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

ECi

ECi DDMS®

September 2011 Rev.

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Setting Up the Arlington PSN

If you have completed the steps in the handout, *Phase I: Setting Up PSN* for any vendor, you're ready to set the Arlington-specific parameters. If you have any questions about PSN installation, email them to ddmssupport@ecisoultions.com.

Setting parameters to communicate with Arlington involves:

1. Contacting Arlington
2. Setting up the EDI record
3. Creating an Arlington customer record
4. Setting up your Vendor database
5. Setting up the communication parameters
6. Setting up your trading partner parameters.

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.

Contacting Arlington

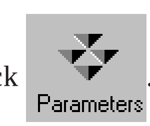
Contact Arlington to find out your user name and password. You should also give them the information (if it is already set up) in the (L6WB) AT&T EDI IMS Parameters screen. (See **Setting Up the EDI Record**.)

Setting Up the EDI Record

If you already have information in the EDI record of the (L6WB) screen, contact Arlington with this information. **Do not change this information unless you are instructed to do so by Arlington.** If the EDI record is blank, complete it using these instructions:

1. In the (L6WB) screen, tab to the Qualifier field, as shown in Figure 1. Type **12**

Note: In the graphical system, double-click 

in the DDMS Master Menu, then double-click 

. In the Parameter Editor window, double-click Text Base Parameters to access the (L) Parameters screen.

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2 In the ID field, enter your company's 10-digit phone number.

3 In the Code field, enter your company's 10-digit phone number.

Note: If you already have information in the EDI record of the (L6WB) screen, contact Arlington. They need this information. **Do not change this information unless you are instructed to do so by Arlington.**

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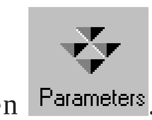
4 Press Enter to save your changes.

5 Contact Arlington and give them this information.

Creating a Customer Record

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

1 In the DDMS Master Menu, 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.

Figure 1: The (L6WB) AT&T EDI IMS Parameters Screen

```
16:10:02                    AT&T EDI IMS Parameters                     04/08/05
================================================================================
             Modem Parameters                  |          EDI Parameters
-----------------------------------------------|--------------------------------
Hayes Only ?             Capture Log  ?  (Y/N) |
Prefix     ?9,               Reliable ?Y       |   Code      :
Phone Nbr  #18003520192      Baud     :9600    |   Logon Id  :
                                               |   Password  :
                                               |   Qualifier :12
Phone Line #M1                                 |   Id        :8175551212
   Custom String [                    ]        |   Code      :8175551212
                                               |   File Type :
                                               |   Backorders :     (SA = NO B/O)
                                               |                    (SS = B/O)
                                               |--------------------------------
                                               |      Location
                                               |   1 [________]
                                               |   2 [________]
                                               |   3 [________]
                                               |   4 [________]
                                               |   5 [________]
                                               |
================================================================================
```

3 Tab to the Next Customer # field. Note the number in this field and save it for later. See Figure 2.

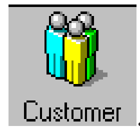
To manually assign a customer number, the next customer number in the (LA) screen must be blank.

4 Space through the number in the Next Customer # field to remove it.

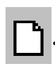
5 Press Enter until the Press Any Key to Continue prompt displays at the bottom of the screen.

6 Press Esc multiple times to return to the Parameter Editor window.

In DDMS's Customer Master tab, create an Arlington customer.

