



## **EDI Training**

**Plex Systems  
Troy, Michigan**

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## Revision History

Author	Version	Revision Date	Note
Mig O'Brien Vista Harris		7/12/07	
Vista Harris		12/29/2010	
Vista Harris		8/1/2013	Added new features and Supplier EDI
Patrick Cooper	1.0	5/2/14	Updated Plex logo in cover page and header

### ***Overview***

The purpose of this document is to set up the EDI Functionality in the Plex System. This document covers how to setup an EDI Mailbox, create documents, get email notification and troubleshoot EDI problems.

### **Objectives:**

- Setup communication networks
- Be able to setup an EDI Mailbox
- Complete the Document Setup Requirements
- Use the EDI Log to view records
- Look at EDI Status Examples
- Setup Email Notification
- Troubleshoot EDI Problems
- Review EDI Permissions

***Plex EDI (USA ONLY)***

As of May 2007, Plex supported approximately 185 different trading partners, including Ford, GM, DaimlerChrysler, Honda, Nissan, Toyota, American Axle, Arvin Meritor, US Steel, Magna, Caterpillar, Mitsubishi and AK Steel. As of December 29, 2010, the number of trading partners Plex supports is 381 and growing. The number of support trading partners as of July 2013 is 574, so approximately a 30% growth rate annually. Plex connects to 60 different networks to transfer data including direct connections to Honda, Chrysler, Caterpillar, Walmart and Amazon.

There are several requirements of Electronic Data Interchange (EDI) that must be entered before EDI can be successfully implemented. Some of the EDI requirements will be completed by Plex Systems and the remaining must be completed by the company implementing EDI. Listed below are the basic steps that need to be completed before EDI testing can begin.

**Plex Systems Responsibilities:**

1. Communications. Plex customers will provide Plex with necessary communication details for VANs or direct connections to include network, communication protocol, user ID and password. Once this information is available, Plex will obtain any necessary licensing and test communications to each network required.

**Customer Responsibilities:**

1. Customer. EDI Mailboxes in Plex are linked to a customer. Customer data must be available prior to building EDI Mailboxes (trading partners) in Plex.
2. EDI Mailbox Setup. At the customer's request, Plex subject matter experts may complete this step or assist in the completion of this step.
3. There are several fields in the Customer Address Detail screen that need to be completed for Shipping address codes.
  - Plant Code – Contact your customer for the correct Plant Code.
  - Mailbox – Required when multiple mailboxes exist for a single customer. Used to define what mailbox will be used for outbound data.
  - Invoice Mailbox – Used when there are multiple mailboxes intended for electronic invoice transmission and a specific mailbox must be used.
4. In the Supplier List of Carriers, each must have a SCAC code entered. Conveyance codes may also be populated for use in ASN transmissions. Specific customer settings must be active to support this function.
5. Customer Part Number relationships must be entered for each Part Number shipped.
6. Enter Customer Purchase Orders for all shipments based on Customer requirements for blanket orders that are not transmitted in EDI.
7. Customer order details for blanket orders.
8. Prices. Multiple options are available in Plex.

### ***VAN Setup***



For ease of use, Plex defines any communication network as a VAN. Each network must be defined in Plex. Network credentials will need to be provided to Plex for connectivity testing.

Connection Name	Van	Account
<a href="#">EBMX Mailbox</a>	EBMX	Account
<a href="#">New VAN</a>	ACS	user id
<a href="#">Test Advantis Mailbox</a>	Advantis	Test
<a href="#">Test EDS Mailbox</a>	EDS	test

### VAN Connection

VAN Connection Name:

Van:

Account:

Password:

Previous Password:

Password Expiration Date:

Van Connection Name, Van, Account and Password must be populated. Previous Password and Password Expiration Date are used by Plex to track password changes which some networks require.

The EDI Mailbox is where the setup of the trading partners is done. There are several links on the screen that are useful. When EDI information is sent, it is a string of characters and numbers with different characters and/or spaces that separate the information. The EDI Mailbox helps to sort out the information that is sent so it is applied correctly.

- **Mailbox Name** - Free text, user defined
- **Customer** - For customer data
- **Supplier** - For supplier data (Supplier selection is a setting and may not be applicable.)
- **Mailbox Code** - Your EDI ID
- **Destination Code** - Your partner's EDI ID
- **Mailbox Status** - Generally Production or Test
- **Plants** - Hyperlink to Customer Address List for that specific customer (N/A for Suppliers)
- **Documents** - Hyperlink to Document Setup (Can add or modify documents for Mailbox/Partner.)
- **Assigned Users** - Hyperlink to define users for the mailbox (generally not used)

<a href="#">Back</a> <a href="#">Help</a> <a href="#">Update</a> <a href="#">Delete</a>		<a href="#">ACME</a> Plexus Online
<b>EDI Mailbox</b>		
Customer:	Honda Delta <input type="text" value=""/>	
Supplier:	<input type="text" value=""/>	
Mailbox Name:	Honda	
Mailbox Code:	000000001 (SASL for inbound documents)	
Mailbox Qualifier:	ZZ (usually ZZ or Y1)	
Mailbox Use:	Send & Receive <input type="button" value="v"/>	
Acme/Vendor Code:	123456789 (usually for GS segment, GS02 for outbound)	
Origin Code:	00030001 (usually for N1/N10)	
Destination Mailbox:	H00000001 (SASL for inbound documents)	
Destination Code:	002162643 (usually for GS segment, GS03 for outbound)	
Destination Mailbox Qualifier:	ZZ (usually ZZ or Y1)	
<b>Van Connection</b> <input type="button" value="Test Advantis Mailbox"/>		
Element Separator:	* (* for GS and EDFACT, * for most others)	
Sub-Element Separator:	^ (^ for GS and EDFACT, ^ for most others)	
Segment Terminator:	126 (ASCII Decimal value, usually 126, 38 for EDFACT)	
Transaction Counter:	85	
Authorization Information Qualifier:	<input type="text" value=""/> (SASL)	
Authorization Information:	<input type="text" value=""/> (SASL)	
Security Information Qualifier:	<input type="text" value=""/> (SASL)	
Security Information:	<input type="text" value=""/> (SASL)	
Trading Partner:	Honda <input type="text" value=""/>	
<b>Mailbox Status</b>		
	Testing <input type="button" value="v"/>	
Note:	<input type="text" value="Honda ADM Test Mailbox"/> <input type="button" value="v"/>	
Added: 6/27/02 2:01 PM Lane Johnston Updated: 4/25/04 7:50 PM Lane Johnston		

