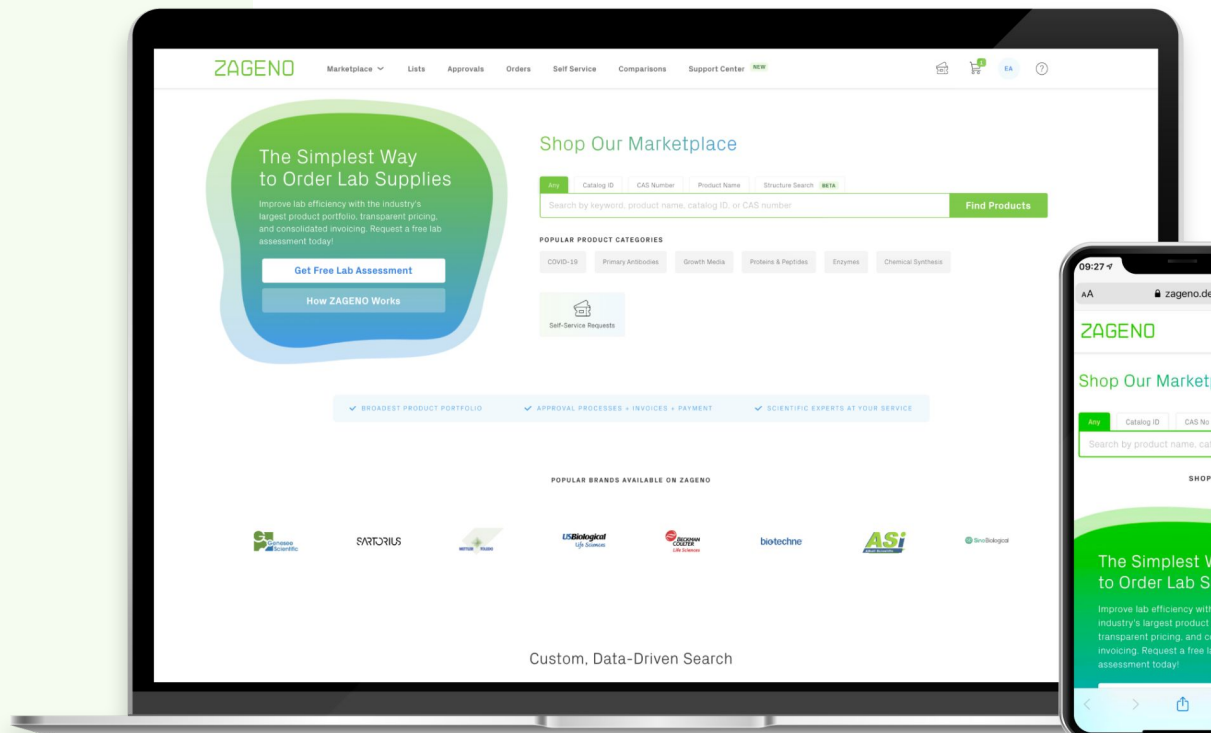


ZAGENO

Saving Time for Science

Creating Acknowledgement via CSVs



Section 1: Setting up a PO export

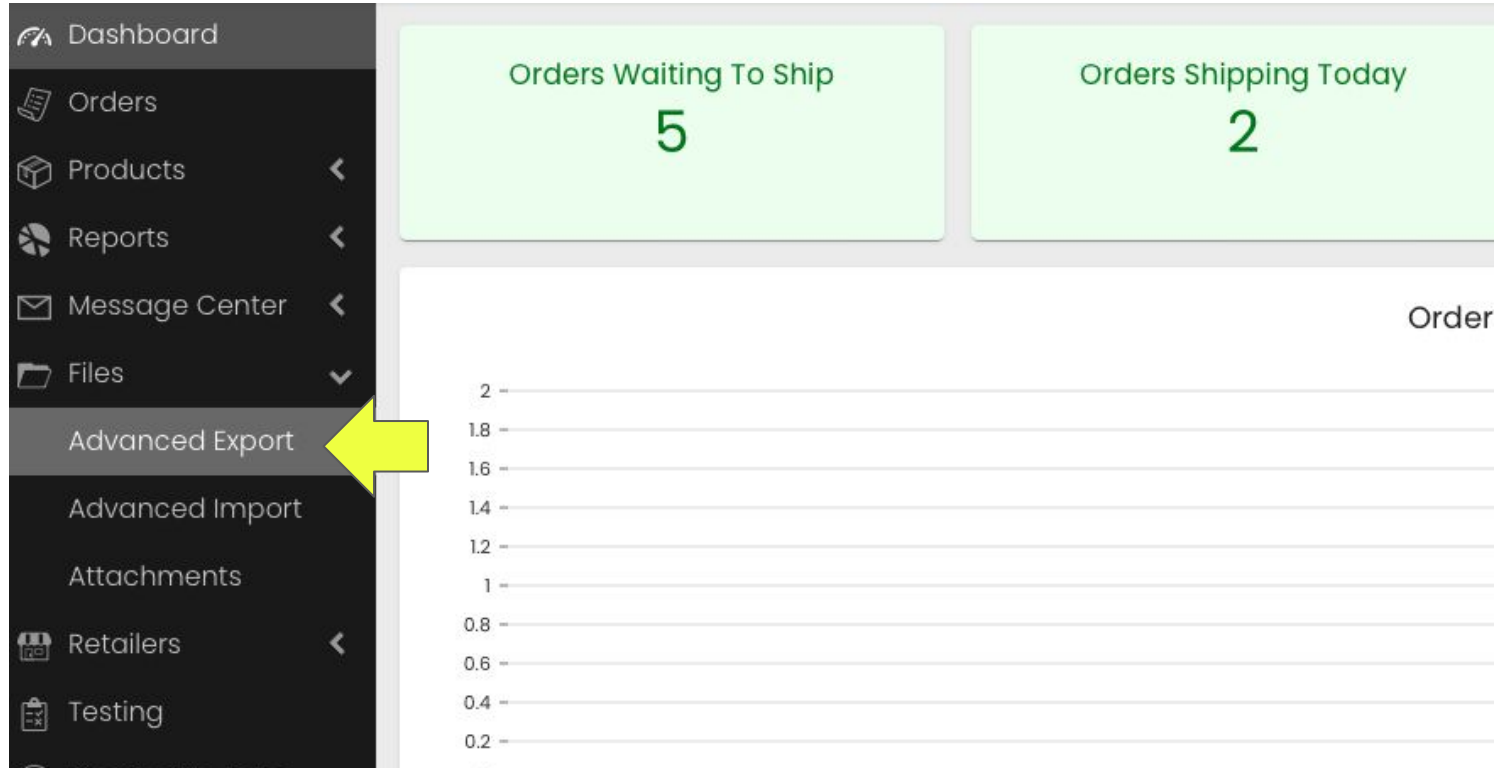
Setting up a PO export

A PO export will make it really easy to:

- Pull only the POs that need to be acknowledged
- Export the key elements of each PO that need to be included within acknowledgement document
- Avoid manual rekeying and data entry errors

This is a one time only exercise that you just need to do the first time!

Once logged in, go to advanced export to set things up



Next you'll land in the main export setup screen, click save as and give your export a name

Profile

Select profile... ▼ SAVE SAVE AS DELETE SAVE TO FILE LOAD FROM FILE

Output Format

CSV XLSX XML JSON External XML DOWNLOAD

Document Filter

Field	Operator	Value
Document Type	is	Order ▼

ADD

Once your export is saved, you'll want to hit share so your colleagues can use it. Then you'll want to start adding document filters

Profile

Rick Test

SAVE

SAVE AS

SHARE

1

DELETE

SAVE TO FILE

LOAD FROM FILE

This profile is only visible to you.