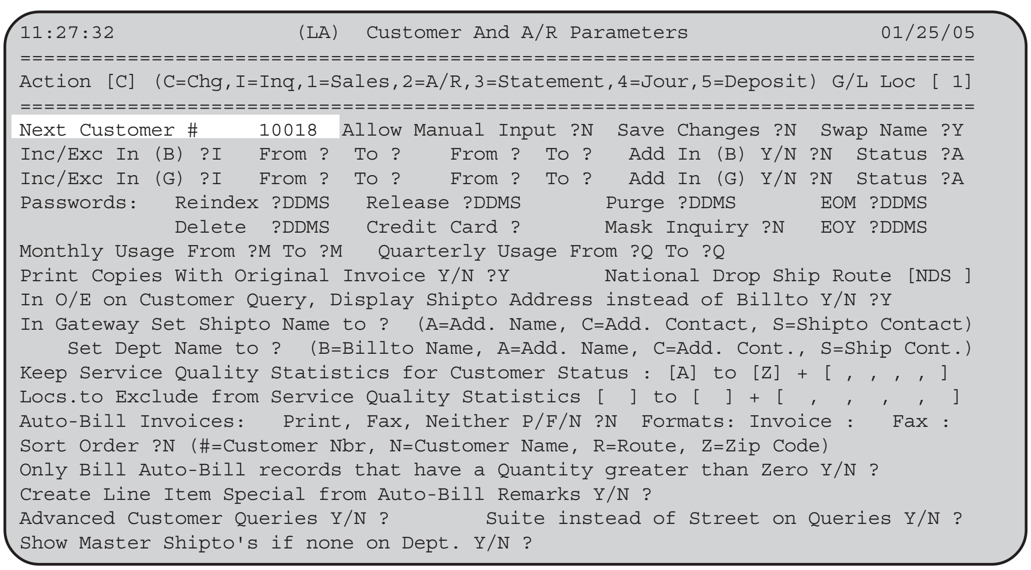
1 In the DDMS Master Menu, double-click 

. The Customer window opens, displaying the information for the last customer selected.

2 Click . The boxes in the window are cleared.

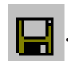
3 In the Acct # box, enter an account number for Arlington.

