

BatchMaster Web – SPS Commerce

EDI Integration User Guide

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About the Manual

Purpose of the Manual

This user guide provides instructions for using BatchMaster Enterprise. The scope of the document is limited to training users on how various BatchMaster modules are inter-related, the purpose of various BatchMaster screens, and the procedural steps to maintain them. The training objective is to help the user get hands-on experience of how BatchMaster Enterprise functions.

This document aids as a hand-out during training and as an introduction to other manuals. It is not as descriptive as other accompanying manuals, but it is packed with necessary and important information that is required for someone to use BatchMaster Enterprise as a new user.

We designed the user guide based on experience obtained from numerous training sessions. This document aims to strengthen user knowledge on the functioning of BatchMaster Enterprise.

Target Audience

This document is intended for a vast group of people which may include Trainers, VARs, Customers, and even BatchMaster employees who are undergoing BatchMaster training. We hope it will be of immense use as a conceptual guide for Trainers, as a resource material for VARs and customers, and as a reference guide for existing BatchMaster Users and employees.

Organization

The user guide is organized module-wise to reduce bulkiness and enhance usability. Each module contains an overview of the module, concepts you must know before you begin using the module, an overview or purpose of the screen, how to maintain data in the screen, Key Points, and FAQs. Examples have been included to help you understand the logic better and maintain data quickly.

Symbols & Conventions

Symbol	Description
	Note
	Mandatory setting
	Tips

Convention	Description
Italicized (Sales Order Entry)	Module name, screen name & components
“ ” (“BatchMaster Web Accounting Guide”)	Reference document

Abbreviation	Description
API	Application Programming Interface
EDI	Electronic Data Interchange
PO	Purchase Order
SPS	St. Paul Software
ASN	Advance Ship Notice
JSON	JavaScript Object Notation

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1 Overview

SPS Commerce is a leading provider of cloud-based supply chain management solutions, enabling businesses to streamline their operations and improve efficiency. Integrating SPS with BatchMaster Web can significantly enhance the overall supply chain process.

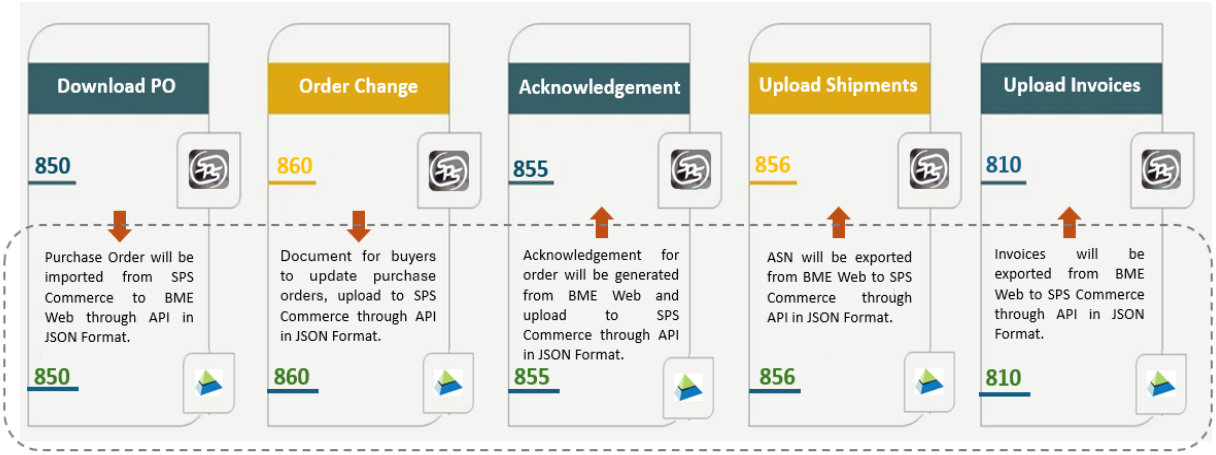
2 What is this document all about?

This document outlines the integration basics, prerequisites, required to automate the integration. It also details how data to SPS Commerce can be uploaded from BatchMaster Web during various transactions, such as Invoice and shipment.

2.1 What is integration?

Integration is the procedure of linking and syncing ERP system with added business applications to create a simplified experience for catching, tracing, and examining real-time data to and from ERP-business applications. The process of creating customers and sales orders is strategic from the point of view of sales and can involve numerous checkpoints. The purpose of the BatchMaster Web- SPS Commerce Integration User Guide is to build an understanding of concepts and establish guidelines for the use of those checkpoints.

