

*Phase II:
Setting Up & Using the
Global Industries
PSN
for DDMS*



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Setting Up the Global PSN

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

Setting parameters to communicate with Global involves:

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

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 Global

Contact Global to find out your user name and password. Also ask for all eligible contract numbers and expiration dates.

Figure 1: The Vendor Window

The screenshot shows a software window titled "Vendor: GLOBAL - GLOBAL INDUSTRIES". The window has a menu bar with "File", "View", and "Help". Below the menu bar is a toolbar with various icons. The main area is divided into three tabs: "Master", "RemitTo/Settings", and "Account Status". The "Master" tab is active and contains the following fields:

- Billing Address:**
 - Vendor #: GLOBAL
 - Name: GLOBAL INDUSTRIES
 - Address: [Empty]
 - City: [Empty]
 - St: [Empty] Zip: [Empty]
 - Phone: [Empty] Fax: [Empty]
- Code:** [Empty] **Mach Dir:** [Empty] **Comm:** Global Industries (dropdown)
- Minimum Order \$/#/Cu:** [Empty]
- Minimum Freight \$/#/Cu:** [Empty]
- Ship Method:** [Empty]
- Contact:** [Empty]
- Acct #:** [Empty]
- Trade Discount Information:** [Empty table]
- Expense G/L #:** [Empty]
- Sales/Purch Major:** [Empty] **P/O Detail:** [Empty]
- Discount %:** [Empty] **Terms:** [Empty] **Net Terms:** [Empty]

Setting Up Your Vendor Database

1 Set up Global as a vendor. If you already have a Global 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 Global.

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

Note: If you've loaded the O/PUS file, your vendor ID must be GLOBAL.

1.4 Click the Comm box's down arrow and click Global. See Figure 1.

1.5 Click .

2 Set PSN parameters.

2.1 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.

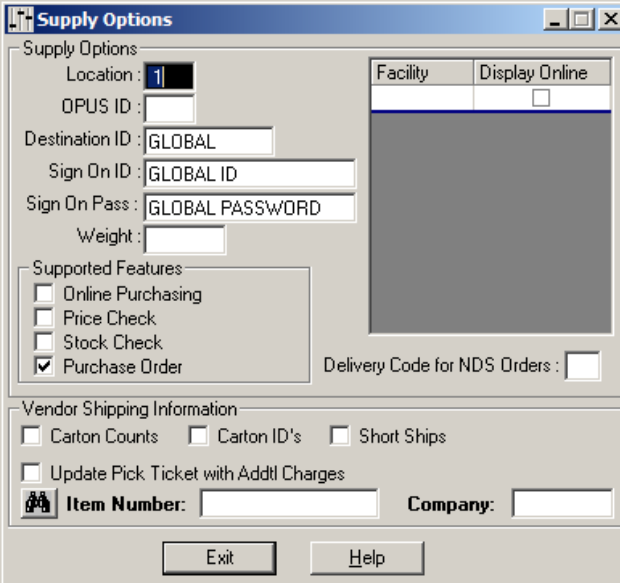
2.3 In the Destination ID box, enter your Global ID exactly as follows: **GLOBAL**

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

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

2.6 From the Supported Features list, click Purchase Order.

Figure 2: The Vendor Supply Options Dialog Box



Facility	Display Online
	<input type="checkbox"/>

2.7 When you finish, click Exit.

3 Click .

Setting Up Furniture Contracts

ECi recommends that you set up your Global contracts before communications. Use the Furniture Contract Maintenance dialog box to create a furniture contract.



