

B2B Solutions and Services Broker

WebForms generic usage

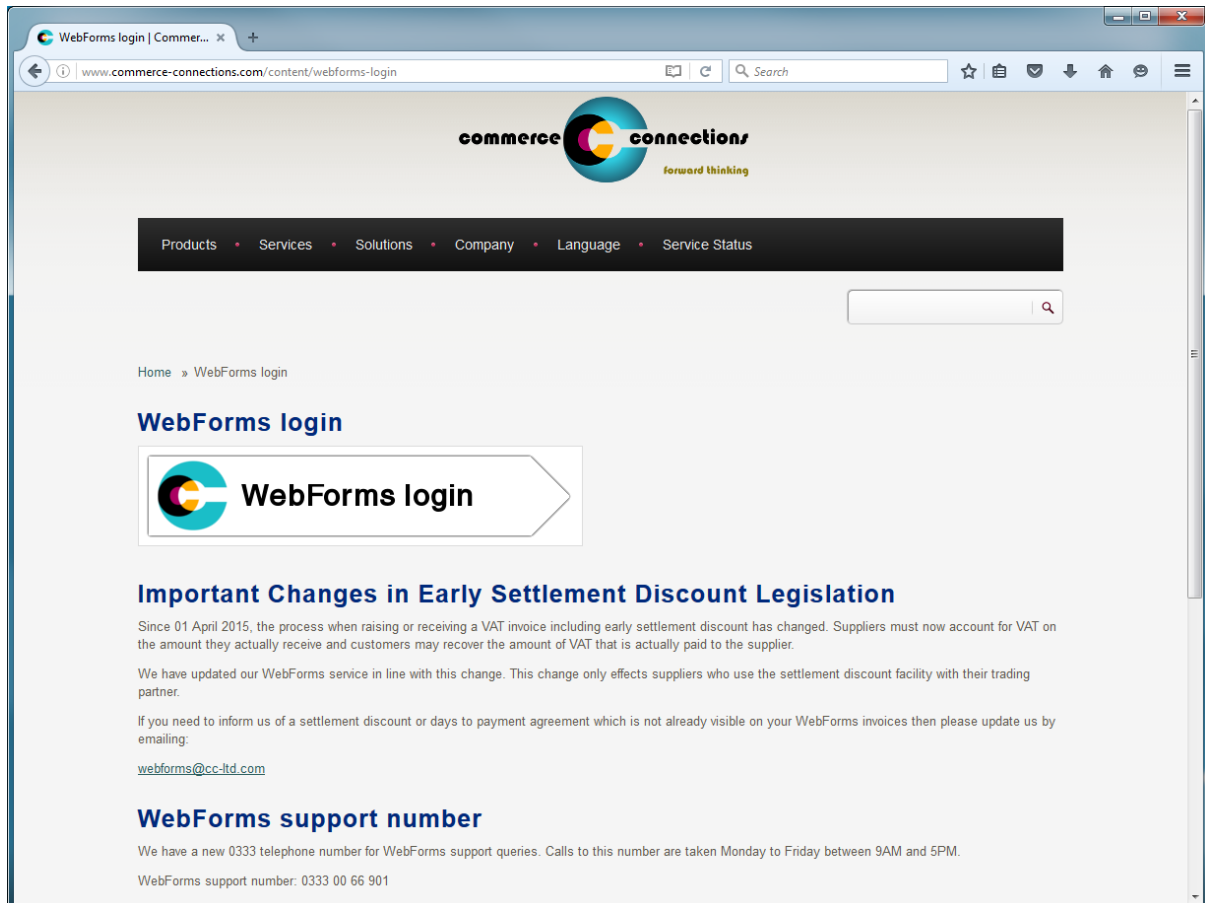
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Logging in to WebForms

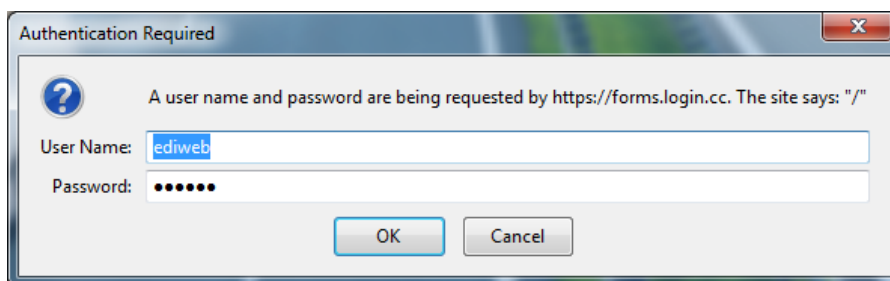
To login to WebForms you will need to navigate to the Commerce-Connections website:

