Phase II: Setting Up & Using the Allsteel PSN for DDMS

ECi

ECi DDMS®

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Setting Up the Allsteel PSN

If you have completed the steps in the handout, *Phase I: Setting Up PSN* for any vendor, you're ready to set the Allsteel-specific parameters.

Setting parameters to communicate with Allsteel involves:

1. Receiving authorization
2. Contacting Allsteel
3. Setting up your Vendor database
4. Setting up furniture contracts
5. Setting up your P/O communication defaults.

Email PSN installation questions to ddmssupport@ ecisolutions.com

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.

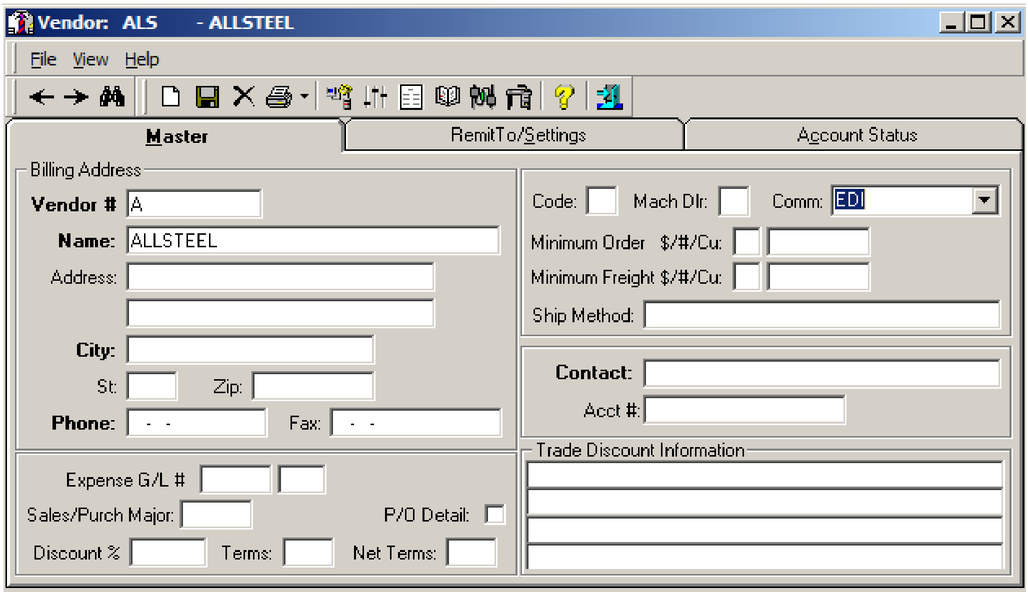
Receiving Authorization

Contact ECi Support at ddmssupport@ecisolutions.com to request authorization.

Contacting Allsteel

Email Allsteel at asisoftwarehelp@allsteeloffice.com to find out your user name and password. Also ask for all eligible contract numbers and expiration dates.

Figure 1: The Vendor Window



Setting Up Your Vendor Database

1 Set up Allsteel as a vendor. If you already have an Allsteel vendor, retrieve it and go to **Step 1.4**.

1.1 In the Vendor Master tab, click .

1.2 Click the Vendor # box and enter an account number for Allsteel.

Contact Allsteel to get your User ID and password.

1.3 Click the Name box and enter a name for Allsteel.

1.4 Click the Comm box down arrow and click Allsteel. See Figure 1.

1.5 Click .

2 Set PSN parameters.

2.1 In the Vendor Master tab, click .

2.2 The Supply Options window opens, as shown in Figure 2. In the Location box, enter a G/L location, or accept the default of 1.

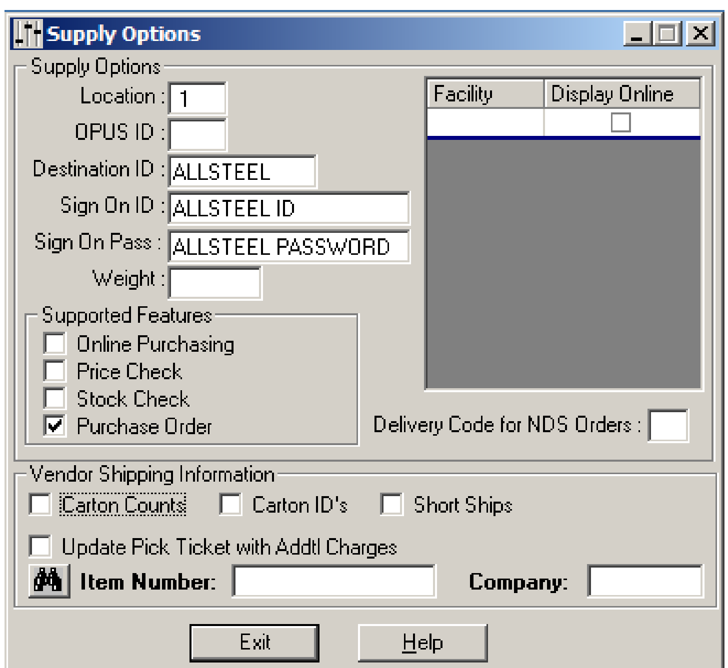
2.3 In the Destination ID box, type **ALLSTEEL**

2.4 In the Sign On ID box, enter your Allsteel sign on ID number.

2.5 In the Sign On Pass box, enter your Allsteel sign on password.

2.6 From the Supported Features list, click Purchase Order.

Figure 2: The Vendor Supply Options Dialog Box



2.7 When you finish, click Exit.

3 Click .

Setting Up Furniture Contracts

ECi recommends that you set up your Allsteel contracts before communications. If no contract is sent to Allsteel during communications, your account's default contract is used. Use the Furniture Contract Maintenance window to create a furniture contract.