- **Note** - Free text, user defined



<div> <a href="#">Back</a> <a href="#">Wiki</a> <a href="#">Add</a> <a href="#">Print</a> </div> <div> ACME MANUFACTURING PLEX ONLINE </div>				
Trading Partners List				
Trading Partner Name: <input type="text"/>		Supplier EDI Only: <input type="checkbox"/>		<a href="#">Search</a>
Trading Partner Name	Trading Partner Certification Information	Documents Supported	Plexus Customers Using Trading Partner	Document Templates Setup
<a href="#">A. P. Plasman Corporation</a>	Pending	830	0	1
<a href="#">ABC Group</a>		830, 856, 997	9	3
<a href="#">Accuride Corporation</a>			1	0
<a href="#">ACSYS</a>			1	0
<a href="#">ADAC</a>		830,862	2	0
<a href="#">Adams Thermal Systems</a>		830	0	1
<a href="#">Advance Wire Products</a>			0	0
<a href="#">Advics</a>		830, 862, 856, 997	2	0
<a href="#">AG Simpson</a>	Pending	830, 856	2	3
<a href="#">AK Steel</a>			4	13
<a href="#">Akebono Brake</a>		830, 856, 997	2	3
<a href="#">Alfield</a>		830,997	1	2
<a href="#">Alison</a>		830, 997	0	0
<a href="#">Allison Transmission</a>		DELFOR, CONTRL, DESADV	5	4
<a href="#">AM General (4010)</a>		830, 856	0	2
<a href="#">American Axle</a>		APERAK, CONTRL, DELFOR, DELJIT, DESADV	13	6
<a href="#">Android</a>		CONTRL, DELFOR, DELJIT, DESADV	5	4
<a href="#">Arvin Meritor CVS</a>	Commerical Vehicle Systems	830, 856	2	3

Using the Trading Partners List will assist you with mailbox setup as follows:

- 1) Determine if the trading partner you desire is available in Plex.
- 2) Document templates linked to the Plex trading partner in document Templates Setup (above) will be automatically activated and linked to your mailbox IF you verify the document templates exist on the Trading Partners List prior to building your mailbox. If they do not exist, contact Plex to add them. Once they exist and you create your new mailbox in your PCN, the documents will be automatically linked. You must be creating a new mailbox with the first time use of a particular trading partner. Subsequent use of the same trading partner will copy documents from the initial instance of the trading partner in your PCN. (See example below.)



[Back](#)
[Wiki](#)
[Add](#)

ACME  
MANUFACTURING

PLEX  
ONLINE

### EDI Mailbox

Customer: 
Supplier: 
Bank Account:

Mailbox Name: 
Mailbox Code:  (ISA08 for inbound documents)
Mailbox Qualifier:  (Usually 'ZZ' or '01')
Mailbox Use:

ACME Vendor Code:  (Usually for GS segment, GS02 for outbound)
Origin Code:  (Usually for N1\*SU)

Destination Mailbox:  (ISA06 for inbound documents)
Destination Code:  (Usually for GS segment, GS03 for outbound)
Destination Mailbox Qualifier:  (Usually 'ZZ' or '01')

Van Connection :

Element Separator:  (\* for GM and EDIFACT; \*\* for most others)
Sub-Element Separator:  (\* for GM and EDIFACT; < for most others)
Segment Terminator:  (ASCII Decimal value, usually 126, 39 for EDIFACT)
Transaction Counter: 
Authorization Information Qualifier:  (ISA01)
Authorization Information:  (ISA02)
Security Information Qualifier:  (ISA03)
Security Information:  (ISA04)
Trading Partner:

Mailbox Status: 
Note:

Added: 6/8/10 5:09 PM Harris, Vista

Plex Trading Partner

### Document Setup

This allows you to configure documents for specific mailboxes. You can add new documents or select the document name to modify the existing documents.

**Document Setup**

Customer:  Mailbox:  Document:

Mailbox Name	Document	Template
Daimler Chrysler	824	X12 - 824 Application Advice
Honda	824	X12 - 824 Application Advice
Test Mailbox	824	X12 - 824 Application Advice
DCX	824	X12 - 824 Application Advice
ISG	92 COILCHG	Order Status - 92 (Coil No Change) Mittal
General Motors SPO	DELFOR	EDIFACT - DELFOR
General Motors SPO	DESADV	DESADV - GM Service Parts (SPO)
Ford	997	X12 - 997 Functional Acknowledgment
Honda	997	X12 - 997 Functional Acknowledgment
Daimler Chrysler	997	X12 - 997 Functional Acknowledgment
DCX	997	X12 - 997 Functional Acknowledgment
Benteler	997	X12 - 997 Functional Acknowledgment
ISG	89	COMPORD - 89 - Inventory Handoff (Mittal)
Test Mailbox	846	X12 - 846 Inventory Advice
Honda	846	X12 - 846 Inventory Advice
Honda	810	X12 - 810 Invoice
ISG	91	COMPORD - 91 - Material Receipt (Sending Mill Weight)
ISG	90	90 - Compord ASN (No tare weight in BOL weight)
ISG	92 BAKOUT	COMPORD - 92 - Back Out (Mittal)
ISG	92 BLNK	COMPORD - 92 - Blanked Material (ISG)
ISG	92 SORT	90 - Sort (ISG ) No 52 Loop
ISG	92 RESCALE	COMPORD - 92 - Rescale Material (Mittal)
General Motors Remittance	820	820 - Remittance Load
Honda	820	X12 - 820 Remittance Advice
Ford	830	X12 - 830 Release Loads
Test Mailbox	830	X12 - 830 Release Loads
Alkar	830	830 - Release Creation (2002)
Honda	832	X12 - 832 Price Catalog

