Orgill EDI FTP Version

Orgill has 2 different file layouts and 2 different ways of receiving orders, Price Updates and Promotions

Technical note: (Files should have a HD1 at the beginning of each record if viewed in Notepad if it's the new file layout)

In this manual we are going to explain the new FTP procedure.

You must have Orgill's EDI department set you up on the FTP server. They will email you a Login and Password.

Note: This only has to be done once.
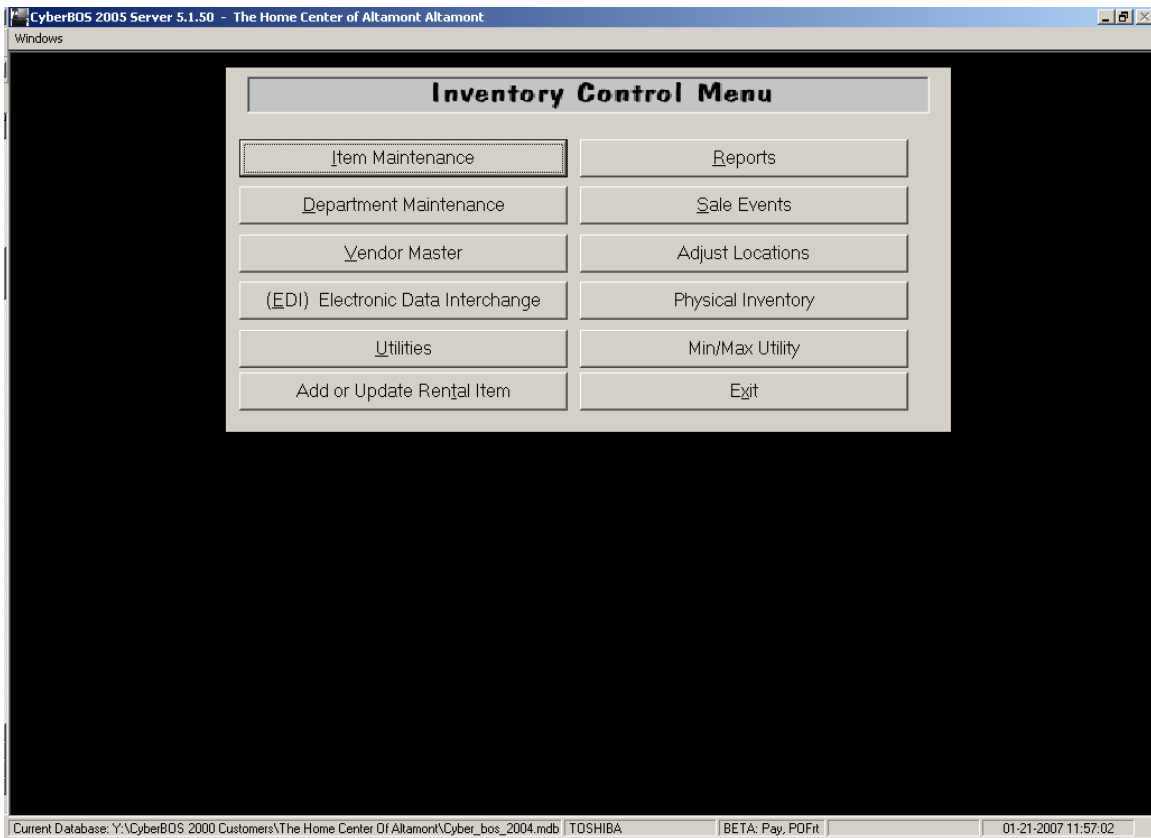
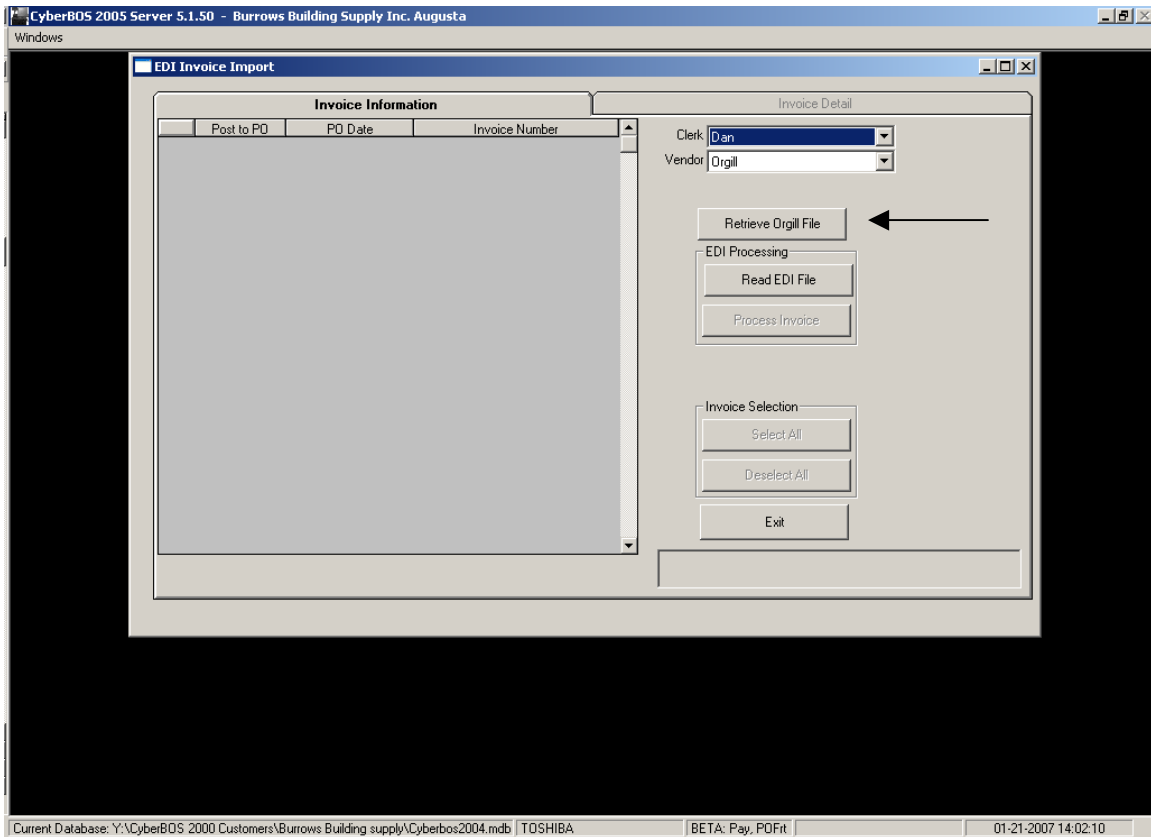Create a vendor Called Orgill In Vendor Master