1 Retrieve your Allsteel vendor.

2 In the Vendor window, click to open the Furniture Contract Maintenance window. See Figure 3.

3 Click to add a new contract.

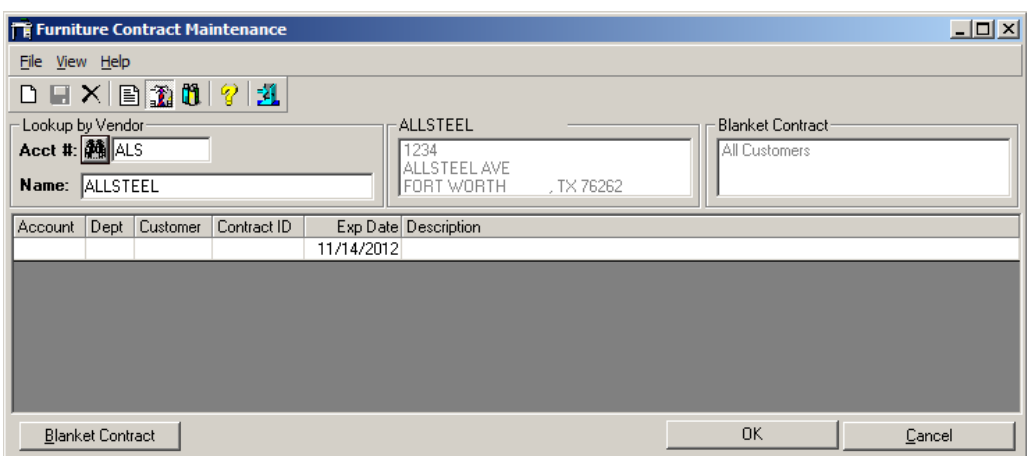
4 In the Contract ID box, enter the new contract number.

5 If the contract has an expiration date, enter it in the Exp Date box. (Allsteel's contracts expire at the end of each calendar year.) Enter the date all in one string: 123111, for example. Press Enter. The date displays as 12/31/2011.

6 To add a description for this contract, click the Description box and enter the description.

7 Continue adding all eligible contracts for Allsteel. (If a contract is specific to a particular customer, you can select their customer account number and/or department. Start typing in the Account box to open the Customer Query box.)

Figure 3: The Furniture Contract Maintenance Window



8 When you finish, click OK.

9 At the Save Changes prompt, click Yes. The cursor returns to the Vendor window and the contract information you specified is saved.

Setting Up Salesperson Contacts

If your sign on ID (which must be a valid email address) is longer than 20 characters, it cannot be entered into the Vendor Supply Options dialog box. Enter this information in the Salesperson Contacts window. You must set up a contact record for each person who sends P/Os or receives acknowledgments from Allsteel. Since there is only one login and password per dealership, the Type, Email, and URL boxes must contain the exact same information for each of your salespersons (users).

1 In the Salesperson Master tab, click to open Salesperson Contacts window.

2 Click and set up each person who sends P/Os or receives acknowledgments from Allsteel via PSN.

2.1 Enter the salesperson's name in the Contact box.

2.2 In the Type box, enter **ALLSTEEL**

2.3 In the Email box, enter the logon email. This is used as your sign on ID. Use the same email address for each salesperson you set up with a contact record.

Note: You must register your email address (login) and password with Allsteel before you enter this information in DDMS.

2.4 In the URL box, enter the sign on password used to log into Allsteel. To obtain this password, contact your Allsteel vendor. Use the same password for each salesperson you set up with a contact record.

Note: The Type, Email, and URL boxes should contain the same information for each of your salespersons (users), since there is only one login and password per dealership.

2.5 Click .

2.6 Repeat these steps for each salesperson who sends P/Os or receives acknowledgments from Allsteel. When you do, be sure the Type, Email, and URL boxes contain the same information for each of your salespersons (users) since there is only one login and password per dealership.

Setting Up DSR for Salespersons

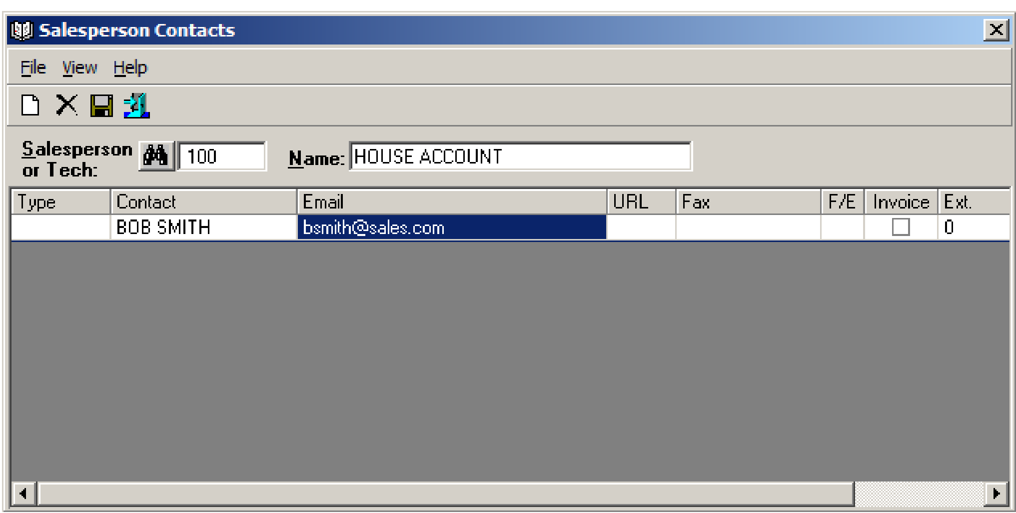
You can set up your system to identify the DSR (Dealer Sales Representative) salesperson of record for this order. When you place the order, the system defaults to assign the salesperson 100% of the responsibility for the order. However, you can divide this 100% among up to three salespersons, 60% to Sam, 20% to Mary, and 20% to John, for example.

To do this, you must set up a contact record for each salesperson who may be considered a DSR salesperson. Using the Salesperson Contact window, there are only two boxes you must complete: the Contact and Email boxes. For this feature to work properly, you must leave the Type box blank.