<http://www.commerce-connections.com/content/webforms-login>

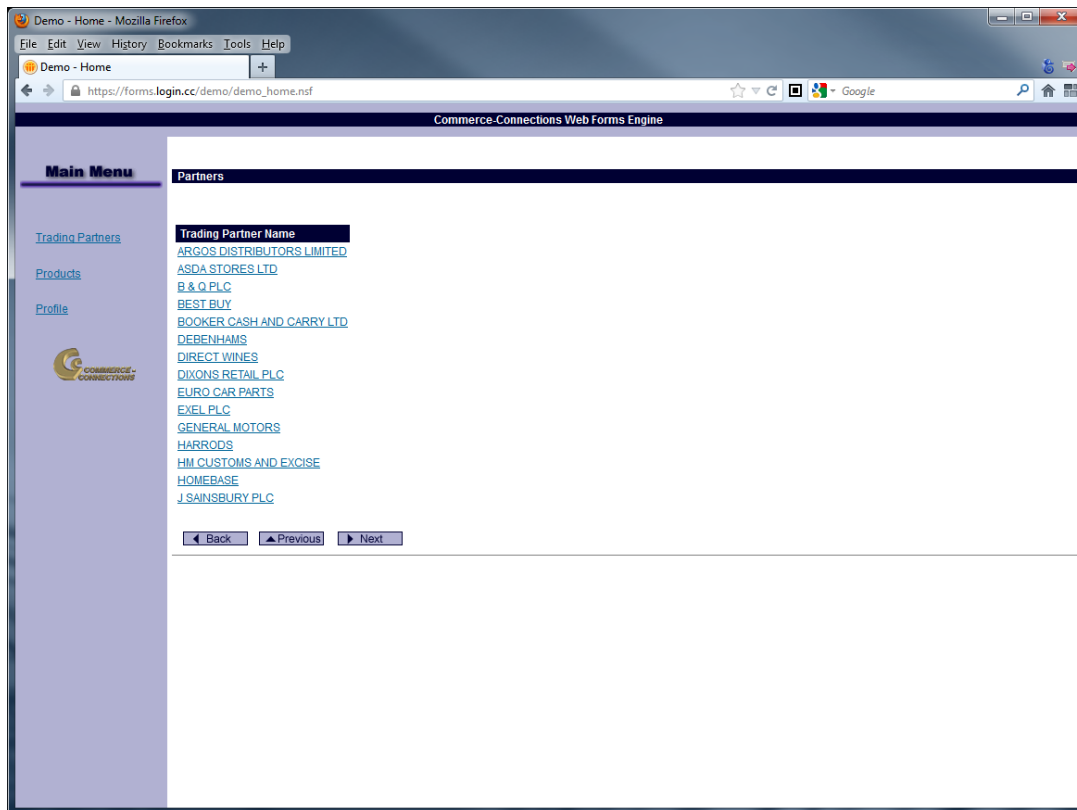


From here you will need to click on the “WebForms Login” button to bring up the login window.

You will now be prompted to enter your login details:



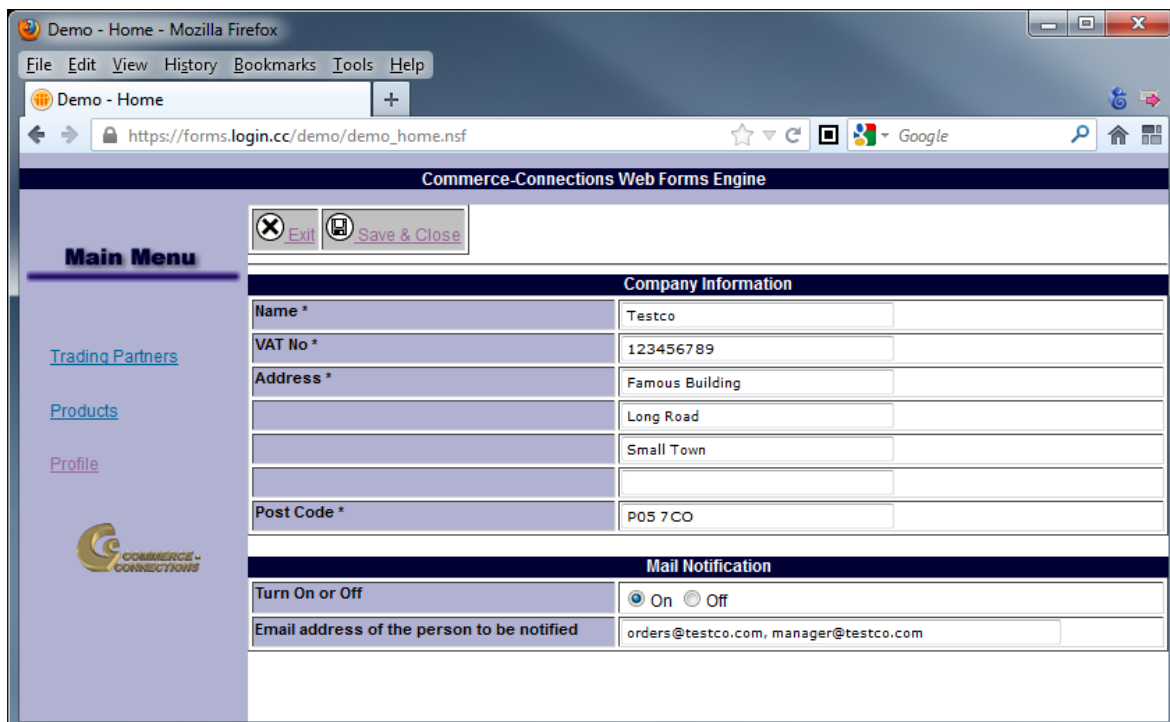
These will have been provided to you via email. Please note that these fields are case sensitive. If your login does not appear to work, try typing the details in as opposed to copying and pasting them. If you are still having difficulty then please do not hesitate to contact us.



