User Guide
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New Features Added to WebEDI 3.0

☑ Faster response time

☑ Improved Functional Acknowledgment (997) tracking
  ✓ Incoming and Outgoing documents

☑ Select multiple documents to:
  ✓ View
  ✓ Print
  ✓ Save
  ✓ Process (Incoming and Outgoing documents)

☑ Review and Validate documents while in edit mode

☑ Save incomplete documents as “DRAFT” for completion later

☑ Create Templates for all Outgoing documents

☑ Improved Document Management
  ✓ Move from Outbox to Pending for editing
  ✓ Copy from Archives to Pending for reprocessing
  ✓ Combined Archives with expanded functionality

☑ Improved reporting functionality
  ✓ Save in Adobe PDF format
  ✓ Font size options for reports

☑ First Time UPCs or GTINs received are automatically added to item defaults

☑ Home Screen added that provides ability to complete all EDI processes from one location
Overview of EDI

EDI (Electronic Data Interchange) is a way of exchanging business documents electronically. To facilitate the exchange, companies form trading partner relationships and agree on what documents to exchange, how they will be exchanged, and what standard and structure will be used. Many companies hire staff to perform these activities internally. However, many companies simply do not have the resources on hand and rely on third party EDI service providers such as Edict Systems and solutions like WebEDI. Using WebEDI simplifies the relationship and allows users to focus on the receipt and processing of business transactions. All of the system and technical issues are monitored and managed by Edict Systems.

WebEDI receives business transactions and stores them in an Inbox for users to acknowledge and review. Once accepted and depending on the document and process requirements, users can update or create the information needed to return to a trading partner. Once processing is complete, documents are released to the account Outbox where the appropriate information is staged for return to the trading partner. Throughout the receipt, processing and return, the document details are maintained and archived for protection and retrieval if needed.

Here’s a typical flow of EDI documents using your WebEDI 3.0 account:

1. A trading partner sends an EDI purchase order which is placed in your Inbox.
2. An email is sent to your notification contacts informing them that a new incoming document has arrived.
3. Log in to your WebEDI 3.0 account and click the Process Inbox button to view a readable version of the EDI purchase order (from which a hard copy can be printed).
4. At the same time, a 997 Functional Acknowledgment document is automatically sent to the sender of the purchase order letting them know that you received the purchase order.
5. When ready, you will select the incoming purchase order and use it to create an outbound invoice to send back to the trading partner. This is referred to a “turnaround” as information contained on the purchase order is automatically turned around onto the invoice being created.
6. Once the invoice is complete, it is “generated” (moved to the Outbox) and sent from the Outbox for delivery to the trading partner.
7. Both the incoming purchase order and outgoing invoice will be housed in archives for access at any time.

The types of documents transmitted will vary by trading partner (as well the types of documents the trading partner expects in return).
Logging into your WebEDI 3.0 account

Users may log into a WebEDI 3.0 account at https://webedihost.edictsystems.com/index.cfm.

A username and temporary password is provided at the time your account is opened with Edict Systems. There is only one username and password for a WebEDI 3.0 account, so multiple users will need to share the same username and password.

Should the user forget their password, click the “Forgot Password?” link located on the Login screen. If the email address provided matches an email address on the account (either flagged as the User or as an email notification point of contact), the requestor will receive a temporary password from Edict Systems with instructions on how to reset the password.

Users will automatically be logged out of WebEDI 3.0 if there is more than 20 minutes of inactivity. A countdown timer will appear when a forced logoff is approaching. To stay logged in, click on the countdown timer.
Setting up account information

Once logged into your WebEDI 3.0 account, take a moment to verify that your settings reflect your account preferences.

Click the **My Account** icon and select **Account Settings** option from the drop-down window.

Several tabs will appear in the Account Information pane allowing for management of the following:

- **User**: Username and/or Password as well as primary contact information.
- **Billing**: Billing method from either credit card or mailed invoicing and billing contact information.
- **Company**: Company name, phone, fax and address.
- **Account Options**: Edict recommends utilizing the **Allow Local Data Storage** option to ensure faster response times.
- **Notifications**: E-mail addresses of those associates you wish to receive automated notifications of documents delivered to your Inbox.
- **Notification Configurations**: Pick and choose which email addresses receive notifications for specific trading partners and/or document types.
Home Screen
Upon logging into your account, your Home screen will appear. The Home screen contains four sections (or panes):

Header Menu
These menu options are available at all times.

Home  Clicking this icon brings the user back to the home screen.

Reports  Provides a list of outgoing documents generated over the last three calendar days. Using the Delete option only removes the document from the 3-day report. It does not delete the document from your account and you can access all your documents via the archive feature.

Information  Provides access to Announcements (notifications of newly supported trading partners and/or documents), Price Sheet, Icon Legend and a download for the Bar Code Label Manager software (for those WebEDI 3.0 customers wishing to utilize Edict’s label printing solution to print either container and/or pallet labels – also requires the purchase of Teklynx’s Label Matrix software – please contact your Edict Sales Representative for pricing).
**My Account**  Provides access to user-input (existing) default information and templates for all trading partners. In addition to viewing and editing existing default and template information, the My Account tab allows for adding a trading partner, adjusting Account Settings (covered in the Setting Up Account Information section) and viewing Billing History.