**Document Setup**

Mailbox:

EDI Document - Template: 862 - X12 - 862 Shipping Schedule (Do Not Use)

Expect Acknowledgement: ☐

Expect Application Advice: ☐

Expect Response (Ex. 855, 865): ☐

Return Acknowledgement: ☐

Return Application Advice: ☐

Return Response (Ex. 855, 865): ☐

Load Document as Shipping Schedule: ☐

Preview Mode on Receive: ☐

Turnaround Document: ☐

Accum Not Used in Release Loading: ☐

Load Document to All Matching Interchanges: ☐

PO Matchup Enforced: ☐

Create Serial Numbers for Inbounds ASN, when missing: ☐




Minutes before Ack Received:

Note:

Example of the document settings:

- **Expect Acknowledgement** – Check box if an acknowledgement is expected (inbound)
- **Expect Application Advice** – Check box if an 824 or Aperak is expected (inbound)
- **Return Acknowledgement** – Check box if an acknowledgement is required (outbound)
- **Return Application Advice** – Check box if an 824 or Aperak is required (outbound)
- **Load Document as Shipping Schedule** – Check box if the inbound document (830 or DELFOR) has firm and planning data and there is no 862 or DELJIT to create ship schedules.
- **Preview Mode on Receive** – Check box if the inbound document is to be loaded manually. The status in the EDI log will remain on Preview Mode until user reprocesses the document. Checking this box effectively suppresses the "Load Document as Shipping Schedule" option.
- **Turnaround Document** – Check box if the document is to be placed in the Turnaround EDI log.
- **Accum Not Used in Release Loading** – Check box if accums are to be ignored during release load process.
- **Load Document to All Matching Interchanges** – Check box if document is to be copied to other PCNs with matching ISA sender/receiver IDs.
- **Turnaround Mailbox** – Mailbox to be used if every inbound document for this specific setup will be turned around.
- **PO Matchup Enforced** – Check box if PO match is to be enforced during release load process.
- **Create Serial Numbers for In bounds ASN, when missing** – Check box if serial numbers are to be system generated when missing from inbound ASNs.

- **Minutes before Ack Received** – Populate with maximum number of minutes allowed when expecting acknowledgment of an outbound document. This is part of the email notification system.
- *Additional document setup settings continue to be added and as of the cross browser initiative in 2013, they are now document specific and are titled 'Additional Document Settings'.*

Document Setup				
Customer:	<input type="text"/>	Mailbox: Honda	Document: <input type="text"/>	<input type="button" value="Search"/>
Mailbox Name	Document Name	Template Description	Note	Additional Document Settings
Honda	<a href="#">810</a>	X12 - 810 Invoice		
Honda	<a href="#">820</a>	X12 - 820 Remittance Advice		
Honda	<a href="#">824</a>	X12 - 824 Application Advice		
Honda	<a href="#">832</a>	X12 - 832 Price Catalog		
Honda	<a href="#">846</a>	X12 - 846 Inventory Advice		
Honda	<a href="#">850</a>	X12 - 850 Honda 850 Load		
Honda	<a href="#">856</a>	856 - Honda ASN		
Honda	<a href="#">861</a>	X12 - 861 Receiving Advice Report		
Honda	<a href="#">862</a>	X12 - 862 Honda Schedules		
Honda	<a href="#">864</a>	X12 - 864 Text Message		
Honda	<a href="#">997</a>	X12 - 997 Functional Acknowledgment		

*Example of the document setup for the 850 as of July 2013. The Wiki for the page includes details regarding the use of each setting.*

Document Setup 850	
Load Price Components:	<input type="checkbox"/>
Load Price Components No Invoice:	<input type="checkbox"/>
Price Unit Defaults To Quantity Unit:	<input type="checkbox"/>
Price Validation PO Date Use:	<input type="checkbox"/>
Plant Code Create:	<input type="checkbox"/>
Ordered Quantity Price Convert:	<input type="checkbox"/>
Ship To Validate:	<input type="checkbox"/>
Bill To Validate:	<input type="checkbox"/>
Buyer Validation:	<input type="text" value="No Validation"/>
Validate Price for Release Load:	<input type="checkbox"/>
Class Of Purchaser Lead Time Use:	<input type="checkbox"/>
Class Of Purchaser Lead Time Days:	<input type="text" value="0"/>

### EDI Log

The EDI Log is a valuable tool that lists all transactions that occur with the EDI communications taking place throughout a day. There are several different filters to reduce the number of transactions that are displayed at one time.

The screenshot shows the 'EDI Log' interface. At the top, there are navigation links for 'Back' and 'Wiki'. The main section contains search filters: Customer, Mailbox Name, Document, EDI Key (996431), Document No., Interchange No., Action, Customer Part, Ship To, Log Status, and Log Date (1/5/11 to 1/5/11). A 'Search' button is located at the bottom right of the filter section. Below the filters is a table with the following columns: EDI Key, Trans #, Set #, Date, Time, Action, Mailbox Name, Ship To(s), Document, Tran/Doc No, View Report, Special Report, Status, Tracking ID, Ack Date, Ack Time, and Note. The first row of data shows: 996431, 000016968, 1, 5/8/06, 1:21 PM, Receive, DCX, Main (04025), 862, \*, [checked], [checked], Loaded, [blank], [blank], [blank], [blank].