Once you are logged in you should see a screen similar to this. In the image above, multiple trading partners have previously been added to this account. Usually when first logging in to your WebForms account, only one trading partner will be visible unless otherwise requested.

Filling in the profile

It is important to fill in the WebForms profile with your company information. To access the profile from the home screen, click on the profile link in the menu on the left.



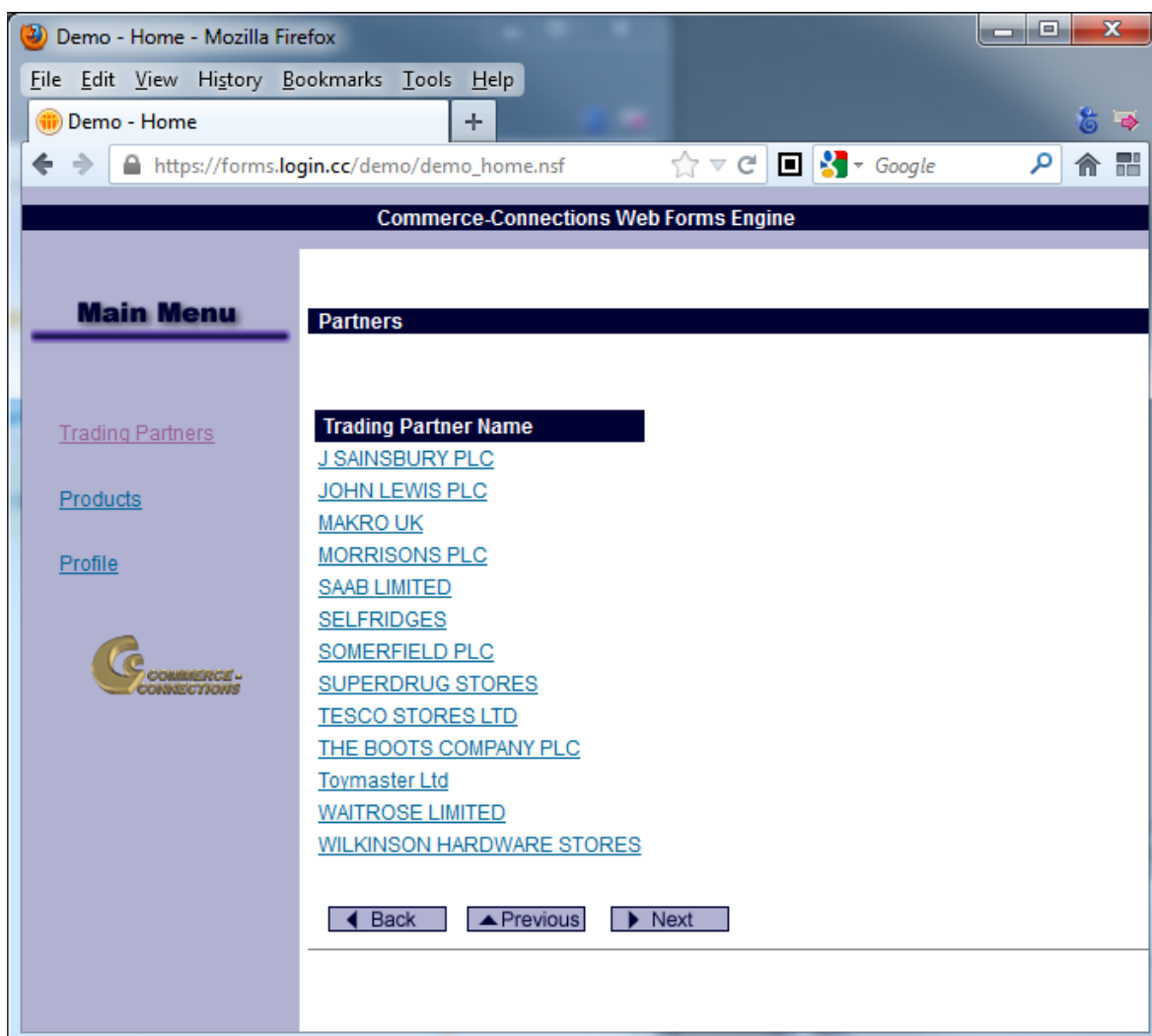
The company name, VAT No and address must be filled in to match the information given to your buyer.

The VAT code may require a country prefix in some circumstances. This is best agreed between you and the buyer.

