Phase II: Setting Up & Using the HNI (HON, Gunlocke, Paoli) PSN

ECi

ECi DDMS®

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Contents

Setting Up the HNI PSN **3**
Receiving Authorization 3
Contacting Your HNI Vendor 3
Setting Up Your Vendor Database 4
Setting Up Salesperson Contacts 5
Setting Up Furniture Contracts (this step is optional) 7
Setting Up P/O Communication Defaults 8

Using PSN **12**
Importing the SIF 12
Building the P/O 17
Uploading the P/O to Your HNI Vendor 19
Receiving Acknowledgments 21

Setting Up the HNI PSN

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

Setting parameters to communicate with the HNI companies involves:

1. Receiving authorization
2. Contacting your HNI company (HON, Gunlocke, or Paoli)
3. Setting up your Vendor database
4. Setting up furniture contracts
5. Setting up your P/O communication defaults.

Email PSN installation questions to support@eci2.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.

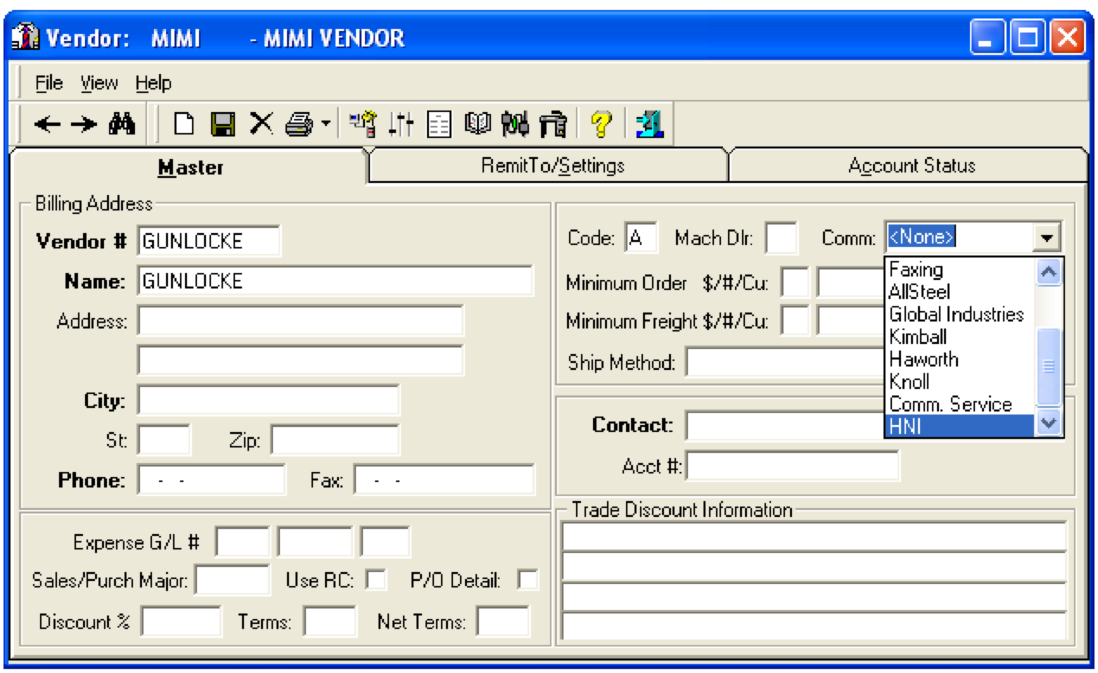
Receiving Authorization

Contact ECi Support at support@eci2.com to request authorization.

Contacting Your HNI Vendor

Contact your HNI vendor to find out your user name and password. The HNI PSN is currently available for HON, Gunlocke, and Paoli. Also ask for all eligible contract numbers and expiration dates.

Figure 1: The Vendor Window



Setting Up Your Vendor Database

1 Set up your HNI vendor. You must set up a separate vendor for HON, Gunlocke, and Paoli. If you already have a vendor for each company with which you communicate, 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 your HNI company. See Figure 1.

1.3 Click the Name box and enter a name for your HNI company. In Figure 1, Gunlocke is entered as an example.

1.4 Click the Comm box's down arrow and click HNI. Select HNI as the communication type for HON, Gunlocke, and Paoli.

1.5 Click .

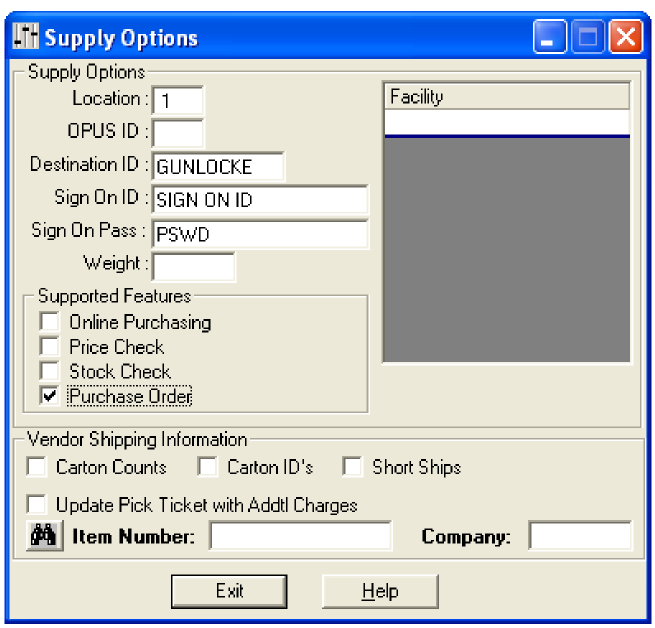
2 Set PSN parameters.

