Integrate Vendors with Crunchtime

Setup Guide

Document Details

Document #: 160_IVSG_240411

Overview

The purpose of this document is to provide the information you need to integrate a Vendor with the Crunchtime Ops Management platform.

Download the latest version of this document here:
https://links.crunchtime.com/SG-IntegrateVendorsWithCT

… or scan the QR code to the left.

© 2024 Crunchtime - All Rights Reserved

SETUP GUIDE

Integrate Vendors with Crunchtime

Introduction

Reach out to your Sales Rep and ask who the best IT resource from their side is that can work with you on an integration project with Crunchtime. You can use the template below to email to your Sales Rep.

Subject: ***Vendor Name*** / Crunchtime Integration Request for ***Client Name***

Greetings,

I'm reaching out to you to request that we integrate electronic Purchase Orders, Confirmations, Invoices, and Order Guides to Crunchtime via our hosted SFTP site.

Files to be included (using Crunchtime Standard file formats that are in place for other Customers):

- PO from Net-Chef to your FTP/SFTP
- Confirm Receipt from you – push to our SFTP
- Invoice from you – day of delivery – push to our SFTP
- Order Guide from you on a weekly basis (or whenever pricing changes) – push to our SFTP

File formats can be found here: https://links.crunchtime.com/LatestVendorInterfaceGuide

Specific details needed:

- Account #'s - please supply the account numbers for each Location
- Our restricted Product Catalog so that we can map the Vendor Product Numbers in our system
- FTP site and credentials for Purchase Orders / *I will send your credentials to our SFTP when your team requests it

Please forward to the IT resource who can work on this request if it is not yourself. Let me know if you need anything else from me and when you can provide this data.

Once the Vendor has confirmed they will utilize FTP/SFTP and our Standard files, continue with sending a request to support@crunchtime.com to have new hosted SFTP credentials created.

Important: If you have not contracted to use the Crunchtime Hosted CDP service, you need to work with the vendor to either have them host the server and provide you the credentials, or host the server yourself and provide credentials and directory instructions to the vendor. Without the Crunchtime Hosted CDP service, you will need to manage a file transfer process to move import files from the server to a CDP service you have installed.

You can use the following script for the request:

Subject: ***Client Name - Create New Vendor Credentials for Hosted SFTP - Vendor Name***

Greetings,

We are adding a new vendor that will need to drop invoices on our CT hosted CDP SFTP server in the /Inbound directory. Please create credentials for this new vendor. This vendor will also need a private folder on the SFTP server to pick up PO's. Please create credentials for this private folder (/po) with read/write access.

Note: If the vendor does not need to pick up PO's from our server, remove that verbiage (in gray above) from the request.

Support will be able to share the credentials with you once they are created. You can then share the credentials with your Vendor resource for the project.

(Continued)

© 2024 Crunchtime - All Rights Reserved

Integrate Vendors with Crunchtime

(Continued)

Setup

1. Communicate with your vendor to pass mapping info and gather setup data such as Account Numbers, Vendor Codes, Markets, and Vendor Bids. Requirements are outlined in the Interface Guide based on file type.
2. Setup the Vendor record in Enterprise Manager and populate the following fields if you are submitting orders from Crunchtime to the Vendor via the FTP connection.
    a. *VO Mode* should be set to 'FTP' or 'Secure FTP', as determined by the vendor.
    b. Set the *Interface* to 'Standard', unless you are using a specific file format as outlined per the Vendor Interface Guide for the vendor (eg. Sysco, US Foods).
    c. Fill in the *URL* field with the server address and path to place orders.
    Example: ftp.fintech.net/IN OR 66.123.445.100:6022/po
3. Account Numbers should be mapped on the Vendor Location Details tab.
    a. Set the *VO Mode* to match the FTP type being used for PO's.
    b. *Reference* field should be set to match the account number (If the Vendor uses a custom order file format as outlined in the Vendor Interface Guide, you may need to populate this field with a specific value as determined by the vendor).
    c. *User Name* and *Password* should be populated with the FTP credentials used to submit PO's.
    d. Recommended to flag E-Invoice as required once the integration is in place.
4. Charge and Credit Codes that will be sent in Invoices for fees, credits, and deposits can be mapped in the Vendor > Charge and Credit Codes tab.