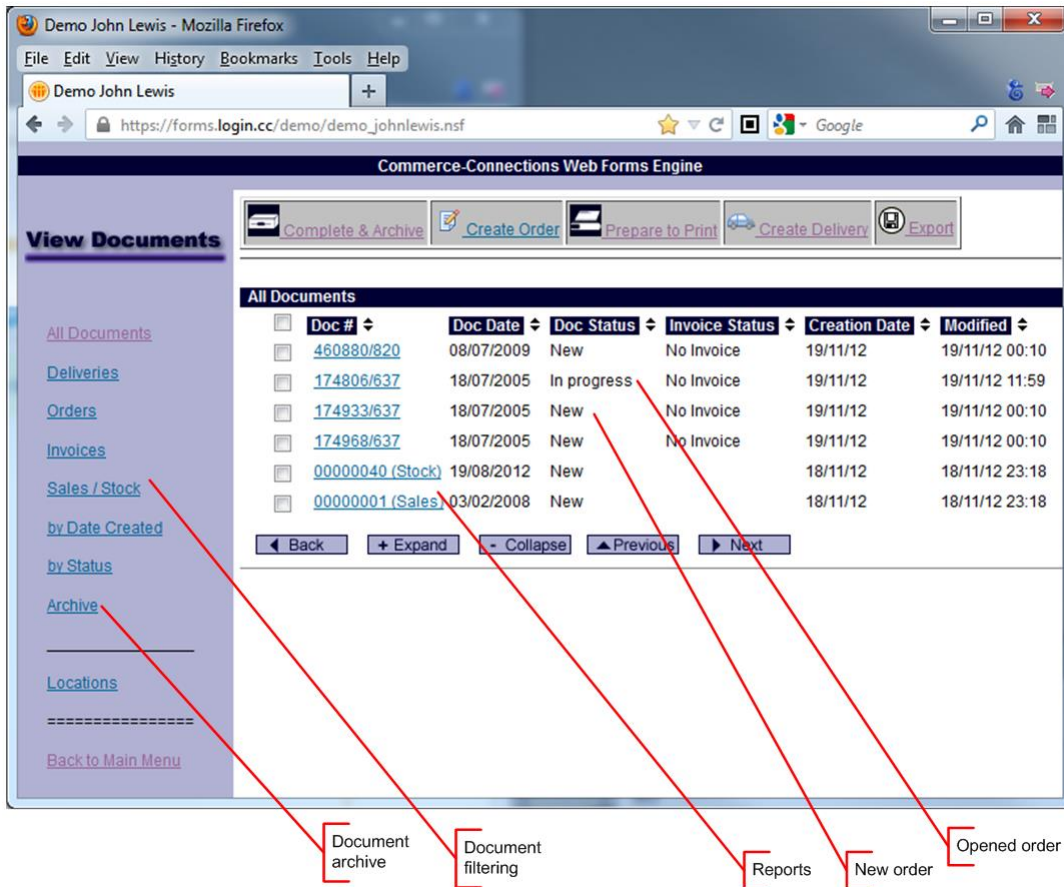
You will most likely want to enable to mail notification option by selecting the 'On' option. Below you can specify a single or multiple email addresses. When adding more than one email address each entry must be separated by a comma and a space.

Viewing an order

To view orders from a trading partner, click on the 'Trading Partners' option in the menu and select the relevant trading partner. Now you can click on any trading partner in the list.



From here a list of EDI documents from your trading partner will be displayed.



Document selection



Printing a document

To print a single document or a batch of documents from the all documents view, first select the checkboxes to the immediate left of the documents that you want to print. Then click on the 'Prepare to Print' option.

