

# SPS Commerce Document Tracker Quick Reference

Version 3.0

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## System Requirements

Recommended system requirements for Document Tracker include;


- A reliable internet connection (broadband is recommended)
  - Microsoft Edge (Chromium)
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## In this Quick Reference

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2. Search Documents
3. View Documents
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5. Print Documents
6. Export Documents
7. Document Management
8. Division Configuration
9. Trading Partner Configuration
10. User Accounts
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# 1. Logging In

To login to Document Tracker;

Step	Action
1.	<p>Go to <a href="http://documenttracker.leadtec.com.au">http://documenttracker.leadtec.com.au</a></p>  <p><b>Welcome to the SPS Commerce Document Tracker</b></p> <p><b>SPS COMMERCE</b></p> <p>Organisation ID: <input type="text"/></p> <p>Username: <input type="text"/></p> <p>Password: <input type="password"/></p> <p><a href="#">Forgot your password?</a></p> <p><input type="checkbox"/> Remember me</p> <p><b>LOGON</b></p> <p><b>SPS Commerce Document Tracker Support &amp; Assistance</b>          If you are experiencing difficulties with SPS Commerce Document Tracker, please contact our Australian Support Team Monday to Friday 07:00hrs to 17:00hrs AEST ☎ <b>1300 532 383</b> or <a href="#">click here</a> to contact us by email.</p> <p>This site is best used with the following system requirements:</p> <ul style="list-style-type: none"> <li>1. Microsoft Edge (Chromium)</li> <li>2. <a href="#">Adobe Acrobat Reader</a> version 7 or higher</li> <li>3. Screen resolution set at 1024 x 768 or higher</li> </ul> <p>Other browser types and versions can be used but you may experience reduced useability. It is recommended that you check your web browser configuration against the <a href="#">Browser Configuration Guide</a> to ensure SPS Commerce Document Tracker functions properly.</p>
2.	Enter your login details, and click 'Save Login Details'. This will ensure log in details are saved on this screen (except the password) for easy access.
3.	<p>Click 'Logon'.</p> <p><b>Result:</b> You should now be able to access your Document Tracker account</p>

## 2. Search Documents

The 'Search' function in Document Tracker allows users to locate documents. There are 2 options to search for a document in Document Tracker:

### Option 1: Global search

Step	Action
1.	After logging in, click on Document Search (located on the left navigation panel).

	<div> <div>DOCUMENT SEARCH</div> <div> <div>Mailbox Folder: <span>All Folders</span></div> <div>Partner: <input type="text"/></div> <div>Partner No: <input type="text"/></div> <div>From / To: <input type="text"/></div> <div>Doc Number: <input type="text"/></div> <div>Doc Type: <span>All Document Types</span></div> </div> <div> <div>Date: <input type="text"/></div> <div>Time: <input type="text"/></div> </div> <div> <div>Duration: <span>All</span></div> <div>From: <span>Enter Date Received From</span></div> <div>From: <span>12:00 AM</span></div> </div> <div> <div>To: <span>18/07/2013</span></div> <div>To: <span>12:00 AM</span></div> </div> <div> <div>Search By Range <input type="checkbox"/></div> <div> <div>FIND</div> <div>CLEAR</div> </div> </div> </div>
2.	Enter at least one search criteria.
3.	Click on 'Find' button. <b>Result:</b> All Documents which meet the entered criteria are displayed.