Enter the Login and Password in their appropriate fields.(See the arrow?)

Enter your dealer number in the Account Number Field.

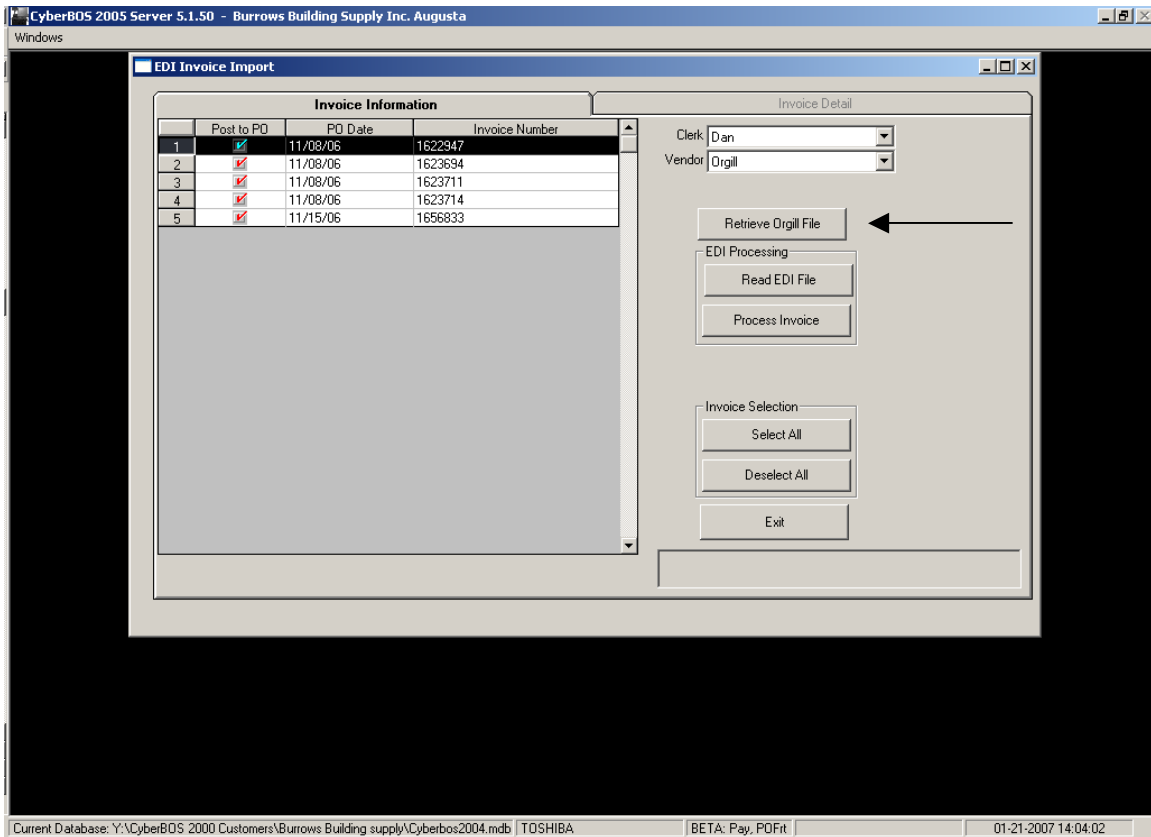Be sure that you are logged on the internet. For FTP is internet based only.

From the Inventory Control Menu Select EDI (Electronic Data Interchange)

Select your clerk name then select Orgill from the Vendor list.

Click on Retrieve Orgill File button (see the arrow?)

The grid will display all the Invoices, Price updates and Promos that are available to process.

If there are any Price Change Files or Proms in the grid, Uncheck them. Process the invoices first, separate from price changes and promos. *See Process Price Changes in a separate manual.* Failure to uncheck the Price Change/Update Promos, will force you to do the Price Changes and Promos first. You will have to go back and process the invoices later. This manual is for training on Invoices Only. There is a separate manual for Price and Promo Updates.

Click on the Process Selected button. (See the arrow?)

You may choose to select or deselect invoices by clicking the check box just left of the PO Date.

Unknown Unit

When pulling in an order, you may get a screen that looks like this, if you do, it's because Orgill is sending you a UOM (Unit Of Measure) that is different from what you have on file for this item.

In this example this member has FT for the Primary Purchase UOM, but Orgill is sending SO (god only knows what SO represents) it appears to be a Spool (what's wrong with SP or SL for Spool?) and the member has it by the Foot (FT). You will also notice this member has the cost at .11 cents, and Orgill has the cost at $48.45. This would indicate that Orgill is sending down the cost per Spool. Here is an opportunity for you to change the Item so your inventory will match Orgill. It is recommended.

Unknown Unit

An item has been received with an unknown unit of measure.

