Trading Partner Connect Integration with Eclipse

Release 8.7.2

Legal Notices

Epicor ® Eclipse™ 8.7.2 Online Help System

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Epicor Trading Partner Connect Integration for Eclipse Overview

Epicor Trading Partner Connect provides a private Internet trading network to streamline your business practices by conducting real-time transactions with other members of the trading network. Instead of mailing printed forms or making phone calls, transactions through Trading Partner Connect are immediately transmitted to trading partners, allowing for faster responses.

Using the B2B Marketplace, also known as the Trading Partner Connect web site (www.tpcx.com), you can access millions of items, allowing you to compete on a larger scale and improve your customer service. Other benefits include the following:

- Eliminating EDI VAN charges.
- Eliminating dead stock.
- Improving your ability to interact with other distributors in your industry.
- Reducing your supply change costs.
- More accurately predicting consumer use of your products

Trading Partner Connect Components

Trading Partner Connect consists of the following components:

- **B2B Marketplace** – Provides a private area where you can administer trading relationships, put dead stock up for sale, and post other items in your inventory. You also setup company profile information and specify core options, such as how to define availability to other trading partners. For information about navigating and using the Trading Partner Connect web site, refer to the online help available on the site.
- **B2B Alliance** – Allows relationships between two or more distributors.
- **B2B Buyer** – Allows relationships between distributors and their manufacturer/suppliers. With B2B Buyer, you can gain greater and more efficient access to important supplier information relating to product availability and pricing. For example, you can send electronic purchase orders to and receive electronic invoices from your suppliers. B2B buyer can also help eliminate the frustration of dealing with incoming calls regarding the status of ship dates, order fulfillment, and order information by providing updates on Trading Partner Connect order information directly to your customer service staff.
- **B2B Gateway** – Provides the digital infrastructure required for distributors to have relationships with other marketplaces or entities that do not fall into the categories listed for B2B Buyer or B2B Alliance.

Getting Started Using Trading Partner Connect

This document provides basic information about how to set up and use Eclipse with Trading Partner Connect. It does not describe each feature of the B2B Marketplace. Additional features are described in the online help available on the www.tpcx.com web site. Click the Help link located in the upper right corner of that site.

To get started using Trading Partner Connect with Eclipse, see the following topics:

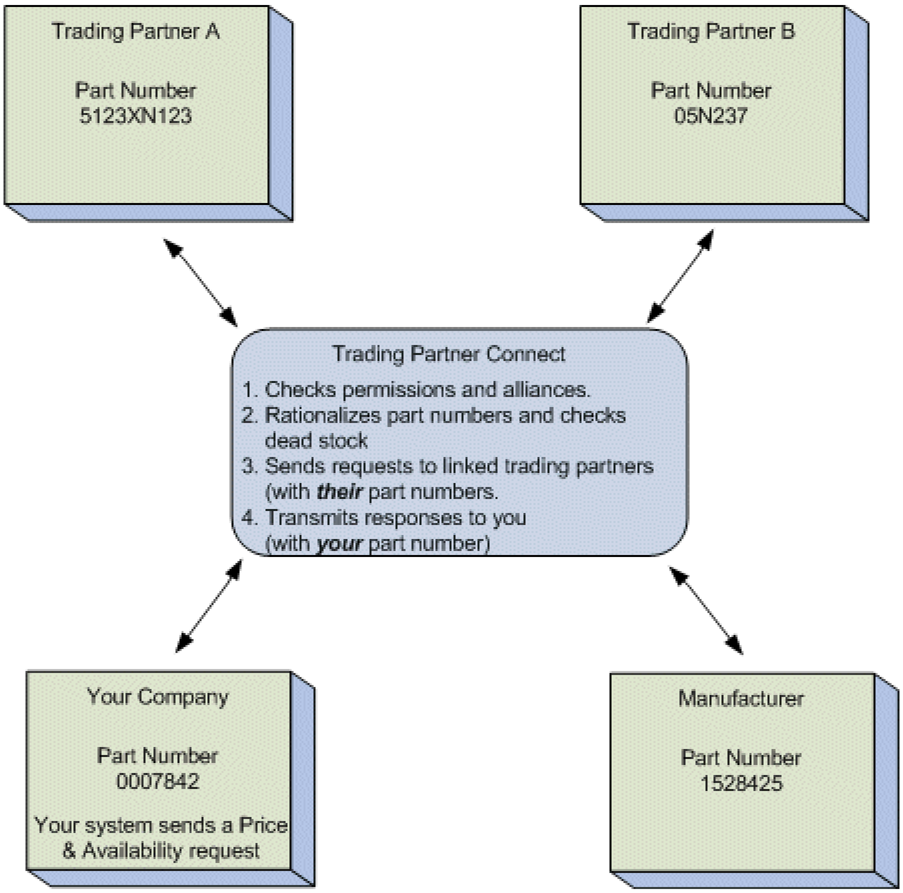
- Accessing the Trading Partner Connect Web Site