1. In the Salesperson Master Tab, click .
2. In the Salesperson Contacts window, set up each person who may be considered a DSR salesperson. To do so, click .
3. When the cursor moves to the Type box, press Tab. Leave the Type box blank.
4. In the Contact box, enter the salesperson's name.
5. Click the Email box and enter the salesperson's email address.
6. These are the only two boxes you need to complete. See Figure 4. Click .

   Repeat these steps for each salesperson who may be considered a DSR salesperson in the database.

Figure 4: The Salesperson Contacts Window with the Type Box Left Blank



Setting Up P/O Communication Defaults

To place an order with Allsteel, you must set up default parameters in the Communicate P/Os window. These parameters include information such as account number, contract number, and billto address. These parameters are defaults only and may be overridden when you send the P/O to Allsteel.

1. From the DDMS Master Menu, double-click 

. The Purchase Order Entry Master tab opens.
2. In the Action Code drop down list box, click Communicate. The Communicate P/Os window opens.
3. From the Vendor Type grid, click Allsteel.
4. Click the View menu and select Default Vendor Options. The Communications Options dialog box opens. Verify Allsteel is the vendor selected in the Vendor drop down box.

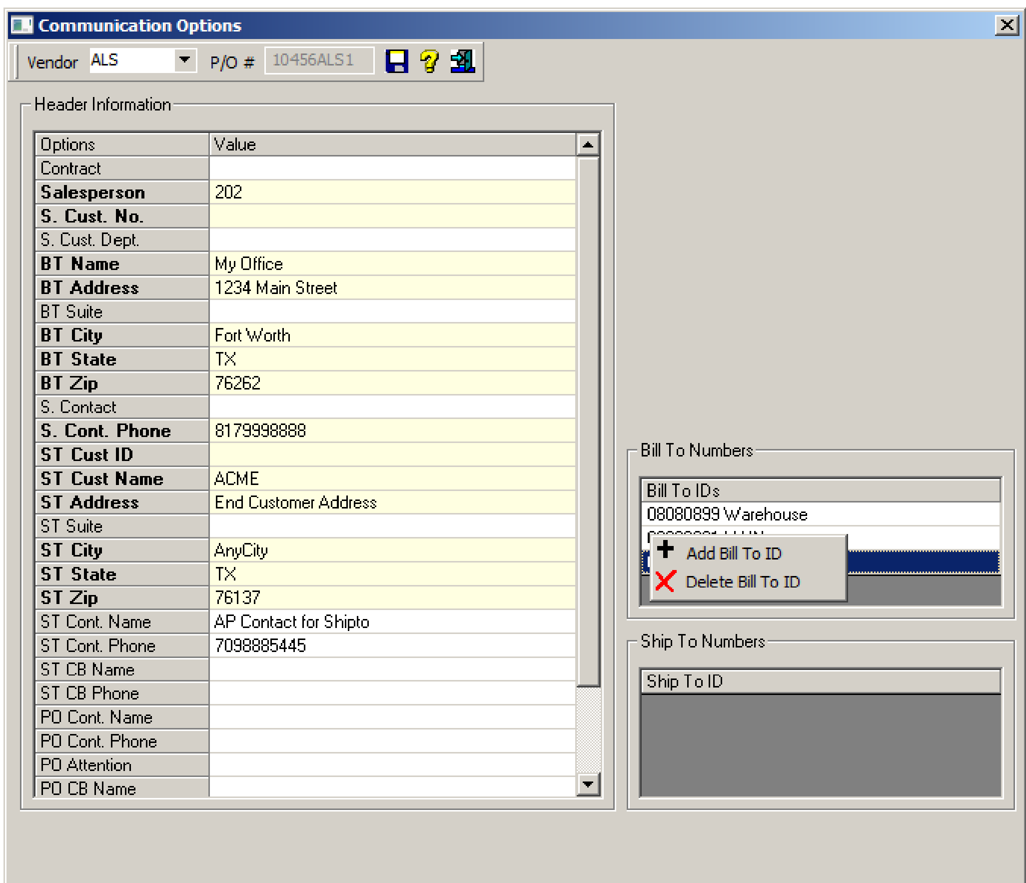


Figure 5: Adding A Bill To ID

5 Set up Bill To and Ship To IDs.

To add Bill To IDs:

5.1 Right-click the Bill To IDs box, then click Add Bill To ID. See Figure 5.

5.2 A new line is added to the Bill To IDs box. Click the line and enter the nine-digit account number and a name, Main, for example.

5.3 Press Enter.

5.4 Repeat **Steps 5.1 - 5.3** to add additional Bill To IDs.

To Add Ship To IDs:

5.5 Click the Bill To ID for which to add Ship To IDs.

5.6 Once the Bill To number is highlighted, right-click the Ship To IDs box and select Add Ship To ID.

5.7 Press Enter.

5.8 Repeat **Steps 5.5 - 5.7** to add additional Ship To IDs.

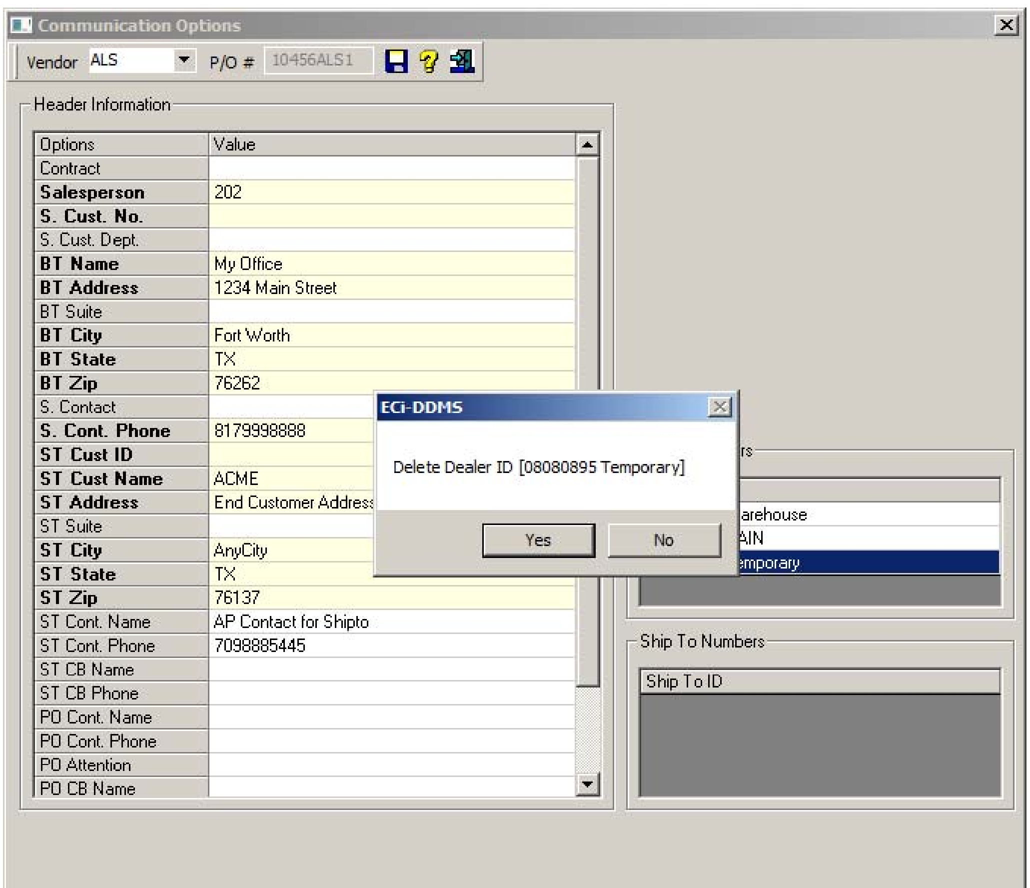


Figure 6: The Delete Ship To ID Message Box

Note: You can set up multiple Bill To and Ship To IDs. Ship To IDs are linked to the Bill To ID for which they are set up. To add Ship To IDs for a separate Bill To account, select another bill to account and repeat **Steps 5.6-5.7**.

To delete a Bill To or Ship To ID:

5.9 Click the line to delete.

5.10 Right-click the same line and click Delete Bill To ID or Delete Ship to ID.

5.11 In the message box, click Yes. See Figure 6.

6 In the Header Information section, the required default options are listed in bold on the left side of the window. You must enter a value in all of these boxes before any information can be transmitted to Allsteel.

If you do not set any defaults, each time you build a P/O for Allsteel, you must manually enter the information.

To set defaults, click a box name and enter a value. Box names in bold are required. For example, click Contract, then in the Value box next to Contract, enter the contract number. Click to look up the contract number. ECi recommends you set up the following defaults:

- BT boxes are for the billto information. Enter the address to which to send your company's invoices.
- S Contact is the billto attention name. Enter the name of your company's A/P clerk.
- ST boxes are for the shipto information. Enter your company's warehouse address where the shipment is to be delivered.
- ST Contact is the person at the warehouse who is to receive the shipment.
- In the Output Path box, enter the same value as in the Outbound Volume/Folder field in the (L6X) PSN Parameter screen. Enter the true network path as \\ddmsserver name\path. For example, a valid path is \\ddmsserver\ddms\w2.
- In the Input Path box, enter the same value as in the Inbound Volume/Folder field in the (L6X) screen. Enter the true network path as \\ddmsserver name\path. For example, a valid path is \\ddmsserver\ddms\w2.

7 When you finish, click .

Using PSN

To place a P/O with Allsteel using PSN:

1. Import the SIF to Order Entry. For more information, see the heading **Importing the SIF.**
2. Build the P/O. For more information, see the heading **Building the P/O.**
3. Upload the P/O to Allsteel. For more information see the heading **Uploading the P/O to Allsteel.**
4. Finish the order using Allsteel's e-ordering site. For more information, see the heading **Using Allsteel's e-Ordering Site.**
5. Receive acknowledgments. For more information, see the heading **Receiving Acknowledgments.**

Importing the SIF

Third party packages like 2020 Worksheet and Project Spec are known as specification or specifier software. They simplify the process of developing specifications for furniture orders. You can easily import the resulting quotes or orders directly into DDMS using a SIF file. This application imports standard SIF format specification files (the file format used by 2020 Worksheet, Project Spec, and many other specifier programs) and releases them to orders. You can use any specifier program that supports the SIF format and still send your furniture sales through the same order and accounting flow as other transactions.

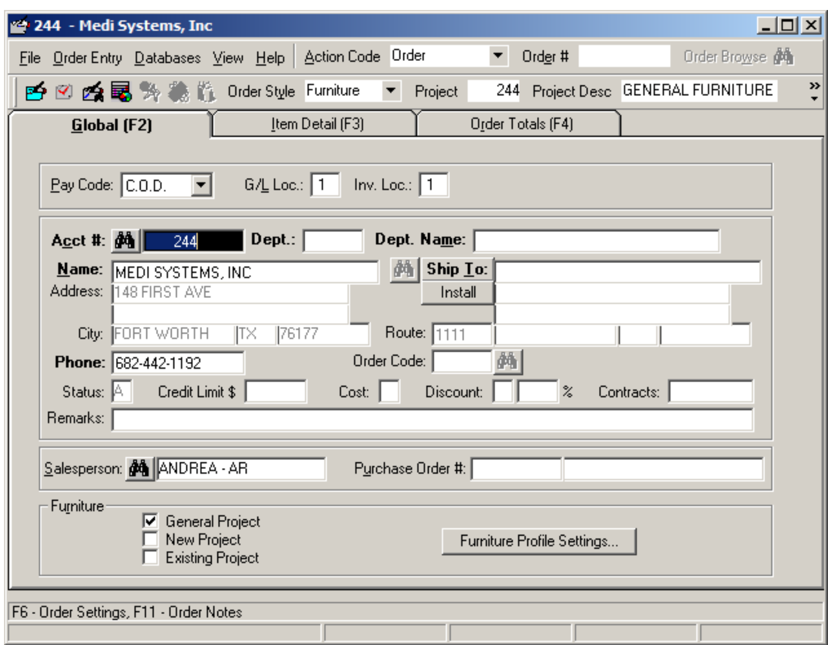
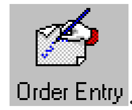


Figure 7: The Order Entry Global Tab

1 From the DDMS Master Menu, double-click 

.