Testing

1. When all setup is ready, reach out to the Vendor for an Order Guide file to test and validate (if file is included in the electronic integration). This step is important to make sure the Vendor Bids are also configured accurately before beginning tests. What to check for:
    a. Product Numbers align.
    b. Products listed in the file align with your expectation of products your locations can order and receive (if not, work with your Sales Rep to clean the list up).
    c. Pack Types match what is setup in Vendor Bids.

(Continued)

© 2024 Crunchtime - All Rights Reserved

Integrate Vendors with Crunchtime

(Continued)

Testing (Continued)

2. Run an end-to-end test:
    a. Create a PO with expected delivery date out a week and order roughly 3 items or so (keep it small for the first test as some vendors need to manually process the test on their end). Send the Vendor your test Order # for them to reference.
    b. Confirm that the file processed on the FTP by checking the FTP log in the Recent Vendor Orders screen; have the Vendor confirm they got the file.
        - Have the Vendor confirm the file processed with no errors (eg. Product numbers are fine, no issues on format).
    c. The Vendor should then supply back a Confirm Receipt file to your CT Hosted CDP SFTP server in the /inbound directory which will push through to your Enterprise Manager > Inbound Integrations.
        - Confirm the file has processed successfully. You'll see the status of the order as "Confirm/Submitted", both in Inbound Integrations and in Net-Chef.
    d. The Vendor should supply an Invoice for the test PO. Confirm the file processes successfully in Crunchtime. Check the data in Net-Chef to validate that there are no data issues such as incorrect conversions, pack types, values.
        - If any issues along the way during testing, circle back to correct and retest.

If more tests are needed such as testing across different Distribution Centers, full order to validate product setup, Credits, etc - make sure to plan for scheduling those additional tests with the Vendor and see them through.

Go Live / Roll Out Support

1. Confirm with the Vendor what the go live cutover process should be (specific locations, whether only certain files should be sent, parallel with AP invoice feed, etc.) and go live date.
    a. Communicate to the field that they should start to place orders in Crunchtime as of the specified date.
    b. Confirm with the Vendor whether invoices created outside of Crunchtime but delivered after or on the go live date should be sent to Crunchtime; same for Credits.
2. On "Go Live Day" - the Vendor should expect to receive orders on the FTP; if they do not receive the orders by cut off time, communication needs to go out to follow up on whether an order was / wasn't placed in Crunchtime.
3. Confirm the contacts for future roll out requests and who to contact when support is needed for issues.

(Continued)

© 2024 Crunchtime - All Rights Reserved

Integrate Vendors with Crunchtime

(Continued)

Other Considerations

PFG and Sysco are two Vendors we integrate with that have specific formats and processes. It is recommended to review the Vendor Interface Guide for specific details that vary from our Standard integration noted above. There is also an Appendix section that lists known vendor integration configurations.

US Foods is our only vendor integration that has a punch-thru process for submitting PO's. Reference the Vendor Interface Guide for specific setup involving VO Mode and Interface fields. The US Foods Order Guides also are the only Order Guide files at this time that do not import through the CDP. You will need to grab the files from US Foods' FTP and import manually through Enterprise Manager > Import and Process Bids.

PBI Vendors should be provided details on the 006 PBI Import, along with your Location Codes and Category mappings.

Vendors who cannot use our Standard integration process but have the option to accept/send EDI files (810,850,855 files) – reach out to support@crunchtime.com to request an EDI resource to be assigned on the integration.

Alternatively, we do offer a Vendor Portal known as Xchange. This has fees involved for use but allows you to invite your Vendors to connect to Crunchtime to access Orders and input their Invoice details. More information can be found here: https://links.crunchtime.com/Xchange

© 2024 Crunchtime - All Rights Reserved