Exporting a document

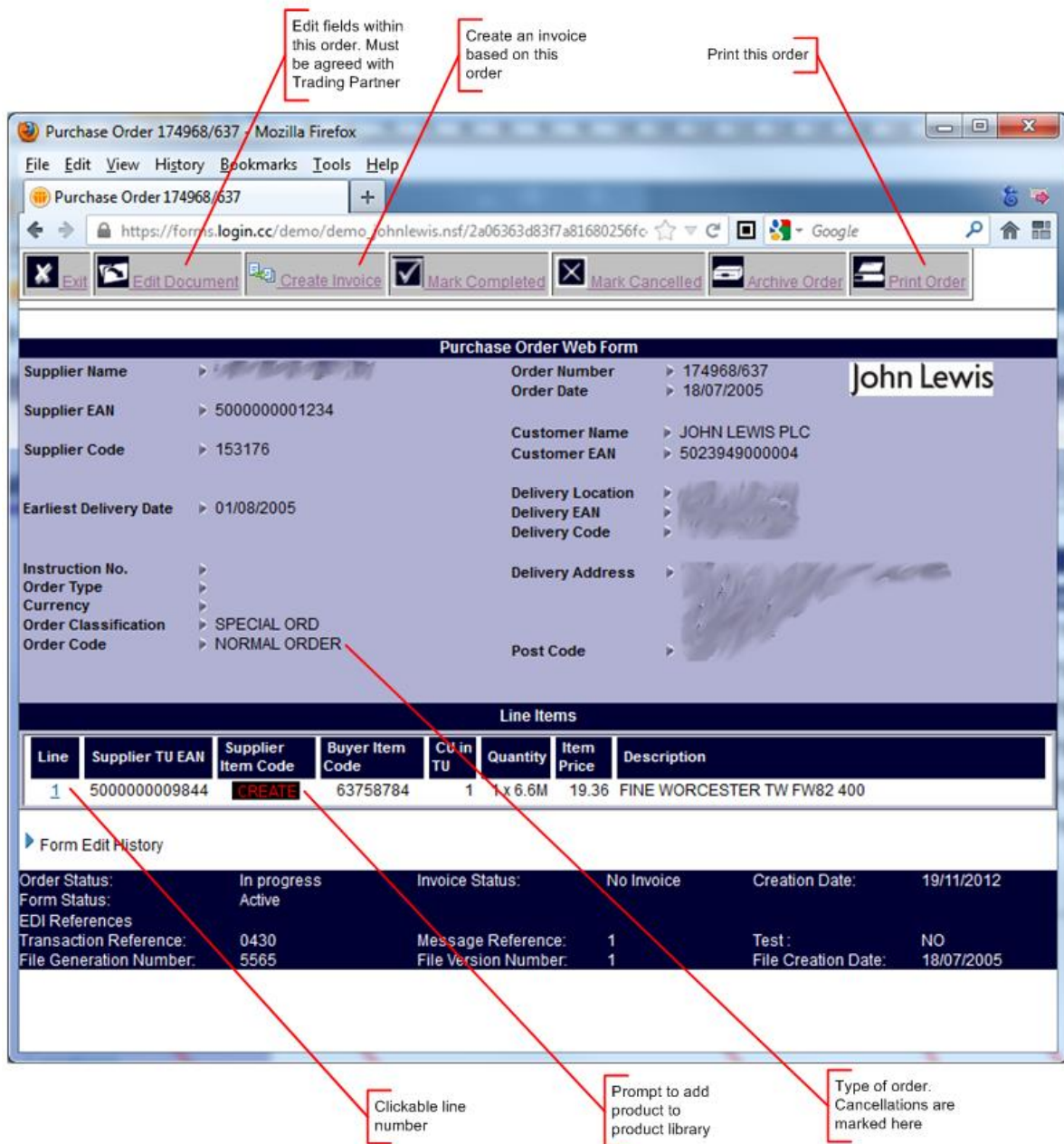
To export a single document or a batch of documents from the all documents view, first select the checkboxes to the immediate left of the documents that you want to export. Then click on the 'Export' option.

Opening an order

To open an order in the list, simply click on the order number

Viewing order details

When opening an order the below screen is show:



In this instance, the order is a normal order as opposed to a cancellation and it is for 1 line item. Not all of the details for this line item have been filled in by the buyer, as indicated by the missing entry where the supplier item code would normally be. In addition to this, the 'Create' text indicates that this product does not exist in the WebForms product library and will need to be created before continuing.

Creating a product based on an order line item

If a line item has the text 'Create' listed under any of the columns, this indicates that this product is not already listed under the WebForms product library. To create a product entry based on the information provided in the order, first click on the line number for the item to be created.

The following popup will be displayed for the selected line item:

Purchase Order Line Item Web Form	
Line #	1
Supplier Product EAN	0777777251232
Supplier EAN CU	
Supplier Item Code	
Customer Item Code	705590
CU in Traded Unit	12
Quantity	1
Unit Measure and Measure Indicator	
Item Price ex VAT	23.28
Extended Line Cost ex VAT	23.28
VAT Code	S - 20 %
Article Description	PRODUCT 150ML F/F
Remarks	

This is all of the information provided for this line. To create a product based on this information, click on the 'Create Product' option. The popup will change to show the below edit fields.

Product Web Form	
Supplier Item Code *	
Item EAN Code	0777777251232
Customer Item Code	705590
Consumer Units in Traded Unit	12
Item Price ex VAT *	23.28 per item
VAT Code	S - 20 %
Article Description	PRODUCT 150ML F/F
Measure Unit and Measure Indicator	
Product associated with	All Partners

In this example, the only field that is marked as mandatory (*) and not filled in is the 'Supplier Item Code'. This should be filled in with your own item code for this product. If you do not have your own supplier item codes then the 'Customer Item Code' can be copied to this field. These codes must be unique and not appear in the product library more than once.

There is an additional option of 'Product associated with' which is set to 'All partners' by default. With this setting, if any additional trading partners are added to your WebForms account, the these product details will be available to all of the trading partners. If you would rather that this instance of the product was unique to this trading partner, for instance, if each trading partner has a different item price for the same product, then this value can be set to the current trading partner name.

This is also a good opportunity for you to check that the value provided by your Trading Partner are correct. If any of the values need to be amended then the buyer will need to be contacted and their own product library will need to be updated as well as yours.

Once all of the details have been checked and filled in, click on the 'Save & Close' option. The product will be added to your WebForms product library and the order will update to show the information that was previously omitted at line item level.

Bulk import more than 50 products

If there are more than 50 products to be added to your WebForms product library then please email the Commerce-Connections support staff who will provide an Excel template that can be used to fill in the product details before being imported into your account.

Advance Shipping Notice (ASN)

From the all documents view, select the orders that would you like to create an advance shipping notice for.

The below screen will be displayed listing each line item from all of the orders.