Product   504351

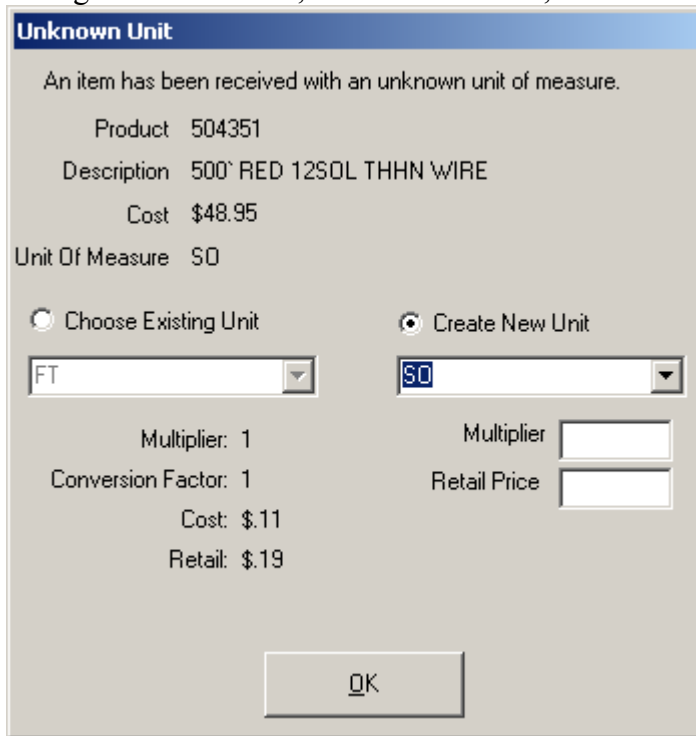Description   500` RED 12SOL THHN WIRE

Cost $48.95

Unit Of Measure   SO

◉ Choose Existing Unit   ○ Create New Unit

[FT ▼]   [24 ▼]

Multiplier: 1   Multiplier [ ]
Conversion Factor: 1   Retail Price [ ]
Cost: $.11
Retail: $.19

[OK]

Change the Unit to SO, if it does not exist, Click on Create New Unit and add it.

Unknown Unit

An item has been received with an unknown unit of measure.

Product   504351

Description   500` RED 12SOL THHN WIRE

Cost $48.95

Unit Of Measure   SO

○ Choose Existing Unit   ● Create New Unit

FT   SO

Multiplier: 1   Multiplier [   ]
Conversion Factor: 1   Retail Price [   ]
Cost: $.11
Retail: $.19

OK
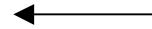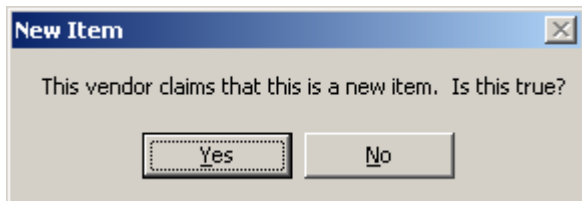
Put 500 in the Multiplier Field. Because this order had 4 Spools on the order, but the system has it in by the foot, you have to tell the system how many feet are on a SO (Spool). You have to look and hope the description tells you how many feet are in the Spool. If not, you will be forced to look it up on their web site, or in their catalog.

New Item Warning

New Item ☒

This vendor claims that this is a new item. Is this true?

Yes   No

You may get this warning if Orgill Claims this is a new item and it's really not. How this can occur, is if Orgill replaces an item with a new Orgill number because they switched vendors on this particular it. They give it a new Orgill number (SKU). If it is new, simply answer YES. If it's not, click on NO and it will allow you to enter your current SKU for this item and add the new Orgill number as an Alternate. Done once it will never ask again.

Invalid Items

Items with a Purple back ground are New but have an invalid department associated with the item number. This would be due to the Orgill catalog having a department that you don't have in your system. Click on the drop down list and choose a valid department. You can prevent this in the future by adding any departments that are missing in your system to match Orgill's catalog.

New Items

New Items appear in Yellow.
Change the departments on all items that say New to their perspective department. If you miss any, the system will make you change all that you missed to one department.

Note: We recommend adding a department called New Items, then putting all new items in that department, and changing them later to the correct department to prevent slowing the EDI process down.