2 Click the down arrow in the Order Style list box and select Furniture.

3 In the Action Code list box, click the down arrow and click Order.

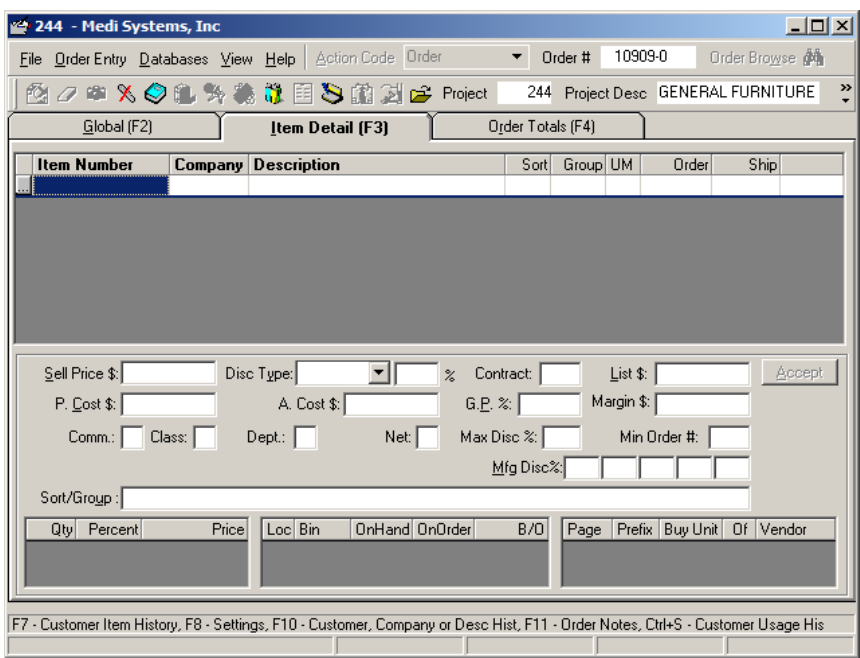
4 Select the customer for this furniture order. For instructions, see your DDMS online help.

5 Assign the order a project number. For instructions, see your online help. Each order or quote that you place must be assigned a project number. This number ties together all the customer's invoices for the project and helps you easily track the project.

6 In the Furniture portion of the window, click Furniture Profile Settings. See Figure 7. The Furniture Profile Settings box displays. You should complete the following date boxes each time you begin an order: Customer Due, Est Delivery, and Est Install.

Note: Be sure the Dates and Sort/Group Desc boxes are checked. They let you view the dates, the sort and group descriptions, as well as the tag information while placing the order. Checking these boxes allows you to enter information in these sections in the Item Detail tab.

Figure 8: The Item Detail Tab



7 In addition to the date and viewing options, you can also change posting dates, default options, dealer shipto information, and printing instructions. For details, see your online help.

8 When you complete the changes, click OK.

9 Click the Item Detail tab. See Figure 8.

10 Click  or press F12.

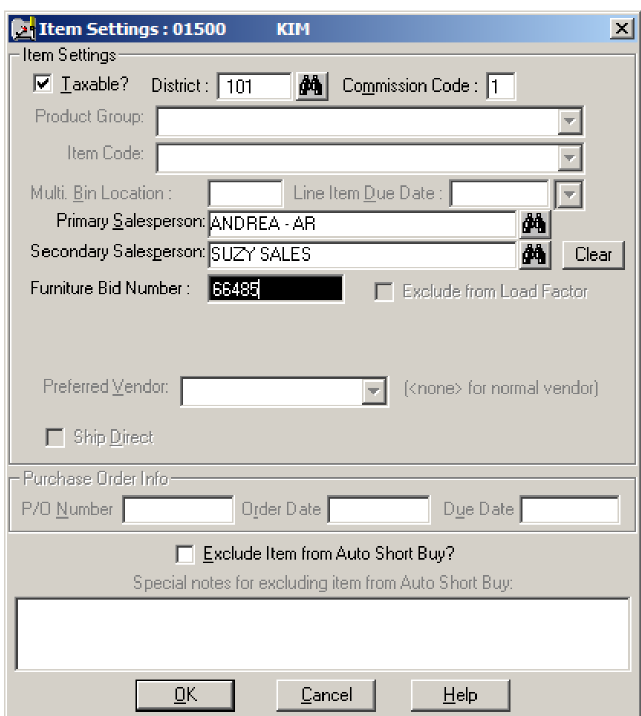
11 Scroll to the location on your network hard drive where the file is stored, C:\SIF Files, for example, and select the file to import.

12 When the Process SIF File prompt appears, click Yes.

13 The items move from the file to a Furniture order. At this point, you can add bid numbers to items.

Note: The bid number populates the Communication window to be sent to Allsteel. If there are multiple bid numbers on the order, only the first bid number is displayed in the Communication window; however, all lines are sent to Allsteel.

Figure 9: The Item Settings Dialog Box



- **13.1** Select an item on the order.
- **13.2** Press F8. The Item Settings dialog box opens. See Figure 9.
- **13.3** Click the Furniture Bid Number box and enter the bid number.
- **13.4** Click OK.

14 You can also add notes or tag information to the order.

- **14.1** Select an item on the order. Press F11. The Order Notes box opens. For more information on adding notes, see your online help.
- **14.2** To add tags, click the down arrow next to Line Item and select Tag. The Tag fields allow you to enter tags that match the five industry standard tags:

  Tag 1: TG (Tag)

  Tag 2: GC (Generic Code)

  Tag 3: L1 (Alias 1)

  Tag 4: L2 (Alias 2)

  Tag 5: L3 (Alias 3)

15 When you finish, click OK.

16 Click the Order Totals tab.

17 If you have add-on items set up in the (LGC1) Furniture Add On Item Parameters screen, the items are automatically added to the order (if the items are required) or the Furniture Addon Items dialog box opens so you can select the items to add to this order.