### Option 2: Folder-specific search

Step	Action
1.	<p>Click on the 'Inbox', 'Outbox' or 'Sent' link (located on the left navigation panel).</p> <p>Click on the 'Search By' drop-down box from the top of the screen to select search criteria.</p> <div> <div>Search by: <span>Partner</span></div> <div> <div>Partner</div> <div>Doc Number</div> <div>Doc Type</div> <div>Doc Creation Date</div> <div>Date Received</div> <div>Document Format</div> </div> <div> <div>Doc Number</div> <div>Doc Type</div> <div>Doc Format</div> <div>Doc Creation Date</div> <div>D</div> </div> <div> <div>Rev Net</div> <div>Rev Document Format</div> <div>Revlon Manufacturing Pty Ltd (GXS Network)</div> <div>Revlon Manufacturing Pty Ltd (GXS</div> </div> <div> <div>13590952</div> <div>13590945</div> <div>13590945</div> </div> <div> <div>ASN</div> <div>ASN</div> <div>ASN</div> </div> <div> <div>EDIFACT</div> <div>EDIFACT</div> <div>Flat File</div> </div> <div> <div>18/07/2013</div> <div>18/07/2013</div> <div>18/07/2013</div> </div> <div> <div>18 PM</div> <div>18 PM</div> <div>18 PM</div> </div> </div>
2.	Enter search value.
3.	Click on 'Find' button. <b>Result:</b> All Documents within the folder which meet the entered criteria are displayed.

## 3. View Documents

There are 2 options to view documents in Document Tracker:

Step	Action
1.	<p>Click on the 'Inbox', 'Outbox' or 'Sent' link (located on the left navigation panel).</p> <p><b>Option 1:</b></p> <p>Double-click on the corresponding document</p> <p><b>Option 2:</b></p>

Right-click on the corresponding document. A pop-up context menu will open. Select View, and the related document type.

InTouch

SPS COMMERCE

EXPORT

PRINT

XML

SAP iDOC

EDI\_DC40\_U 0000000000000001 2 ORDERS05  
 FS\_N200\_20KUAG0007119126  
 20220831100000  
 E2EDK01003 000000000000001000001000000001  
 4520014516

ORDERS

KU GIS

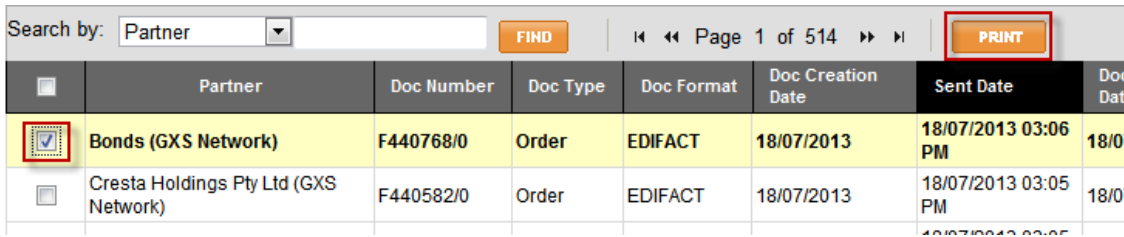
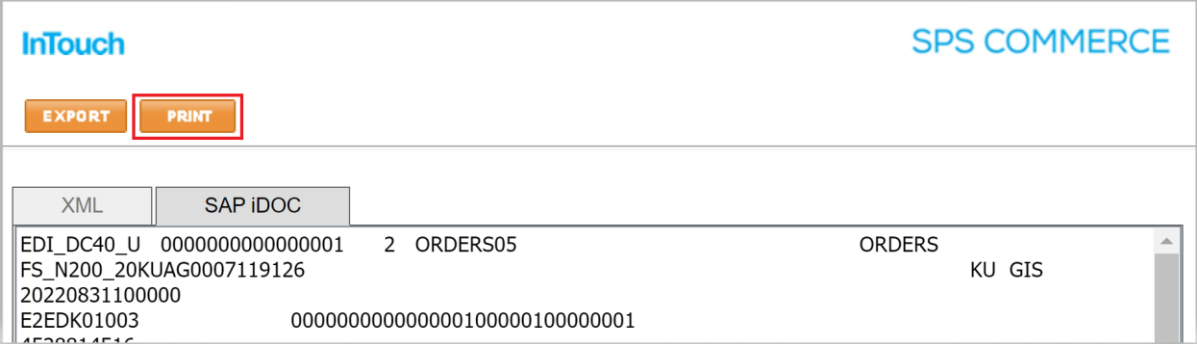
## 4. Resend Documents

To resend document in Document Tracker:

Step	Action																																										
1.	Click on the 'Sent' link (located on the left navigation panel).																																										
2.	Right click on the document which needs to be resent.																																										
3.	<div>Click on 'Resend'.</div> <table><tr><th><input type="checkbox"/></th><th>Partner</th><th>Doc Number</th><th>Doc Type</th><th>Doc Format</th><th>Doc Date</th></tr><tr><td><input type="checkbox"/></td><td>Bonds (GXS Network)</td><td>F440768/0</td><td>Order</td><td>EDIFACT</td><td>18/0</td></tr><tr><td><input type="checkbox"/></td><td>Cresta Holdings Pty Ltd (GXS Network)</td><td>F440582/0</td><td>Order</td><td>EDIFACT</td><td>18/0</td></tr><tr><td><input type="checkbox"/></td><td>Bonds (GXS Network)</td><td></td><td></td><td>EDIFACT</td><td>08/0</td></tr><tr><td><input type="checkbox"/></td><td>Phosphagenics Ltd (GXS Network)</td><td></td><td></td><td>EDIFACT</td><td>11/0</td></tr><tr><td><input type="checkbox"/></td><td>Dksh Australia Pty Ltd (GXS Network)</td><td>B006835/0</td><td>Order</td><td>EDIFACT</td><td>18/0</td></tr><tr><td></td><td>MCDERMID HOUSEWARES</td><td></td><td></td><td></td><td></td></tr></table> <div><b>Result:</b> The 'Sent' summary screen will be refreshed automatically and a new entry for the resent document will appear. This indicates that the document is being processed to be resent.</div> <div><b>Tip:</b> Refresh the 'Sent' summary screen after 1-2 minutes to see the resent message.</div>	<input type="checkbox"/>	Partner	Doc Number	Doc Type	Doc Format	Doc Date	<input type="checkbox"/>	Bonds (GXS Network)	F440768/0	Order	EDIFACT	18/0	<input type="checkbox"/>	Cresta Holdings Pty Ltd (GXS Network)	F440582/0	Order	EDIFACT	18/0	<input type="checkbox"/>	Bonds (GXS Network)			EDIFACT	08/0	<input type="checkbox"/>	Phosphagenics Ltd (GXS Network)			EDIFACT	11/0	<input type="checkbox"/>	Dksh Australia Pty Ltd (GXS Network)	B006835/0	Order	EDIFACT	18/0		MCDERMID HOUSEWARES				
<input type="checkbox"/>	Partner	Doc Number	Doc Type	Doc Format	Doc Date																																						
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<input type="checkbox"/>	Bonds (GXS Network)			EDIFACT	08/0																																						
<input type="checkbox"/>	Phosphagenics Ltd (GXS Network)			EDIFACT	11/0																																						
<input type="checkbox"/>	Dksh Australia Pty Ltd (GXS Network)	B006835/0	Order	EDIFACT	18/0																																						
	MCDERMID HOUSEWARES																																										

## 5. Print Documents

To print documents in Document Tracker;

Step	Action
1.	<p>Click on the 'Inbox', 'Outbox' or 'Sent' link (located on the left navigation panel).</p> <p>There are 2 options to print documents in Document Tracker;</p> <p><b>Option 1:</b></p> <p>Tick the checkbox adjacent to the document to print and select the 'Print' button.</p>  <p><b>Option 2:</b></p> <p>Double-click on the required document to open and click on the 'Print' button.</p>  <p><b>Result:</b> A pop-up window will show all selected documents as a PDF document ready for you to print.</p> <p><b>Tip:</b> To print multiple documents; tick any checkbox for any document or tick the checkbox at the very top of the summary screen and all documents will be automatically selected and included for printing.</p>

## 6. Export Documents

The 'Export' function allows users to download the transactional data in a format as specified on the "Doc Format" column.

To download a document in Document Tracker;

Step	Action
1.	<p>Click on the 'Inbox', 'Outbox' or 'Sent' link (located on the left navigation panel).</p> <p>There are 2 options to export documents in Document Tracker;</p> <p><b>Option 1:</b></p>

Right-click on the required document to export, select 'Export' and then select 'Data'.