- Creating Your Company Profile
- Rationalizing Products in Your Eclipse Product File
- Trading Partner Connect Relationships Overview

Click here for a printable version of the Trading Partner Connect Integration for Eclipse documentation.

How Trading Partner Connect Works with Eclipse

Trading Partner Connect works with your Eclipse system to provide a comprehensive buying and selling solution for your business.



Accessing the Trading Partner Connect Web Site

The Trading Partner Connect web site is available at www.tpcx.com. User names and passwords are assigned by Epicor Implementation Consultants or Account Managers. Contact your Eclipse sales representative for more information.

Creating Your Company Profile on the Trading Partner Connect Web Site

Use your company profile on the Trading Partner Connect web site to identify information that is specific to you, such as your contact, billing, and shipping information, and your system preferences. You must complete your company profile prior to using any of the Trading Partner Connect functionality.

The company profile includes the following components. For detailed information about completing the fields in each section, see the Trading Partner Connect online help accessible through the www.tpcx.com web site. Click the **Help** link in the upper right corner of the page.

Company Profile Section	Use to...
My Account	Provide or update user ID and log in information.
My Documents	Upload documents that trading partners would need to see, such as tax exemptions, making them available to your trading partners for review.
Partner Profile	Change or view the information about your company provided to your trading partners, including your company name, e-mail, company ID #, and identification code.
Billing Information	Change or view your billing contact and address.
Shipping Information	Change or view your shipping contact and address.
Contact Information	Change or view information for any of your contacts that you have set up in the system,including selecting alerts are sent to each contact and resetting passwords. **Note:** Only administrators can view and change contact information.
Vertical Markets	Select the markets in which you want to trade.
Available Options	Indicate the way your free stock quantities are displayed to your trading partners. For example, you do not need to make all of your free stock available for sale on the Trading Partner Connect site.
Notification Defaults	Select how often the system sends you reminders regarding relationship requests.
Document Support	Establish which of your company contacts receive certain reports.

Trading Partner Connect Relationships Overview

Establishing alliances, or trading partner relationships, with distributors that carry the same product lines as you do, allows you to complete transactions electronically using Trading Partner Connect. Your goal is to create as many relationships, or B2B alliances as possible. Alliances provide you with online access to your trading partners' product lines, which can translate into hundreds of thousands of additional products available in your inventory. When a customer places an order, you can fill it immediately without having to purchase from your vendor, saving you and your customers valuable time and increasing your profitability.

You can also establish buyer relationships with your manufacturers and suppliers through Trading Partner Connect.

Set up your trading partner relationships through the Trading Partner Connect web site (www.tpcx.com). To get started creating trading partner relationships, see Establishing Relationships with Trading Partners.