At this point you can print any items that the prices have changed. Click on "Print Price Changes.
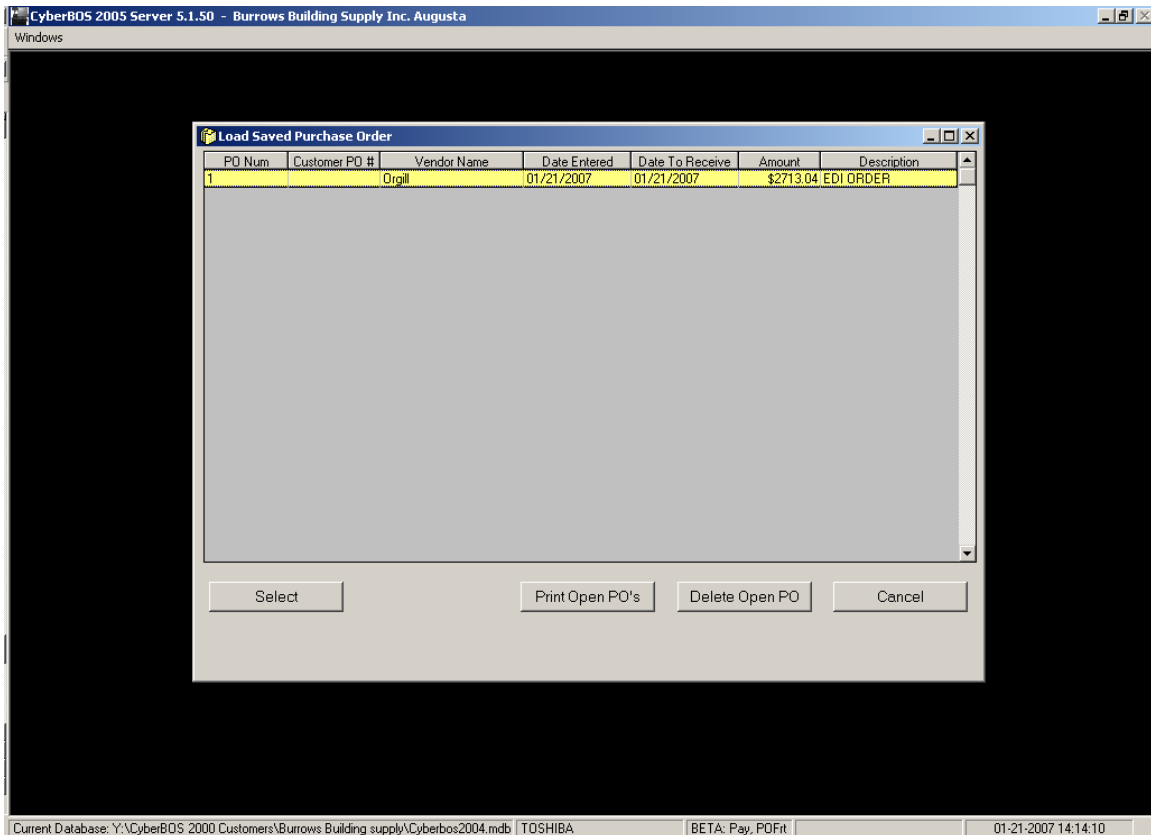
Click on Post To Purchase Order.

A warning will appear warning that you are about to replace the Cost in your inventory, answering Yes will do that now, answering No will NOT update the cost or retail until you post the PO (Purchase Order)

If you want to view the order in a PO for editing, posting and or printing, answer Yes. Otherwise answering NO will allow you to process another Invoice, File Maintenance or Price update.
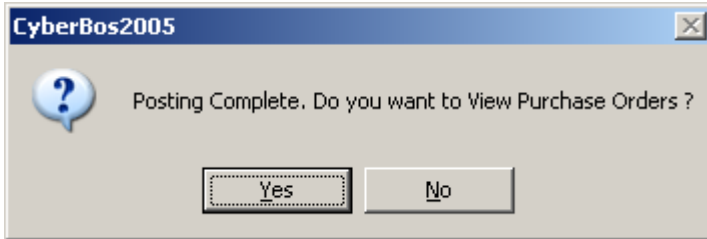
In this case I answered Yes.
The system automatically takes you the Open PO Search Screen. Your EDI order should be the last PO in the list highlighted in Yellow, click on Select.

