System Setup and Configuration

Last updated: December 9, 2022

Once installed, there is an eInteract Configuration page that needs to be setup and configured. However, before setting this up, it is worth considering the standard NetSuite features that affect the operation of eInteract:

Company – International

Multiple Currencies – if multiple currencies are enabled, eInteract assumes the Supplier Invoice is issued in the same currency as the Purchase Order

Multi-Currency Vendors – if this feature is enabled, eInteract is unable to maintain vendor prices on items

Accounting – Advanced Features

Advanced Taxes – this determines whether eInteract requires Tax Code or Tax Schedule defaults in the eInteract Configuration screen

Transactions – Basic Features

Sales Orders – required for using Real-time Price & Availability Enquiry with sales orders

Purchase Orders – required for electronic processing is Purchase Orders and subsequent transactions

Transactions – Shipping & Receiving

Advanced Shipping – required for processing Despatch Advices for Drop Shipment or Special Order purchase orders

Pick, Pack and Ship – eInteract will always mark drop shipment order fulfilments as Shipped

Advanced Receiving – required for processing Despatch Advices

Items & Inventory – Items

Drop Shipments & Special Orders – required for Vendor and Price selection on Sales Orders

Multiple Units of Measure – this determines whether eInteract requires a default Unit of Measure in the eInteract Configuration screen

Multiple Vendors – enables tracking of linked vendors with vendor part code and price

Items & Inventory – Inventory

Inventory – required for eInteract

Multi-Location Inventory – this determines whether eInteract requires a default Location for item receipts in the eInteract Configuration screen

Serialized Inventory – allows serial numbers to be tracked by NetSuite

Advanced Bin/Numbered Inventory Management – enables additional options within eInteract for auto-generated serial numbers

These features are available in the Classic Centre through Setup, Company, Enable Features. Refer to the NetSuite online help for details of how these settings affect NetSuite.

The following Accounting Preferences also affect the operation of eInteract:

Order Management – Purchase Orders

Allow Expenses on Purchase Orders – eInteract will not pass Expenses through to Onetrail and will Close any outstanding Expenses when the Supplier Invoice is received

Order Management – Drop Shipment

Limit Vendor List on Items – determines whether only linked item vendors appear in the Price & Availability lookup

Order Management – Receiving

Bill in Advance of Receipt – if this is not enabled, eInteract will not be able to process Supplier Invoices which include items not yet received

These features are available in the Classic Centre through Setup, Accounting, Set Up Accounting. Refer to the NetSuite online help for details of how these settings affect NetSuite.

Multiple Vendors

Without the Multiple Vendors feature, any supplier can be used for the purchase of any item. NetSuite will not track which suppliers have previously been used for an item and will not hold a vendor part code or purchase price for each supplier and item. The eInteract Price & Availability lookup can still be used and will request information for each Onetrail enabled vendor.

When this feature is enabled, items and suppliers can be linked and NetSuite will validate this link when entering purchase orders. The vendor part code and purchase price for each supplier and item can be entered and maintained. When creating and updating items from Onetrail.net Product Information, this link will automatically be established and maintained. If the Limit Vendor List on Items feature is marked, the Price & Availability lookup will only request information from the vendors linked to the item, otherwise it will request information for each Onetrail enabled vendor.

If the Multi-Currency Vendors feature is also enabled then eInteract will not be able to maintain item vendors and vendor prices. This is because the multi-currency purchase prices can only be maintained through the user interface in the current version of NetSuite (2014.1).

Serialised Inventory

With this feature enabled, NetSuite can track individual serial numbers against the purchase and sale of items (and all item movements). By marking an item as serialised, serial numbers must be provided for transactions affecting the item.

In some scenarios, the serial numbers may be notified at a later date and not available during

transaction entry. The eInteract configuration option “Use Serialised Inventory Items” allows serialized inventory to be used, or not, without requiring the NetSuite Serialized Inventory feature to be disabled. For example, if stocked items

require serial tracking but supplier drop-shipped items require serial number recording upon invoicing rather than despatch.

eInteract Configuration

This is split into different sections. Below provides some details of each of the sections. Not every field is detailed, and some fields will not always appear, this will dependant on what other features have been enabled in NetSuite. To get to the page, as an Administrator go to: Setup > Custom Records > eInteract Configuration.

Credentials

Here you need to enter your log in details for Onetrail. All of these details should be provided by Onetrail and all is required is to enter the details. There is also an option to select whether to use the Onetrail Production or Staging environment. It is recommended to use Production, there is a separate setting to determine whether you use real Suppliers or the Onetrail Test Supplier for raising Orders.

Settings

As previously explained, not all fields are detailed, but more information can be found on most fields by clicking on the field help. Some of the more important fields are listed below with some detail:

Update Items from P&A Enquiry

If this is enabled, and you press the P&A Lookup button on an Item, it will update the item with the latest quantity and price

This will update the information per Supplier on the Supplier tab – the latest Purchase Price, as well as Purchase Stock Available field on body of Item

Track Detailed Price and Availability

If this is enabled, vendor prices and availability will be tracked, including the total stock available across all vendors and the best price with stock. This will populate on the eInteract Item Vendor P&A tab

Number of Days to Keep Saved Responses

Messages retrieved from Onetrail are automatically stored as Saved Response records. A scheduled task deletes these records once they reach the age configured in this setting, to prevent an excessive number of historical messages being retained on the system.