2.2 SPS Commerce Integration with BatchMaster Web



Download PO (850): An EDI 850 is an electronic document that buyers use to transmit purchase order information to sellers. It contains essential details such as item numbers, quantities, prices, shipping addresses, and delivery dates. By using EDI 850, businesses can streamline the ordering process and reduce manual data entry errors.

Order Change (860): An EDI 860 is a digital document that buyers use to communicate changes to an existing purchase order. These changes can include quantity adjustments, price modifications, shipping updates, or even cancellations. By using EDI 860, both buyers and sellers can align on the revised terms, improving efficiency and reducing potential disputes.

Order Acknowledgment (855): An EDI 855 Purchase Order Acknowledgment is a digital document that vendors use to respond to a customer's purchase order. It indicates whether the vendor can fulfill the order as requested, needs to make adjustments due to inventory shortages or other discrepancies, or must decline the order. This document is crucial for maintaining open communication between buyers and sellers, particularly in providing timely updates on delivery information for direct-to-consumer shipments.

Upload Shipment (856): An EDI 856 is an electronic document that suppliers use to notify distributors or retailers about a shipment. It provides specific information such as the items included in the shipment, their quantities, the shipping carrier, the shipment date, and the estimated delivery date

Upload Invoices (810): An EDI 810 is an electronic invoice that sellers use to bill buyers for products or services they have delivered. It provides detailed information about the items purchased, quantities, prices, and taxes.

2.3 BatchMaster Web & SPS Commerce Integration Workflow



2.3.1 Processing Workflow in BME Web

1. **Download Purchase Order (EDI 850) Received** – The customer sends an EDI 850 Purchase Order to the Mailbox. This document contains item details, quantities, pricing, and shipping information, allowing businesses to streamline the ordering process.
2. **PO Sent to Merchant** – The Mailbox forwards the EDI 850 PO to the Merchant, initiating the order processing workflow.
3. **PO Exported to SPS Integration Manager (Includes EDI 860 & 855)** – The Merchant sends the EDI 850 PO to the BME SPS Integration Manager. If there are any Order Changes (EDI 860), such as quantity adjustments, price modifications, or cancellations, they are processed at this stage. Additionally, the Order Acknowledgment (EDI 855) is generated to confirm the order acceptance or any required modifications.
4. **Order Data Transferred to BME Web** – The BME SPS Integration Manager transmits the confirmed Sales Order (SO) to BME Web SO Entry, ensuring the order is processed accurately.
5. **Sales Order Available in BME Web** – The Sales Order is now available in the BME Web SO Entry screen for further processing.
6. **Picking, Packing, and Labeling** – The ordered items are picked, packed, and labeled in BME Web, preparing them for shipment.
7. **Shipment Recorded in BME Web** – The shipment details are updated and maintained in BME Web, ensuring proper tracking.

8. **Advance Shipping Notice (EDI 856) Generated** – BME Web generates an EDI 856 ASN (Advance Shipping Notice), which includes shipment details such as item list, carrier information, shipment date, and estimated delivery time. This document is then transferred to SPS for customer notification.
9. **Invoice Generated in BME Web** – Once the shipment is completed, an invoice is generated in BME Web for billing purposes.
10. **Invoice Sent to SPS Integration Manager (EDI 810)** – The invoice is transmitted to the BME SPS Integration Manager as an EDI 810 Invoice, containing item details, pricing, taxes, and total amount due.
11. **Invoice Exported to Merchant** – The invoice from SPS Integration Manager is exported to the Merchant, ensuring that billing details are properly managed.
12. **Invoice Sent to Mailbox** – The Merchant sends the final EDI 810 Invoice to the Mailbox, completing the order lifecycle.

2.4 Data Synchronization

When SPS Commerce is integrated with BatchMaster Web, it creates a seamless flow of data between the two systems, automating many manual processes and improving overall efficiency. Here's a simplified breakdown of the information flow:

1. **Order Creation in SPS Commerce:**

   A Purchase Order (PO) is created in the SPS Commerce system. The PO is translated into the required EDI format (e.g., 850). SPS Commerce securely transmits the EDI 850 to the trading partner's system.

2. **Data Processing in BatchMaster Web:**

   The SPS Commerce sends the PO data to BatchMaster Web via API in JSON Format. BatchMaster Web import the PO data and validates it against predefined rules. The data is mapped to the appropriate format for the specific trading partner.

3. **Acknowledgment and Processing by BatchMaster Web:**

   The BatchMaster Web receives the EDI 850, processes it, and sends an acknowledgment (EDI 855) back to SPS Commerce via API in JSON Format.