Exit
 Delete
 Save Draft & Close
 Submit Now

Please don't forget to press 'Save & Close' if you change something in this document

Shipping Note Web Form

Buyer Name	TESCO STORES LTD	Supplier Name	NEW VENTURES LTD	Document No.	(unassigned)
Buyer EAN	5000119000006	Supplier EAN	5065000714222	Document Date	07/12/2012
		Supplier Code	60032		
		Delivery Date	08/12/2012		
		Delivery Time	13:30		
		Shipment Type	Direct		
		Shipment Ref.			

Buyer HQ Address ▶ TESCO FINANCE SERVICES CENTRE, COMMERCIAL-PAYABLE DEPARTMENT, MAESYCOED ROAD, CARDIFF, CF14 4TT
 Supplier HQ Address ▶ BROOMLEY IND ESTATE, 11 LONDON ROAD, BROOMBERRY, BB1 2KK

Line Items

Ref #	Order No.	Order Date	Ship To	Item EAN No.	Buyer Item No.	Sup. Item No.	CU in TU	Quantity	Description
<input type="checkbox"/> 1	LM83541445003	28/05/09	5000119008350	05099999999960	3429999	FFF004	10	1	VENTURE PRODUCT 1
<input type="checkbox"/> 2	LM83541445003	28/05/09	5000119008350	05099999999939	3428888	FFF002	20	9	VENTURE PRODUCT 2

Add selected to
Pallet
No.
New

Packaging

Shipping Units / Packages					Grouped by ASN					
No.	ASN No.	Pack ID	Pack Type	Ref #	Quantity	ASN No.	Pack ID	Pack Type	No.	Packs

Delete selected
Update

As usual, most of the provided edit boxes are automatically filled in. However, you will need to add a shipping reference which will be display on each SSCC label, as well providing a document/ASN number.

Line Items									
Ref #	Order No.	Order Date	Ship To	Item EAN No.	Buyer Item No.	Sup. Item No.	CU in TU	Quantity	Description
<input type="checkbox"/> 1	LM83541445003	28/05/09	5000119008350	05099999999960	3429999	FFF004	10	<input type="text" value="1"/>	VENTURE PRODUCT 1
<input type="checkbox"/> 2	LM83541445003	28/05/09	5000119008350	05099999999939	3428888	FFF002	20	<input type="text" value="4"/>	VENTURE PRODUCT 2

Add selected to Pallet No. New

Shipping Units / Packages						Grouped by ASN				
No.	ASN No.	Pack ID	Pack Type	Ref #	Quantity	ASN No.	Pack ID	Pack Type	No.	Packs
1	89	050600999900001257	Pallet	<input type="checkbox"/> 2	<input type="text" value="4"/>	89	050600999900001257	Pallet	1	2
2	89	050600999900001264	Pallet	<input type="checkbox"/> 1	<input type="text" value="1"/>		050600999900001264	Pallet	2	

Delete selected Update

From here, a certain quantity of each line item can be added to its own pallet or container, or an existing one shared by another line item.

There is also the possibility of splitting a line item across multiple pallets or container by amending the quantity for the selected line.

Once you have distributed the line items across multiple pallets or containers, select the submit now button to send an ASN to the trading partner.

Creating Serial Shipping Container Codes (SSCC) to print

Once an ASN has been submitted, it can be open from the all documents view.



Shipping Note Web Form										
Buyer Name	TESCO STORES LTD		Supplier Name	NEW VENTURES LTD		Document No.	83			
Buyer EAN	5000119000006		Supplier EAN	5065000714222		Document Date	07/12/2012			
			Supplier Code	60032						
			Delivery Date	08/12/2012						
			Delivery Time	13:30						
			Shipment Type	Direct						
			Shipment Ref.	82						
Buyer HQ Address	TESCO FINANCE SERVICES CENTRE, COMMERCIAL-PAYABLE DEPARTMENT, MAESYCOED ROAD, CARDIFF, CF14 4TT									
Supplier HQ Address	BROOMLEY IND ESTATE, 11 LONDON ROAD, BROOMBERRY, BB1 2KK									

Line Items									
Ref #	Order No.	Order Date	Ship To	Item EAN No.	Buyer Item No.	Sup. Item No.	CU in TU	Quantity	Description
1	LM83541445003	28/05/09	5000119008350	05099999999960	3429999	FFF004	10	1	VENTURE PRODUCT 1
2	LM83541445003	28/05/09	5000119008350	05099999999939	3428888	FFF002	20	9	VENTURE PRODUCT 2

Shipping Units / Packages						Grouped by ASN				
No.	ASN No.	Pack ID	Pack Type	Ref #	Quantity	ASN No.	Pack ID	Pack Type	No.	Packs
1	88	050600999900001240	Pallet	Show		88	050600999900001240	Pallet	1	1

You will notice that there is also a 'PDF Label' option. Clicking on this will load a PDF containing the label or labels for each pallet or container to be printed and physically added to each one.

[Redacted]	
Customer	TESCO STORES LTD
Destination	5000119008350
Delivery Date	08/12/2012
SSCC Code	050600999900001240
Product Count	2
Product Quantity	10
Pallet 1 of 1	
 (00)050600999900001240	

Submitting an invoice from an order

Click on the 'Create Invoice' option of the an open order to show the invoice creation screen.