**Adding a Trading Partner:**
Input the name of the trading partner you wish to add in the Search Keywords field and click the **Search** button. If the system finds a match (and the trading partner is not already an active trading partner on your WebEDI 3.0 account), click on the trading partner name and click the **Signup for Selected Partner** button. You may be required to provide additional information as required by the trading partner.

**Billing History:**
All charges associated with your WebEDI 3.0 account will be available here. This includes monthly access charges with any applicable document fees and new trading partner additions. Select a billing record and click the **Show Detail** option to view a breakdown of the charges, or click View or View as PDF to view a billing report (with detail). The billing report will open in a new tab on your web browser. The search results can be adjusted by selecting different start and end dates at the bottom of the pane.

**Support**  Provides access to this User Guide as well as ways in which to contact Edict’s Customer Support Team (via phone, email, fax and chat).

**Log Out**  Allows user to log out of the WebEDI 3.0 account.
Document Tray

Appearing in the upper left corner of your Home screen, the Document Tray displays the number of documents in both the Inbox (that have yet to be “Processed”) and Outbox (that have yet to be “Sent/Transmitted” to the trading partner).

The contents of either the Inbox or the Outbox can be viewed by clicking on either “Inbox” or “Outbox”.

When viewing the contents of the Inbox, the user can filter the incoming documents by either trading partner and/or Document Type with drop down menus provided. Those documents can be processed from the Inbox while the other documents remain in the Inbox. This feature allows individual users to choose which items in the Inbox to process.
### Process Inbox
Clicking Process Inbox performs four functions simultaneously.

1. The incoming EDI documents will be displayed as a readable report in a separate tab in your web browser. **Make certain your web-browser pop-up blocker is turned off.** This report can be printed if hard copies are needed. Simply access the Adobe Reader menu (accessible at the bottom of your report window) if viewing as a PDF or use your web browser print option if viewing the report in HTML.

2. The incoming documents are loaded into your WebEDI 3.0 account to allow for viewing/printing and the creation of any applicable outgoing documents.

3. A 997 Functional Acknowledgement document is automatically sent to the sender of the original document. The 997 notifies the sender of the original incoming document that it was received by the recipient. If an incoming document sits in the Inbox for an extended period of time, the sender may reach out to the recipient to confirm that the document has been received. Simply processing your Inbox fulfills this requirement.

4. Any items appearing on incoming purchase orders will automatically be added to the item defaults section for that specific trading partner (if not already existing in the item defaults).

### Send Outbox
Clicking Send Outbox transmits the EDI document to the trading partner.

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**Table: Process Inbox**

<table>
<thead>
<tr>
<th>Document #</th>
<th>Document Date</th>
<th>Trading Partner</th>
<th>Status</th>
<th>Type</th>
<th>Version</th>
</tr>
</thead>
<tbody>
<tr>
<td>0040102</td>
<td>Mar 31, 2017</td>
<td>Wein Markets</td>
<td>Inbox</td>
<td>850</td>
<td>004010</td>
</tr>
</tbody>
</table>
Located in the lower left corner of your Home screen, the Partners pane lists all trading partners that have been added to your WebEDI 3.0 account. To view a list of supported Incoming and Outgoing documents for a specific trading partner, click the arrow to the left of the trading partner name. Also viewable are the Archive, Template and Default options (along with the trading partner logo at the bottom of the pane).
Archives
All documents that are received or sent from an account are archived and can be accessed at any time. Each trading partner has its own archive section.

Once the **Archive** option is selected for a specific trading partner, the user can search by date range, document number, TSet (document type) and/or EDI Version. The **Search Legacy Documents** option is used to view archived documents that had been created in the earlier WebEDI 2.0 (GroceryEC) site. Click the **Search Archive** button to view the results based on the search criteria provided.

Templates
Templates are typically used by WebEDI 3.0 users that do not receive EDI purchase orders from specific trading partners (often these are DSD – Direct Store Delivery suppliers). Creating and using templates will allow users to easily produce documents with populated information thus only having to change or provide a few pieces of information. Templates are unique to each trading partner. A template created for one trading partner cannot be used to create an outbound document for a different trading partner.
Defaults
Setting up defaults allows for easier outgoing document creation as repetitive entry fields can automatically be populated (or perhaps available via a drop-down menu). Depending on the requirements of the trading partner, this may include various addresses, invoicing terms, transportation methods, etc.
Home / Welcome to WebEDI

The largest pane in your WebEDI 3.0 account will be the Welcome to WebEDI pane. Please note that this pane can change based on different menu options selected, but clicking the Home icon on the header menu will always bring you to the Welcome to WebEDI pane.

Based on the search parameters selected, you will see incoming and outgoing documents for your WebEDI 3.0 account. The Activity drop down menu located in the upper left corner of this pane will determine how much activity can be viewed from this screen (anywhere from activity for that day to up to 60 days of historical activity). To further refine your document search results, you can search by trading partner, document #, location of document and type of document using the fields located at the top of this pane.