Establishing Relationships with Trading Partners in Trading Partner Connect

Establishing alliances, or trading partner relationships, with distributors, manufacturers, and suppliers that carry the same product lines as you do allows you to complete transactions electronically using Trading Partner Connect. Set up trading partner relationships through the Trading Partner Connect web site. The system uses the Electronic Data Interchange (EDI) trading partner profile you selected when setting up Trading Partner Connect to create the trading partner profiles in Eclipse.

> **Note:** After you successfully establish trading partner relationships, the view only **TPCx Rationalized** field is selected in the Additional Customer Information screen or Additional Vendor Information screen in Customer Maintenance or Vendor Maintenance, respectively (from Customer or Vendor Maintenance, select). This check box indicates that you have a Trading Partner Connect trading partner relationship established with the customer or vendor.

For detailed information about using the Trading Partner Directory, viewing existing trading partner relationships, and entering the terms of a trading partner relationship on the web site, see the Trading Partner Connect online help accessible through the www.tpcx.com web site. Click the **Help** link in the upper right corner of the page.

To create a relationship on www.tpcx.com:

1. Log in to www.tpcx.com and select **Company Profile** to display the Company Profile page.
2. Click **Create** in the **Relationships** heading on the left side of the page to display the Relationships Trading Partner Search page.
3. To locate a company, do one of the following:

To...	Do this...
find a specific company	enter the company name or e-mail address in the **Company Name** and **E-mail** fields, respectively. Click **Search** to search for the company with that name or address.
find any company that fits a set a criteria	leave the **Company Name** and **E-mail** fields blank and select the business type you are looking to trade with using the radio buttons in the **Trading Partner Type** field. Continue with Step 4 below.

4. In the **Vertical Markets** field, move any markets that you do not want to search to the **Deselected** list.

   The system defaults to include all possible vertical markets in the search. One market must remain in the Selected list.

5. If you selected Distributor or Marketplace in the **Trading Partner Type** field, in the **Manufacturer** fields, move the manufacturers you want to search to the **Selected** list.

   The list contains manufacturers with whom you have rationalized products. You must select at least one manufacturer.

6. Click **Search** to display all the companies that match your search criteria.
7. Click the **Request Relationship** link next to the company with which you want to establish a relationship.

8. Set your relationship details and click **Save**.

   The system sends a notification to the potential trading partner detailing the proposed arrangement. If the business accepts, the system sends you a notification and select the **TPCx Rationalized TPCx Rationalized** field in the customer or vendor record, and the relationship can begin.

Inventory Availability Through Trading Partner Connect Overview

To sell your products through Trading Partner Connect, you must indicate which products you want to make available so they display on the web site and are available for your partners to see. This process is called rationalization.

Because you and your trading partners likely have different names and part numbers for the same item, the Trading Partner Connect system needs to translate and connect your product with like products in the system that are available. The conversion takes place within the Trading Partner Connect database, so only you can see your company-specific product information, providing a secure trading marketplace.

> **Note:** Use the TPCx view in order entry to view if a product has been rationalized to the Trading Partner Connect web site while you are creating sales, purchase, or transfer orders.

See the following topics for more information about inventory availability:

- Inventory and Trading Partner Connect Considerations
- Making Inventory Available in Trading Partner Connect

To post products that you consider dead stock, products that you have had in your inventory for an extended period of time without any sales, see Posting Dead Stock Products.

Important: Depending on the size of your inventory and how many products you plan to post to the Trading Partner Connect web site, the rationalization process can take two weeks or more.

Inventory and Trading Partner Connect Considerations

To make items in your inventory available to your trading partners on the Trading Partner Connect web site, you need to rationalize your products. Rationalizing your products converts, translates, and connects your product with like products in the system that are available. Keep the following things in mind when rationalizing products in your inventory.