Figure 2: 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 ?
```

4 In the Name box, enter a name for the Arlington customer. See Figure 3.

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 Enter until the Press Any Key to Continue prompt displays at the bottom of the screen.

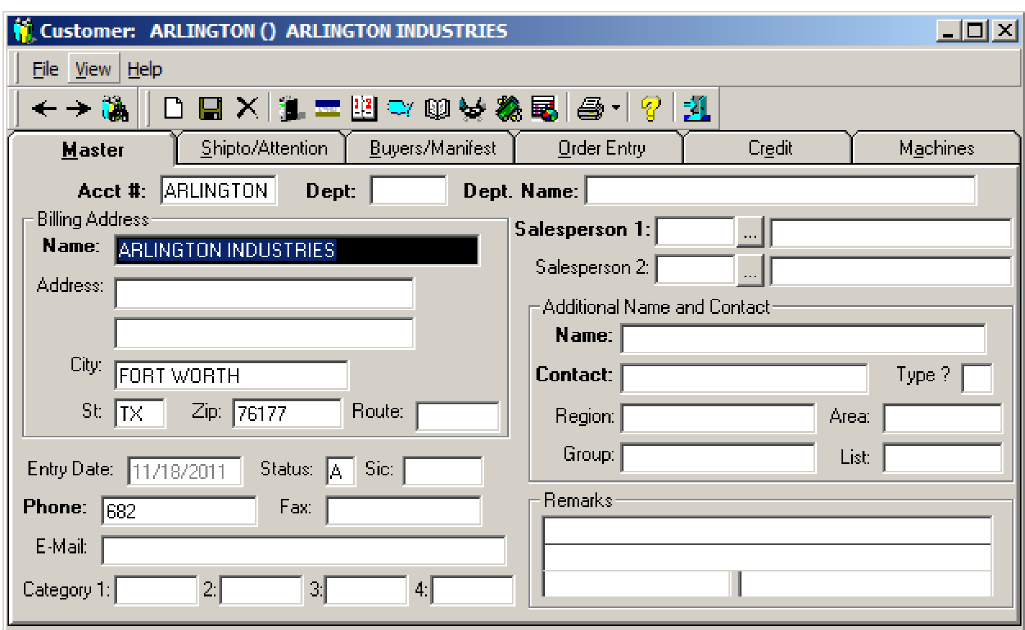
6.4 Press Esc multiple times to return to the Parameter Editor window.

Setting Up Your Vendor Database

You must set up the appropriate destination ID for Arlington Industries and select the features to enable.

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

Figure 3: Creating a Customer Record



1.1 In the Vendor Master tab, click .

1.2 Click the Vendor # box and enter the vendor number for Arlington.

1.3 Click the Name box and enter a name for the Arlington vendor.

1.4 Click the Comm box's down arrow. From the menu, click EDI. See Figure 4.

1.5 Click .

2 Set PSN parameters.

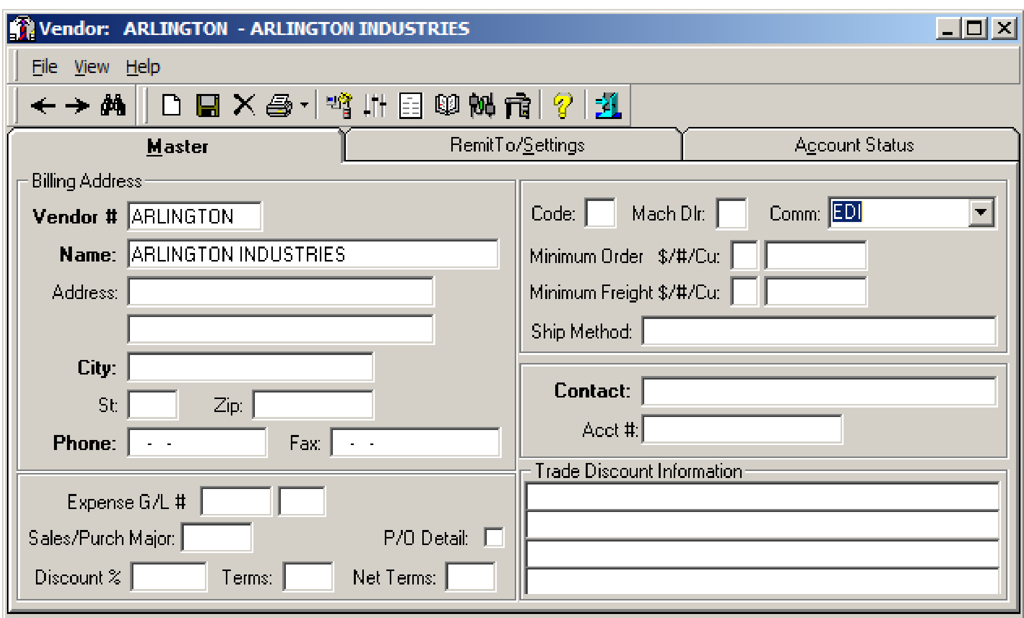
2.1 Click .

2.2 The Supply Options dialog box opens. In the Location box, enter a G/L location, or accept the default of 1.

2.3 In the Destination ID box, enter your Arlington ID exactly as follows: **ARLINGTON**

2.4 In the Sign On ID box, enter your Arlington vendor ID number.

Figure 4: The Vendor Window



2.5 In the Sign On Pass box, enter your Arlington password, as shown in Figure 5.

2.6 From the Supported Features list, click Price Check, Stock Check and Purchase Order.

2.7 When you finish, click Exit.

3 Click .

Setting Communication Parameters

You must set up communication parameters for Arlington. You can do this using *either* text-based or graphical software.

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

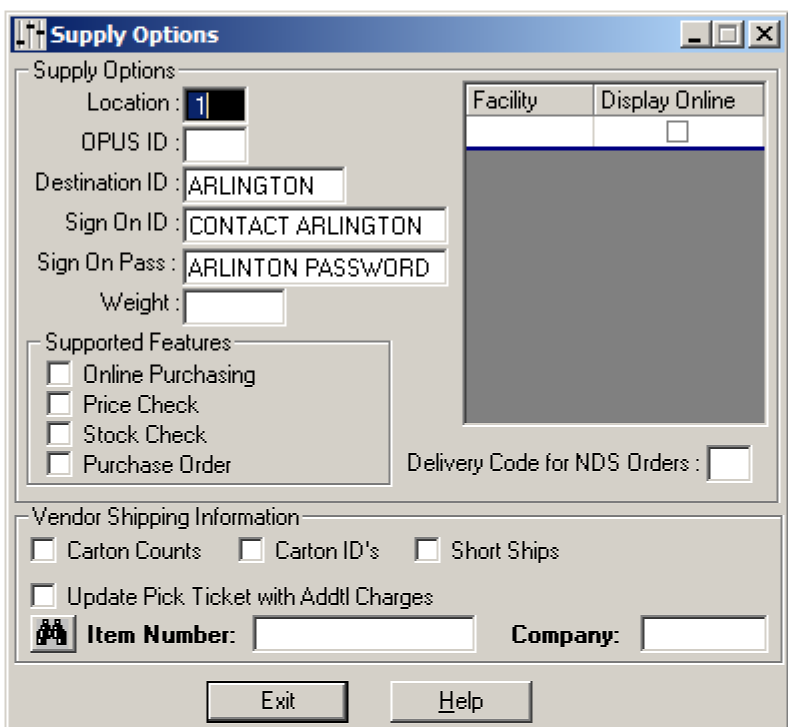
---

1 Set up the Vendor Private Communications Network dialog box.

1.1 In the Vendor window, open the Vendor Private Communications Network dialog box. To do so, click View and select PCN; press Ctrl + U; or click .

1.2 From the Communication Type drop down list, select Private Communication Network.

Figure 5: The Supply Options Dialog Box



1.3 From the Template drop down list, select PSN Standardized Communications.

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. See Figure 6.

Add a default by entering the default information in the Value column. For example, to create a capture log file, type **Y** in the Capture Log Value box.