Output Format

CSV XLSX XML JSON External XML

DOWNLOAD

Document Filter

Field

Operator

Value

Document Type

is


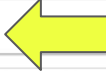
Order



ADD

2

Setup the document filter as noted below

Document Filter			
Field	Operator	Value	
Document Type	is	Order	 This will ensure only PO documents are exported
Status	is	Ready to Acknowledge	 This will ensure only PO's that have items that have not yet been acknowledged will be exported

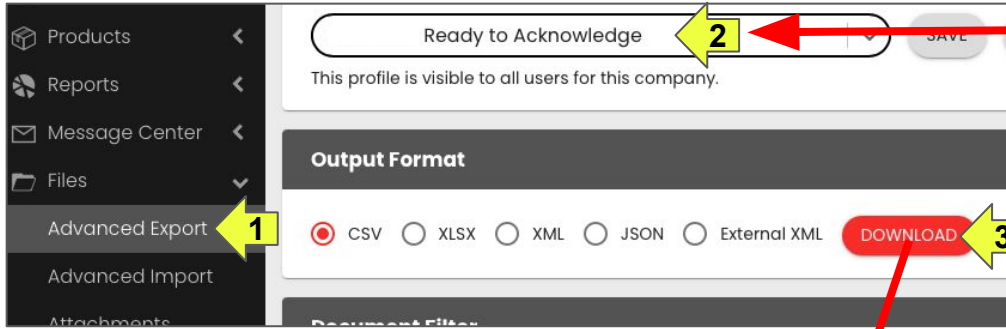
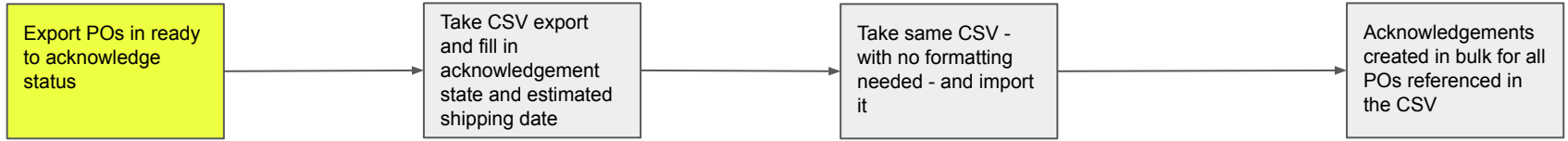
Define your fields to export

Fields to Export	Order	Input Field/Expression	Output Column
1	"130259" ← This is ZAGENO's ID and will remain static	ReceiverCompanyId	
2	"1234567" ← This is your ID and will remain static	VendorNumber	
3	OrderNumber		
4	PartnerPO		
5	This will create a column for your to input estimated shipping dates →	ScheduledShipDate	
6	OrderLine.LineNumber	AckLines.LineNumber	
7	OrderLine.Quantity	AckLines.Quantity ←	
8		AckLines.QuantityCancelled	
9		AckLines.QuantityBackordered	
10	DocumentDate		

This column represents the quantity you're accepting. If all or part of the quantity is back orders or will be canceled, remove that amount from this column in the import and add it to one or more of the next two columns

Section 2: Importing a acknowledgement CSV

Export POs that need acknowledgements



Note the export will be called whatever you saved it as in section 1

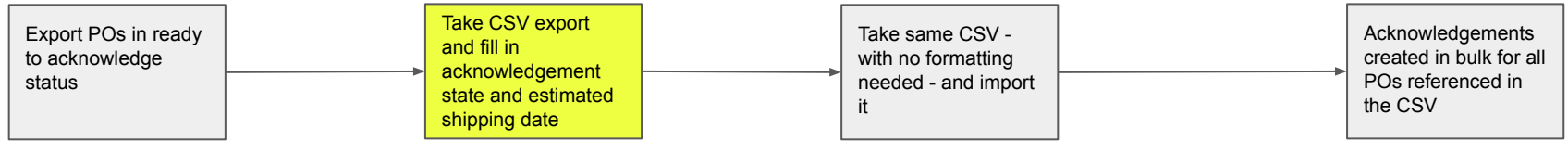
ReceiverCompanyId	VendorNumber	OrderNumber	PartnerPO	ScheduledShipDate	AckLines.LineNumber	AckLines.Quantity	AckLines.QuantityCancelled	AckLines.QuantityBackordered
130259	1234567	US-UETG2Y-PJB561	US-UETG2Y		214518			
130259	1234567	US-UETG2Y-PJB561	US-UETG2Y		214519			
130259	1234567	US-UETG2Y-ROBLAD	US-UETG2Y		214517			

