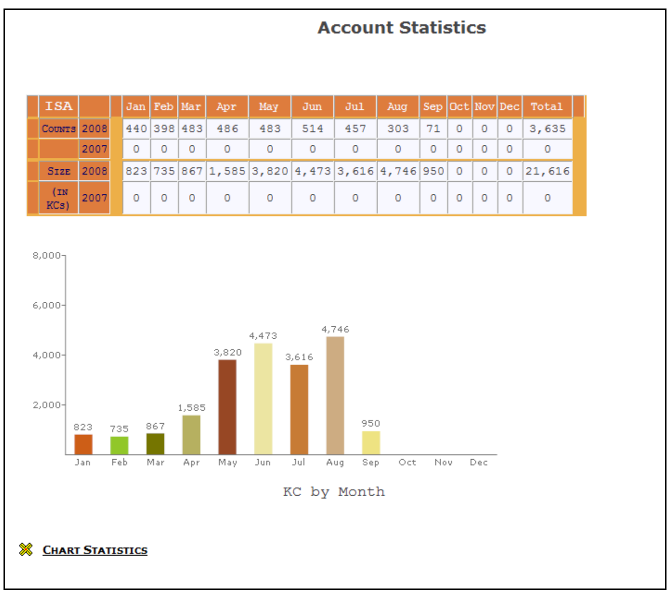
Clicking *Find reference number* from the **Document Tracking** menu allows you to search for a file based on a reference number in the file. The reference number varies based on the document type, but it includes both the PO number and Invoice number.

Document Tracking – Find exchange ID

Clicking *Find exchange ID* from the **Document Tracking** menu allows you to search for a trading partner based on their EDI ID.

Account Information – Data statistics

Clicking *Data statistics* from the **Account Information** menu displays a page that shows and overview of your data usage for the past two years. The table at the top shows usage in *Counts* and *Size* referring to the number of individual files and the total size of all the files respectively. The chart at the bottom displays usage in KiloCharacters for the current year.


Account Statistics

ISA		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
Counts	2008	440	398	483	486	483	514	457	303	71	0	0	0	3,635
	2007	0	0	0	0	0	0	0	0	0	0	0	0	0
Size	2008	823	735	867	1,585	3,820	4,473	3,616	4,746	950	0	0	0	21,616
(in KCs)	2007	0	0	0	0	0	0	0	0	0	0	0	0	0

Figure 3: KiloCharacters Monthly Totals Account Statistics View

To view more detailed information click *Chart Statistics* at the bottom of the page.

On this page you can filter the charts based on Customer/Factory and Month/Year. The totals are given in KiloCharacters, however they do not include the data from the ISA envelope so the sizes will be slightly smaller than the data on the previous page. This is typically an insignificant size of about 0.1 KC per file.

WinRep does routinely archive the data stored in SetSightXS, for this reason historical data may be limited at times. Make sure you look at the **Document Types** under the chart on Figure 4.

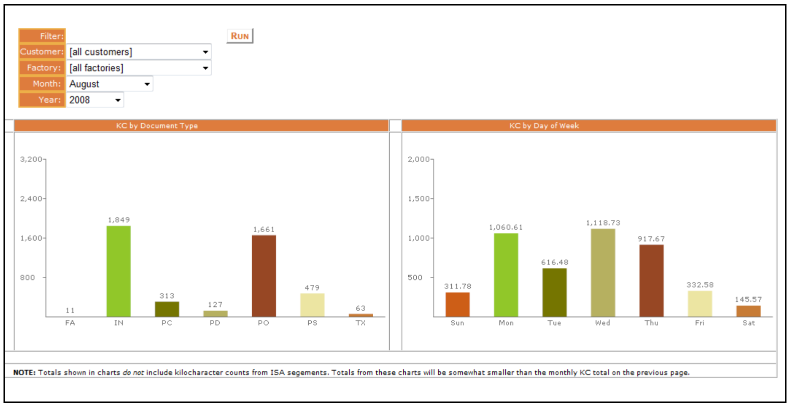


Figure 4: Trading Partner Statistics View

Document Types

Document # - Document Code – Description

Common Documents

810 – IN – Invoice

830 – PS – Planning Schedule (Forecast)

850 – PO – Purchase Order

852 – PD – Product Activity Data

855 – PR – Purchase Order Acknowledgment

856 – SH – Ship Notice/Manifest

860 – PC – Purchase Order Change

864 – TX – Text Message

875 – OG – Grocery Product Purchase Order

880 – GP – Grocery Products Invoice

997 – FA – Functional Acknowledgment

Other Documents

812 – CD – Credit/Debit Adjustment

816 – OR – Organizational Relationships

820 – RA – Payment Order/Remittance Advice

824 – AG – Application Advice

832 – SC – Price/Sales Catalog

846 – IB - Inventory Inquiry/Advice

861 – RC – Receiving Advice/Acceptance Certificate

865 – CA – Purchase Order Change Acknowledgment

889 – QG – Promotion Announcement