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

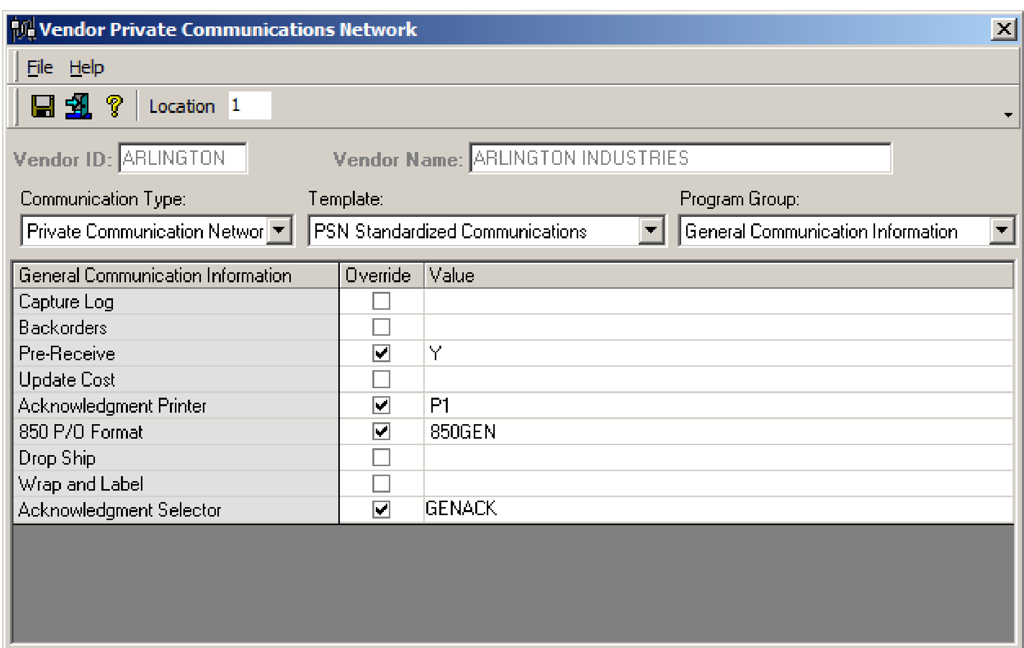
You may set these parameters as you choose with the following exceptions:

2.2 Check the Pre-Receive Override box. Type **Y** in the corresponding Value box.

2.3 Check the Acknowledgment Printer Override box. Enter your acknowledgment printer's name in the corresponding Value box.

2.4 Check the 850 P/O Format Override box. Type **850GEN** in the corresponding Value box.

Figure 6: Setting General Communications Information Parameters



2.5 Leave the Drop Ship Value box blank. The default is next-day delivery. Entering information in this box places your order on hold on the Arlington side.

2.6 Check the Acknowledgment Selector Override box. Type **GENACK** in the corresponding Value box.

2.7 When you finish, click .

3 Set the account parameters in the Vendor Private Communications Network dialog box.

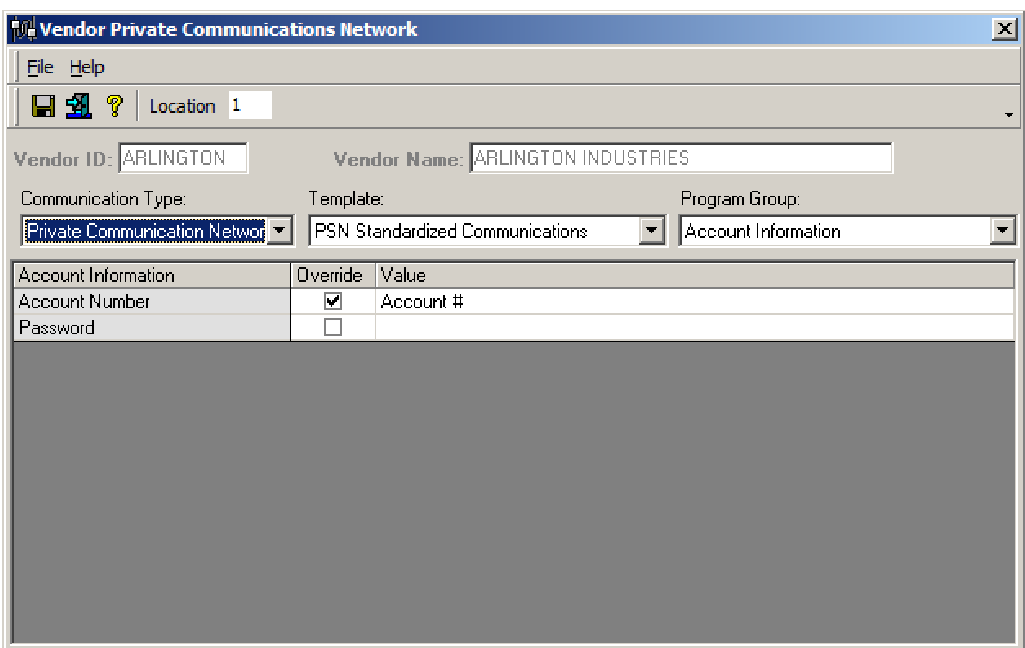
3.1 From the Program Group drop down list, click Account Information. The available parameters are listed in the Account Information column. See Figure 7.

Add a default value by entering it in the Value column. Check the corresponding Override box to allow these parameters to be changed at the time of communication. You may choose how to set these parameters, with the following exception:

3.2 Check the Account Number Override box. In the Account Number Value box, enter the account number provided by Arlington.

3.3 When you finish, click .

Figure 7: Setting Account Information Parameters



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 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, enter the Arlington vendor number, then press Enter.
3. At the Correct Record prompt, press Enter.
4. Tab to the Interchange Id Qualif field and type **12**, as shown in Figure 8.
5. In the ID field, type **8473621001**
6. Tab to the Interchange Control Std field and type **U**
7. In the Version field, type **ØØ4Ø1**
8. In the Receivers Code Id field, type **8473621001** and press Tab.
9. In the Responsible Agency Code field, type **X**
10. In the Version field, type **ØØ4Ø1Ø**
11. Tab to the Test Indicator field and type **P**
12. Tab to the Seg Term field and enter two tildes (type **~~**).

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

Figure 8: The (SGA) Trading Partner Parameters Screen