Link to the EDI Load List

Link to the raw data (See example below).

Tracking ID for Send transactions

### EDI Documents / Transactions Examples:

- 810 Invoice
- 856 Ship Notice/Manifest
- 862 Shipping Schedule
- 997 Functional Acknowledgement
- 820 Payment Order/Remittance Advice
- 861 Receiving Advice/Acceptance Certificate
- 830 Planning Schedule w/Release Capability
- 824 Application Advice
- DELFOR Edifact Planning Schedule
- DELJIT Delivery just in time message
- DESADV Despatch advice message
- RECADV Receiving Advice
- CONTRL Control document (acknowledgement)

Link to user friendly report

Status Information:  
Not Loaded or **Partially Loaded** will appear on the **EDI Load Error List**. A list of EDI Status examples are on the next page.

### EDI Transaction

Mailbox: 55555 DCX  
 EDI Key: 996431  
 Action: Receive  
 Document: 862  
 Transaction / Document No :  
 Transmission Log: Transmission Log  
 Log Status: Loaded  
 Log Date: 5/8/06 1:21 PM  
 First Comm Date: 5/8/06 1:21 PM  
 Last Comm Date:  
 Acknowledge Date:  
 Tracking ID:  
 Complete: ✓  
 Doc Status: Original  
 Note:

Tracking ID for Send transactions  
(As provided by network)

**EDI Change History Examples – History is available on every EDI transaction.**

EDI Change History		
Change User	Change Date	Description
system	7/12/07 1:48 AM	Created by System
system	7/12/07 1:48 AM	Automatically Processed

EDI Change History		
Change User	Change Date	Description
Vista Harris	5/6/07 9:09 AM	Manually Reprocessed
Vista Harris	5/6/07 9:12 AM	Manually Reprocessed
Vista Harris	5/6/07 9:15 AM	Manually Reprocessed
Vista Harris	5/6/07 10:18 AM	Manually Reprocessed

### EDI Transaction

```

ISA 00~00~ZZ~04000~ZZ~55555~060506~0434~U~00204~000016968~0~P~<
GS SS~04000~55555~060506~0434~15895~X~002040CHRY
ST 862~000019128
BSS 05~061260432~060506~SH~060506~060604~061260432
N1 SI~92~04000
N1 SU~92~55555
N1 ST~92~04025
N1 SF~92~55555
LIN ~BP~06505627AA
UIT EA
            
```

Transmission Log for Send transactions

```

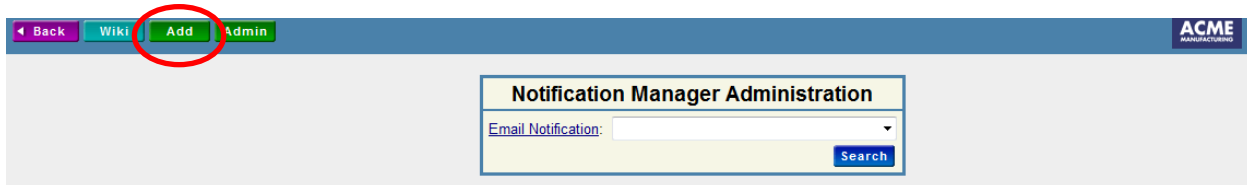
Begin EDI Send Transaction
Wed 01/07/2009
02:12 AM
open 12.147.7888
220 FTP Server
331 User name okay, need password for acme.
230 User acme logged in.
prompt
cd SENDDIR
200 Directory changed to /SENDIR99
mput 99999999_123456_94635-*
200 Command PORT okay.
150 Opening ASCII mode data connection for 99999999_123456_94635-1234567.raw.
226 Transfer complete.
0.084.05pwd
257 "/SENDIR99" is current directory.
quit
221 Goodbye.
End EDI transaction
02:16 AM
            
```

### *EDI Status Examples*

- **Accepted** - If the document is an 856 or Desadv, then an acknowledgment has been received for the outbound document and it was accepted.
- **Accepted w/Errors** - If the document is an 856 or Desadv, then an acknowledgment has been received for the outbound document and it was accepted with some kind of error.
- **Rejected** - If the document is an 856 or Desadv, then an acknowledgment has been received for the outbound document and it was rejected or some part of it was rejected.
- **Done** - For a Send, the document was Transmitted to the Van. For a Receive, the document was received without error.
- **Waiting** - For a Send, the document is waiting to be sent to the Van. For a receive, the document is being processed. Ack Alert - An acknowledgment is expected, and one has not been received in 25 minutes.
- **Send Alert** - The document has been waiting to be transmitted for more than 10 minutes.
- **Shipment Fulfilled** - The document is a receive advice and states that everything they received matched the ASN.
- **Ack** - The document is a system generated acknowledgement to response to a inbound document. The system will send this document when it is not processing anything else.
- **Invoice** - The document is an 810 or INVOIC created from a shipment. The system will send this document when it is not processing anything else.
- **Test** - The document is a test document and is not sent. If it is an outbound document, the mailbox status is of test. If it is an inbound document, the trading partner sent the document as a test.

### Email Notification Setup

There are automatic e-mail notifications that can be set up for many issues including **EDI Notification**. You can add a notification by selecting '**Add**' at the top of the page.





### Customer Email Notification


Email Notification Key: 26  
Plex Customer: ACME  
Email Notification: EDI Notification  
Note: Notification of loading issues, ASN rejections, and formatting issues generating EDI.  
Notification Group:   
Subject Text:   
From Address:   
Email Message: 


Times Roman


3













































































































































































































































































































































































































































































































































































































Use the green **+** key to subscribe to the notification.

**Notification Manager Administration**

Email Notification: EDI Notification
Search

Notification Group	Notification	Note	Subscribe	Filter
Production	<a href="#">EDI Notification</a>	Notification of loading issues, ASN rejections, and formatting issues generating EDI.	+	

Filter on the type of notification needed.