To add items to the order, enter the quantity of each item in the Qty box. For example, to add one freight charge, type 1 in the Qty box corresponding to the freight item. When you finish adding items, click OK. If you are not adding items to the order, click Cancel.

18 The Order Totals tab opens. At this point, you can end the order or make changes to the ending order status. You can also change printer information and enter an end line special. For details on changing this information, see your online help.

19 To automatically build the purchase order when the order is ended, click Build P/O.

20 Click Accept Order.

Note: Using the F11 Order Notes box, you can also manually add, change, or delete option numbers and descriptions without a specifier program. In the Purchase Order Entry window, press F11 to access the Order Notes dialog box, shown in Figure 10. Enter the option number and option description using the correct order and specifier format.

Building the P/O

1 The Purchase Order Info dialog box opens. See Figure 11. The Vendor box defaults to the vendor for the last item on the order.

Figure 10: The Order Notes Dialog Box

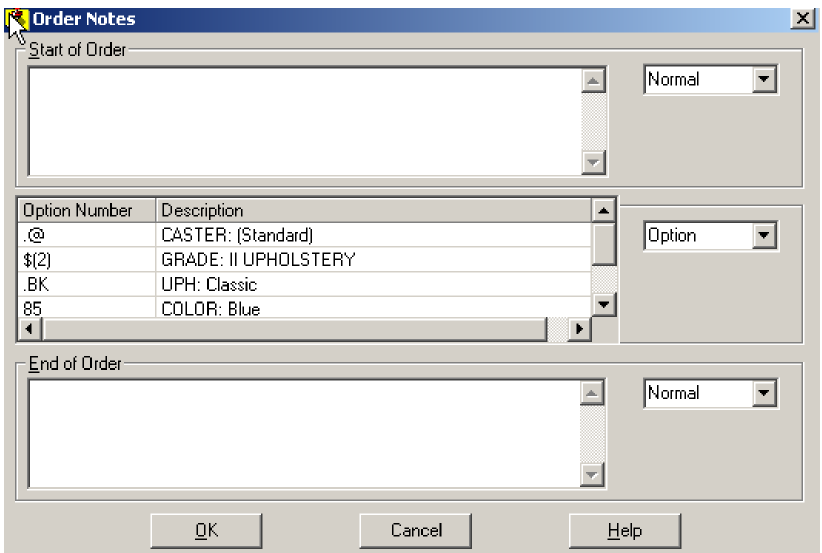
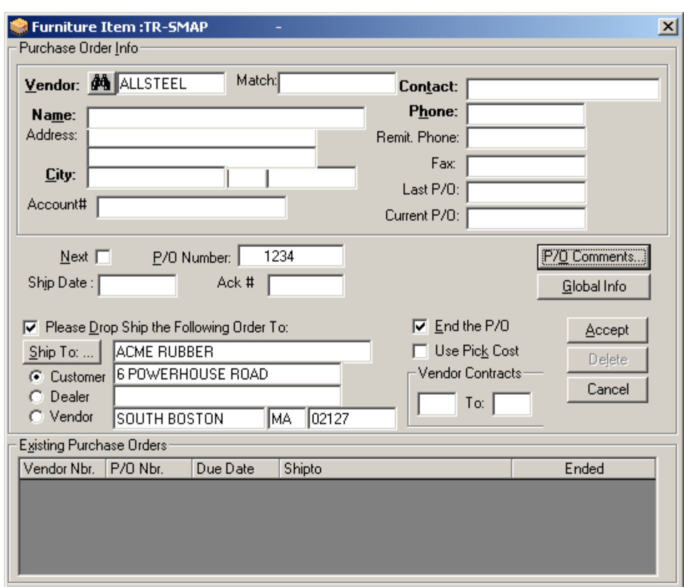


Figure 11: The Purchase Order Info Dialog Box



To change it, enter the vendor's name or account number over the existing vendor. Or click to open the Vendor Query dialog box.

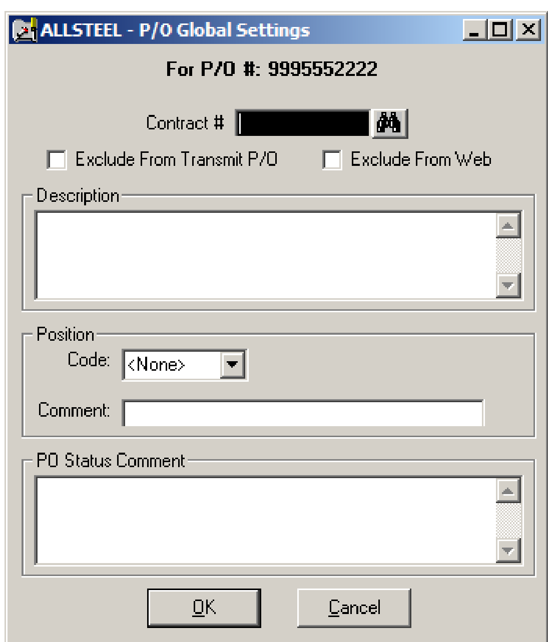
You use the Purchase Order Info dialog box to specify information for this purchase order, including the following:

- P/O Number.
- Ship Date: This is the date sent to Allsteel as Requested Delivery Date.
- Ship To: Enter the shipping address to which to ship items on the purchase order.
- End the P/O: Check this box to end the P/O before you can transmit it to Allsteel.

2 To view global information, click Global Info. The P/O Global Settings dialog box opens. See Figure 12. The system displays information for the vendor (manufacturer). You can use this dialog box to specify a vendor contract. If you don't know the vendor contract, click to open the Furniture Contract dialog box. You can also use this dialog box to enter a P/O description, a category code, and any comments. When you finish, click OK.