Category	Description
Quotation Marks	Part numbers cannot contain quotation marks. The system rejects these items due to coding language restrictions.
Duplicates	It is possible that more than one part number exists for the same product in your system. The rationalization takes place, but Trading Partner Connect does not allow more than one item from the same trading partner to be associated with the same manufacturer’s item. For example, part numbers MMM 42305 and MMM-42305 both exist in your system. Both items rationalize to 3M item 511004423056. When the update runs, Trading Partner Connect rejects both products. It is best to review your data, apply any changes, and submit the vendor codes for rationalization.
Manufacturer Data	When submitting an item rationalization request, note the number of items available in the manufacturer database. Activant is continually building this database and establishing relationships with manufacturers. At times, the number of items is limited or certain divisions have not been imported. To correct this, you can e-mail or post data you have received from the manufacturer to your implementation consultant, the data rationalization specialist, or the Trading Partner Connect account manager.

Making Inventory Available in Trading Partner Connect

To sell your products through Trading Partner Connect, you must rationalize the products you want to make available so they display on the web site and are available for your partners to see. Create rationalization requests through the Trading Partner Connect web site to rationalize your products.

Note: After you successfully rationalize products, the view only **TPCx Rationalized** check box is selected in the Product Miscellaneous Information window in Product Maintenance (from Product Maintenance, use the **Add'l** hot key and then the **Misc Product Info**).

For detailed information about reviewing the status of your rationalization requests, see the Trading Partner Connect online help accessible through the www.tpcx.com web site. Click the **Help** link in the upper right corner of the page.

To create a rationalization request on www.tpcx.com:

1. Log in to www.tpcx.com and select **Inventory** to display the Item Rationalization Create Request page.
2. In the **Select Manufacturer** field, select the manufacturer you want to rationalize.

   The **Items Available for Rationalization Comparison** field displays the total number of items in your inventory that you can rationalize against the manufacturer's inventory.
3. In the **Enter your ID for this Manufacturer** field, enter the ID of the manufacturer as it displays in Eclipse.

   This is the vendor's ID number that displays in the lower left corner of Vendor Maintenance in Solar. The vendor's ID displays in the upper right corner in Eterm.
4. In the **Select Item Type** field, select one of the following types to indicate which items you want to rationalize:

Option	Description
All Items	Creates the item rationalization request for both stock and non-stock items. If the same part numbers exist in both your stock and non-stock items, do not select this option. The system sees repeated part numbers as duplicates and rejects the items for rationalization.
Inventory Only	Creates the item rationalization request for only items you consider stock items in your inventory.
Catalog Only	Creates the item rationalization request for only non-stock items in your product file.

5. Click **Create** to create and send your rationalization request for the selected manufacturer.

   When your request is processed and the manufacturer has responded, you receive an e-mail sent to the address associated with your Trading Partner Connect log in account.

Dead Stock in Trading Partner Connect Overview

Through the relationships you develop with your trading partners, you can eliminate inventory that you know longer plan to stock, or dead stock. The Trading Partner Connect system allows other distributors to view your stock for any item that is rationalized; they can then purchase those items in which they have interest.

If you have dead stock of an item that another distributor needs, they can purchase that inventory from you, rather then directly from the manufacturer or their supplier. Dead stock searches reveal available inventory from all members of Trading Partner Connect, but you must establish trading relationships to buy or sell dead stock inventory.

For more information about dead stock, see the following topics:

- Posting Dead Stock Products
- Removing Dead Stock Products

For detailed information about searching for and buying dead stock from other distributors, see the Trading Partner Connect online help accessible through the www.tpcx.com web site. Click the **Help** link in the upper right corner of the page.

Posting Dead Stock Products to Trading Partner Connect

If you have items in your warehouse that are not selling, called dead stock, you can post your dead stock items to the Trading Partner Connect web site where other distributors can purchase them from you instead of the manufacturer. The system uses the customer record you selected when setting up Trading Partner Connect to determine the pricing parameters for any dead stock items that you post to the web site.