4. **Acknowledgment and Update in SPS Commerce:**

   SPS Commerce receives the EDI 855, validates it, and updates the order status in its system.

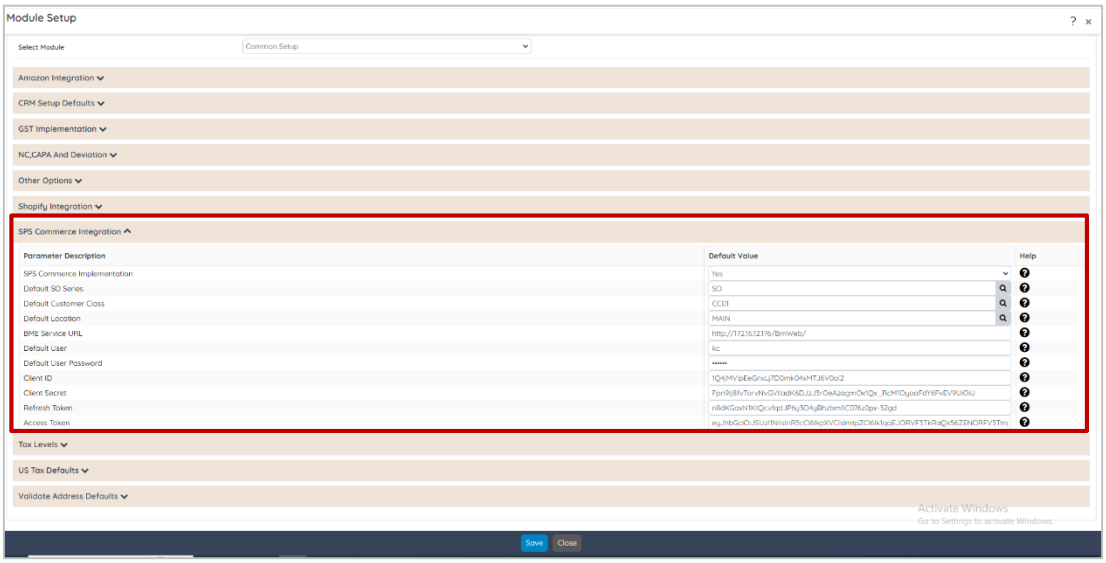
5. **Notification to BatchMaster Web:**

SPS Commerce sends a notification or updates the order status in the BatchMaster Web, indicating the order has been acknowledged.

3 BatchMaster Web - Module Setup Screen

To integrate BatchMaster Web with SPS Commerce, you need to maintain various defaults on the *Common Setup* option under the *SPS Commerce Integration* section.

GoTo: Configuration → Module Setup → Common Setup.



SPS Commerce Integration Fields:

SPS Commerce Implementation: This parameter decides whether you want to integrate BatchMaster Web with SPS Commerce or not.

Default SO Series: The series type specified here is used for creating a sales order in SPS Commerce.

Default Customer Class: If the Customer Class is not present with the record that is to be uploaded or downloaded, the system will utilize this customer class to upload and download the BatchMaster Web and SPS Commerce data.

Default Location: Specify the default location of the BatchMaster Web where the Sales Orders are downloaded from the SPS Commerce.

BME Service URL: Refers to a URL (Uniform Resource Locator) that is used to access or interact with BatchMaster Web Service or API (Application Programming Interface). The URL typically points to the location where the service can be accessed on the internet.

Default User: Specify the User ID of the user who is authorized for uploading and downloading the BatchMaster Web and SPS Commerce data.

Default User Password: Specify the password of the *Default User* (as specified above) who is authorized for uploading and downloading the BatchMaster Web and SPS Commerce data.

Client ID and Client Secret are unique credentials obtained from SPS Commerce when you create an application in their developer portal. They are essential for authenticating the connection between BatchMaster and SPS Commerce.

Client ID: The unique identifier assigned to your application by SPS Commerce when the integration is set up. It is used to authenticate the BME Web system with SPS Commerce. This field is essential for initiating the connection with SPS Commerce.

Client Secret: A confidential key provided by SPS Commerce that is used along with the Client ID to authenticate your application. It should be kept secure, as it provides access to sensitive data.