This column is for accepted

Input 1: Enter an estimated ship date. Format is MM/DD/YYYY

Input 2: Enter the full QTY for that line item that's been either accepted, canceled or back ordered

Fill out CSV with required details

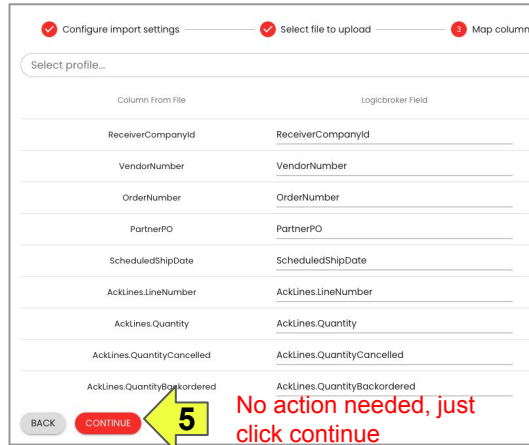
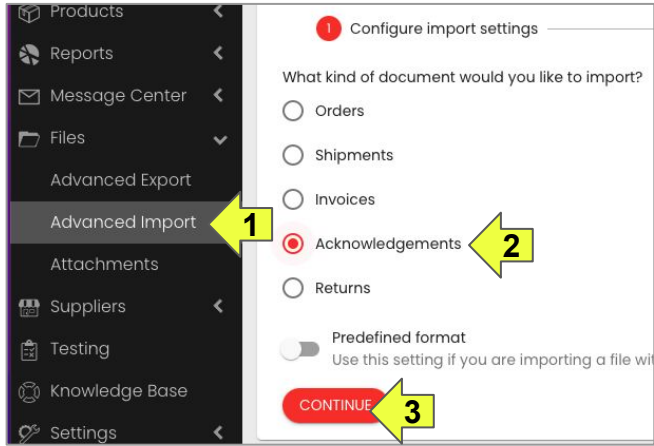
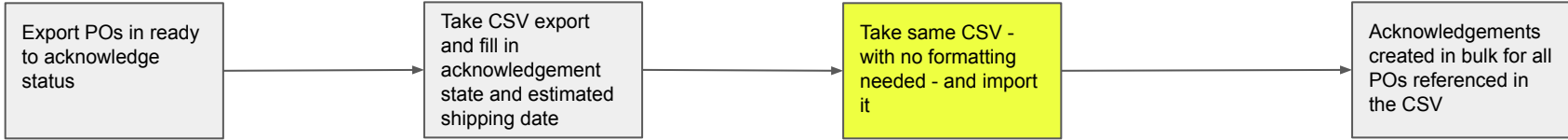


ReceiverCompanyId	VendorNumber	OrderNumber	PartnerPO	ScheduledShipDate	AckLines.LineNumber	AckLines.Quantity	AckLines.QuantityCancelled	AckLines.QuantityBackordered
130259	1234567	US-UETG2Y-PJB561	US-UETG2Y	10/29/22	214518	1		
130259	1234567	US-UETG2Y-PJB561	US-UETG2Y	10/29/22	214519	1		
130259	130904	US-UETG2Y-ROBLAD	US-UETG2Y	10/29/22	214517	1		

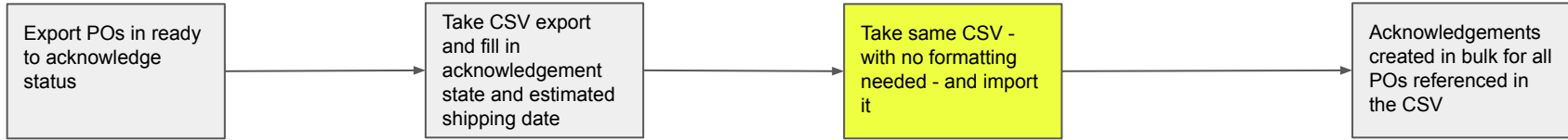
Estimated shipping date

Acknowledgement states

Import your CSV following the steps below



Import your CSV following the steps below



✓ Configure import settings ✓ Select file to upload ✓ Map columns 4 Validate

There are some common fields missing from this file. You can still continue if you have uploaded files in this format before or you know these field