- Type – What kind of notification, successful loads, rejections, text messages from your customer for example
- Customer – You can only get notifications from select customers, or all of them
- Document – You can only get release load notifications or acknowledgements
- Ship From – Only receive notifications from your ship from
- Email Type – Customer or Supplier

**Notification Filter**

Type:  
Add another Type Filter

Customer:  
Add another Customer Filter

Document:  
Add another Document Filter

Ship From:  
Add another Ship From Filter

Email Type:  
Add another Email Type Filter

There is an **Admin** function also to subscribe users.

Back
Wiki
Add
Admin
ACME MANUFACTURING

**Notification Manager Administration**

Email Notification: EDI Notification
Search

Notification Group	Notification	Note	Subscribe	Filter
Production	<a href="#">EDI Notification</a>	Notification of loading issues, ASN rejections, and formatting issues generating EDI.	+	



### EDI Load Error List

The EDI Load Error List has errors that took place while loading EDI records.

EDI Load List									
Customer:	<input type="text"/>	Plant Code:	<input type="text"/>	Part No:	<input type="text"/>				
PO No:	<input type="text"/>	Error Type:	<input type="text"/>	EDI Key:	<input type="text"/>				
EDI Dates:	6/1/07	To	7/12/07	Sort by:	Customer, Error Type, Part, EDI Key	<input type="button" value="Search"/>			

Error Type	Customer	Plant Code	PO No	Part No	Rev	EDI Date	Last Failure Date	EDI Key	Note
Zero Price	Honda HAM	PPA		19505R70 A000	01	7/9/07	7/9/07	2195722	
Customer Part not Setup	Honda Motor Mfg. Alabama	08114001		19532R70 A000	00	6/6/07	6/6/07	2088303	
Customer Part/Rev Not Setup	Honda Motor Mfg. Alabama	NIS1 I0		1713CRGW A000	00 01	6/5/07	6/22/07	2082283	
Customer Part/Rev Not Setup	Honda Motor Mfg. Alabama	NIS1 I1		1713CRGW A000	00 01	6/5/07	6/22/07	2082283	
Customer Part/Rev Not Setup	Honda Motor Mfg. Alabama	NIS1 I1		1713CRGW A000	00 01	6/6/07	7/5/07	2087062	
Order Not Setup	Honda Motor Mfg. Alabama	NIS1 I0		16728R70 A010M2	11M2	6/5/07	6/22/07	2082283	
Order Not Setup	Honda Motor Mfg. Alabama	NIS1 I0		1713BRGL A000	00 01	6/5/07	6/22/07	2082283	
Order Not Setup	Honda Motor Mfg. Alabama	NIS1 I0		19505RDJ A000	01	6/5/07	6/22/07	2082283	

**Note:** The EDI Date is the date your trading partner formatted the date. It may not represent the date within the EDI file which may not match the date the file arrived.

#### Error Type – The Problem causing EDI not to load

- **Plant Code not Setup** - Plant code is missing from the customer address or the customer address is not authorized on the customer purchase order.
- **Customer Part not Setup** - Customer part is not linked to an internal part number in the Customer Part List.
- **Customer Part/Rev not Setup** - Customer part/revision combination is not linked to an internal part number in the Customer Part List.
- **Order not Setup** - Customer order is not linked to a customer purchase order for a specific part/plant/purchase order combination.
- **Supplier Code Problem** - Inbound supplier document not matching Plex code from Supplier List.
- **Successful Load** - Error type will only be reported if setting 'Log Load Successes' is toggled to 'True'.
- **Zero Price** - The EDI file has been loaded, but this informational error is reporting that you have loaded a release against a Zero Price PO.
- **PO Mismatch** - Error type will only be reported if 'PO Matchup Enforced' filter is not checked on the document setup. This is a soft error. The EDI file has been loaded, but this informational error is reporting that there is a PO mismatch.

- **Accum Mismatch** - The EDI file has been loaded, but this informational error is reporting that there is an accum mismatch.

### EDI Load Error Exception List

EDI Load Error Exceptions is an optional feature. With this feature, users can create exception lists of parts that appear in EDI, but are intentionally ignored by the Load List.

Customer setting is **Loading Exceptions Use**.

EDI Load Error Exception					
Customer Part No: <input type="text"/>		Plant Code: <input type="text"/>		Active Only: <input type="checkbox"/>	<input type="button" value="Search"/>
Customer Part No	Customer Part Revision	Plant Code	Active	Note	Add Date
<a href="#">123457</a>	E	ABBD	✓		12/30/2010 11:33:40 AM
<a href="#">798367876</a>	B	1	✓	Ignoring during plant move.	10/3/2010 6:00:00 PM

These exceptions are Part/Plant Code specific.

### EDI Load Error Exception Form

Customer Part No:

Customer Part Revision:

Plant Code:

Active: ☒

Note:

Add Date: 10/3/2010 6:00:00 PM  
Add By: McGee, Bill

Update Date: 12/30/2010 11:40:35 AM  
Update By: Harris, Vista

### EDI Issues

When there is a system outage from one your trading partners, or networks, the ticket information will be stored to help with disputes. This information is only available as provided.

Issue Number	Trading Partner	Van	EDI Issue	Ticket #	Issue Date
34		Inovis	Maintenance is being performed on their network and it will be done for a while.	4911812	5/19/07

**EDI Issue 34**

Trading Partner:  #  
 Van:  #  
 Ticket: 4911812

EDI Issue: Maintenance is being performed on their network and it will be done for a while.

Issue Date: 5/19/07

Issue Resolution:

Resolution Date:

Active: ☒

### EDI Schedule

An automatic schedule can be set up to receive data on a regularly basis. Only one schedule per network is required unless there a variation on days, hours or mailboxes is required.