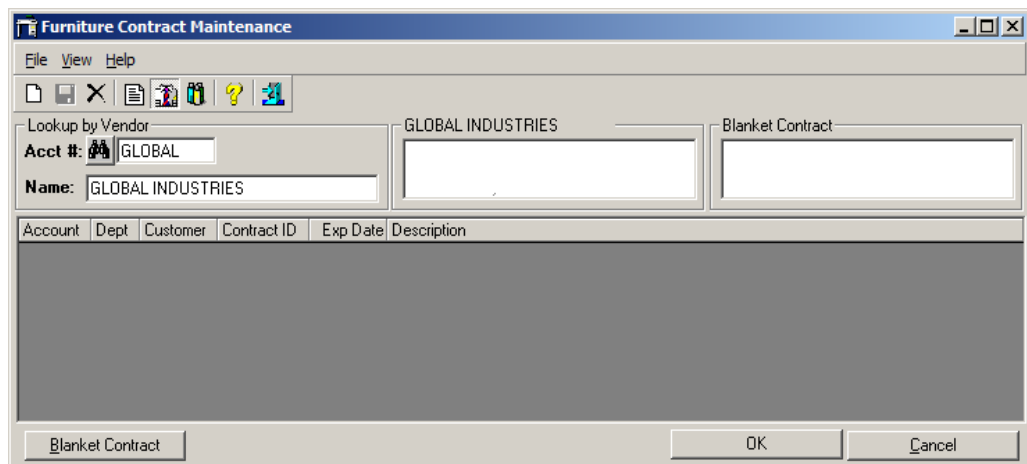
- 1 Retrieve your Global vendor.
- 2 In the Vendor window, click  to open the Furniture Contract Maintenance dialog box. See Figure 3.
- 3 Click  to add a new contract.
- 4 In the Contract ID box, enter the new contract number.
- 5 If the contract has an expiration date, enter it in the Exp Date box. Enter the date all in one string 123112, for example. Press Enter. The date displays as 12/31/2012.
- 6 To add a description for this contract, click the Description box and enter it.
- 7 Continue adding all eligible contracts for Global. (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.)
- 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.

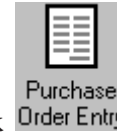
Figure 3: The Furniture Contract Maintenance Dialog Box



Account	Dept	Customer	Contract ID	Exp Date	Description
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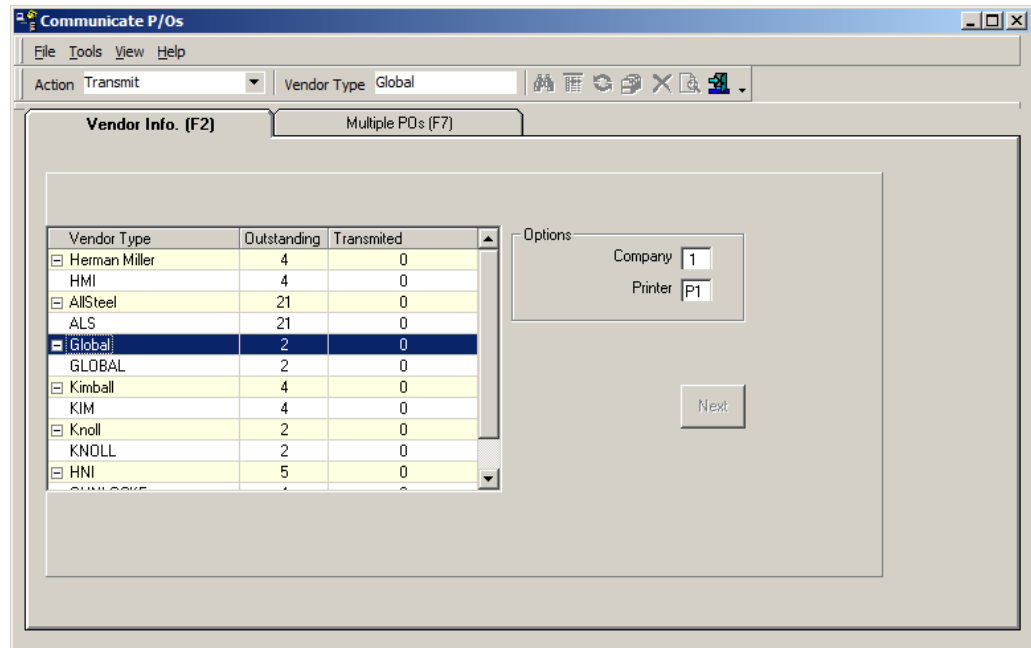
Setting Up P/O Communication Defaults

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



- 1 From the DDMS Master Menu, double-click **Purchase Order Entry**. The Purchase Order Entry Master tab opens.
- 2 In the Action Code dropdown list box, click Communicate. The Communicate P/Os window opens. See Figure 4.
- 3 From the Vendor Type grid, click Global.
- 4 Click the View menu and select Default Vendor Options. The Communications Options dialog box opens. See Figure 5. Be sure Global is the vendor selected in the Vendor drop down box.