All acknowledgements are missing item identification.

```
{
  "Type": 0,
  "OrderNumber": "US-UETG2Y-PJB561",
  "OrderDate": "0001-01-01T00:00:00",
  "PartnerPO": "US-UETG2Y",
  "VendorNumber": "130904",
  "ScheduledShipDate": "2022-10-29T00:00:00",
  "AckLines": [
    {
      "Type": 0,
      "Quantity": 1,
      "QuantityCancelled": 0,
      "QuantityBackordered": 0,
      "LineNumber": "214518"
    },
    {
      "Type": 0,
      "Quantity": 1,
      "QuantityCancelled": 0,
      "QuantityBackordered": 0,
      "LineNumber": "214519"
    }
  ]
},
{
  "ReceiverCompanyId": 130259,
  "StatusCode": 0
},
{
  "Type": 0,
  "OrderNumber": "US-UETG2Y-ROBLAD",
  "OrderDate": "0001-01-01T00:00:00",
  "PartnerPO": "US-UETG2Y",
  "VendorNumber": "130904",
  "ScheduledShipDate": "2022-10-29T00:00:00",
  "AckLines": [
```

BACK CONTINUE

Advanced Import

✓ Configure import settings ✓ Select file to upload ✓ Map columns ✓ Validate 5 Complete import

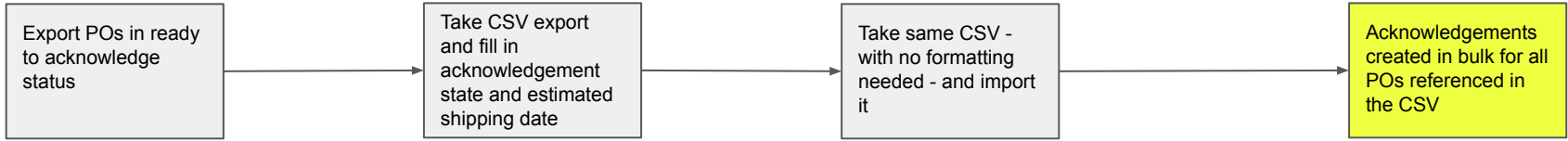
Imported 1 records.

Created acknowledgement #1836770

1 No action needed, just click continue

All successfully created acknowledgements will be displayed on this page where you can click on them to review the document

Reviewing your acknowledgement documents



Acknowledgement US-UETG2Y-PJB561 (ID# 1836770) (Zageno EDI Vendor) MORE ACTIONS ▾

Acknowledgement Status: Complete Received: 10/19/2022 3:16 PM

Billing Address	Shipping Address	General Information
Test Organization - Test Street 1 Test Department LA, CA 90001 United States of America E: orders@zageno.com	Test Organization - Test Street 1 Test Department LA, CA 90001 United States of America E: orders@zageno.com	Order ID US-UETG2Y-PJB561 Acknowledgement Number US-UETG2Y-PJB561 Change Reason Estimated Ship Date 10 / 29 / 2022 Reference Number US-UETG2Y Update Request Number Requested Ship Date 10 / 19 / 2022 Expected Delivery Date 10 / 19 / 2022

Individual acknowledgements like this one are now available in the portal after your successful uploads have processed!

Acknowledgement Items									
Line	SKU	Partner SKU	UPC	Description	Quantity Accepted	Quantity Cancelled	Quantity Backordered	Change Reason	
214518	07533			Human Pluripotent Stem Cell-Derived Endoderm qPCR Array SKU: 07533	1	0	0		
214519	100-0818			Wheat Germ Agglutinin (WGA), iFluor™ 647 SKU: 100-0818	1	0	0		