**Schedule**

Mailbox Name: DCX

Perform Every: 30 (In Minutes)

Start Time: 1:00 PM

Stop Time: 1:00 PM

Next Execution Time: 4/25/2004 7:59 PM

**Recurrence**

☒ Weekly ☐ Monthly ☐ Yearly

Sunday: ☐  
 Monday: ☒  
 Tuesday: ☒  
 Wednesday: ☒  
 Thursday: ☒  
 Friday: ☒  
 Saturday: ☐

Mailbox	Perform Minutes	Start Time	Stop Time	Repetition	Last Receive Attempt
Honda	60	12:00 PM	12:00 PM	Weekly	
General Motors SPQ	55	10:30 AM	2:00 PM	Weekly	
DCX	30	1:00 PM	1:00 PM	Weekly	

### EDI Manual Receive

The Manual receive action authorizes entire contents of network mailbox to be received.

### Permissions

Permission Trading Partner User Maintenance is given to user(s) that will administrator the mailbox users and Full Access To Trading Partners. If a user does not have Full Access to Trading Partners permission, they can only access those documents on the EDI log where they are a user on the mailbox.

EDI Mailboxes									
Mailbox Name	Customer	Mailbox Code	Mailbox Status	Network	Connection Name	Plants	Documents	Note	Action
Alkar		53423	Testing	EDS	Test EDS Mailbox	0	1		<a href="#">Receive</a>
Benteler	DC	123456789	Testing	EDS	Test EDS Mailbox	2	2		<a href="#">Receive</a>
Daimler Chrysler	DC	Acme	Testing	EBMX	EBMX Mailbox	2	4	Test	<a href="#">Receive</a>
DCX	DCX	55555	Production	EBMX	EBMX Mailbox	4	4		<a href="#">Receive</a>
Ford	Ford	XXXXX	Testing	EDS	Test EDS Mailbox	12	3	Testing	<a href="#">Receive</a>
Freightliner	Freightliner	ACME	Testing	Advantis	Test Advantis Mailbox	1	1		<a href="#">Receive</a>
General Motors Remittance	GM	XXX	Production	EDS	Test EDS Mailbox	11	1		<a href="#">Receive</a>
General Motors SPO	GM	XXX	Testing	EDS	Test EDS Mailbox	11	2		<a href="#">Receive</a>
Honda	Honda Delta	XXX0XXX01	Testing	Advantis	Test Advantis Mailbox	2	9	Honda AHM Test Mailbox	<a href="#">Receive</a>
Honda SOFTAP2	Honda GPCS USA	XXX0XXX01	Testing	Advantis	Test Advantis Mailbox	1	1	Honda AHM Test Mailbox	<a href="#">Receive</a>
Honda SOFTAP3	HMA	XXX0XXX01	Testing	Advantis	Test Advantis Mailbox	3	1	Honda AHM Test Mailbox	<a href="#">Receive</a>
ISG	ISGBHI	123456789	Testing	EDS	Test EDS Mailbox	1	14		<a href="#">Receive</a>
PSB Tooling		ACME	Testing	EDS	Test EDS Mailbox	0	0		<a href="#">Receive</a>
Test Mailbox	Trinity	123456789TRW	Testing	Advantis	Test Advantis Mailbox	2	5		<a href="#">Receive</a>

### ASN Processing

Status flow for customer ASNs.

- At Creation

EDI Log - Windows Internet Explorer

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### EDI Log

Customer:  Mailbox Name:  Document: 856

EDI Key:  Document No:  Release No:  Action:

Customer Part:  Ship To:

Log Status:  Log Date: 1/1/07 To 10/22/07 Search

EDI Key	Date	Time	Action	Mailbox Name	Ship To(s)	Document	Tran/Doc No	View Report	Status	Ack Date	Ack Time
1982545	5/9/07	1:32 PM	Send	DCX	Sterling Hgts Assy 04025 (04025)	856	00202	<input checked="" type="checkbox"/>	ASN		

- When Transmitting

EDI Key	Date	Time	Action	Mailbox Name	Ship To(s)	Document	Tran/Doc No	View Report	Status	Ack Date	Ack Time
1982545	5/9/07	1:32 PM	Send	DCX	Sterling Hgts Assy 04025 (04025)	856	00202	<input checked="" type="checkbox"/>	Transmit		

- Transmission Complete

EDI Key	Date	Time	Action	Mailbox Name	Ship To(s)	Document	Tran/Doc No	View Report	Status	Ack Date	Ack Time
1982545	5/9/07	1:32 PM	Send	DCX	Sterling Hgts Assy 04025 (04025)	856	00202	<input checked="" type="checkbox"/>	Done		

- If rejection received from customer (997 or 824)

EDI Key	Date	Time	Action	Mailbox Name	Ship To(s)	Document	Tran/Doc No	View Report	Status	Ack Date	Ack Time
1982545	5/9/07	1:32 PM	Send	DCX	Sterling Hgts Assy 04025 (04025)	856	00202	<input checked="" type="checkbox"/>	Rejected		

- If acceptance received from customer (997 or 824)

EDI Key	Date	Time	Action	Mailbox Name	Ship To(s)	Document	Tran/Doc No	View Report	Status	Ack Date	Ack Time
1982545	5/9/07	1:32 PM	Send	DCX	Sterling Hgts Assy 04025 (04025)	856	00202	<input checked="" type="checkbox"/>	Accepted		

EDI Report - Windows Internet Explorer

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Re-Send  
(Resend the EDI Transaction)

Download document  
to a text file.

Edit EDI Transaction  
\*\*\*Use with Caution\*\*\*

Xmit Cancel  
(Create Cancellation 856)

### EDI Transaction

Mailbox: 55555 DCX  
EDI Key: 1982545  
Action: Send  
Document: 856  
Transaction / Document No: 00202  
Transmission Log:   
Log Status: Accepted  
Log Date: 5/9/07 1:32 PM  
First Comm Date:  
Last Comm Date:  
Acknowledge Date:  
Complete: ☒  
Doc Status: Original  
Note:

### EDI Transaction

ISA 1001 1001 1XX155555 1ZZ10400C 1070509113321U1002C01000300C02101P11  
GS 1SH15555510400012C070509113321002021X1004010  
BT 15555555

- Cancellation creates a new EDI key in the EDI log.