Figure 4: The Communicate P/Os Window




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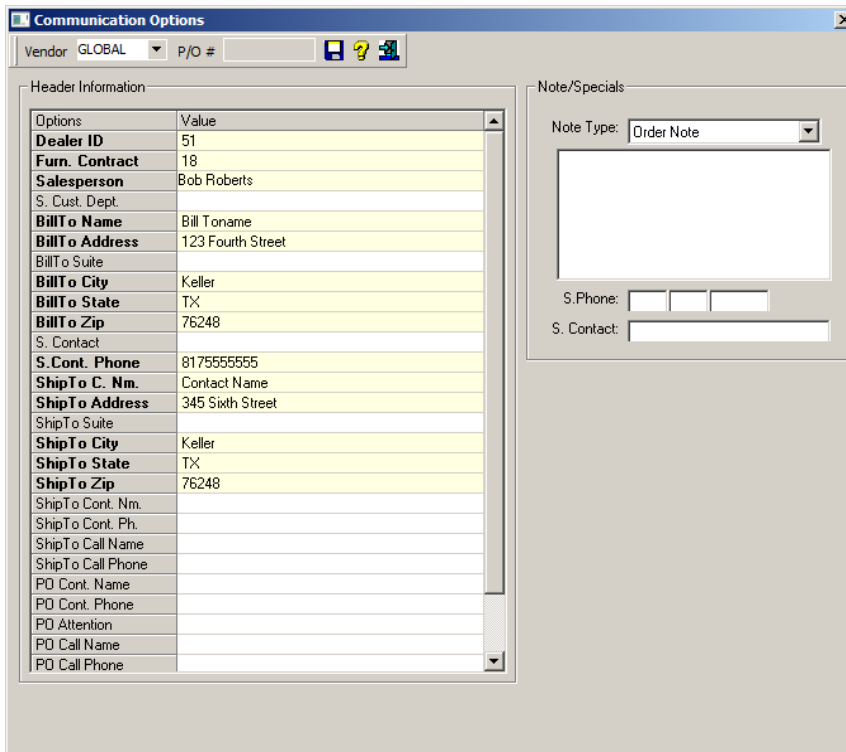
- 5 In the Header Information section, the required default options are listed in bold on the left side of the window. You must enter a value in all of these boxes before any information can be transmitted to Global.

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

To set defaults, click a box name and enter a value. Box names in bold are required.

ECi recommends you set up the following defaults:

- Contract is the contract number. To set a default contract, click the field and click  to look up the contract number.
- 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. For example, 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. If there is an alternate shipto address on the purchase order, the system populates them with the customer's shipto address from the ticket.



Options	Value
Dealer ID	51
Furn. Contract	18
Salesperson	Bob Roberts
S. Cust. Dept.	
Bill To Name	Bill Toname
Bill To Address	123 Fourth Street
Bill To Suite	
Bill To City	Keller
Bill To State	TX
Bill To Zip	76248
S. Contact	
S. Cont. Phone	8175555555
Ship To C. Nm.	Contact Name
Ship To Address	345 Sixth Street
Ship To Suite	
Ship To City	Keller
Ship To State	TX
Ship To Zip	76248
Ship To Cont. Nm.	
Ship To Cont. Ph.	
Ship To Call Name	
Ship To Call Phone	
PO Cont. Name	
PO Cont. Phone	
PO Attention	
PO Call Name	
PO Call Phone	

Note/Specials

Note Type: Order Note

S. Phone:


S. Contact:

Figure 5: The Communication Options Dialog Box

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- ST Contact is the person at the warehouse or at the customer's site who is to receive the shipment.

Note: When inputting phone numbers and dates, enter the numbers with no additional characters, for example enter 8175551212, not 817-555-1212.

- In the Output Path box, enter the same value as in the Outbound Volume/Folder field in the (L6X) PSN Parameters screen. Enter the true network path as \\ddmserver name\path. For example, a valid path is \\ddmserver\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 \\DDMS server name\path, for example, \\DDMS server (DDMS) W2.
- 6 When you finish, click . At the Save Vendor Option Changes prompt, click Yes. A message appears confirming the vendor options have been updated. Click OK.