Run the Inventory On Hand With No Sales Report and use the TPCx Dead Stock Upload Maintenance Queue to determine what products in your inventory are considered dead stock and to upload that information to the Trading Partner Connect web site. When you run the report with the Trading Partner Connect options selected, the system populates the TPCx Dead Stock Queue.

> **Note:** After you successfully post your dead stock products, the view only **TPCx Dead Stock** field is selected in the Product Miscellaneous Information window in Product Maintenance (from Product Maintenance, use the **Add'l** hot key and then the **Misc Product Info**).

To run the Inventory On Hand With No Sales Report with Trading Partner Connect data:

1. From the **Reprts > End of Month Reports** menu, select **Inventory On Hand With No Sales** to display the Inventory On Hand with No Sales Report screen.
2. Complete the fields to run the general report.
3. Use the **TPCx Options** hot key to display the TPCX Dead Stock Criteria screen and complete the following fields:

Field	Description
Include TPCx Dead Stock Criteria	Enter **Y** to run the report including the Trading Partner Connect products that you set in the other fields. Running the report with this option selected populates the TPCx Dead Stock Queue. The default is **N**.
TPCx Item Types	Select whether to include items that you have added to the Trading Partner Connect web site, to run the report for items that you have not added to the web site, or both. The default is **Rationalized**.
TPCx Stock type	Select whether to include stock that has already been flagged as dead stock and loaded to the Trading Partner Connect web site, to run the report for only those items, or both. The default is **No**.

4. Set options, if needed, and generate the report.

   The system populates the TPCx Dead Stock Queue.

To upload dead stock to the Trading Partner Connect web site:

1. From the **Purchase > Queues** menu, select TPCx Dead Stock to display the TPCx Dead Stock Upload Maintenance screen.

   The screen displays the items that are considered dead stock in your inventory, including the last sale date, how many you have in inventory, and the unit and extended unit value of the items.
2. Select the **Send** field next to items that you want to post as dead stock to the Trading Partner Connect web site.

3. Use the **Upload to TPCx** hot key to send the dead stock products to the web site.

Removing Dead Stock Products from Trading Partner Connect

If you posted dead stock products to the Trading Partner Connect web site that you no longer consider dead stock, you can remove the products from the web site at any time. From the web site you can search your dead stock products using the Un-Post Dead Stock report feature, and change the status to a non-dead product.

> **Note:** After removing dead stock products from the web site, the system updates the **TPCx Dead Stock** field in the Product Miscellaneous Information screen in Product Maintenance (from Product Maintenance, use the **Add'l** hot key and then the **Misc Product Info**).

For detailed information about changing a product's dead stock status, see the Trading Partner Connect online help accessible through the www.tpcx.com web site. Click the **Help** link in the upper right corner of the page.

To remove dead stock products from www.TPCx.com

1. Log in to www.tpcx.com and select **Reporting** to display the Dead Stock page.
2. Select the **Un-Post Dead Stock** option on the left side of the page to display the Un-Post Dead Stock page.
3. To search your dead stock items, complete any or all of the following search parameters and click **Search**:

Search Criteria	Description
Keyword Search on Item Code and Descriptions	Enter any words that might be part of the product description. The search returns any items you have uploaded as dead stock that have this keyword in the product code or description.
UPC	Enter the product's universal product code (UPC) to search for dead stock items that match that UPC.
Manufacturer Part #	Enter the part number to search for dead stock items by product part number.
Sort Order	Select how you would like the search results sorted. The web site sorts the results in alphanumeric order by the option you select.
Manufacturers	Select the manufacturers that you would like to search. The list includes all the manufacturers with which you have rationalized inventory. Select the manufacturers in the **Deselected** box that you want to search and move them to the **Selected** box.

The system returns the products that you have uploaded as dead stock.

4. Select the **Un-Post** check box next to the products you want to remove from dead stock.
5. Click **Update** to remove all items with the **Un-Post** check box selected.

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