

Edisoft Solutions Configuration Guide 2015



Edisoft Supply Chain Solutions Configuration Guide

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ERP Integrated Solution Requirements

For Integrated EDI you need to meet the following minimum requirements (based on your ERP):

- Sage 300 ERP - OE, IC, AR version 6.0, 2012 or 2014
- Sage 100 ERP - Sales Order, Inventory Management, Accounts Receivable, versions 4.50, 2012, 2014
- Sage X3 - version 6.5, 7.0



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ERP Integrated Solution Client Information

Please specify order types that will be processed

- Distribution Center
- Direct Store Delivery
- Cross Dock
- Direct Vendor Ship (i.e. ship direct to consumer for online orders) - see section 5
- Spreadsheet orders (i.e. multiple destinations received on a single PO)
- Automotive (planning schedules and/or shipping schedules) - See section 5
- Purchasing (outbound orders to vendors) - See section 5

Please specify EDI Documents required (Please note: this section is not applicable when EDI is not required)

- Purchase Order (850 or 875)
- Invoice (810 or 880)
- Advance Ship Notice (856)
- Inventory Advice (846)
- Purchase Order Acknowledgement (855)
- Purchase Order Change (860)
- Payment Order Remittance Advice (820)
- Test Document (864)
- Application Advice (824)
- Warehouse Shipping Request (940)
- Warehouse Shipping Advice (945)



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ERP Integrated EDI Options

(Please note: this section is not applicable when EDI is not required)

1. Please select from the following options for the sending/receiving of EDI documents (more than one may apply)

- Edisoft Merchant XChange (Electronic Messaging Service)
- Other VAN such as GXS, Sterling Commerce (Please specify)
- AS2 (Cleo)
- Direct FTP (Please specify connections hosts)

2. Merchant translators are based on ERP Integration Engine. Please select the appropriate ERP to which the translator will be integrated.

- Sage 100
- Sage 300
- Sage X3

3. If you are required to send ASNs, please select from the following:

- ASN Module *Requires 1 ASN data source (Please see below for options) - Shipping from your own warehouse
- 3PL Module (Requires ERP Accounts Payable Module) - Shipping from a contracted/third party warehouse



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ERP Integrated EDI Options

4. If the ASN Module was selected in the previous section. Please select one of the ASN Data Sources below.

- QuikPAK - Provides packing support for both EDI and non-EDI customers. Can also provide integration support for carrier management systems (required in ASN documents for many online trading partners). Provides support for basic and advanced packing rules as well as scanner based packing. Packing is trading partner agnostic and can be setup to follow order fulfillment processes.
- Internal Packing - Provides packing support for EDI customers only. Packing is specific to the ASN structure of the trading partner. Supports basic auto packing rules only.
- Import Packing - Import packing from external systems to support ASN compliance requirements. External systems must be able to provide data in packing structures required to meet EDI trading partner specifications (i.e. details of which items are in which cartons, etc.)
- Accellos Integration - Read packing data from Accellos WMS (Requires QuikPAK)

5. For order types other than distribution center or store shipments please select from the following options.

- Vendor Module (Requires ERP Purchase Order Module) - Provides support for purchasing via EDI
- Supply Chain Scheduling Module - Provides support for Just In Time functionality required in the automotive industry
- Automation Module for Online Retailers

6. Edisoft Merchant includes one user license and two company licenses. Please select below if additional licenses are required

- User Licenses
- Company/Database Licenses

7. Every trading partner has unique requirements. Trading partner kit are configurable plug in kits that are designed to trading partner specifications. Please contact Edisoft for information on our library of approximately 2000 trading partner kits, shipping labels. Please contact Edisoft for an updated listing.

- Trading Partner Kits (please contact Edisoft for information on partners in our library)



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ERP Integrated EDI Options

8. If you require labels or packing slips to be included on/in the shipping containers that will be sent to your customers, please select from the list below:

- 1D Carton Label - Supports barcode fonts Code128, I2of5, Code39, Codabar, and UPC/EAN
- 2D Carton Label - Supports barcode fonts Code128, I2of5, Code39, Codabar, UPC/EAN, and PDF417(2D)
- 1D Pallet Label - Supports barcode fonts Code128, I2of5, Code39, Codabar, and UPC/EAN
- 2D Pallet Label - Supports barcode fonts Code128, I2of5, Code39, Codabar, UPC/EAN, and PDF417(2D)
- Branded Packing Slips - Typically online retailer packing slips (i.e. CommerceHub)



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ERP Integrated Warehouse Automation Options

1. Order fulfillment options can be affected by ERP capabilities. Please select the appropriate ERP to which QuikPAK will be integrated.

- Sage 100
- Sage 300
- Sage X3

2. Please select from the appropriate picking process add on modules below.

- Orchid Bin Tracking Integration - Reads bin allocation information from Sage 300 and confirms picked quantities to Orchid (only supported with Sage 300)
- Mobil Scan and Pack - Provides for both pick and pack functionality on a mobile hand held scanning device
- Line Level Warehouse Filter - Creates multiple pick orders within QuikPAK based on the ERP line level ship from warehouse

3. If packing within the warehouse follows logical rules that can be predefined please select the appropriate module(s) below.

- Basic Auto Packing Rules - Single sku per container
- Advanced Packing Rules - Prepacks - Multiple skus per container.
- Advanced Packing Rules - Kits/BOM - Provides option to pack ERP kits as a single unit or at the component level.

4. Merchant QuikPAK includes one user license and three company licenses. Please select below if additional licenses are required.

- User Licenses
- Company/Database Licenses



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ERP Integrated Shipping Client Requirements

1. Types of Transport Management Services (TMS)

- Small Parcel
- Less Than Truckload (LTL)
- Freight Forwarding
- Use own trucks
- Freight Broker (eg. AFS, SMC)

2. Who do you ship with?

Small Parcel

- FedEx
- UPS
- DHL
- TNT
- Other _____

LTL

- YRC Freight
- ESTES _____
- SAIA _____
- Other _____

Other Shipping Method

- Canada Post
- US Postal Service
- Other _____
- Other _____

3. What is your shipment volume? (Please enter the number of shipments for each timeframe.)

- Daily _____
- Weekly _____
- Monthly _____
- Annually _____

4. Do you need any of the following features? (Check all that apply.)

- Track and Trace
- Freight Analytics (Shipping Manifest/Reports)
- 3rd Party Billing
- Customized Labels
- Customs Clearance Documentation



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ERP Integrated Warehouse Automation and Shipping Options

1. Integration to a carrier management system can provide a high degree of automation when communicating with carriers. The ability to pass ship to and package details to the carrier management system, as well as the reading of tracking numbers and freight costs, can greatly reduce the amount of rekeying of data. QuikPAK carrier management can pass a combination of ERP and packing information to the carrier management system and a combination of carrier and packing information to the ERP. Please select from the list of carrier management connectors below:

- QuikPAK Connector for ProcessWeaver - Can run in a user interface or automated mode and supports over 300 small parcel and LTL carriers. Supports direct communications with FedEx and UPS. Supports carriers worldwide.
- QuikPAK Connector for StarShip - Supports a number of small parcel and LTL carriers. Supports direct communications with FedEx and UPS. Support US carriers only.
- QuikPAK Connector for linXship - Support a number of small parcel and LTL carriers. Communicates with carriers via carrier software (i.e. FedEx Ship Manager). Supports US and Canadian carriers.
- QuikPAK Connector for SmartLinc - Supports a number of small parcel and LTL carriers. Supports direct communications with FedEx and UPS. Support US and Canadian carriers.