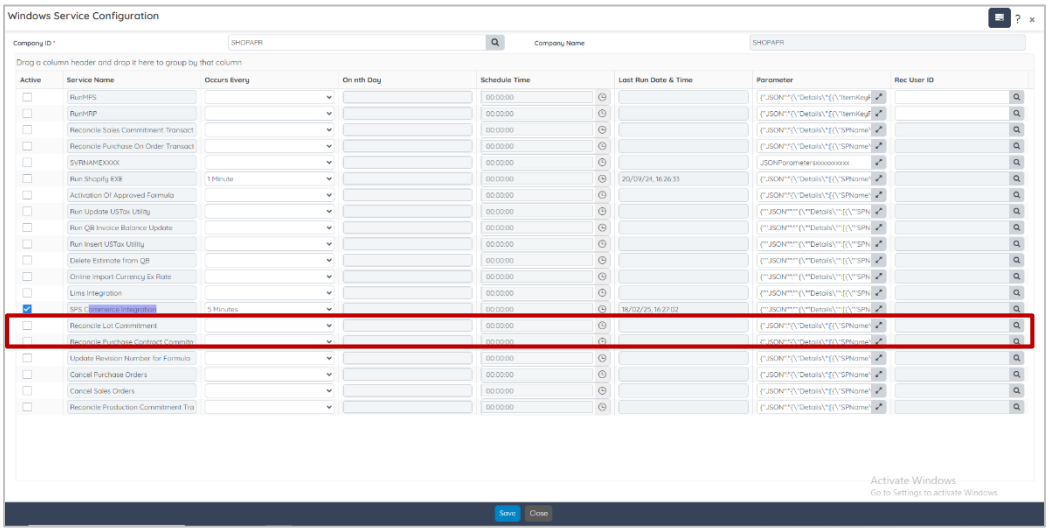
Refresh Token: This token allows the system to request a new access token once the previous one expires. It ensures continuous connectivity with SPS Commerce without requiring the user to manually re-authenticate frequently.

Access Token: The access token is used to authenticate API requests between BME Web and SPS Commerce. It is granted upon successful authentication using the Client ID and Client Secret. This token typically expires after a certain period, requiring renewal through the refresh token.

4 Windows Service Configuration

Use *Windows Service Configuration* screen to set the *SPS Commerce Integration* service as active and its runtime frequency for the selected BatchMaster Web Company.

Go To: Admin → System Setup → Windows Service Configuration.



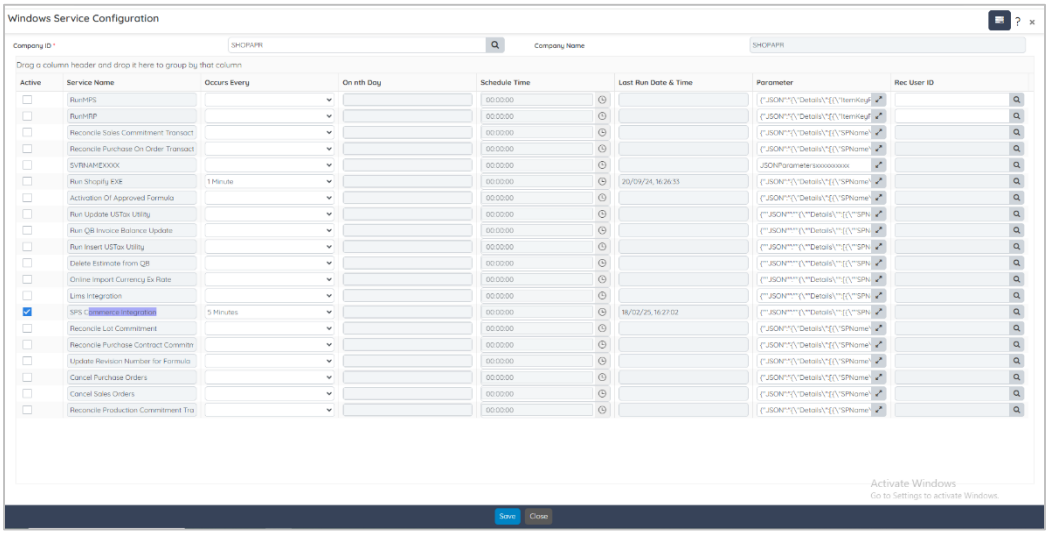
4.1 Windows Service Configuration Screen

1. Open the *Windows Service Configuration* screen from the BatchMaster Web Administration Module.

2. Select a BatchMaster Web company using the lookup next to the *Company ID* field.

3. Once selected, the system populates grid fields with the services and its details.

4. Mark the *Active* checkbox for the *SPS Commerce Integration* service.



5. Select one of the duration for which you want the system to auto-run the selected *SPS Commerce Integration* service. The available option in the *Occurs Every* dropdown are:

    - 1 Minute

- 5 Minutes
- 1 Hour
- 5 Hours
- Day
- Week
- Month
- Quarter
- Year

6. Click the *Save* button to save the SPS Commerce Integration service.