Post an EDI Order Within a Purchase Order

Notice: Remember the item we changed the UOM to SO and Multiplier to 500? Look at the last line on the PO. It received 4000 ft with the correct cost and new retail at .15 cents. It's recommended to go to Inventory Control and fix the item permanently, Change the Purchase Unit to SO, Change the Conversion Factor to 500, Update the Cost to Cost per Spool. $48.95 This will make Orgill happy, and will prevent the Unknown Unit box from popping up the next time you purchase it. As long as Orgill doesn't change the UOM to SP or SL the next time you buy it.

Make any changes necessary to the items in the grid, and click on F1 to Post this order to Inventory .

If you change the retail price, be sure to print a new Bin Tag to match your changes.

Be sure to answer Yes on updating Alternate UPC's, Target Pricing and Print a receiving report.

Reposting Old EDI Orders and Skipped Invoices

If you choose only one invoice to process and leave the rest behind, you will have to go back and retrieve the original file that contains the invoices skipped. Or if you need to repost or just look at an old EDI order, use the following procedure to do so.

From the EDI Menu Select Read EDI File:
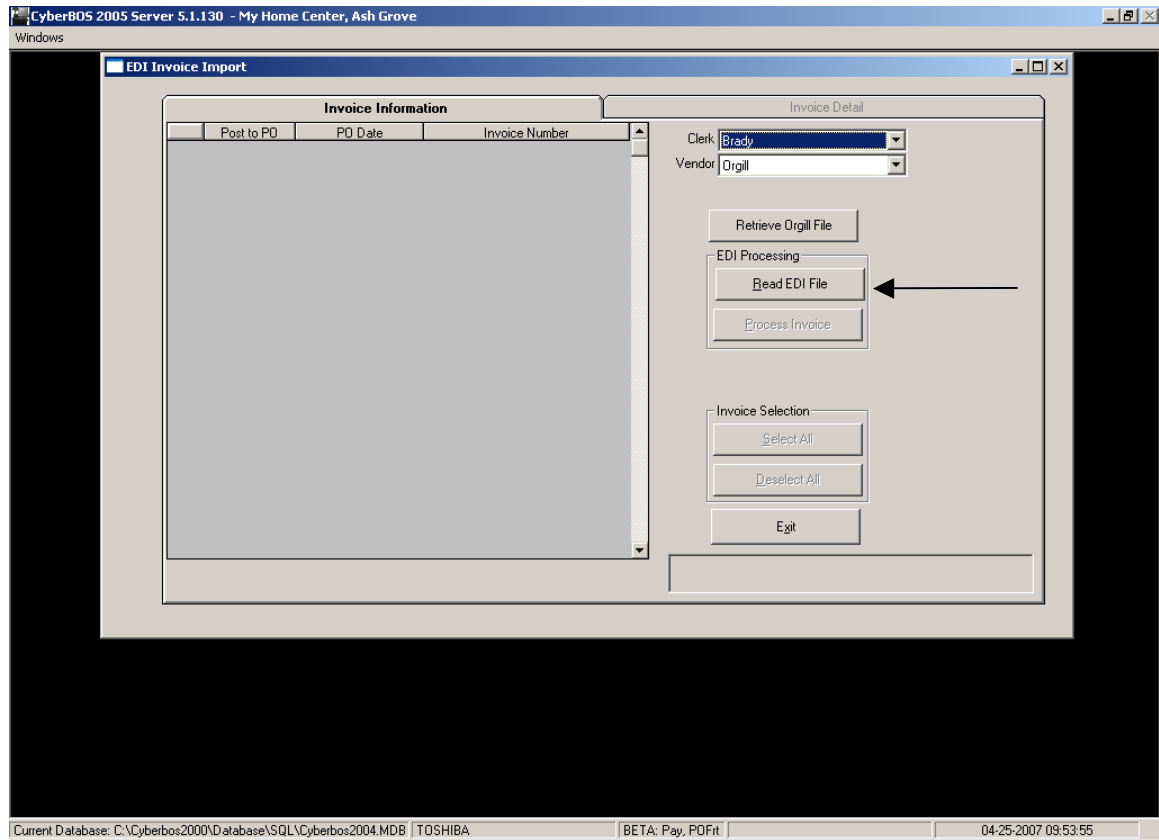
This should take you to y:\cyberbos2000\EDI\Orgill

