

*Phase II:  
Setting Up & Using the  
Tech Data  
PSN  
for DDMS*



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## Setting Up the Tech Data PSN

Once you have completed the steps in the handout, *Phase I: Setting Up PSN*, you're ready to set the Tech Data-specific parameters.

Setting parameters to communicate with Tech Data involves:

- 1 Opening an account with Tech Data
- 2 Creating a Tech Data customer record
- 3 Setting up your Vendor database
- 4 Setting up the communication parameters
- 5 Setting up your trading partner parameters
- 6 Testing your system settings.

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Email PSN  
installation  
questions to  
[support@eci2.com](mailto:support@eci2.com)

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**Note:** Do not perform the steps listed here until you have executed the steps listed in the handout *Phase I: Setting Up PSN*. It is available at [www.ddms.com/support/doc/psn.htm](http://www.ddms.com/support/doc/psn.htm).

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### Opening an Account with Tech Data

To use Tech Data's PSN, you must have a reseller account with them. If you do not have a reseller account, go to [http://www.techdata.com/content/visitor/overview/over\\_business.aspx](http://www.techdata.com/content/visitor/overview/over_business.aspx). Click the reseller link.

In addition, you must have an XML EC ID number. This information is assigned by Tech Data. To request an enrollment form and instructions, call 1-800-237-8931, extension 88006, or email [ecsupport@techdata.com](mailto:ecsupport@techdata.com).

The XML enrollment form has instructions for setting up an XML USER for your reseller account. You receive your XML EC ID number during the process. Enter your XML EC ID number on the form and fax it to Tech Data. They notify you when you are set up.

You need your XML EC ID number and XML EC password when you set up the Supply Options dialog box.

The XML EC ID number and your reseller account are not the same thing. You must have both before you proceed.

## Creating a Customer Record

Before you create the Tech Data customer record, if your account numbers are automatically assigned, you must remove your Next Customer # in the (LA) Customer and A/R Parameters screen.

*To manually assign a customer number, the next customer must be blank.*

- 1 In DDMS, double-click  then . Next, double-click

Text Base Parameters. The (L) Parameters screen opens. Type **A** in the Selection Code field.

- 2 The (LA) screen opens. Type **C** in the Action field.
- 3 Tab to the Next Customer # field. Note the number in this field and save it for later. See Figure 1.
- 4 Space through the number in the Next Customer # field, and press Enter.
- 5 Press Esc to return to the Parameter Editor window.




**Figure 1: The (LA) Customer and A/R Parameters Screen**

```

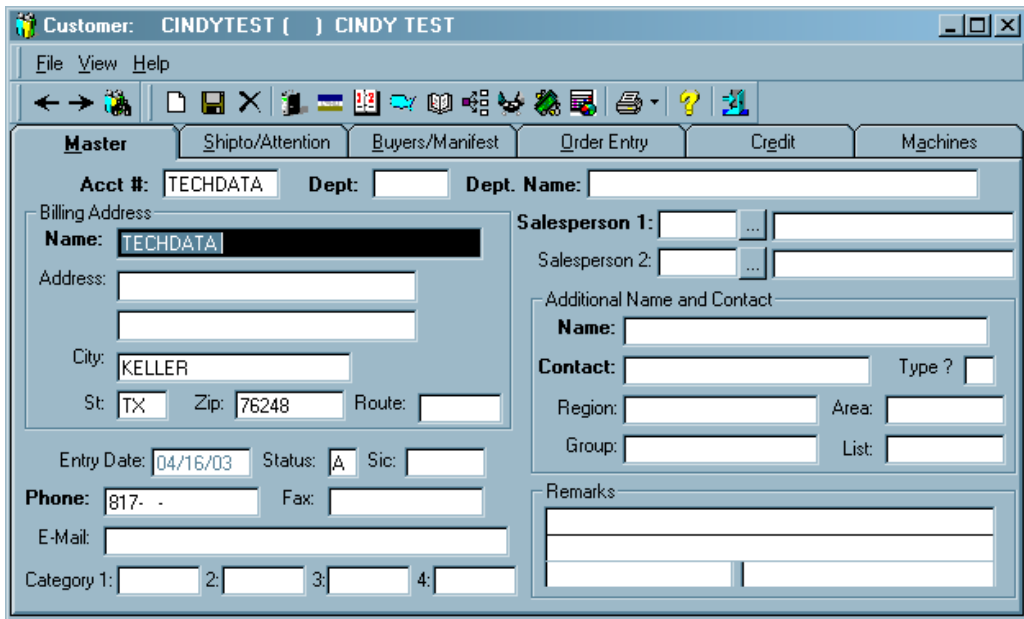
11:27:32                (LA) Customer And A/R Parameters                01/25/05
=====
Action [C] (C=Chg,I=Inq,1=Sales,2=A/R,3=Statement,4=Jour,5=Deposit) G/L Loc [ 1]
=====
Next Customer #      10018  Allow Manual Input ?N  Save Changes ?N  Swap Name ?Y
Inc/Exc In (B) ?I   From ?  To ?      From ?  To ?      Add In (B) Y/N ?N  Status ?A
Inc/Exc In (G) ?I   From ?  To ?      From ?  To ?      Add In (G) Y/N ?N  Status ?A
Passwords:  Reindex ?DDMS  Release ?DDMS  Purge ?DDMS      EOM ?DDMS
            Delete  ?DDMS  Credit Card ?  Mask Inquiry ?N  EOY ?DDMS
Monthly Usage From ?M To ?M  Quarterly Usage From ?Q To ?Q
Print Copies With Original Invoice Y/N ?Y      National Drop Ship Route [NDS ]
In O/E on Customer Query, Display Shipto Address instead of Billto Y/N ?Y
In Gateway Set Shipto Name to ? (A=Add. Name, C=Add. Contact, S=Shipto Contact)
Set Dept Name to ? (B=Billto Name, A=Add. Name, C=Add. Cont., S=Ship Cont.)
Keep Service Quality Statistics for Customer Status : [A] to [Z] + [ , , , , ]
Locs.to Exclude from Service Quality Statistics [ ] to [ ] + [ , , , , ]
Auto-Bill Invoices:  Print, Fax, Neither P/F/N ?N  Formats: Invoice :  Fax :
Sort Order ?N (#=Customer Nbr, N=Customer Name, R=Route, Z=Zip Code)
Only Bill Auto-Bill records that have a Quantity greater than Zero Y/N ?
Create Line Item Special from Auto-Bill Remarks Y/N ?
Advanced Customer Queries Y/N ?      Suite instead of Street on Queries Y/N ?
Show Master Shipto's if none on Dept. Y/N ?
    
```