<input type="checkbox"/>	Partner	Doc Number	Doc Type	Doc Format	Doc Create Date
<input type="checkbox"/>	Bonds (GXS Network)	E440768/0	Order	EDIFACT	18/07/20
<input type="checkbox"/>	Cresta H (GXS Network)		Order	EDIFACT	18/07/20
<input type="checkbox"/>	Bonds (GXS Network)		Order	EDIFACT	08/07/20
<input type="checkbox"/>	Phosphagenics Ltd (GXS Network)	E426827/0	Order	EDIFACT	11/06/20

#### Option 2:

Double-click on the required document to open and click on 'Export' button and then select 'Data'.

InTouch

SPS COMMERCE

EXPORT

PRINT

XML

SAP iDOC

EDI\_DC40\_U 0000000000000001 2 ORDERS05

FS\_N200\_20KUAG0007119126

20220831100000

E2EDK01003 000000000000000100000100000001

ORDERS


KU GIS

**Result:** A pop-up window will show the document in the format that is specified.

2. You will be prompted to open or save the document.

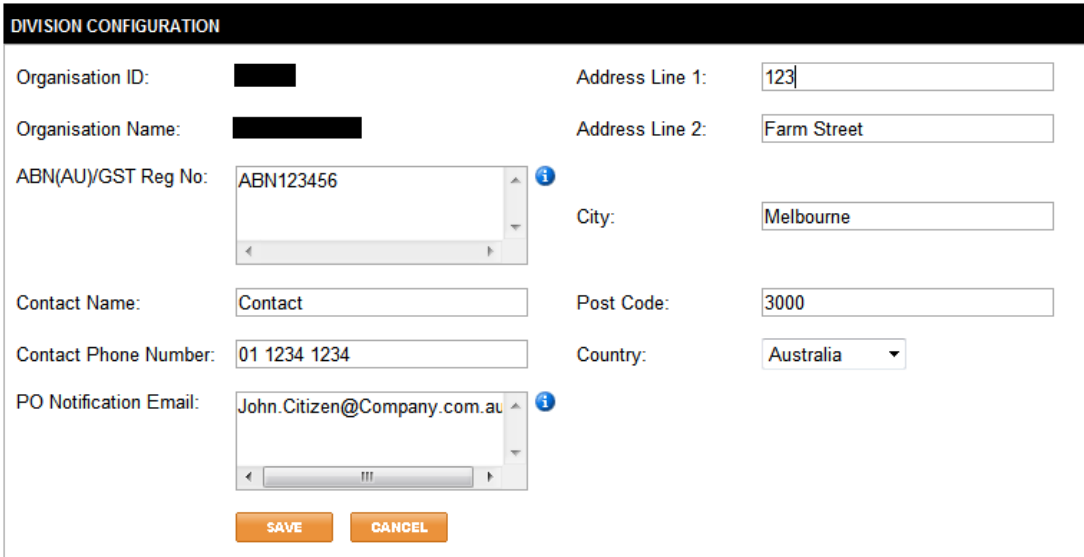
## 7. Document Management

Document Management is represented by a number of folders and functions similar to email applications (e.g. Microsoft Outlook) which appear under the Mailbox section. The Inbox, Outbox, and Sent folders are default folders.

Folder	Description
<b>Inbox</b>	<p>All documents coming from trading partners will be delivered into the <i>Inbox</i> folder.</p> <p><b>Tip:</b> To refresh the Inbox click on the refresh  icon on the web browser.</p>
<b>Outbox</b>	<p>The <i>Outbox</i> holds documents that are in the process of being sent from <b>Retailer</b> to its trading partners.</p> <p><b>Tip:</b> Documents sitting for extended periods in the 'Outbox' i.e. greater than 24 hours could indicate a problem with the documents. If the problem persists, contact your <b>Document Tracker</b> administrator or SPS Commerce support team.</p>
<b>Sent</b>	The <i>Sent</i> folder contains documents that have successfully been sent from <b>Retailer</b> to trading partners.