Exit
Save Draft Invoice & Close
Submit Invoice Now

Buyer Name > JOHN LEWIS PLC

Buyer EAN > 5023949000004

Buyer VAT > 000000000

Delivery Loc. Name > JOHN LEWIS SOUTHAMPTON

Delivery Loc. EAN > 5023949460563

Delivery Loc. Code > SOUTHAMPTON

Supplier's Loc. Code > [Redacted]

Delivery Address > UNIT 1A
CITY INDUSTRIAL PARK
WEST QUAY ROAD
SOUTHAMPTON

Post Code > SO15 1GY

Buyer HQ Address > [Redacted]

Supplier HQ Address > [Redacted]

Supplier Name > [Redacted]

Supplier EAN > 5000000001234

Supplier Code > [Redacted]

Supplier VAT > [Redacted]

Order Number > 174933/637

Order Date > 18/07/2005

Delivery Note No. > test01

Delivery Note Date > 01/08/2005

Goods Receipt No. > [Redacted]

Goods Rcpt Date > 01/08/2005

Invoice Number > test01

Invoice Date > 19/11/2012

Tax Date > 19/11/2012

Payment Terms > Pay by specified date

Payment Date > 19/12/2012

Days to Payment > 30

Settlement Disc. % > 0

Currency > GBP

Line Items

Line	Supplier TU EAN	Supplier Item Code	Buyer Item Code	CU in TU	Quantity	Item Price	Line Price	VAT %	Description
1	5000000000070	TEST1	63758704	1	1 x 9.9M	19.36	191.66	20	FINE WORCESTER TW FW04 400

Totals

Total Net Amount (ex. VAT)	191.66
Total VAT Amount	38.33
Total Invoice Amount (incl. VAT)	229.99

VAT Summary

Code	%	Lines	Total Net	VAT Amount	Total
S	20.0	1	191.66	38.33	229.99

Form Status: Active **Invoice Status:** No Invoice **Created On:** 19/11/2012

File Generation Number: unknown **File Version Number:** unknown **File Creation Date:**

Delivery details

Invoice details

Invoice totals

Most of the fields available have been automatically calculated and will not require alteration. However, the Invoice Number and Delivery Note Number will need to be filled in before an invoice can be sent.

Fill in the Invoice Number and Delivery Note Number fields with the values provided from your ERP system.

It is suggested that before submitting your first invoice, the invoice should be saved as a draft by clicking on Save Draft Invoice & Close. Once this has been done the Commerce-Connections support staff should be contacted and asked to check that the invoice has been filled in correctly before being sent to your trading partner.

Once the first invoice has been checked by Commerce-Connections, the Submit Invoice Now option can be used to send the invoice to your trading partner. This should be the only invoice sent in one day if this is your first invoice as this permits your trading partner the time to change your EDI test flag to live. It is normally safe to submit invoices with live data the day after submitting the test invoice unless your trading partners states otherwise.

Exporting a document

Once enabled, orders, sales reports and stock reports can be exported from WebForms as a CSV file for importing in your ERP system or to be viewed as a spreadsheet where calculations can be made on the data.

To export an order or a report, select the documents from the all documents view with the checkboxes to the immediate left of the reference numbers. Then simply click on the 'export' button and you will be prompted to download a CSV file containing all of the order or report details.