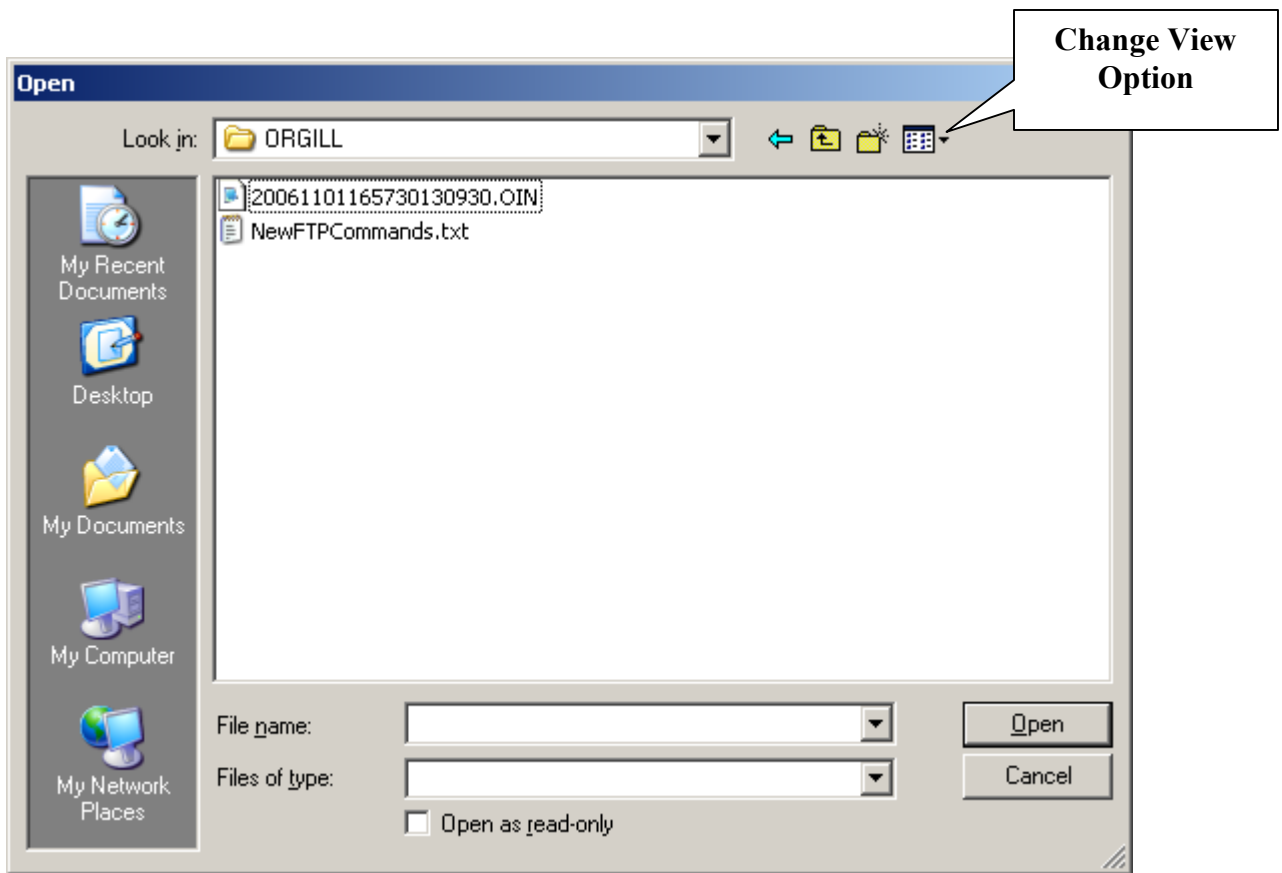The original file you download every week is your dealer number with an OIN (Orgill Invoice) extension. We rename this file with the date and time you processed it originally. We do this because the EDI file is always the same name every week. This will prevent old orders from being copied over. The last EDI order should be the last OIN in the list, if your not sure which one it is. Click on the "Change View" box located in the tool bar, to Detail. This will show the date. Or you may place your mouse on the file, it will display the date as well.