2.1 In the Vendor Master tab, click .

2.2 The Supply Options dialog box opens, as shown in Figure 2. In the Location box, enter a G/L location, or accept the default of 1. The supply options need to be set for each vendor that you are using.

Note: The settings in the Supply Options dialog box are location specific. If you specify the destination ID, sign on ID, and password for location 1 only, and have multiple locations, these settings are used for each location.

Figure 2: The Vendor Supply Options Dialog Box



However, if you set up multiple locations in the Supply Options dialog box, for example 1 and 3, no default is used. You must enter settings for every location separately (for example 2, 4, 5, etc).

2.3 In the Destination ID box, enter the destination ID for your company, for example GUNLOCKE. The destination ID must be entered in ALL CAPS.

2.4 In the Sign On ID box, enter your sign on ID (valid email address). If your email address exceeds 20 characters, you must enter the sign on ID and password in the Salesperson Contacts window.

2.5 In the Sign On Pass box, enter your sign on password provided by your HNI company.

Note: If you enter a sign on ID and password in the Salesperson Contacts window, this information overrides the values listed in the Vendor Supply Option dialog box. For more information, see the heading **Setting Up Salesperson Contacts.**

2.6 From the Supported Features list, click Purchase Order.

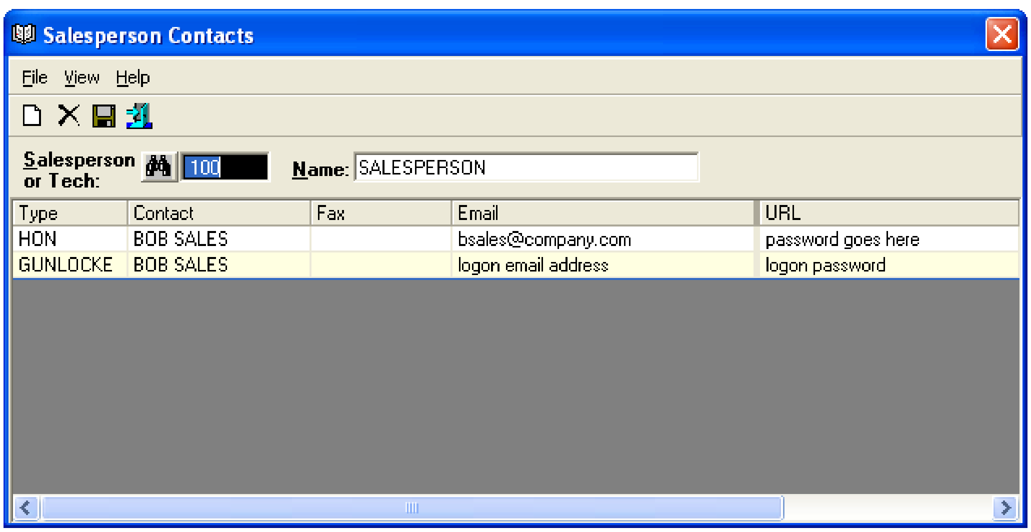
2.7 When you finish, click Exit.

3 Click .

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.

Figure 3: The Salesperson Contacts Window



1 In the Salesperson Master tab, click . The Salesperson Contacts window, as shown in Figure 3.

2 Set up each person who sends P/Os to an HNI vendor via PSN.

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

2.2 In the Type box, enter the destination ID for your vendor.

2.3 In the Email box, enter the logon email. This is used as your sign on ID.

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

2.4 In the URL box, enter the sign on password used to log into HNI. To obtain this password, contact your HNI vendor.

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.

When a salesperson whose information is entered into the Salesperson Contacts window is logged into the system, the log in ID and password in the Salesperson Contacts window overrides the information listed in the Vendor Supply Options dialog box.

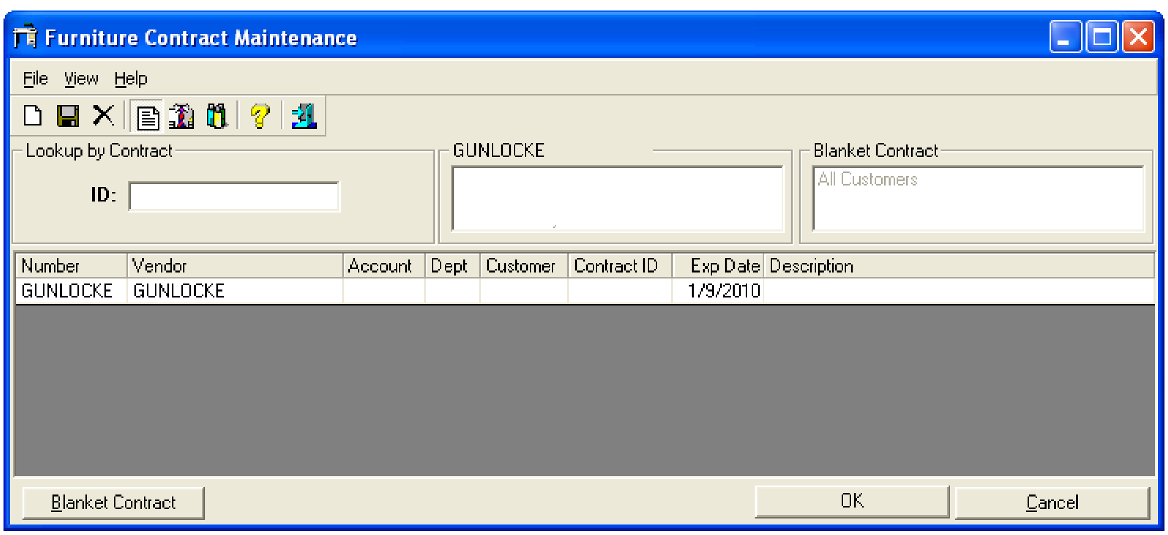
2.5 Click .