## 8. Division Configuration

Division Configuration allows the admin user to update company information such as Purchase Order email notification addresses. To update information in Document Tracker:

Step	Action
1.	<p>Click on 'Division Configuration'.</p> 
2.	<p>Enter new or updated information.</p> <p><b>Tip:</b> Ensure all email addresses are accurate and use the 'enter' key (or start on a new line) to separate additional email addresses.</p>
4.	<p>Click on 'Save'.</p> <p><b>Result:</b> The system will display a message that change has been updated.</p> <p><b>Result:</b> The Trade Partner admin users email address will be sent a confirmation email containing all the email addresses that have been added to the Document Tracker account for Purchase Order notifications.</p>

## 9. Trading Partner Configuration

Trading Partner Configuration allows the admin user to update regular and BCP (Business Continuity Process) communication methods with trading partners (e.g. webforms, email, or fax). To update information in Document Tracker:

Step	Action
1.	Click on 'Trading Partner Configuration'.

Page 3 of 3

TRADING PARTNER CONFIGURATION

Search by: Org ID

FIND

Page 1 of 18

☐

eMail

☒

Fax

ACTIVATE BCP

SAVE CHANGES

CANCEL CHANGES

Organisation ID	Trading Partner Name	ABN (AU)/GST Reg No	Contact Name	Contact Number	
		ABN1			
			NA	NA	
	Fletcher				

2. Click on the preferred communication method for a specific trading partner.

3. Click on 'Save Changes' to save the new setting.

4. Click on 'Cancel Changes' to revert any changes to the configuration.

5. To search for specific trading partners enter the search criteria and select 'Find'.

**Result:** A list of trading partners that meet the search criteria are displayed.

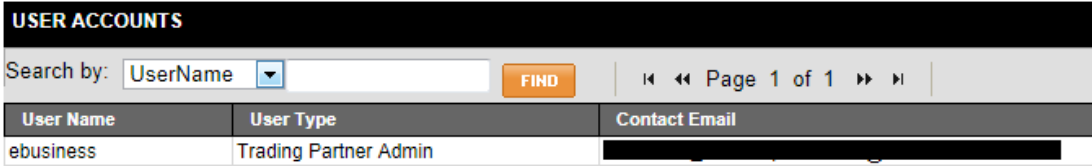
6. To activate BCP, click on 'Activate BCP'

**Result:** All trading partners communication methods will automatically be switched to Fax



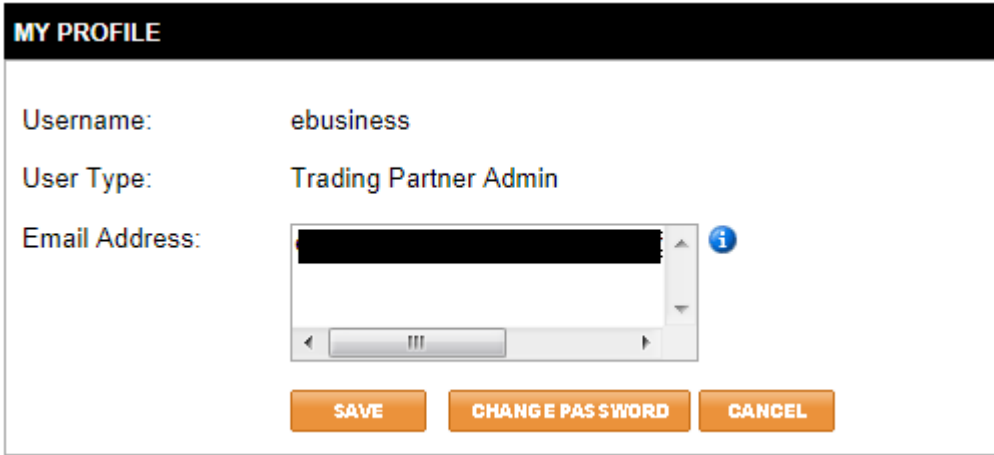
## 10. User Accounts

User Accounts provides a list of all the users set up for your Document Tracker account and allows you to view the details of a specific user.