EDI Log - Windows Internet Explorer

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### EDI Log

Customer:  Mailbox Name:  Document: 856  
EDI Key:  Document No:  Release No:  Action:   
Customer Part:  Ship To:   
Log Status:  Log Date: 10/1/07 To 10/22/07

EDI Key	Date	Time	Action	Mailbox Name	Ship To(s)	Document	Tran/Doc No	View Report	Status	Ack Date	Ack Time
2592959	10/22/07	5:25 PM	Send	DCX	Not Available	856	00202	<input checked="" type="checkbox"/>	Waiting		

**Note:**

This is a  
cancellation  
transmission

### ASN Creation Problems

- Problems with ASNs will appear in the EDI log as VOID transactions with a link to the EDI Problems Log.

Link to EDI Problems Log

**EDI Log**

Customer:  Mailbox Name:  Document:   
 EDI Key: 2839662 Document No:  Interchange No:   
 Action:  Customer Part:  Ship To:   
 Log Status:  Log Date: 1/5/11 To 1/5/11

EDI Key	Trans #	Set #	Date	Time	Action	Mailbox Name	Ship To(s)	Document	Tran/Doc No	View Report	Special Report	Status	Tracking ID	Ack Date	Ack Time	Note
<a href="#">2839662</a>		1	12/18/07	3:45 PM	Send	General Motors SPO	Toluca - 23762 ()	DESADV	00189	<input checked="" type="checkbox"/>		Void				EDI Problem Record Exists for this EDI Key

### EDI Problems Log

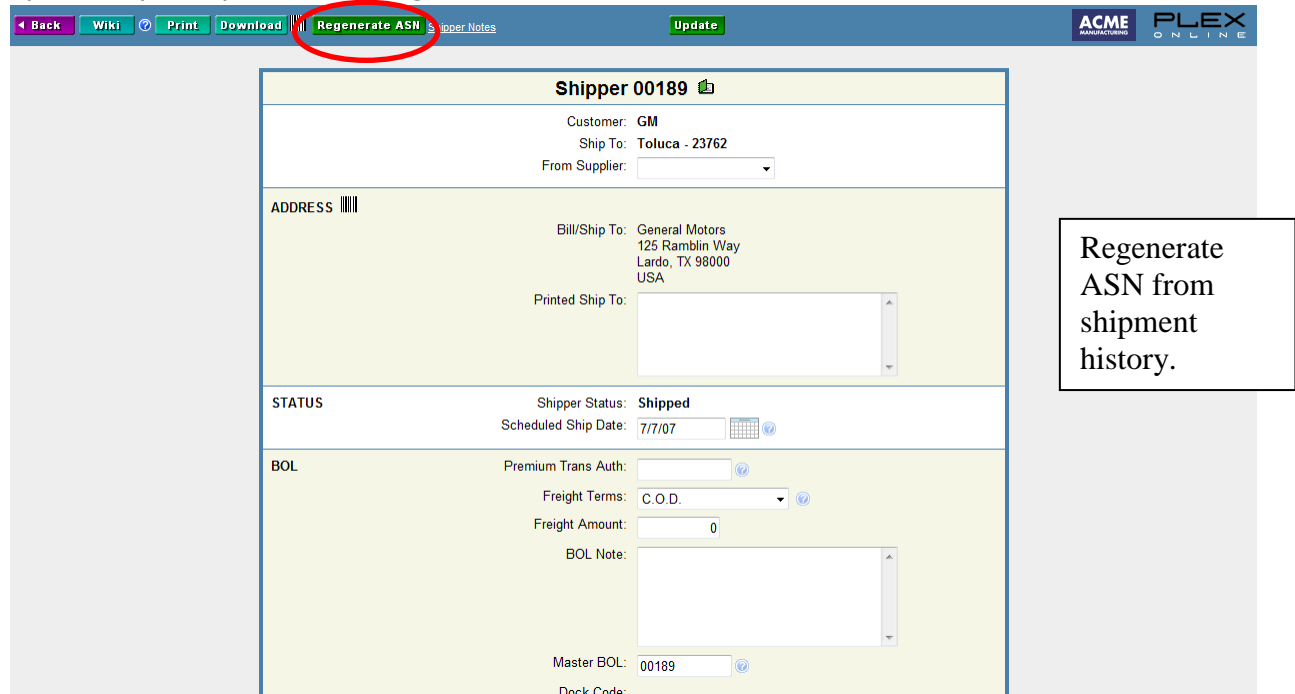
- The EDI Problems screen gives error details from failed ASNs. The information is also available via E-Mail notifications.

**EDI Problems**

Mailbox:  Problem Type:  Active: ☒  
 Problem Date: 1/12/07 To 7/12/07

EDI Problem Key	Shipper No	EDI Document	Mailbox	Problem Type	Problem Description	Problem Date	EDI Key
802	00175	DESADV	General Motors SPO	ASN Format Problem	Plant Code is missing	1/30/07	1637433
909	00185	DESADV	General Motors SPO	ASN Format Problem	Plant Code is missing	3/1/07	1735836
1224	00190	DESADV	General Motors SPO	ASN Format Problem	Plant Code is missing	5/21/07	2026349

Once the problem has been resolved, the ASN can be regenerated from Shipment History. This option requires permission Regenerate ASN.