```
15:38:39        (SGA) TRADING PARTNER PARAMETERS REV. (06/13/03)        04/08/05
--------------------------------------------------------------------------------
 Action [C] ( C=Chg, D=Del, I=Inq, R=Ref Codes)
--------------------------------------------------------------------------------
Name :ARLINGTON                      Account # ARLINGTON Dept :
                                       KELLER                     TX
                                        817-   -
--------------------------------------------------------------------------------
EDI VAN  :                                         Auto Send          :    (Y/N)
Interchange ID Qualif  :12  ID :8473621001         Negate Credit Inv. :
Auth. Info Qualif.     :    Info :                 Use Received Price :    (Y/N)
Security Info Qualif.  :    Info :                 Using 810          :
Interchange Control Std :U  Version :00401         Using 855          :
                                                   Auto 850 Sendfile  :
 Receivers Code Id       :8473621001               Default Selector   :
                                                   Interchange Control#        1
Responsible Agency Code :X                         Group Control      #        1
                Version :004010                    ======= 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 !!
```

13 The number in the Interchange Control field increases by one with each transaction. To enter a starting point, type **1ØØØØ** and press Tab.

14 The number in the Group Control field increases by one with each transaction. To enter a starting point, type **2ØØØØØ** and press Enter.

Using PSN

After building a P/O for Arlington, you can transmit it online to Arlington. To transmit P/Os using text-based software. In the (SR) Purchase Order Reports screen :

1 Type **B** in the Request field.

Note: To access the (SR) Purchase Order Reports screen in graphical, double-click 

, then double-click 

.

---

2 Tab to the Who field and type **N** to select Arlington. See Figure 9.

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.

4 Press Enter until the Are You Sure prompt appears. Type **Y**.

Figure 9: Transmitting P/Os Online