Step	Action
1.	<p>Click on 'User Accounts'.</p>  <p><b>Result:</b> A list of all the users set up on the specific Document Tracker account is displayed.</p>
2.	<p>To search for specific users enter the search criteria and select 'Find'.</p> <p><b>Result:</b> A list of users that meet the search criteria are displayed.</p>
3.	<p>Double click on the required user to see detailed user information such as user type and email address.</p>

## 11. My Profile

My Profile allows the user to update their own contact details and change their individual password. To update your details or change your password in Document Tracker;

Step	Action
1.	<p>Click on 'My Profile'.</p> 
2.	<p>To Add or Change an Email Address enter a new or update an existing email address.</p> <p><b>Tip:</b> Ensure all email addresses are accurate and use the 'enter' key (or start on a new line) to separate additional email addresses.</p>
3.	<p>To change a Password Click on the 'Change Password' button.</p> <p>Enter your current password and your new password twice in the relevant fields.</p>

4.	<p>Click on 'Save'.</p> <p><b>Result:</b> After selecting 'Save', the system will display a message that change has been updated.</p>
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## 12. Trading Partners Report

Trading Partners Report allows users to download a list of all trading partners set up for your Document Tracker account in CSV format (Excel compatible) and allows you to reset or turn off announcement page.

Step	Action																																				
1.	<p>Click on 'Trading Partners' from the Report section.</p> <div><div>TRADING PARTNER LIST</div><div><div>TURN OFF ANNOUNCEMENT PAGE</div><div>RESET ANNOUNCEMENT PAGE</div><div>DOWNLOAD</div></div><table><tr><th>Org ID</th><th>Name</th><th>ABN(AU)/GST Reg No</th><th>Contact Name</th><th>Contact Number</th><th>Contact Email</th></tr><tr><td>HW97000315</td><td></td><td>90000100096</td><td>3M Customer Service</td><td></td><td></td></tr><tr><td>HW97001192</td><td></td><td>90000100096</td><td>N/A</td><td>N/A</td><td></td></tr><tr><td>HW97000255</td><td></td><td>46150125723</td><td>7 Steel</td><td></td><td></td></tr><tr><td>HW97000402</td><td></td><td>24 133365563</td><td>Roseanne Tannous</td><td></td><td></td></tr><tr><td></td><td>A and M JOINERY PTY</td><td></td><td></td><td></td><td></td></tr></table></div> <p><b>Result:</b> A list of all the users set up on the specific Document Tracker account is displayed.</p>	Org ID	Name	ABN(AU)/GST Reg No	Contact Name	Contact Number	Contact Email	HW97000315		90000100096	3M Customer Service			HW97001192		90000100096	N/A	N/A		HW97000255		46150125723	7 Steel			HW97000402		24 133365563	Roseanne Tannous				A and M JOINERY PTY				
Org ID	Name	ABN(AU)/GST Reg No	Contact Name	Contact Number	Contact Email																																
HW97000315		90000100096	3M Customer Service																																		
HW97001192		90000100096	N/A	N/A																																	
HW97000255		46150125723	7 Steel																																		
HW97000402		24 133365563	Roseanne Tannous																																		
	A and M JOINERY PTY																																				
2.	<p>Click 'download'</p> <p><b>Result:</b> You will be prompted to open or save the CSV document.</p>																																				
3.	<p>To reset announcement page for all trading partners, click on 'Reset announcement page'.</p> <p>You will be prompted to confirm or cancel the reset of announcement page.</p> <p><b>Result:</b> Trading partners will see an announcement page when they log in to webforms.</p>																																				
4.	<p>To turn off announcement page for all trading partners, click on 'Turn off announcement page'.</p> <p>You will be prompted to confirm or cancel the turn off of announcement page.</p> <p><b>Result:</b> Trading partners will see not see any announcement page when they log in to webforms</p>																																				