Back Wiki Print Download **Regenerate ASN** Shipper Notes Update

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**Shipper 00189**

Customer: GM  
Ship To: Toluca - 23762  
From Supplier: [Dropdown]

ADDRESS [Barcode]

Bill/Ship To: General Motors  
125 Ramblin Way  
Lubbock, TX 79400  
USA

Printed Ship To: [Text Area]

STATUS Shipper Status: Shipped  
Scheduled Ship Date: 7/7/07 [Calendar Icon]

BOL Premium Trans Auth: [Text Area]  
Freight Terms: C.O.D. [Dropdown]  
Freight Amount: 0  
BOL Note: [Text Area]

Master BOL: 00189 [Text Area]  
Dock Code: [Text Area]

Regenerate ASN from shipment history.

Module Group	Module	Accessible	Audit	Permission	Permission Note	User Count	Role Count
Shipping	Customer Shipping	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<a href="#">Regenerate ASN</a> ?	Allow creation of ASN from shipment history	66	2
		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<a href="#">Regenerate ASN Shipper No Change</a> ?	Used in shipping history to update the shipper no prior to resending an ASN.	0	0

An additional permission is available to allow you to change the shipper no when the ASN is regenerated. This option is useful for trading partners that pay against the ASN, but will not allow the ASN to be processed once the product has been received. Usually these trading partners will allow an alpha suffix to be appended to the shipper and the ASN will process through for payment.

With the additional permission – Regenerate ASN Shipper No Change and additional popup is presented.



**Enter New Shipper No.**

### Supplier EDI

As of 2013, there are 7 supplier EDI trading partners to choose from. They can be filtered on the Trading Partners List by checking the Supplier EDI Only box in the filter area.

Trading Partners List				
Trading Partner Name: <input style="width: 100px;" type="text"/>		Supplier EDI Only: <input checked="" type="checkbox"/>		<input type="button" value="Search"/>
Trading Partner Name	Trading Partner Certification Information	Documents Supported	Plexus Customers Using Trading Partner	Document Templates Setup
<a href="#">Ryder</a>		DELFOR Carrier XML, DELJIT Carrier XML	0	2
<a href="#">Supplier EDI - EDIFACT 97A</a>		DELFOR, DELJIT, DESADV, CONTRL	0	4
<a href="#">Supplier EDI - VDA</a>		4905, 4913	0	2
<a href="#">Supplier EDI (X12 Honda GPCS)</a>		830, 862, 850, 824, 856, 997	4	6
<a href="#">Supplier EDI Documents v2002</a>		830	0	0
<a href="#">Supplier EDI Documents v3060</a>		830, 856	3	2
<a href="#">Supplier EDI Documents v4010</a>		830, 850, 855, 856, 997	34	5
<b>Total Trading Partners</b>				<b>7</b>


There are additional menu nodes to assist with supplier EDI. Outbound releases can be created manually or via a set schedule.

**830 Release Creation**


**830 EDI Release Creation**

Supplier:

Once the supplier is selected the release are displayed for final review. Then select Generate to proceed.



### Supplier EDI Schedule



Add

### EDI Supplier Load Schedule

Template: 
🔍 Day of Week:  ▼
Search

Weekday	Schedule Time	Template Description
Monday	<a href="#">2:00:00 AM</a>	830 - Release Creation (4010)
Monday	<a href="#">4:00:00 AM</a>	862 - Outbound Ship Schedules (4010)

Schedules are created by template, so any supplier setup for the template will have the document created.



In place of the EDI Load List, for supplier ASNs there is the Receipt Load List.

### Receipt Load List

EDI Key:

Part No:

Serial No:

Log Date:  12/7/12  To  8/13/13 

Receipt Issue:  ▼

Search

EDI Key	EDI Date	Mailbox	Part No	Serial No	Receipt Issue
11344563	12/7/2012 10:31:18 AM	USSCAN	RM2008-102335-ERMA		Material Not Found
11344563	12/7/2012 10:31:18 AM	USSCAN	RM2008-102335-ERMA		Material Not Found
11344563	12/7/2012 10:31:18 AM	USSCAN	RM2008-102335-ERMA		Material Not Found
11344563	12/7/2012 10:31:18 AM	USSCAN	RM2008-102335-ERMA		Material Not Found
11344563	12/7/2012 10:31:18 AM	USSCAN	RM2008-102335-ERMA		Material Not Found
11344563	12/7/2012 10:31:18 AM	USSCAN	RM2008-102335-ERMA		Material Not Found
11344563	12/7/2012 10:31:18 AM	USSCAN	RM2008-102335-ERMA		Material Not Found
11344563	12/7/2012 10:31:18 AM	USSCAN	RM2008-102335-ERMA		Material Not Found
11344563	12/7/2012 10:31:18 AM	USSCAN	RM2008-102335-ERMA		Material Not Found
11344563	12/7/2012 10:31:18 AM	USSCAN	RM2008-102335-ERMA		Material Not Found
11344563	12/7/2012 10:31:18 AM	USSCAN	RM2007-79432-ERMA		Material Not Found
11344563	12/7/2012 10:31:18 AM	USSCAN	RM2007-79432-ERMA		Material Not Found
11344563	12/7/2012 10:31:18 AM	USSCAN	RM2008-102335-ERMA		Supplier PO Not Found
11344563	12/7/2012 10:31:18 AM	USSCAN	RM2008-102335-ERMA		Supplier PO Not Found

ASNs do the first step of the receiving process – create inventory. The receipt must still be finalized using standard practices.

See Wiki – Supplier EDI (Best Practice) for more details.

### Summary

The purpose of this document is to set up the EDI Functionality in the Plex System. This document covers how to setup an EDI Mailbox, create documents, get email notification and troubleshoot EDI problems.

### Completed Objectives:

- Be able to setup an EDI Mailbox
- Complete the Document Setup Requirements
- Use the EDI Log to view records
- Look at EDI Status Examples
- Setup Email Notification
- Troubleshoot EDI Problems
- Review EDI Permissions

~~~~~ End of Document ~~~~~