Report Ty	Report Nc	Report Date	Report Ba	Period From	Period To	Supplier N	Supplier E	Supplier I	Cust. Nam	Cust. EAN	Msg. Ref.	File Gen.	File Date	Add. Info	Line No.	Pr. EAN	Pr. St
Stock	40	19/08/2012	Day	18/08/2012		sup	5.07E+12		JOHN LEW	5.02E+12	3780		19/08/2012			1	5E+12
Stock	40	19/08/2012	Day	18/08/2012		sup	5.07E+12		JOHN LEW	5.02E+12	3780		19/08/2012			2	5E+12
Stock	40	19/08/2012	Day	18/08/2012		sup	5.07E+12		JOHN LEW	5.02E+12	3780		19/08/2012			3	5E+12
Stock	40	19/08/2012	Day	18/08/2012		sup	5.07E+12		JOHN LEW	5.02E+12	3780		19/08/2012			4	5E+12
Stock	40	19/08/2012	Day	18/08/2012		sup	5.07E+12		JOHN LEW	5.02E+12	3780		19/08/2012			5	5E+12
Stock	40	19/08/2012	Day	18/08/2012		sup	5.07E+12		JOHN LEW	5.02E+12	3780		19/08/2012			6	4E+12
Stock	40	19/08/2012	Day	18/08/2012		sup	5.07E+12		JOHN LEW	5.02E+12	3780		19/08/2012			7	5E+12
Stock	40	19/08/2012	Day	18/08/2012		sup	5.07E+12		JOHN LEW	5.02E+12	3780		19/08/2012			8	5E+12
Stock	40	19/08/2012	Day	18/08/2012		sup	5.07E+12		JOHN LEW	5.02E+12	3780		19/08/2012			9	5.05E+12
Stock	40	19/08/2012	Day	18/08/2012		sup	5.07E+12		JOHN LEW	5.02E+12	3780		19/08/2012			10	5.05E+12
Stock	40	19/08/2012	Day	18/08/2012		sup	5.07E+12		JOHN LEW	5.02E+12	3780		19/08/2012			11	5.05E+12
Stock	40	19/08/2012	Day	18/08/2012		sup	5.07E+12		JOHN LEW	5.02E+12	3780		19/08/2012			12	5.05E+12
Stock	40	19/08/2012	Day	18/08/2012		sup	5.07E+12		JOHN LEW	5.02E+12	3780		19/08/2012			13	5.05E+12
Stock	40	19/08/2012	Day	18/08/2012		sup	5.07E+12		JOHN LEW	5.02E+12	3780		19/08/2012			14	5.05E+12
Stock	40	19/08/2012	Day	18/08/2012		sup	5.07E+12		JOHN LEW	5.02E+12	3780		19/08/2012			15	5.05E+12
Stock	40	19/08/2012	Day	18/08/2012		sup	5.07E+12		JOHN LEW	5.02E+12	3780		19/08/2012			16	5.05E+12
Stock	40	19/08/2012	Day	18/08/2012		sup	5.07E+12		JOHN LEW	5.02E+12	3780		19/08/2012			17	5.05E+12
Stock	40	19/08/2012	Day	18/08/2012		sup	5.07E+12		JOHN LEW	5.02E+12	3780		19/08/2012			18	5.05E+12
Stock	40	19/08/2012	Day	18/08/2012		sup	5.07E+12		JOHN LEW	5.02E+12	3780		19/08/2012			19	5.05E+12
Stock	40	19/08/2012	Day	18/08/2012		sup	5.07E+12		JOHN LEW	5.02E+12	3780		19/08/2012			20	5.05E+12
Stock	40	19/08/2012	Day	18/08/2012		sup	5.07E+12		JOHN LEW	5.02E+12	3780		19/08/2012			21	5.05E+12
Stock	40	19/08/2012	Day	18/08/2012		sup	5.07E+12		JOHN LEW	5.02E+12	3780		19/08/2012			22	5.05E+12
Stock	40	19/08/2012	Day	18/08/2012		sup	5.07E+12		JOHN LEW	5.02E+12	3780		19/08/2012			23	5.05E+12
Stock	40	19/08/2012	Day	18/08/2012		sup	5.07E+12		JOHN LEW	5.02E+12	3780		19/08/2012			24	5.05E+12

Please contact Commerce-Connections to have the export facility enabled.

Glossary – WebForms terminology

Message Types

Note: Not all message types will be available on your WebForms account; this will be defined by your trading partners' requirements.

- **ASN** – Advanced Shipping Notice, used to send an ASN about a pending delivery.
- **Customs Declaration** – Transfers customs information from a declarant (e.g. an exporter) to a customs administration.
- **Delivery Forecast** – Specifies delivery schedule information.
- **Despatch Advice** – Confirms despatch of goods following an ASN.
- **Invoice** – Invoice Web Form, used to send an invoice to the retailer.
- **Invoice ACK** – Acknowledgement sent by a retailer to a supplier confirming receipt of an invoice.
- **Order** – Purchase Order Web Form, contains order details. Used for creating an invoice.
- **Price Catalogue** – Contains pricing and catalogue details for goods offered by a supplier to a buyer. Can also be sent from a buyer to a supplier to specify other information such as packaging requirements, or as a response (accept or reject) to a previously received price catalogue.
- **Proof of Delivery** – Sent by retailer to supplier confirming receipt of goods.
- **Sales Report** – Breakdown of sales data from the retailer.
- **Stock Report** – Breakdown of stock data from the retailer.

Interface

- **Archive** – All documents can be archived and retrieved a later time if necessary.
- **Create Delivery** – Generate an ASN for an order.
- **Create Order** – Create a new order which can be filled in.
- **Empty Trash** – Permanently deletes items marked as trash.
- **Export** - A non-standard WebForms feature which can be added to your account for better analysis of sales and stock reports.
- **Locations** – Add a new delivery point which can be selected when creating an order.
- **Mark Cancelled** – Cancels an order if you do not wish to invoice it.
- **Mark Completed** – Marks an order complete after it has been invoiced.
- **Move to Trash/Delete** – Marks a product or location for deletion.
- **Prepare to Print** – Prepares a printable copy of the document which is open or selected.
- **Print PDF Label** – Prints an ASN label from within an ASN document, which can be affixed to the pallet or container.
- **Products Library** – Used to store and access all of your created products.
- **Profile** – Used to fill out your company/supplier information and configure email notifications.
- **Trading Partners** – View a list of trading partners and their associated EDI documents.

Retailer specific information

- Amazon – Requires ASNs to be created through Amazon Vendor Central.
- Booker Cash and Carry (Wholesale) – An order baseplate should be created before invoices can be sent.

Additional training and support

Commerce-Connections have created a series of training videos demonstrating and explaining common WebForms tasks. You can view them at the following link:

<https://www.youtube.com/playlist?list=PLIdArKLMKNpI02qYQJkcf3p8OAG-u4NqB>

If you require further support and assistance, you can call the Commerce-Connections WebForms support team on: 0845 127 9955.