## Phase II: Setting Up & Using the Tech Data PSN for DDMS

In DDMS's Customer Master tab, create a Tech Data customer.

- 1 Double-click . The Customer window opens, displaying the information for the last customer selected.
- 2 Click . The boxes in the window are cleared.
- 3 Click the Account # box and type **TECHDATA**. See Figure 2.
- 4 In the Name box, type **TECHDATA**.
- 5 When you finish, click .
- 6 If you removed the number from the Next Customer # field in the (LA) screen when you started setting up the Customer window, follow these instructions to replace it now.
  - 6.1 In the (LA) screen, type **C** in the Action field.
  - 6.2 Tab to the Next Customer # field. Enter the number you noted previously and press Enter.
  - 6.3 Press Esc to return to the Parameter Editor window.

**Figure 2: The Customer Master Tab**



Customer: CINDYTEST ( ) CINDY TEST

File View Help

Master Shipto/Attention Buyers/Manifest Order Entry Credit Machines

Acct #: TECHDATA Dept: Dept. Name:

Billing Address  
Name: TECHDATA  
Address:  
City: KELLER  
St: TX Zip: 76248 Route:

Entry Date: 04/16/03 Status: A Sic:

Phone: 817- Fax:

E-Mail:

Category 1: 2: 3: 4:

Salesperson 1:  
Salesperson 2:

Additional Name and Contact  
Name:  
Contact: Type ?  
Region: Area:  
Group: List:

Remarks:



## Setting Up Your Vendor Database

- 1 Set up Tech Data as a vendor. If you already have a Tech Data vendor, retrieve it and go to **Step 1.4** to set up the Comm box.