Onetrail Schema

This determines which version of Onetrail to interface with.

Version 2.0 was the originally supported schema version and Version 3.1 is the latest version

3.1 should be used whenever possible as it is the latest supported option provided by Onetrail

For Onetrail 3.1 produces .SEL files and 2.0 produces .PRD

Item Create and Update Options

Reference Vendor

Select which vendor will be used to update additional product information on the item.

This will affect the description used on certain fields on the Items, for example the Vendor Short & Long Description

Will also set the preferred Vendor if the Item already exists before linking to Onetrail

If the Item does not already exist, a Drop Ship item has to have a preferred Vendor. Therefore the preferred Vendor will be set as the first Vendor which the Product feed is picked up from

Max Length of Item Description

Determines the number of characters of the item description provided by the Reference Vendor which are copied into the Item Description field.

Create Items as Drop Ship Items

Item Group Mapping

This allows the Pricing Group, Accounts and web site Category for a new item to be defaulted based upon either the Onetrail Product Group or the UNSPSC assigned to the item

Enable Pricing Rules

This enables the item selling price to be calculated according to Pricing Rules which are based upon the web site category of the item. See the later section on Pricing Rules for further details

Use Manufacturer for Pricing Rule

Mark this box to use Manufacturer (Brand) as a key for Pricing Rules. If this box is not marked, Vendor (Supplier) will be used instead

Use Product Classification for Pricing Rule

Mark this box to use Product Classification as a key for Pricing Rules. If this box is not marked, Item Category will be used instead

Prioritise Vendor/Brand over Category/Class

Mark this box to use apply pricing rules by Vendor or Brand before by Category or Classification. If this box is not marked, rules resolve by Category or Classification first

Processing Options

Use Test Seller for All Purchase Orders

If this setting is marked, the Onetrail Test Seller will be used for all purchase orders submitted to Onetrail, regardless of the actual Vendor selected on the transaction within NetSuite.

This means that the PO is not passed to a real vendor and is intended for testing and training purposes only

Require PO Validation

Indicates whether each item on a purchase order must be validated by lookup on Onetrail, to ensure the vendor part code and item details are correct prior to submitting the order.

Purchase Orders Submit Automatically

Use this setting to submit Purchase Orders to Onetrail as soon as they are created, without requiring the user to edit the Purchase Order and use the Save and Submit Electronically button. It is recommended that this option is not used when it is necessary to edit the Purchase Order before submitting, such as to include a Special Deal Reference.

Purchase Order Confirmations/Generate Receipts/Generate Supplier Invoices

These three fields control what records are automatically created in NetSuite from the information supplied by Onetrail

Each has the same two options:

Only for Orders submitted via eInteract

All Onetrail Confirmations/Receipts/Invoices

Depending on the Supplier, Onetrail can provide up to three different notifications. More information about these can be found in a later section, however they are: Purchase Order Confirmations/Generate Receipts/Generate Supplier Invoices

Only for Orders submitted via eInteract

This will only receiving notifications for PO’s that were submitted via eInteract and Onetrail to the Supplier

All Onetrail Confirmations/Receipts/Invoices

This will allow notifications to be received in NetSuite for Orders not submitted via eInteract/Onetrail but who are sent to Suppliers for whom you are linked with

For example a PO is sent to Supplier A via email. You are linked with Supplier A via eInteract/Onetrail. When Supplier A ships the delivery to the Customer, you

can receive the receipt in NetSuite if provided by the Supplier, this will automatically create the record in NetSuite

Require Strict Invoice Matching

Enforces additional validation upon matching a Supplier Invoice to the original Purchase Order. Items must be identical (no substitutions or additions), costs within the variance specified and no excess quantity

Maximum Cost Variance

Defines the maximum difference (positive or negative) between the unit cost (PO Rate) on the Purchase Order versus the Supplier Invoice.

Match Delivery Charges by Value

Enables matching of delivery charges on the Supplier Invoice (as overall charges) against outstanding Delivery Charge line items on the Purchase Order, by value.

Maximum Delivery Charge Variance

Defines the maximum difference (positive or negative) between the Delivery Charge item cost on the Purchase Order versus the charge on the Supplier Invoice.

Enforce Field Length Restrictions

Truncate contact name on purchase order to 35 characters. Truncating field lengths is an option provided by Onetrail as some distributors may reject orders with field lengths greater than 35 characters.

Vendor and Contact Setup

Each vendor available through Onetrail will have a unique identification number known as their Distributor/Seller GLN. This field has been added to the vendor record in NetSuite to allow the GLN to be stored on the vendor.

The Enable Onetrail.net Integration checkbox allows a vendor to be enabled or disabled for Onetrail.net use without affecting the stored GLN or their normal NetSuite status.

When submitting a purchase order electronically, contact details at the vendor are requested (i.e. which person or department it should be submitted to). This can be an individual or can be a role or department (e.g. “Sales Department”). To enable eInteract to provide these details, a contact should be created (related to the vendor) and marked as being the Onetrail.net Contact – this is done by checking the corresponding checkbox on the contact record.