```
16:26:12         (SR) Purchase Order Reports  rev. (12/16/04)          04/08/05
================================================================================
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 ?   DMI         TPA
C. Receive P/O Transmission From Vendor.                  TECHDATA    XSTAMPER
D. Print P/O Receipts From Vendor.    Delete File Y/N ?   ISG         EXPRESS
F. Talk To Wholesaler.                             Who N  ARLINGTON
I. Receive Electronic Invoice.    Regional Wholesaler ?

E. Backorder Reports.            Short Buy Report Y/N ?
   Keep Short Buy File for P/O's ?.   Print All ?.
M. Debit Memo Report.
P. Purge Purchase Orders.
       From File [PO-MASTER ] Vol. [W1  ]
         To File [JOUR-PO   ] Vol. [W1  ]
R. Inquire or Report on Archive   Reindex Y/N ?.
S. Compare Vendor Purchases with Daisytek

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

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.

1 At the Enter Number For Selection prompt, type **C** to complete the transmission. See Figure 10.

2 The P/O is transmitted to Arlington.

The acknowledgment does not print automatically.

Requesting Acknowledgments

The order processes overnight. You can request an acknowledgment the next day.

Note: To access the (SR) screen in graphical, double-click 

, then double-click 

.

Figure 10: Completing the Transmission

```
14:25:25 Vendor Private Communication Network Rev. (02/07/03) 10/27/03
================================================================================
ACTION [ ] A=Add, C=Change, I=Inquire Location [ 1]
================================================================================
Vendor#__________ ______________________________ Code :_ G/L #___-__
Comm. Type       Template                         Parameter Group
[PCN ]          [PSNSTD   ]        [                                    ]
                 Parameter
[Drop Ship                ]                        1-20  [N]
             Override [Y]                         21-40  [ ]
                                                  41-60  [ ]
0 [Backorders ]                                   61-80  [ ]
1 [Pre-Receive ]
2 [Acknowledgment Printer ]
3 [Shipping Code ]
4 [Drop Ship ]
5 [Acknowledgment Selector ]

================================================================================
Enter Number for Selection "C" - Complete, "A" - Abort [4]
```

1. In the (SR) screen, type **C** in the Request field.
2. At the Are You Using Private Supply Network prompt, 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 11.

   If the status is one of the following, go to **Step 5**.

   N The order has not been pre-received.

   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**.

Figure 11: 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 [__]
================================================================================
```

To pre-receive and/or print the acknowledgment:

1 Use the fields at the bottom of the screen, shown in Figure 12, 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: If you don't know if your order has been received, try to pre-receive the order while you print the acknowledgment. You can only pre-receive once, but you can print an acknowledgment as many times as necessary.

---

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

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

Figure 12: 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
 [..........]  [.]   [..........]  [.]   [..........]  [.]   [..........]  [.]
 [..........]  [.]   [..........]  [.]   [..........]  [.]   [..........]  [.]
 [..........]  [.]   [..........]  [.]   [..........]  [.]   [..........]  [.]
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 [..........]  [.]   [..........]  [.]   [..........]  [.]   [..........]  [.]

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