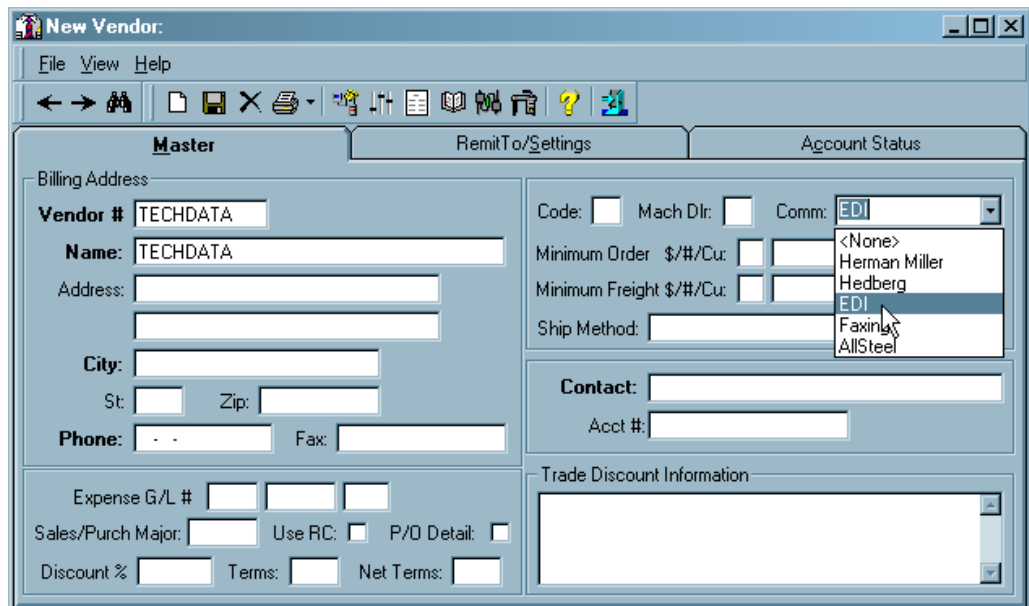
---

**Note:** To use Tech Data's costs loaded from the O/PUS files, your vendor must have the vendor account number TECHDATA.


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- 1.1 In the Vendor Master tab, click .
- 1.2 Click the Vendor # box and type **TECHDATA**. See Figure 3.
- 1.3 Click the Name box and type **TECHDATA**.
- 1.4 Click the Comm box's down arrow. From the menu, click EDI.
- 1.5 Click .

**Figure 3: The Vendor Window**




## Phase II: Setting Up & Using the Tech Data PSN for DDMS

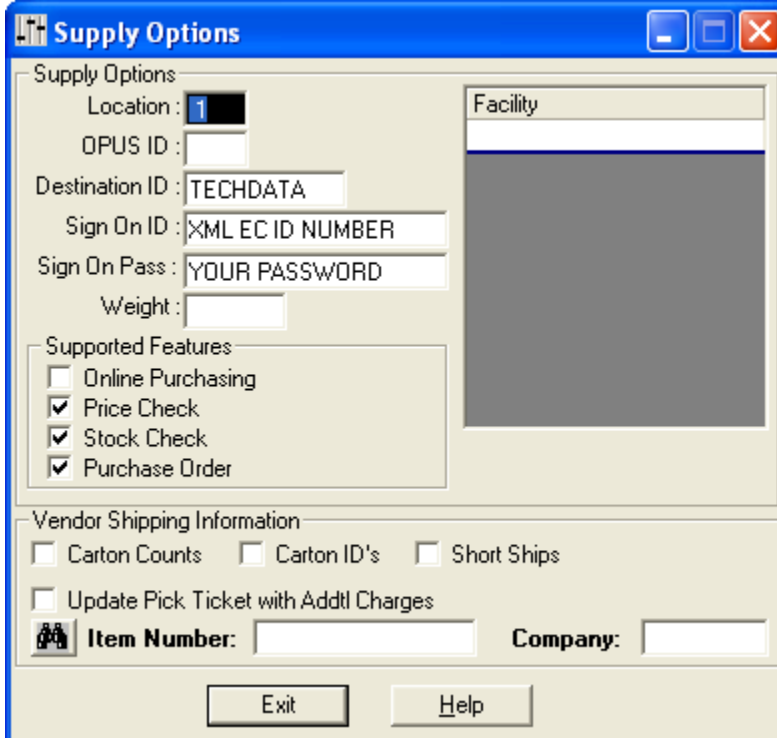
- 2 Set PSN parameters.
    - 2.1 Click .
    - 2.2 The Supply Options window opens, as shown in Figure 4. In the Location box, enter a G/L location, or accept the default of 1.
    - 2.3 In the Destination ID box, enter your ID exactly as follows:  
**TECHDATA**
    - 2.4 In the Sign On ID box, enter your vendor ID number.

---

  - Note:** If you do not know your XML EC ID number, call Tech Data at 1-800-237-8931, extension 88006. You can also send an email to [ecsupport@techdata.com](mailto:ecsupport@techdata.com).

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  - 2.5 In the Sign On Pass box, enter your password.
  - 2.6 From the Supported Features list, click Price Check, Stock Check and Purchase Order.
  - 2.7 When you finish, click Exit.
- 3 Click .



**Supply Options**

Supply Options

Location : 1

OPUS ID :

Destination ID : TECHDATA

Sign On ID : XML EC ID NUMBER

Sign On Pass : YOUR PASSWORD

Weight :

Facility

Supported Features

Online Purchasing

Price Check


Stock Check

Purchase Order

Vendor Shipping Information

Carton Counts  Carton ID's  Short Ships

Update Pick Ticket with Addtl Charges


 Item Number:  Company:

Exit Help

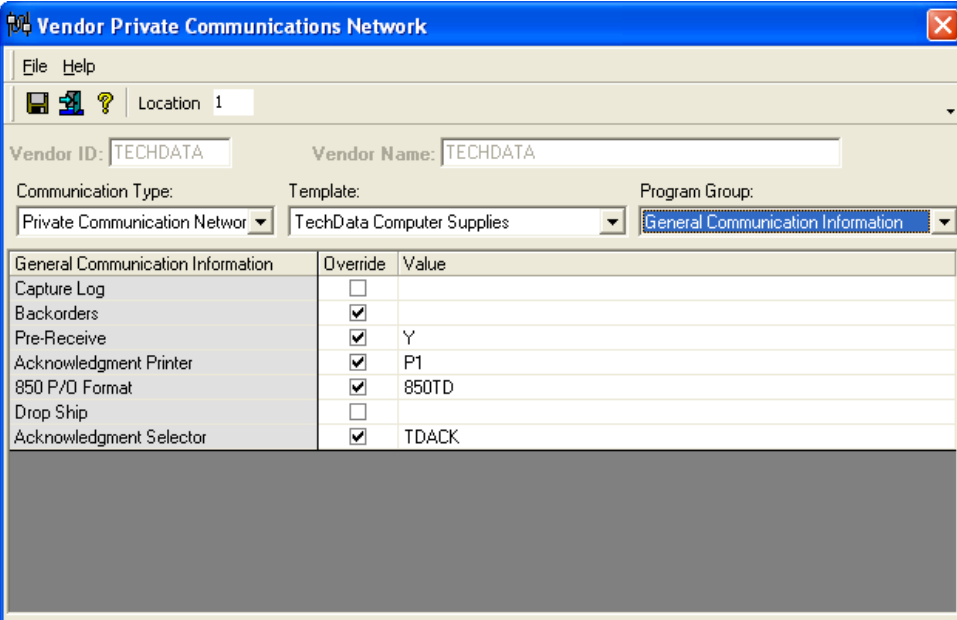
**Figure 4: The Supply Options Dialog Box**

## Setting Communication Parameters

**Note:** Be very careful when setting communication parameters. Once you've set them, do not change them without contacting ECi support.

- 1 Set up the Vendor Private Communications Network dialog box.
  - 1.1 In the Vendor window, select the Tech Data vendor.
  - 1.2 Open the Vendor Private Communications Network dialog box. To do so, click View and select PCN; press Ctrl + U; or click .
  - 1.3 From the Communication Type drop down list, select Private Communication Network.
  - 1.4 From the Template drop down list, select TechData Computer Supplies.
- 2 Set the general communications parameters in the Vendor Private Communications Network dialog box.
  - 2.1 From the Program Group drop down list, click General Communications Information. The available parameters are listed in the General Communication Information column, as shown in Figure 5.
  - 2.2 Add a default by entering the information in the Value column. For example, to create a capture log file, type Y in the Capture Log Value box.

**Figure 5: Setting General Communications Information Parameters**




General Communication Information	Override	Value
Capture Log	<input type="checkbox"/>	
Backorders	<input checked="" type="checkbox"/>	
Pre-Receive	<input checked="" type="checkbox"/>	Y
Acknowledgment Printer	<input checked="" type="checkbox"/>	P1
850 P/O Format	<input checked="" type="checkbox"/>	850TD
Drop Ship	<input type="checkbox"/>	
Acknowledgment Selector	<input checked="" type="checkbox"/>	TDACK

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Check the corresponding Override box to allow these parameters to be changed at the time of communication.

You may set these as you choose with the following exceptions,

- In the Pre-Receive Value box, type **Y**
- In the Acknowledgment Printer Value box, enter your printer's name.
- In the 850 P/O Format Value box, type **850TD**
- Leave the Drop Ship Value box blank or type **BS** to set up blind drop-shipping as the default. If you leave the box blank, the default is FedEx ground delivery. Entering information places your order on hold with Tech Data.
- In the Acknowledgment Selector Value box, type **TDACK**

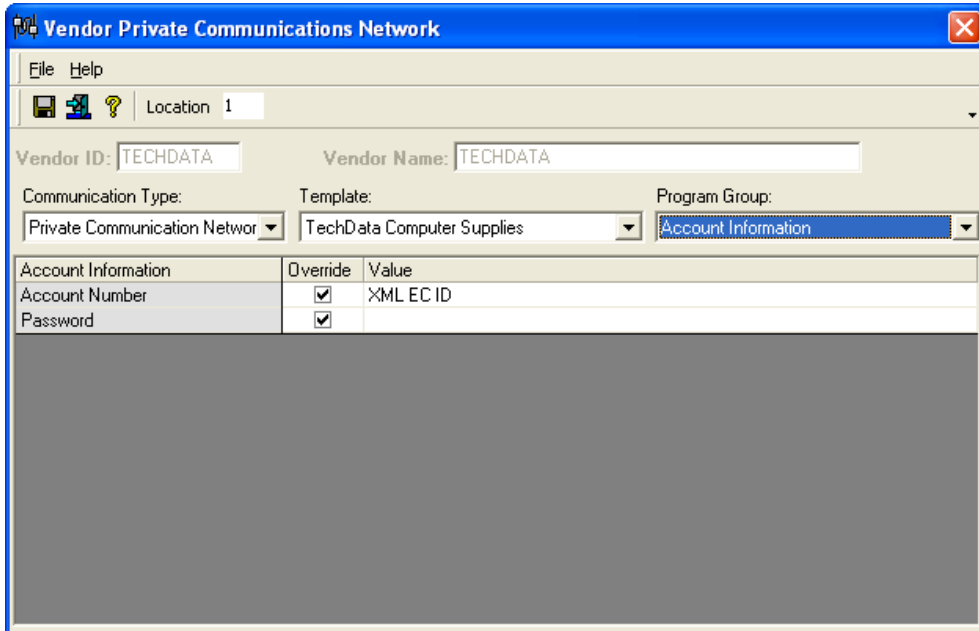
**2.3** When you finish, click .