Setting Up Furniture Contracts (this step is optional)

ECi recommends that you set up your furniture contracts before communications.

1. Retrieve your HNI vendor (HON, Gunlocke, or Paoli). You must set separate furniture contracts for each vendor.
2. In the Vendor window, click to open the Furniture Contract Maintenance window. See Figure 4.
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. (HNI's contracts expire at the end of each calendar year.) Enter the date all in one string 123108, for example. Press Enter. The date displays as 12/31/2008.
6. To add a description for this contract, click the Description box and enter it.
7. Continue adding all eligible contracts for your HNI vendor. (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 4: The Furniture Contract Maintenance Window



Setting Up P/O Communication Defaults

To place an order with HON, Gunlocke, or Paoli 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 your HNI company.

Note: You must set up communication defaults separately for every location that communicates via PSN.

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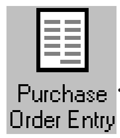
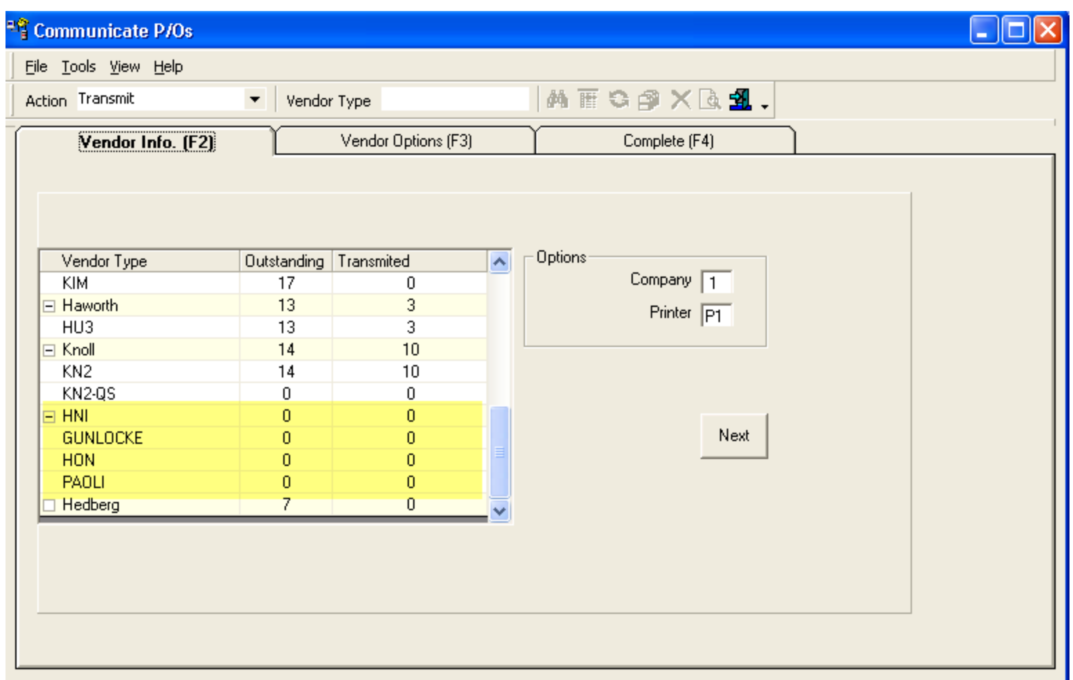
1 Double-click 

. The Purchase Order Entry Master tab opens.