3 The cursor returns to the Purchase Order Information dialog box. When you finish specifying information, click Accept.

Figure 12: The P/O Global Settings Dialog Box



4 The Items to Be Purchased dialog box opens. See Figure 13. The system automatically checks the items that match the vendor alias and displays them in this box. To deselect an item, click it. To reselect an item, click it again.

5 You can use this dialog box to limit to a specific SIF file. To do so, click the down arrow in the SIF Limit box and click the SIF file by which to limit this P/O.

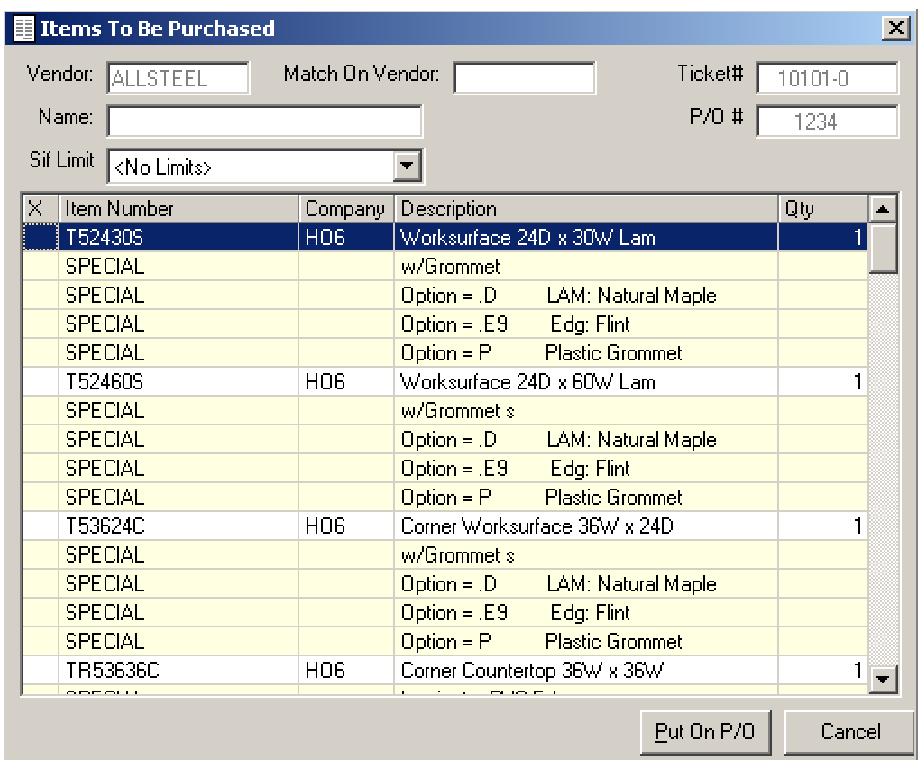
6 Click Put On P/O.

7 At the Finished Adding Items to P/O message, click OK.

8 The Purchase Order Information dialog box reopens for every vendor match on the order. However, the second time this box opens, you must manually select the vendor. After you select the vendor to which to send this purchase order, enter the appropriate information. When the Items to Be Purchased dialog box reopens, select the items to purchase and click Put On P/O.

9 When all the items on the order are on a P/O, the Finished Adding Items to P/O # message appears. Click OK. The cursor returns to the Global tab.

Figure 13: The Items To Be Purchased Dialog Box



Uploading the P/O to Allsteel

1. From the DDMS Master Menu, double-click 

. The Purchase Order Entry Master tab opens.
2. In the Action Code drop down list box, click Communicate. The Communicate P/Os dialog box opens.
3. From the Vendor Type grid, click the plus sign next to Allsteel to expand the list to include all of your Allsteel vendors.

Note: You can set or change communication defaults for this vendor. Refer back to the heading **Setting Up P/O Communication Defaults**.

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4. Click the appropriate vendor. The Purchase Order Browse dialog box opens.
5. Click the check box of the P/O to select.
6. Click OK.
7. Click Next.
8. The Vendor Options tab opens. You can change the default settings. All required boxes are bold and must be filled before you can continue.

   The DSR (Dealer Sales Representative) boxes show the name and email addresses of the salespersons of record for this order. The DSR Name 1 box defaults to the salesperson assigned to the order when the order was placed. The DSR Percent 1 box defaults to 100%. However, you can split the percentage amount among up to three different salespersons.

   To do so, double-click the DSR Name 2 box in the Options column. The Salesperson Query dialog box automatically opens so you can select the DSR salesperson. (Do not click the DSR Name 2 Value box. Instead, double-click the DSR Name 2 box in the Options column.) Then, click the DSR Percent 2 Value box and select the percentage to assign. Repeat these steps to assign a percentage to a third salesperson. The percentage in the DSR Percent 1 box is automatically adjusted as you assign percentages. See Figure 14.
9. Use the Notes/Specials section to add notes or specials to the P/O. These appear on the Allsteel site in the Comments box.

Click the down arrow in the Note Type box. From the drop down list, select the type of note to add. You can select Order Note, Shipping Tag, Shipping Attention, Shipping Instructions.

To enter an order note, a shipping tag, or shipping instructions, click the text box below the Note Type box. Enter the text for the note. For example, you might type Ship Via UPS as a shipping instruction.

To enter a shipping attention, click the first S Phone box. Enter the shipto contact's area code. Enter the shipto contact's phone number in the second and third boxes. Click the S Contact box. Enter the shipto contact's name.

10 In the Ship Condition box, select Delivery By to deliver on or before the specified Due Date. Select Deliver By to deliver on or before the specified Due Date. Select Deliver On to deliver only on the specified due date.

Note: The Due Date is pulled from the Ship Date in the Purchase Order Info dialog box. You can change this date in the Vendor Options tab.