Using PSN

To place a P/O with Global using PSN:

- 1 Import the SIF to Order Entry
- 2 Creating Orders and Purchase Orders
- 3 Transmit the P/O to Global
- 4 Receive 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 the DDMS through 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.



- 1 From the DDMS Master Menu, double-click **Order Entry**.
- 2 Click the down arrow in the Order Style list box and select Furniture.

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- 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 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. The Furniture Profile Settings dialog box opens. See Figure 6. You should complete the following date boxes each time you begin an order: Customer Due, Est Delivery and Est Install.


Note: Be sure the Tag Info, 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.


- 7 In addition to the date and Tag Info 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.

The screenshot shows the 'Furniture Profile Settings' dialog box with the 'General' tab selected. The 'Project Type' section has 'General Project' selected. The 'Dates' section has 'Customer Due' set to 02/20/2012, 'Est. Delivery' to 03/10/2012, and 'Est. Install' to 03/10/2012. The 'Posting Dates' section has empty fields for 'P/O Ship' and 'A/R Invoice'. The 'View Options' section has 'Mfg Discounts', 'Dates', and 'Sort/Group Desc.' checked. The 'Default Options' section has 'Build P/O At End Of Order' checked, and 'Exclude Tag Import for #' with checkboxes for 1, 2, 3, 4, and 5. The 'Reset', 'OK', 'Save', and 'Cancel' buttons are at the bottom.

Figure 6: The Furniture Profile Settings Dialog Box

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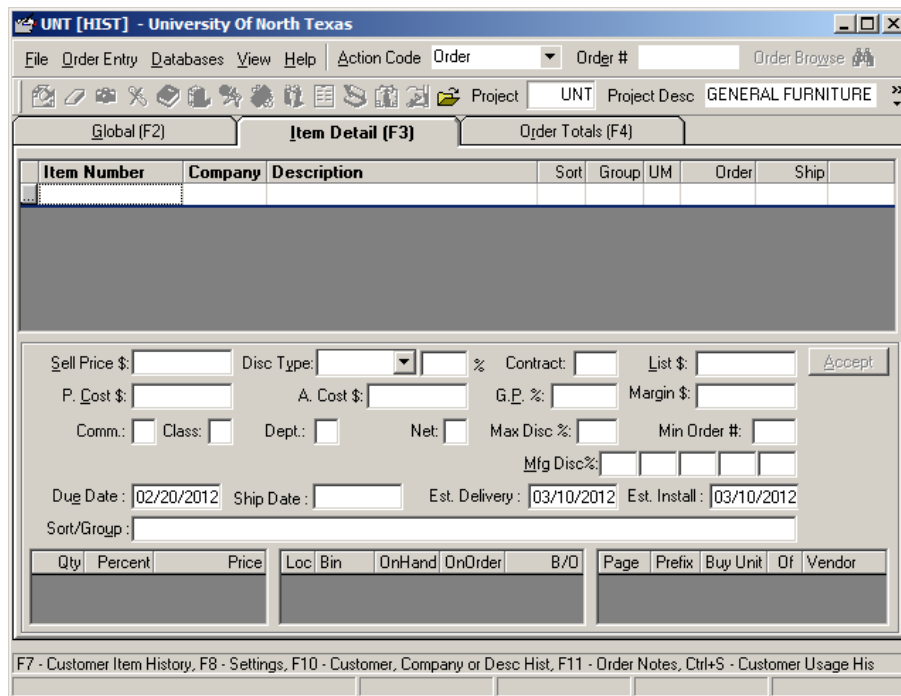
- 9 Click the Item Detail tab. See Figure 7.
- 10 Click  to open the SIF Specifier, and perform the standard operations to create the item.

Note: To open the Giza Specifier, click . To open the CAP Specifier, click **CAP**.

- 11 Scroll to the location on your network hard drive where the SIF file is stored, C:\SIF Files, for example and import the file.
- 12 At the Process prompt, click Yes.
- 13 The items move from the file to a Furniture order.
- 14 Click the Order Totals tab.
- 15 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.