2 In the Action Code drop down list box, click Communicate. The Communicate P/Os window opens. See Figure 5.

3 From the Vendor Type grid, click HON, Gunlocke, or Paoli.

Figure 5: The Communicate P/Os Window

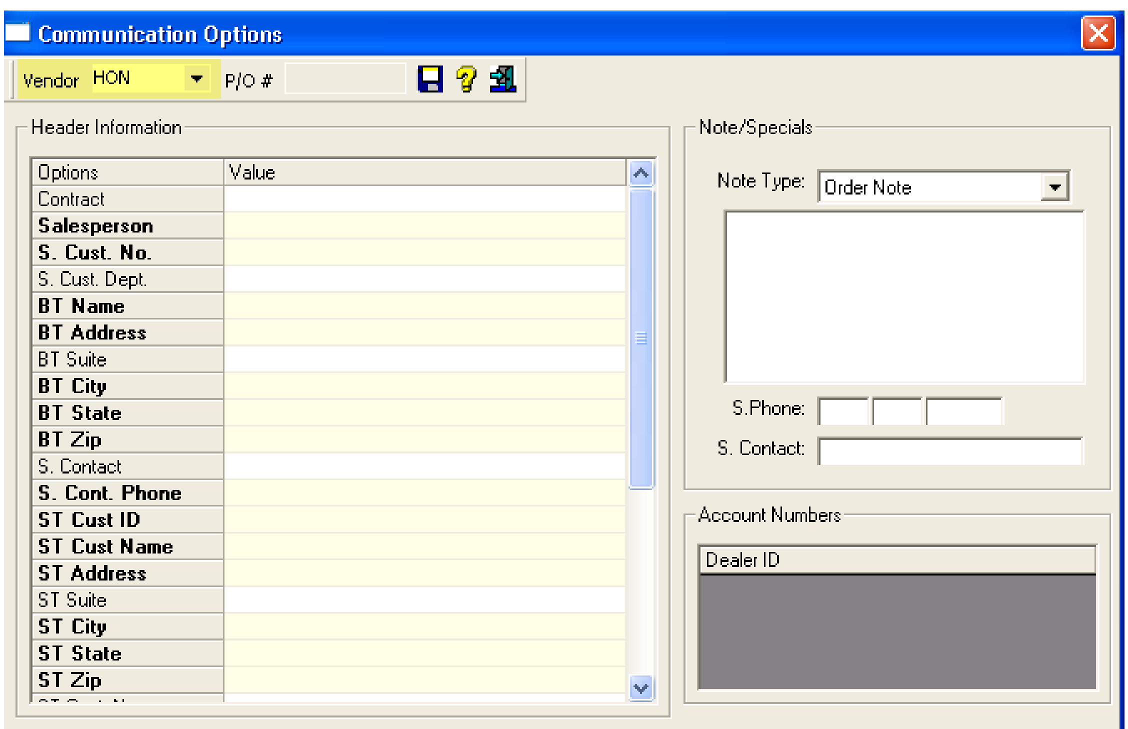


4 Click the View menu and select Default Vendor Options. The Communications Options dialog box opens. See Figure 6. Be sure the correct vendor is selected in the Vendor drop down box.

5 Use the Dealer ID boxes in the Account Numbers section to add your account number. The first account number on the list is the default. Account numbers come from your HNI vendor and are nine digits. Your main account number is six digits, plus a three-digit suffix of ØØØ. The suffix of your other account numbers details your shipping preference. For example, suffix 001 indicates this order is a temporary dropship. This means that the order is shipped to the customer's address. If you have three warehouses, suffix 002 could indicate the first warehouse; suffix 003 the second; and suffix 004, the third. Enter all nine characters.

Note: Contact your HNI vendor to obtain your dealer ID.

Figure 6: The Communication Options Dialog Box



To add an account number:

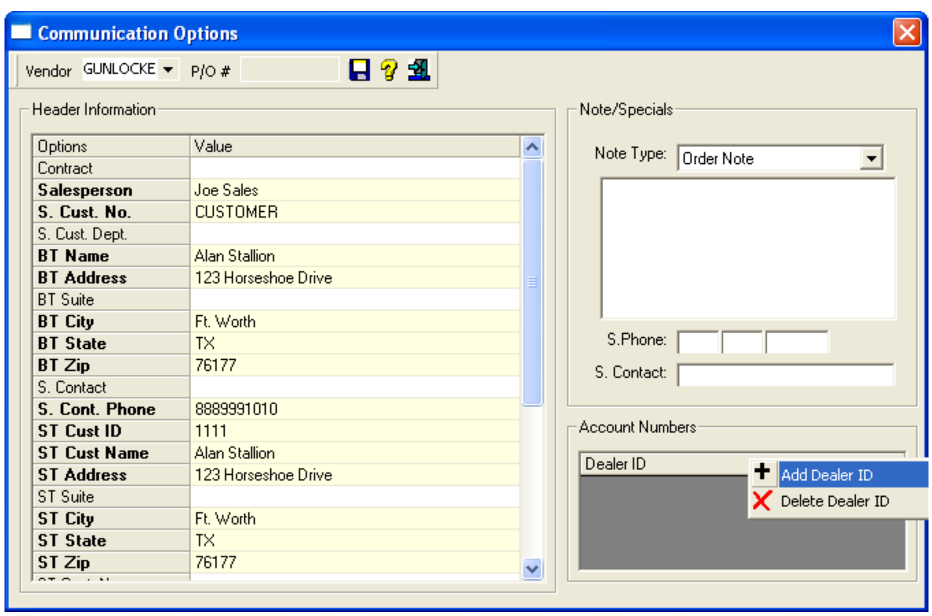
5.1 Right-click the Account Number section, then click Add Dealer ID. See Figure 7.

5.2 A new line is added to the Account Number section. 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** for each account number to set up.

Figure 7: Adding a Dealer ID



To delete an account number:

5.5 Click the line to delete.

5.6 Right-click the same line and click Delete Dealer ID.

5.7 In the Delete Dealer ID message box, click Yes. See Figure 8. The account number is deleted.

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 your HNI vendor.

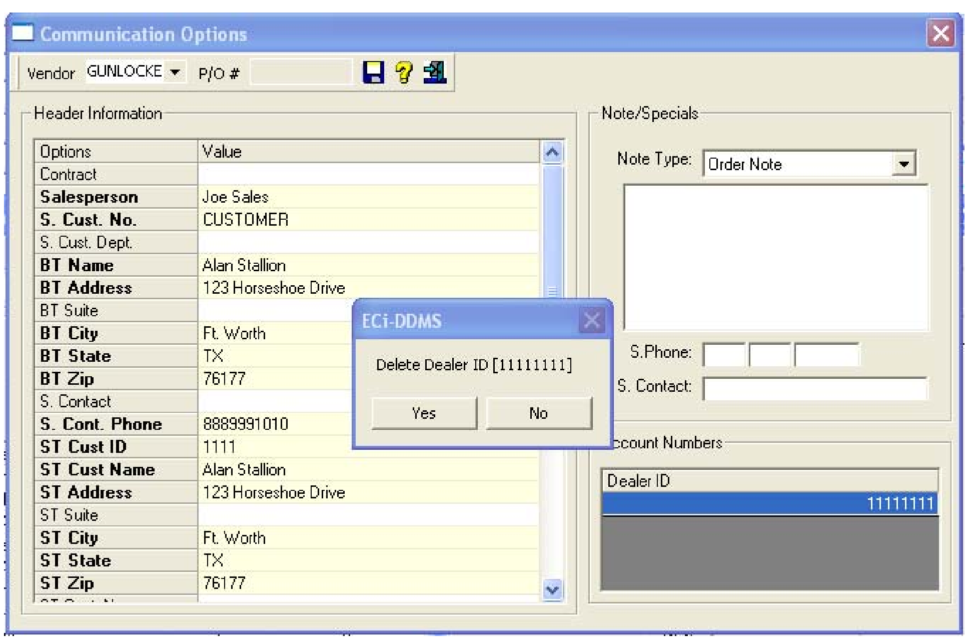
If you do not set any defaults, each time you build a P/O for HON, Gunlocke, or Paoli, you must manually enter the information.