**3** Set the account parameters in the Vendor Private Communications Network dialog box. See Figure 6.

**3.1** From the Program Group drop down list, click Account Information.

**3.2** In the Account Id Value box, enter your Tech Data XML EC ID number.


**Figure 6: Setting Account Information Parameters**



Account Information	Override	Value
Account Number	<input checked="" type="checkbox"/>	XML EC ID
Password	<input checked="" type="checkbox"/>	

## Phase II: Setting Up & Using the Tech Data PSN for DDMS

3.3 In the Password Value box, enter your password.

3.4 When you finish, click .

4 Set the Shipto Address parameters in the Vendor Private Communications Network dialog box. See Figure 7.

4.1 From the Program Group drop down list, click Shipto Address. The available parameters are listed in the Shipto Address column.

4.2 Add a default by entering the default information in the Value column. For example, to enter your company's name, enter the name in the Name Value box.

Check the corresponding Override box to allow these parameters to be changed at the time of communication.


You can specify:

- Name\*
- Suite
- Street\*
- City\*
- State\*
- Zip code\*
- Shipto contact qualifier
- Shipto contact name\*.

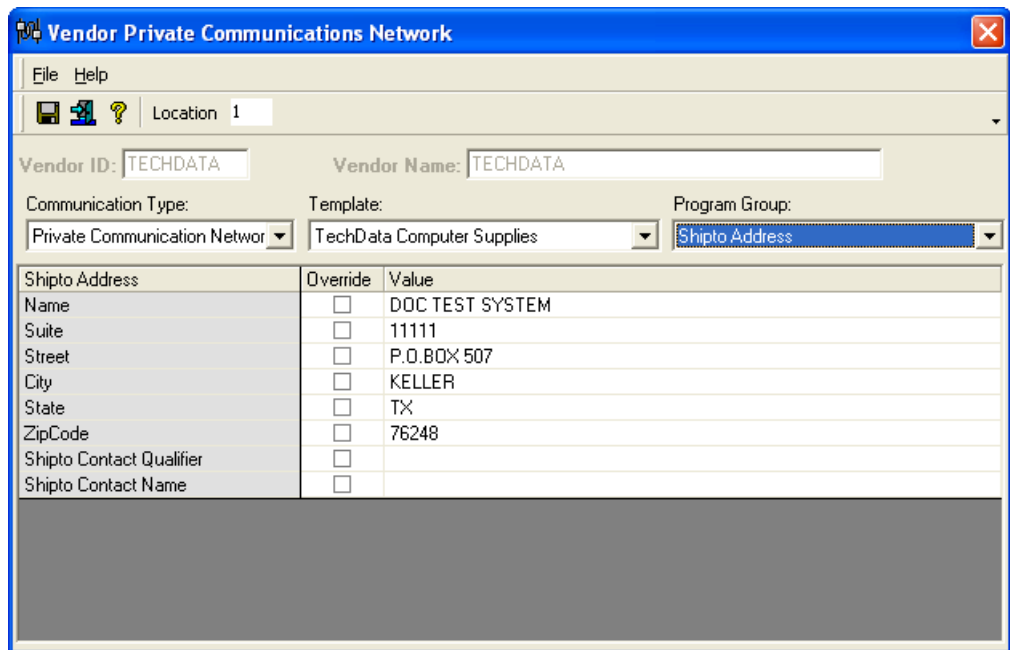
---

**Note:** Required information is denoted by an asterisk (\*).

---

4.3 When you finish, click .


**Figure 7: Setting Shipto Address Parameters**



Shipto Address	Override	Value
Name	<input type="checkbox"/>	DOC TEST SYSTEM
Suite	<input type="checkbox"/>	11111
Street	<input type="checkbox"/>	P.O.BOX 507
City	<input type="checkbox"/>	KELLER
State	<input type="checkbox"/>	TX
ZipCode	<input type="checkbox"/>	76248
Shipto Contact Qualifier	<input type="checkbox"/>	
Shipto Contact Name	<input type="checkbox"/>	

## Phase II: Setting Up & Using the Tech Data PSN for DDMS

- 5 Set the Supplier Information parameters in the Vendor Private Communications Network dialog box.
  - 5.1 From the Program Group drop down list, click Supplier Information. The available parameters are listed in the Supplier Information column, as shown in Figure 8.
  - 5.2 Add a default by entering the default information in the Value column.