Select the EDI file, this one file contains all the invoice(s) for that week.
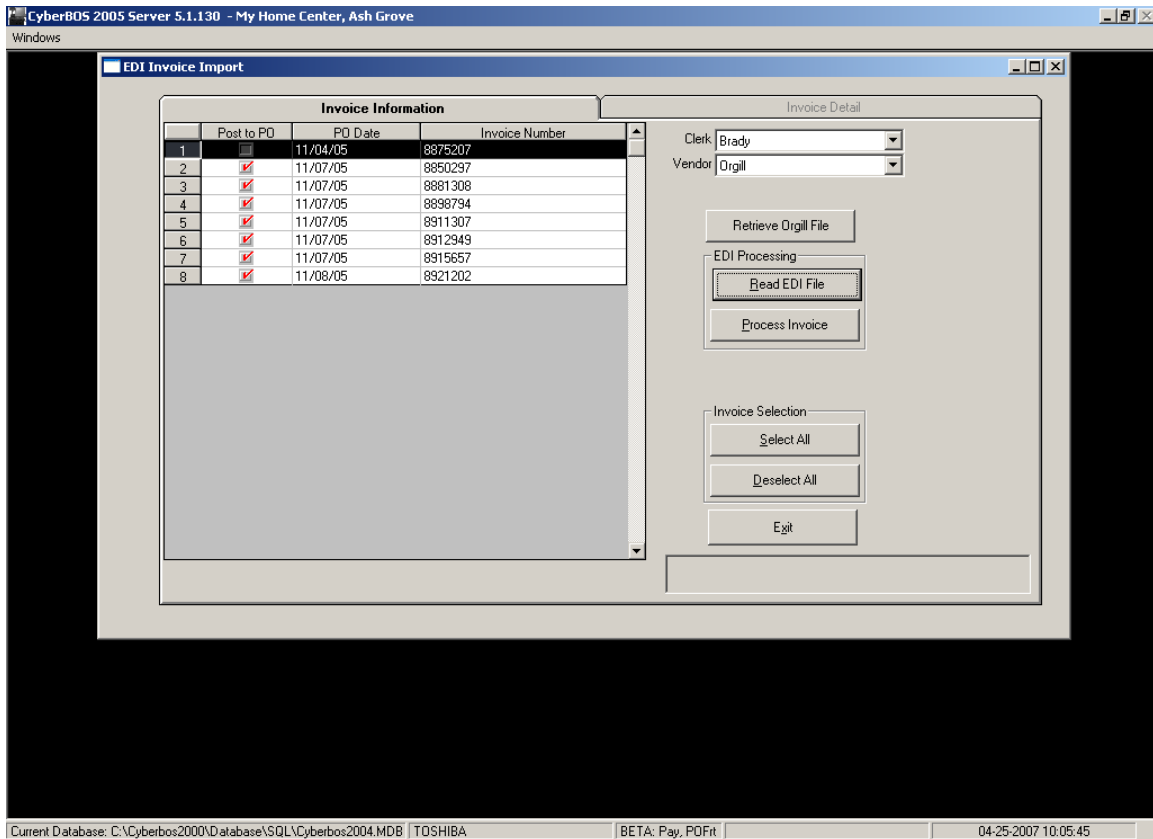
You will notice that the invoices that have not been posted have a Red check box by them, and the first one does not. This means the first invoice was processed and the rest have not been. Select the invoice(s) you want to process and proceed as normal.

Note: if you choose an invoice that has already been processed, it will warn you that you have already processed this invoice, and it asked are you sure you want to reprocess it.