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.

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.

Figure 8: The Delete Dealer ID Message Box



- 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 HON, Gunlocke, or Paoli using PSN:

1 Import the SIF to Order Entry

2 Build the P/O

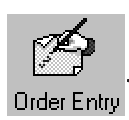
3 Upload the P/O to HNI

4 Finish the order using your vendor's e-ordering site

5 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 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 9. 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.

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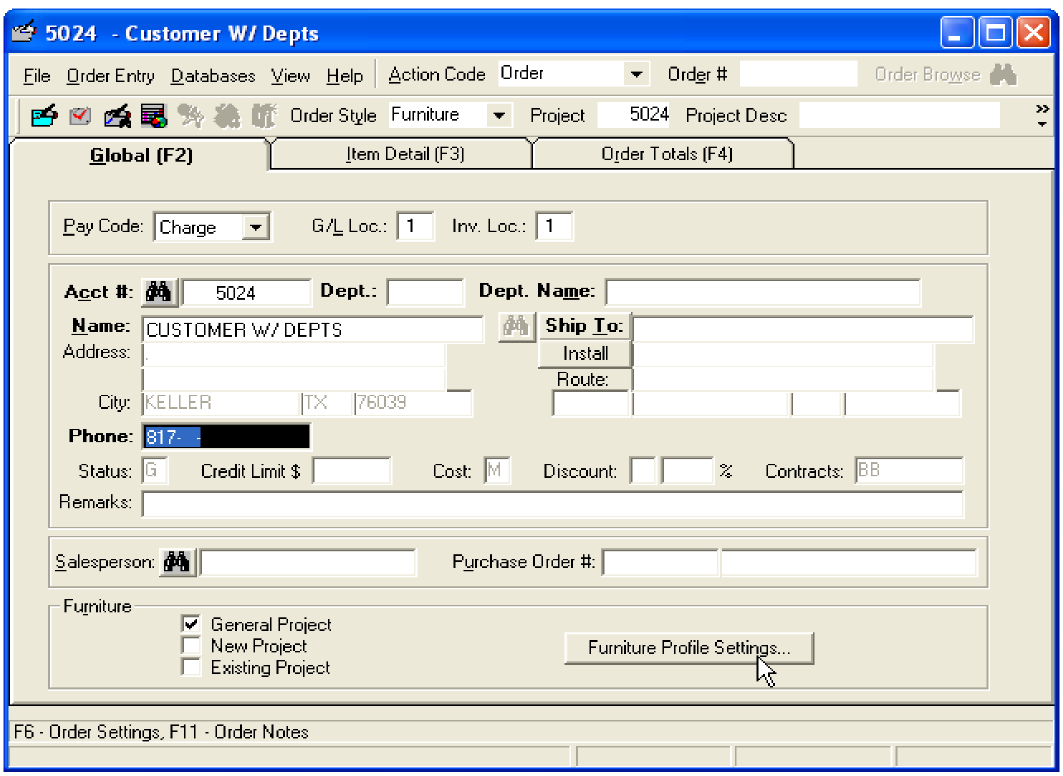
7 In addition to the date and viewing options, you can also change posting dates, default options, dealer shipto information, and printing instructions. For details, see your online help.

8 When you complete the changes, click OK.

Figure 9: Selecting Furniture Profile Settings



9 Click the Item Detail tab. See Figure 10.

10 Click to open the SIF Specifier, and perform the standard operations to create the item.

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. At this point, you can add bid numbers to items or to the entire order.

Note: The bid number populates the Communication window to be sent to your HNI vendor. 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 your HNI vendor.