To view activity exceeding 60 days, select the trading partner from the Partners Pane and select either the Archives option to view archived documents specific to that trading partner, or select an incoming or outgoing document type for that trading partner to view corresponding open documents.

Note: All column headings are “sortable” in any screen within WebEDI 3.0. Click a column heading once to sort the column contents from lowest to highest. Click the same column a second time to sort the column contents from highest to lowest.
Viewing and printing documents
Once the desired document has been located, simply double-click on the document to open it in a new tab for viewing and/or printing. Up to 10 documents can be opened at the same time (by single-clicking on the first document to highlight it, and while holding down the Shift key, click the last in a consecutive series of documents to highlight a range. If multiple, non-sequential documents need to be viewed, single-click on the first document to highlight it, and while holding down the Ctrl key, click more documents to select them as well).

This report can be printed if hard copies are needed. Simply access the Adobe Reader menu (accessible at the bottom of your report window) if viewing as a PDF or use your web browser print option if viewing the report in HTML.

Incoming Documents

<table>
<thead>
<tr>
<th>Status</th>
<th>Type</th>
<th>Version</th>
<th>Document #</th>
<th>Document Date</th>
<th>Location</th>
<th>Partner</th>
<th>Modified Date</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Purchase</td>
<td>060410</td>
<td>0075596955</td>
<td>Feb 01, 2017</td>
<td></td>
<td>Tractor Supply</td>
<td>Feb 17, 2017</td>
</tr>
</tbody>
</table>

Based on the search parameters used on the Home screen, incoming documents will appear in the Incoming Documents section.

Outgoing Documents

<table>
<thead>
<tr>
<th>Status</th>
<th>Type</th>
<th>Version</th>
<th>Document #</th>
<th>Document Date</th>
<th>Location</th>
<th>Partner</th>
<th>Modified Date</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Invoice</td>
<td>060410</td>
<td></td>
<td>Mar 20, 2017</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Delivery</td>
<td>060410</td>
<td></td>
<td>Mar 20, 2017</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Based on the search parameters used on the Home screen, outgoing documents (those documents that have been created and/or sent, along with those that are in incomplete or “Draft” form) will appear in the Outgoing Documents section.
Creating Documents
There are several different ways to create an outbound document. These include turning around an incoming purchase order (when accompanied by defaulted information is the easiest way to create a document), using a template to create a new document, or creating a document while neither turning around a PO nor using a template.

Turning around a purchase order
Locate and single-click the open purchase order to be used in the creation of the outbound document. If at the Home screen, click the Create option on the Incoming Document command line.

If accessing the open purchase order via the Partners pane, click the Create option on the Actions line.
Using a template
Access the user-created template by clicking the Create option on either the Incoming Documents or Outgoing Documents command lines.

When the Create Document window appears, select the desired trading partner, Document Type and click the New Document from Template option before clicking the Create button.

When the Select a Template window appears, click on the desired template (created earlier by the user) then click the Create button.
Creating without PO turnaround or Template
Select the *New Document* option in the Create Document window.

Once the document creation process begins, the user will need to complete all mandatory fields in the Document Editor. The information required will vary amongst trading partners and document types.
All fields containing blue text are mandatory. All tabs containing a red asterisk contain at least one mandatory field. These fields will need to be completed before the document can be sent to the trading partner. Documents that are missing mandatory information can be saved as a “Draft” and edited at a later time with the missing / corrected information. “Draft” documents cannot be sent to a trading partner. Each field in the document editor is pre-defined by the trading partner, making some fields mandatory, optional or even conditional based on other fields. Edict Systems is responsible for validating EDI and business rule requirements so that documents are accurately processed to a trading partner.
Pending Documents

Once a document has been created, it will appear in the Outgoing Documents section of the Home screen (or the Outgoing section if a specific trading partner is selected in the Partners pane). Pending documents can be viewed and printed, edited, generated or deleted. When ready to send the document, single-click to select it, click the Generate button (which sends the document to the Outbox), then click Send Outbox to send the document to the trading partner.
Acknowledgments

In the same way processing the Inbox sends a 997 Functional Acknowledgment back to the sender of the incoming document, your trading partner will send a 997 Functional Acknowledgment back to you once they successfully receive your outgoing document.

If EDI documents are sent to a trading partner and a 997 Functional Acknowledgment is not received within a reasonable time period (normally 24 hours), users should confirm with the trading partner that the documents were successfully received. If the documents have not been received, they may need to be resent.

To track 997 Functional Acknowledgments for EDI documents sent to trading partners, navigate to the Outbox and click on the Documents Waiting for Acknowledgments tab. EDI documents which have been sent are placed into this section and will remain there until a 997 Functional Acknowledgment is received.

Acknowledgment status can also be viewed at the Home screen (in the Outgoing Documents section, ACK column).
Support Options
Please contact the Edict Systems Customer Support team for general questions or assistance with an account.

Business Hours: Mon - Fri (8:00am to 8:00pm ET)

Phone: (800) 443-3428, Option 2
Email: Support@EdictSystems.com
Chat: Live representative via online chat

This information can also be found by clicking on Support and then Support Options.