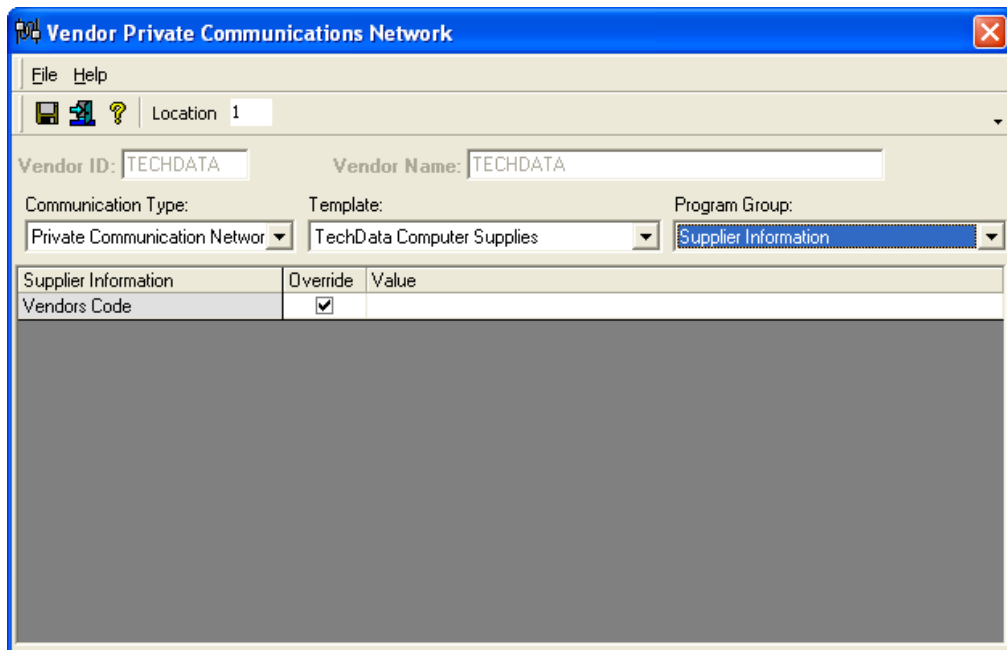
Check the corresponding Override box to allow these parameters to be changed at the time of communication.
  - 5.3 When you finish, click .

### Setting Up Trading Partner Parameters

You set up trading partner parameters in the (SGA) screen, which is text-based. Open your TBL client to access the DDMS Master Menu. To set up your trading partner parameters:

- 1 In the (SGA) screen, type **C** in the Action field.
- 2 Tab to the Account # field, type **TECHDATA** and press Enter.
- 3 At the Correct Record prompt, press Enter.
- 4 Tab to the Interchange Id Qualif field and type **ZZ**

**Figure 8: Setting Supplier Information Parameters**



Supplier Information	Override	Value
Vendors Code	<input checked="" type="checkbox"/>	

**Phase II: Setting Up & Using the Tech Data PSN for DDMS**

- 5 In the ID field, type **TECHDATA**
- 6 Tab to the Interchange Control Std field and type **U**
- 7 In the Version field, type **00401**
- 8 In the Receivers Code Id field, type **TECHDATA** and press Tab.
- 9 In the Responsible Agency Code field, type **X**
- 10 In the Version field, type **004010**
- 11 Tab to the Test Indicator field and type **P**
- 12 Tab to the Seg Term field and type **~~**, as shown in Figure 9.

---

**Note:** The tilde (~) key is located in the upper left corner of most keyboards.

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- 13 In the Default Selector field, type **850TD** and press Tab.
- 14 The number in the Interchange Control field increases by one with each transaction. To enter a starting point, type **10000** and press Tab.
- 15 The number in the Group Control field increases by one with each transaction. To enter a starting point, type **200000** and press Enter.

**Figure 9: The (SGA) Trading Partner Parameters Screen**

```

11:19:24          (SGA) TRADING PARTNER PARAMETERS REV. (09/16/XX)          05/20/03
-----
Action [C] ( C=Chg, D=Del, I=Inq, R=Ref Codes)
-----
Name : TECHDATA          Account # TECHDATA Dept :
                        KELLER
                        817- -
-----
EDI VAN :
Interchange ID Qualif :ZZ ID :TECHDATA          Auto Send : (Y/N)
Auth. Info Qualif. : Info :          Negate Credit Inv. :
Security Info Qualif. : Info :          Use Received Price : (Y/N)
Interchange Control Std :U Version :00401      Using 810 :
                                                Using 855 :
                                                Auto 850 Sendfile :
Receivers Code Id :TECHDATA          Default Selector :850TD
Responsible Agency Code :X          Interchange Control# 20443
                        Version :004010      Group Control # 200543
                                                ===== AOPD Use Only =====
Test Indicator :P (T/P) Buy Unit : (S/M/W) | Contract #...
Acknowledgement : Customer Ref : | Location #.....
Release/Contract : 1: 2: | Contracting Dealer #...
Round Quantities when Needed U/D/R ? Seg Term:~~ | Reports Used :.
-----
** ENTER DATA OR <?> FOR HELP !!