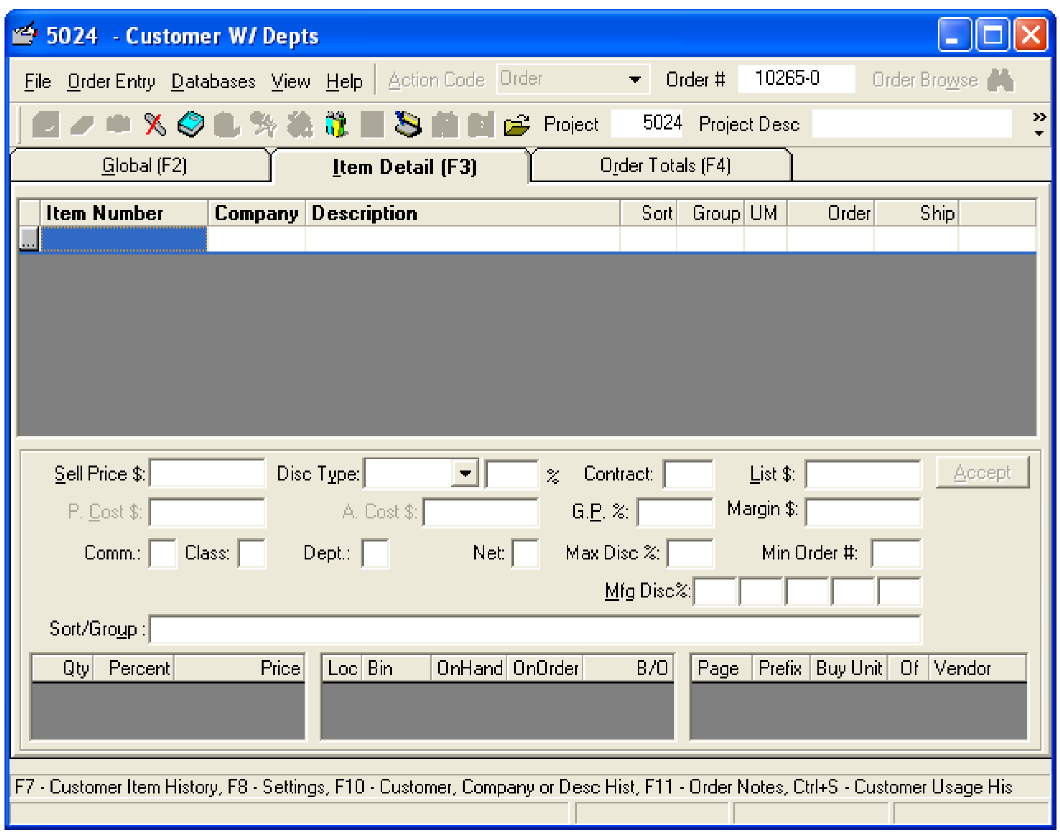


Figure 10: The Item Detail Tab

To add bid numbers to individual items:

13.1 Select an item on the order.

13.2 Press F8. The Item Settings dialog box opens. See Figure 11.

13.3 Click the Furniture Bid Number box and enter the bid number.

13.4 Click OK.

To add items to the entire order:

13.5 Press F6.

13.6 At the Do You Want To Make Changes message, click Yes. The Order Settings dialog box opens.

13.7 In the Order Settings dialog box, you can specify global changes. For details, see your DDMS online help.

13.8 Click OK.

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

14.1 The Order Notes box opens. For more information on adding notes, see your online help.

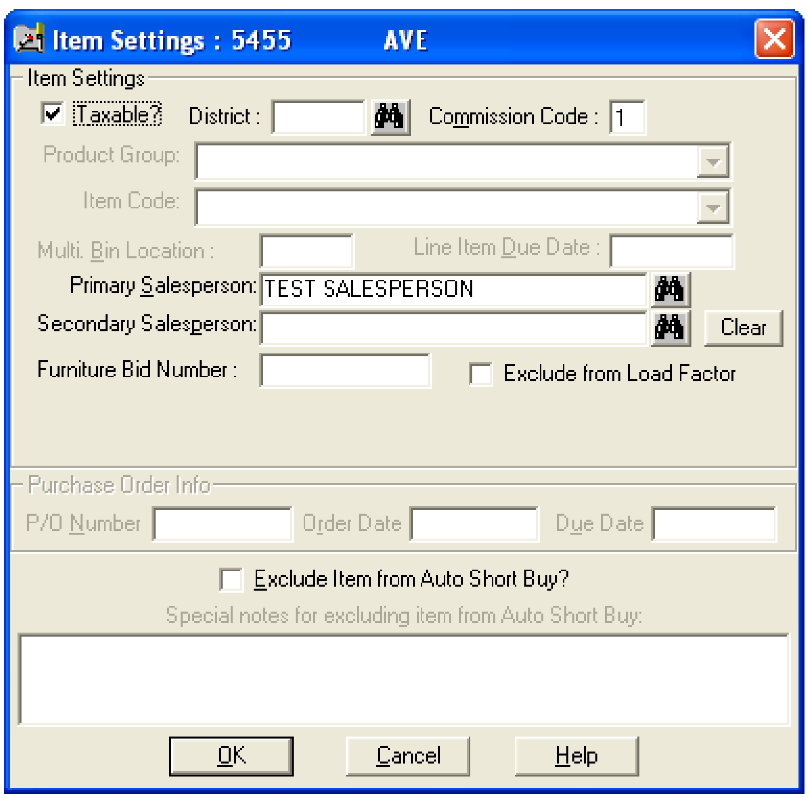


Figure 11: The Item Settings Dialog Box

14.2 To add tags, click the drop 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 or 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.