Figure 7: The Item Detail Tab



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- 16 The Order Totals tab opens. At this point, you can end the order or make changes to the ending order status or printer information, and enter an end line special. For details on changing this information, see your online help.
- 17 To automatically build the purchase order when the order is ended, click Build P/O.
- 18 Click Accept Order.

Creating Orders and Purchase Orders

- 1 The Purchase Order Info dialog box opens. See Figure 8. The Vendor box defaults to the vendor for the last item on the order. 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, which is sent to Global as Requested Delivery Date
- Ship To boxes, in which you enter the shipping address of where to ship items on the purchase order
- End the P/O, which you must check to end the P/O before you can transmit it to Global.

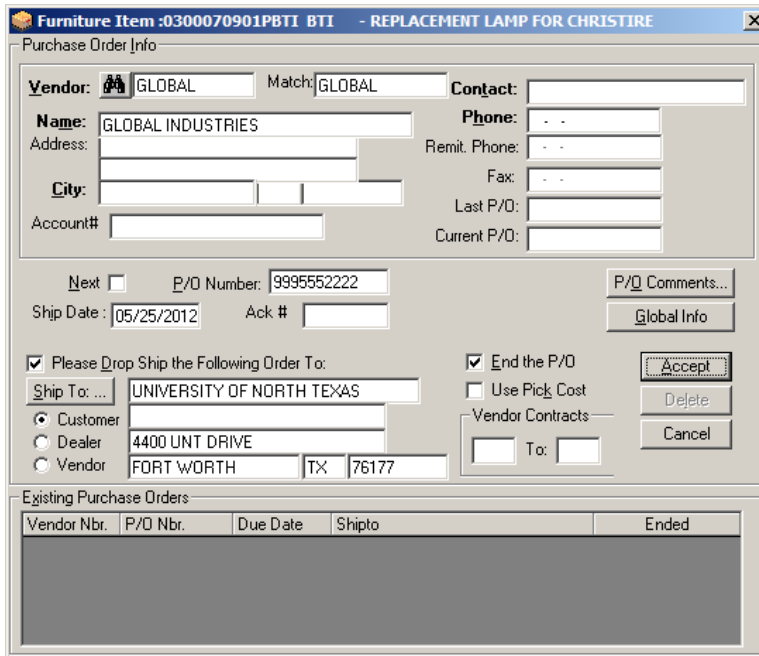


Figure 8: The Purchase Order Info Dialog Box

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- 2 To assign a vendor contract:
 - 2.1 When building the P/O, click Global Info. The Global Settings Dialog Box opens. See Figure 9.