```

## Testing Your System Parameters

After completing the Tech Data PSN communications setup in DDMS and making any necessary changes to your Item database, you are ready to execute your first live order.

To complete your first order:

- 1 Create a small purchase order.
- 2 Transmit this purchase order via the Tech Data PSN. For instructions, see **Using PSN**.
- 3 Call Tech Data (1-800-237-8931) with the P/O number to be sure they have received this purchase order into their system.
- 4 Confirm the acknowledgment is received from Tech Data. The order processes overnight and acknowledgments can be picked up the next day.
- 5 Confirm the order arrives at your destination.

If you have problems with the transmission, or the acknowledgment, first get a verbal confirmation that Tech Data received the transmission. Then contact ECi technical support.

When you have successfully completed your first order, you are ready to begin using the Tech Data PSN to transmit real information.

## Using PSN

After building a P/O for Tech Data, you can transmit it online to Tech Data. To transmit P/Os using text-based software:

- 1 In the (SR) Purchase Order Reports screen, type **B** in the Request field.

**Note:** To access the (SR) screen in DDMS, double-click  , then

double-click



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*The P/O is sent to the vendor matching the Vendor ID on the P/O.*

---

- 2 Tab to the Who field and type **N** to select Tech Data. See Figure 10.
- 3 In the P/O Numbers field, enter the number of the P/O to send. To send more than one P/O, enter the number of the first P/O in the P/O Numbers field. Enter the number of the last P/O in the To # field.

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- 4 Press Enter until the Are You Sure prompt appears. Type Y.
- 5 You can complete the transmission using the (CX) screen. See **Completing the Transmission**.

---

**Note:** The order processes overnight. You can request an acknowledgment the next day. For instructions, see **Requesting Acknowledgments**.

---

### Completing the Transmission

Once you've completed the (SR) screen, the (CX) screen opens. You can override the drop ship order type and shipping method set up in the Vendor Private Communications Network window for this order (optional) and complete the transmission (required).

- 1 At the Enter Number For Selection prompt, type the number of the parameter to set.
  - To override the drop ship code, type 1.
  - To override the shipping method, type 2.
- 2 In the Override field, type Y and press Tab.

**Figure 10:  
Transmitting  
P/Os Online**

```

16:40:09          (SR) Purchase Order Reports  rev. (06/01/04)          07/08/04
=====
A. Print P/O's.   P/O Form Format Y/R/B/S ?.   Past Due Y/N ?.   Outstanding Y/N ?.

B. Transmit P/O To Vendor          Send Special Codes ?
C. Receive P/O Transmission From Vendor.          DMI          XSTAMPER
D. Print P/O Receipts From Vendor.   Delete File Y/N ?.   TPA          IS
F. Talk To Wholesaler.              Who ?N   TECHDATA
I. Receive Electronic Invoice.       Regional Wholesaler ?.

E. Backorder Reports.              Short Buy Report Y/N ?.
  Keep Short Buy File for P/O's ?.   Print All ?.   Match Against P/O's A/E ?.
M. Debit Memo Report.

P. Purge Purchase Orders.           Archive Purge to Journal Y/N ?.
  From File [PO-MASTER ] Vol. [W1 ]          E=Dept
  To File [JOUR-PO ] Vol. [W1 ]              D=Date   P=Prefix  V=Vendor
                                              S=Slsm   R=Route   N=Item Nbr
R. Inquire or Report on Archive   Reindex Y/N ?.   C=Cust   L=Class   I=Invoice
S. Compare Vendor Purchases with Daisytex          Sort Codes 1(.), 2(.), 3(.)

P/O Numbers #..... To #.....
Vendor Nbr #..... To #.....
Request [B] Location ? 1 Printer ?P1 COMPANY ? Totals Only ?N Y/N
    
```

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- 3 In the 1-20 field, enter the appropriate code.
  - To change the drop ship code:
    - For blind drop-shipping, type **BS**. See Figure 11.
    - For drop-shipping, leave this field blank.
  - To change the shipping method, in the 1-20 field enter the code for the shipping method to use. (A list of codes is available at [www.ddms.com/Resources/Doc/PSN/TechDataShipVia.pdf](http://www.ddms.com/Resources/Doc/PSN/TechDataShipVia.pdf).)
- 4 At the Enter Number For Selection prompt, type **C** to complete the transmission.
- 5 The P/O is transmitted to Tech Data.