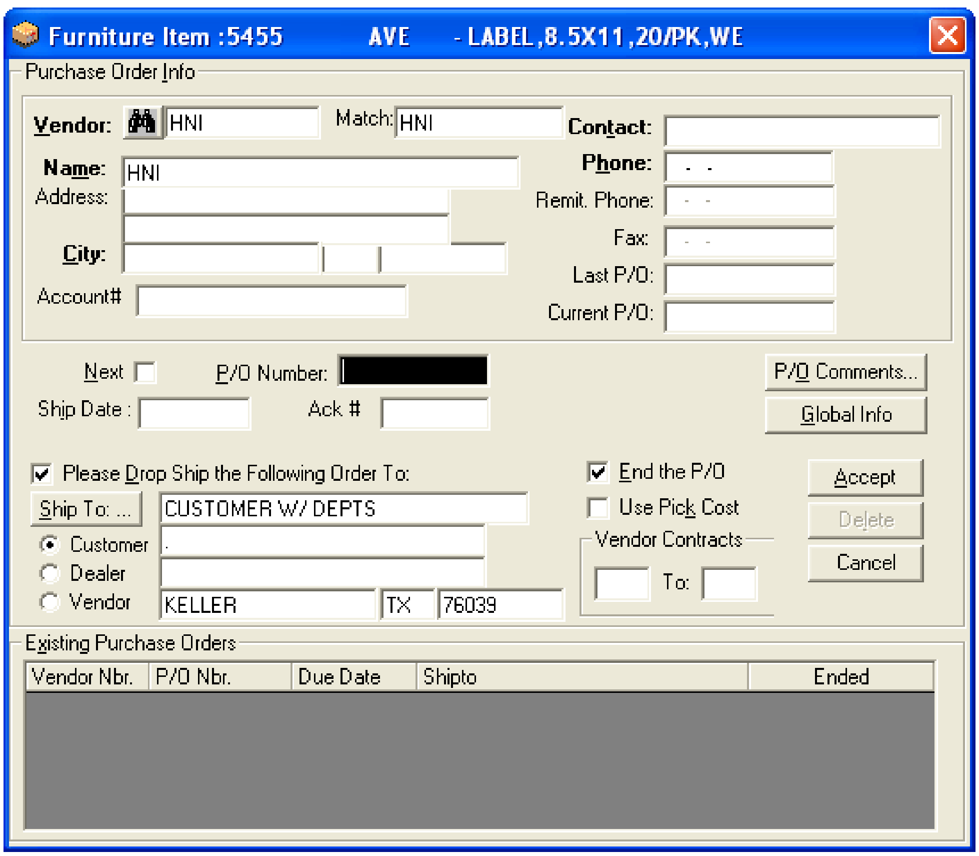
Building the P/O

1 The Purchase Order Info dialog box opens. See Figure 12. 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 HNI as Requested Delivery Date.
- Ship To boxes, in which you enter the shipping address 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 to HNI.

Figure 12: The Purchase Order Info Dialog Box



2 To view global information, click Global Info. The P/O Global Settings dialog box opens. See Figure 13. 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.

4 The Items to Be Purchased dialog box opens. See Figure 14. The system automatically checks the items that match the vendor alias, HON, for example, 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.

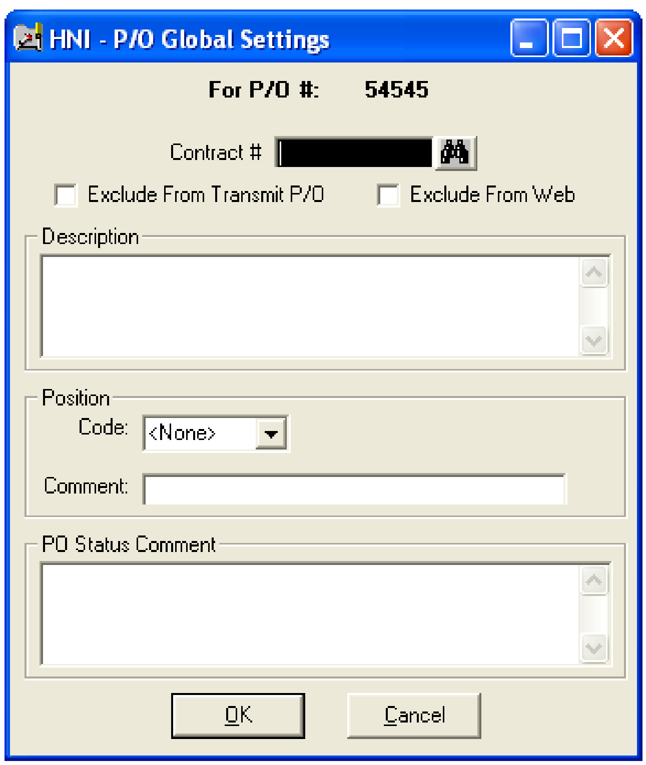


Figure 13: The P/O Global Settings Dialog Box

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.

Uploading the P/O to Your HNI Vendor

1 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 HNI to expand the list to include all of your HNI vendors.