Figure 9: The P/O Global Settings Dialog Box

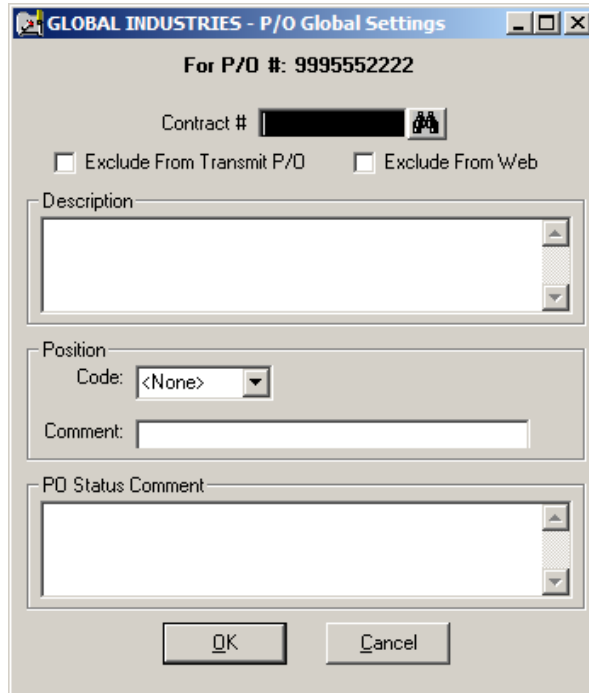
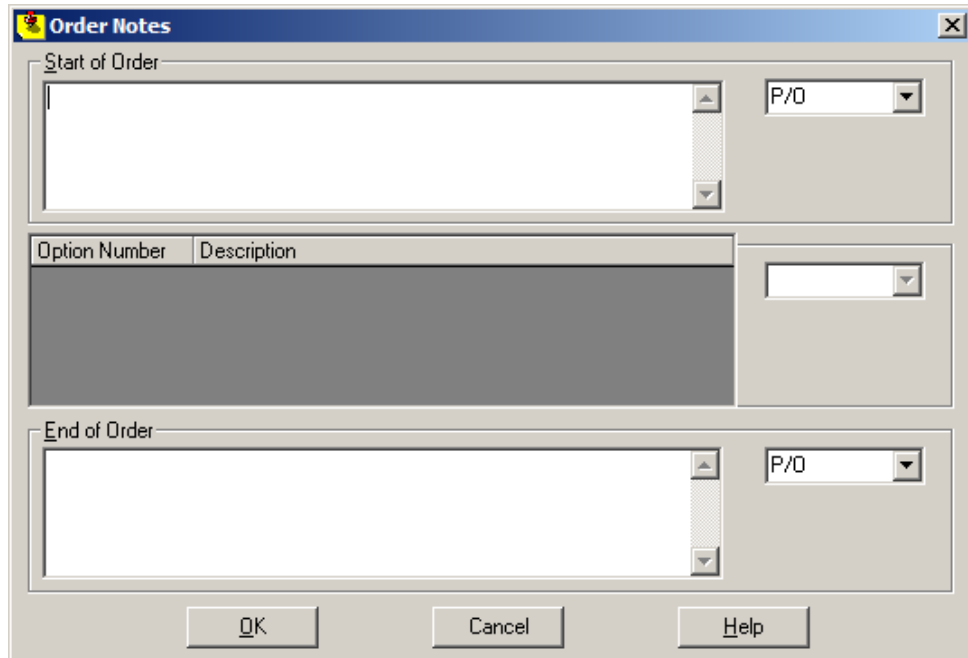






Figure 10: The Order Notes Dialog Box



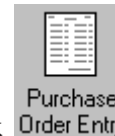
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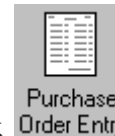
- 2.2 Click  next to the Contract # field to open the Furniture Contract Selection dialog box.
- 2.3 Click  to look up the contract by contract ID. Click  to look up the contract by vendor name or number. Click  to look up the contract by customer name, number, or department.
- 2.4 The Query dialog box opens. Highlight the desired contract and click OK.
- 2.5 Click OK in the P/O Global Settings window.
- 3 To exclude a P/O from being transmitted to Global:
 - 3.1 When building the P/O, click Global Info.
 - 3.2 Click the Exclude From Transmit P/O box.
 - 3.3 Complete the P/O as usual.
- 4 To enter notes about the P/O, click on P/O Comments in the Purchase Order Info dialog box. The Order Notes dialog box opens. See Figure 10. In this box, you can specify Order Notes, Shipping Tag, Shipping Instruction, Shipping Attention, and P/O Special Notes. The Order Notes and P/O Special Notes print on internal documents at Global. The Shipping Tag, Shipping Instruction, and Shipping Attention print comments on the BOL, invoice, and picking slip at Global.

Note: These comments are displayed in P/O Communicate when you transmit the P/O. You may override these at that time.

Transmitting P/Os

To transmit a P/O to Global:



- 1 From the DDMS Master Menu, double-click . The Purchase Order Entry window opens.
- 2 Click the down arrow in the Action Code box and click Communicate.
- 3 The Communicate P/Os dialog box opens. Click the down arrow in the Action box and click Transmit.
- 4 In the Vendor Info (F2) tab, select the vendor for whom to transmit a purchase order by double-clicking the vendor name.
- 5 The purchase orders for this vendor display in the Purchase Order Browse dialog box. Click the check box next to the purchase order to send. You can select multiple purchase orders.

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- 9 The Complete (F4) tab opens. Verify that the information shown in the Build Options Out Folder box displays the folder where the transmission is sent and saved. This folder is set up in the Communications Options dialog box. When you are ready to build, click Build.
- 10 When the purchase order is built, a Complete message appears in the box on the left side of the tab.

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: Setting Up and Using Furniture Acknowledgments*. It is available at www.ddms.com/support/doc/psn.htm.