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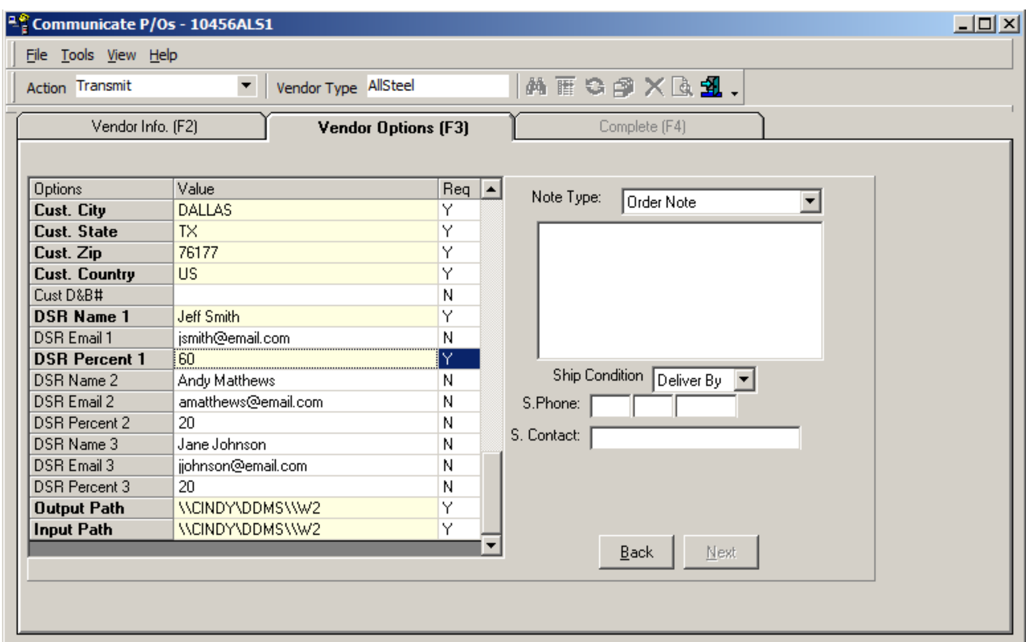
11 When all the required boxes are populated, click Next.

Figure 14: The Percentage Amount Split Among Three Users



12 The Complete tab opens. Click Build. See Figure 15. The P/O you selected is transmitted to Allsteel's website.

13 The Allsteel website Cart and Order Processing page opens automatically. From the Process File list box, click your P/O.

Note: The most recently uploaded P/O goes to the bottom of the list box.

14 Click Process.

Using Allsteel's e-Ordering Site

Once the P/O is processed, it goes to a shopping cart on Allsteel's website. The shopping cart has two tabs: Item Detail and Order Detail.

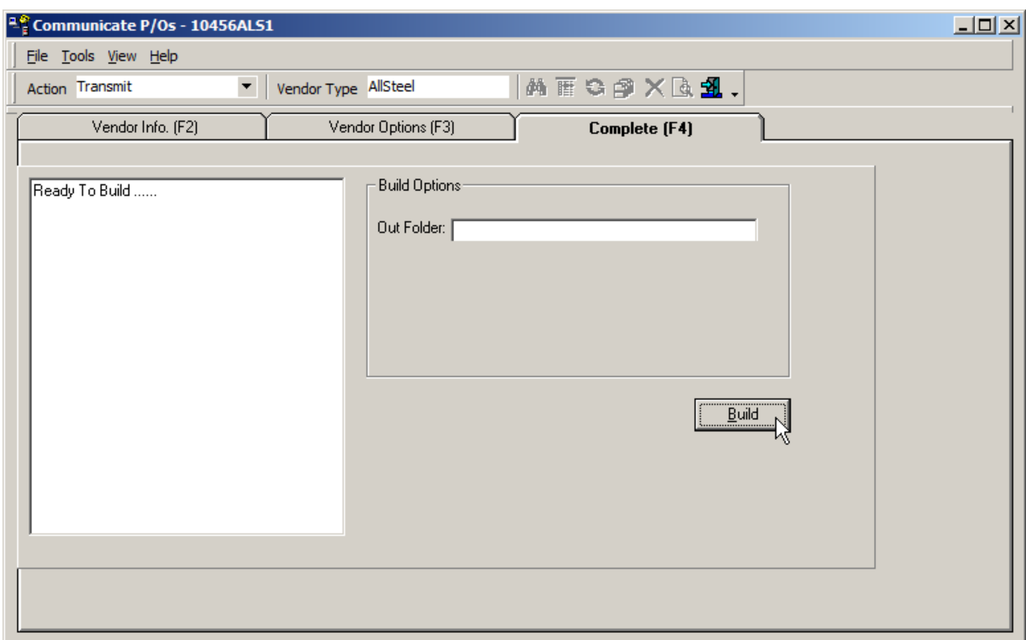
Using the Item Detail Tab

Use the Item Detail tab to maintain products or to view the cart or order header information. Click View Cart to view the current cart. Or click Change Cart to select a different one from the list box.

The Cart Action buttons are in the upper right corner. You can create a new cart, copy the current cart, empty the cart of products, delete the cart, print the cart and save any changes you made.

The Filter radio buttons let you limit the items in the cart. Click Errors to show only the problem items. Click All to include every item on the order.

Figure 15: The Complete Tab



It is possible to change an order on Allsteel's website. However, changing an order on Allsteel's website does not change it in DDMS. This may cause acknowledgments not to be updated properly. For this reason, rather than changing the order on Allsteel's website, you should delete it and reenter it in DDMS.

Using the Order Detail Tab

The Order Detail tab shows all the order information, including shipping, date requirements and general instructions.

1. The Ship To list box shows the shipping account number. The shipping account number comes from the Dealer ID you specified in the Communications Options dialog box. (Refer back to **Setting Up P/O Communication Defaults**.)
2. In the boxes below the Ship To list box, the shipping address displays. It is assigned to the account number in the Dealer ID section of DDMS.
3. Click Check Out to send the order to Allsteel.
4. Close the Allsteel browser window.
5. Close the P/O Communications dialog box.

Receiving Acknowledgments

Use the Receive action in the Purchase Order Entry Communicate dialog box to import the acknowledgment. For more information, see the handout *Phase III: Furniture Acknowledgments.*