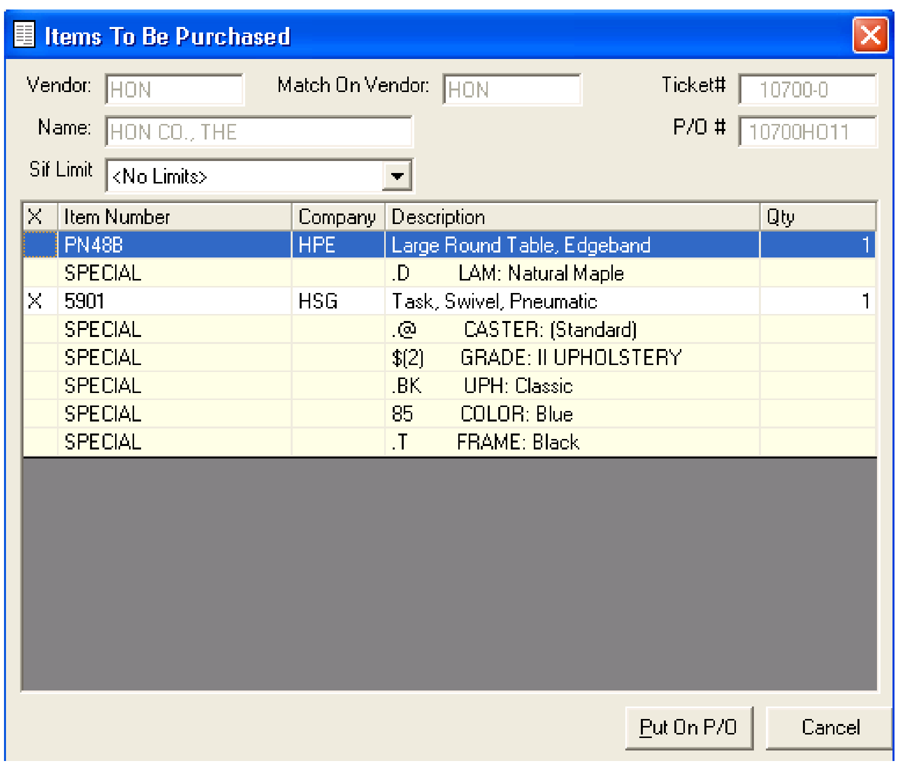


Figure 14: The Items To Be Purchased Dialog Box

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

4 Click the appropriate vendor. The Purchase Order Browse dialog box opens. See Figure 15.

5 Click the check box of the P/O to select.

Note: In the Purchase Order Browse dialog box, you can limit to any of the following: PO #, Vendor # (as shown in the example in Figure 15), Vendor Name, Location (G/L location), Acknowledgment (acknowledgment #), Order Date, Due Date (P/O requested ship date), Total (total amount of the P/O), and Line (number of lines on the P/O).

6 Click OK.

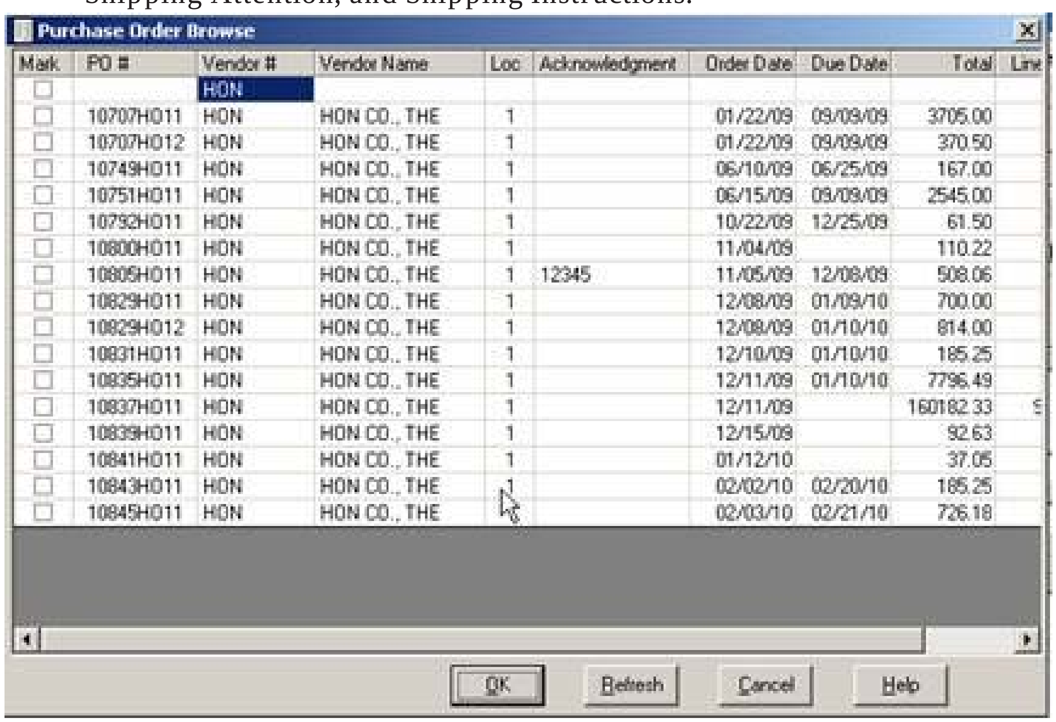
7 Click Next.

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.

9 Use the Notes/Specials section to add notes or specials to the P/O. These appear on the HNI 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, and Shipping Instructions.

Figure 15: The Purchase Order Browse Dialog Box



Mark	PO #	Vendor #	Vendor Name	Loc	Acknowledgment	Order Date	Due Date	Total	Line
☐		HON							
☐	10707HO11	HON	HON CO., THE	1		01/22/09	09/09/09	3705.00	
☐	10707HO12	HON	HON CO., THE	1		01/22/09	09/09/09	370.50	
☐	10749HO11	HON	HON CO., THE	1		06/10/09	06/25/09	167.00	
☐	10751HO11	HON	HON CO., THE	1		06/15/09	09/09/09	2545.00	
☐	10792HO11	HON	HON CO., THE	1		10/22/09	12/25/09	61.50	
☐	10800HO11	HON	HON CO., THE	1		11/04/09		110.22	
☐	10805HO11	HON	HON CO., THE	1	12345	11/05/09	12/08/09	508.06	
☐	10829HO11	HON	HON CO., THE	1		12/08/09	01/09/10	700.00	
☐	10829HO12	HON	HON CO., THE	1		12/08/09	01/10/10	814.00	
☐	10831HO11	HON	HON CO., THE	1		12/10/09	01/10/10	185.25	
☐	10835HO11	HON	HON CO., THE	1		12/11/09	01/10/10	7796.49	
☐	10837HO11	HON	HON CO., THE	1		12/11/09		160182.33	
☐	10839HO11	HON	HON CO., THE	1		12/15/09		92.63	
☐	10841HO11	HON	HON CO., THE	1		01/12/10		37.05	
☐	10843HO11	HON	HON CO., THE	1		02/02/10	02/20/10	185.25	
☐	10845HO11	HON	HON CO., THE	1		02/03/10	02/21/10	726.18	

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 When all the required boxes are populated, click Next.

11 The Complete tab opens. Click Build. See Figure 16. The P/O you selected is transmitted to your HNI company's Web site:

https://honreadyapps.hon.com

www.GunlockeBusiness.com

www.PaoliConnect.com

For more information, contact your HNI vendor.

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.*

Figure 16: The Complete Tab