**Figure 11:**  
**Completing the**  
**Transmission**

```
16:37:38      Vendor Private Communication Network Rev. (06/13/03)      03/16/06
=====
ACTION [C]  A=Add, C=Change, I=Inquire                               Location [ 1 ]
=====
Vendor#TECHDATA      TECHDATA                               Code :A      G/L #  -
-----
Comm. Type      Template      Parameter Group
[PCN      ]      [TECHDATA ]      [Supplier Information      ]
      Parameter
[Drop Ship Order Type      ]      1-20 [BS      ]
      Override [Y]      21-40 [      ]
      41-60 [      ]
0 [Vendor's Code      ]      61-80 [      ]
1 [Drop Ship Order Type      ]
2 [Shipping Method      ]

=====
Enter Number for Selection [1]
```

## Using Acknowledgments

The order processes overnight. You can request an acknowledgment, pre-ceive it and print it the following day, using the (SR) screen.

### Requesting Acknowledgments

**Note:** To access the (SR) screen in DDMS, double-click  , then

double-click



- 1 In the (SR) Purchase Order Reports screen, type **C** in the Request field.
- 2 At the Are You Using Private Supply Network query, type **Y**.
- 3 The (SRC) Acknowledgment Request screen opens. In the P/O Number field, enter the number of the P/O for which you are requesting an acknowledgment and press Enter.
- 4 The requested P/O's information fills the Vendor #, Transmission Date and Transmission Time fields. The P/O's status appears in the Status field next to the PO Nbr field, as shown in Figure 12. If the status is one of the following, go to **Step 5**.

**N** The order has not been pre-received.

**Figure 12: The (SRC) Acknowledgment Request Screen**

```

15:35:55          Acknowledgment Request Screen (04/23/03)          05/08/03
=====
P/O Number #.....          Vendor #.....
Transmission Date [.....]    Transmission Time [.....]

          Transmission Status
[.....]

? - P/O Not Found  N - Not Received  F - Final Received  P - Pre-Received

PO Nbr   Status   PO Nbr   Status   PO Nbr   Status   PO Nbr   Status
[.....] [.] [.....] [.] [.....] [.] [.....] [.]
[.....] [.] [.....] [.] [.....] [.] [.....] [.]
[.....] [.] [.....] [.] [.....] [.] [.....] [.]
[.....] [.] [.....] [.] [.....] [.] [.....] [.]
[.....] [.] [.....] [.] [.....] [.] [.....] [.]
[.....] [.] [.....] [.] [.....] [.] [.....] [.]
[.....] [.] [.....] [.] [.....] [.] [.....] [.]

P=Print Acknowledgment  R=Pre-Receive and Print Acknowledgment [P]  Printer [__]
=====
    
```

## Phase II: Setting Up & Using the Tech Data PSN for DDMS

**F** The vendor has shipped your order.

**P** The vendor has allocated inventory to fill your order.

If the status field is blank or is set to ? (question mark), the P/O you requested was not found. Re-enter the P/O number. If the record is still not found, call your vendor for a verbal acknowledgment. Your order may not have been transmitted.

5 At the Get Acknowledgment prompt, type **Y**.

### Pre-receiving and/or Printing Acknowledgments

1 Use the fields at the bottom of the screen, shown in Figure 13, to print an acknowledgment or pre-receive a P/O.

- To pre-receive a P/O and print an acknowledgment, type **R**.
- To print an acknowledgment, type **P**.

---

**Note:** Once you print an acknowledgment, you cannot pre-receive it. Contact Tech Data to repost the acknowledgment.

---

2 In the Printer field, enter the name of the printer to use.

3 At the Are You Sure prompt, type **Y**.

**Figure 13:**  
**Printing and**  
**Pre-Receiving**  
**an**  
**Acknowledgment**

```
15:35:55 Acknowledgment Request Screen (04/23/03) 05/08/03
=====
P/O Number #..... Vendor #.....
Transmission Date [.....] Transmission Time [.....]
Transmission Status
[.....]
? - P/O Not Found N - Not Received F - Final Received P - Pre-Received
PO Nbr Status PO Nbr Status PO Nbr Status PO Nbr Status
[.....] [.] [.....] [.] [.....] [.] [.....] [.]
[.....] [.] [.....] [.] [.....] [.] [.....] [.]
[.....] [.] [.....] [.] [.....] [.] [.....] [.]
[.....] [.] [.....] [.] [.....] [.] [.....] [.]
[.....] [.] [.....] [.] [.....] [.] [.....] [.]
[.....] [.] [.....] [.] [.....] [.] [.....] [.]
P=Print Acknowledgment R=Pre-Receive and Print Acknowledgment [P] Printer [__]
```