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

ECi DDMS®

December 2010 Rev.

Contents

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:

Email PSN installation questions to ddmssupport@ecisolutions.com

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.

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.

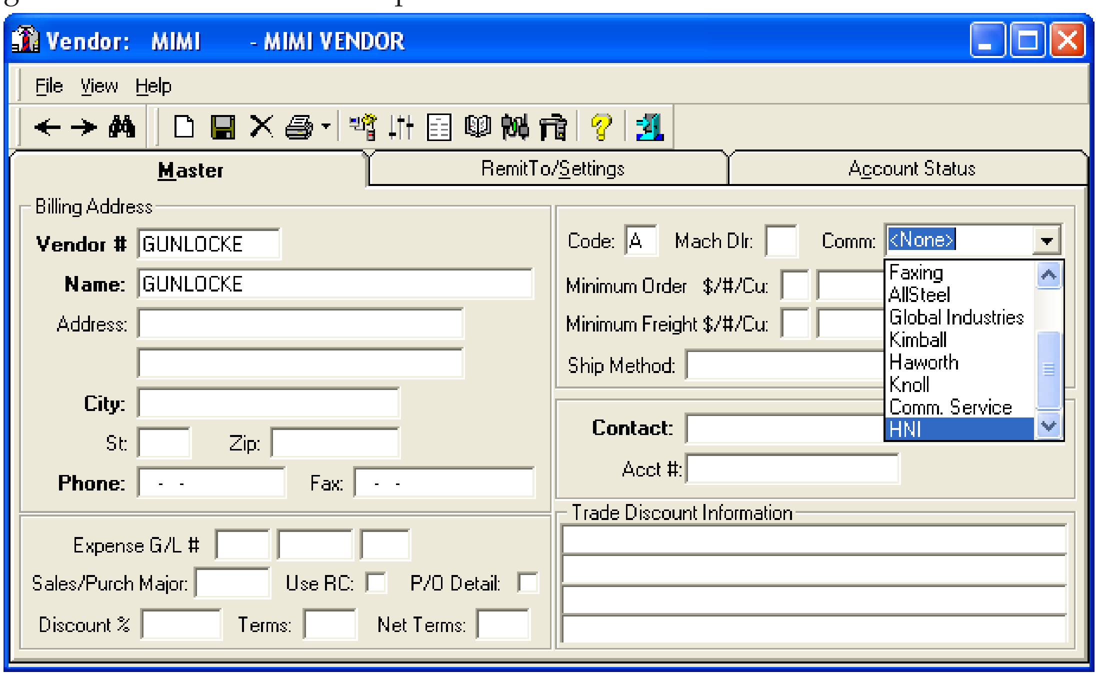
Receiving Authorization

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

Contacting 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.

  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.

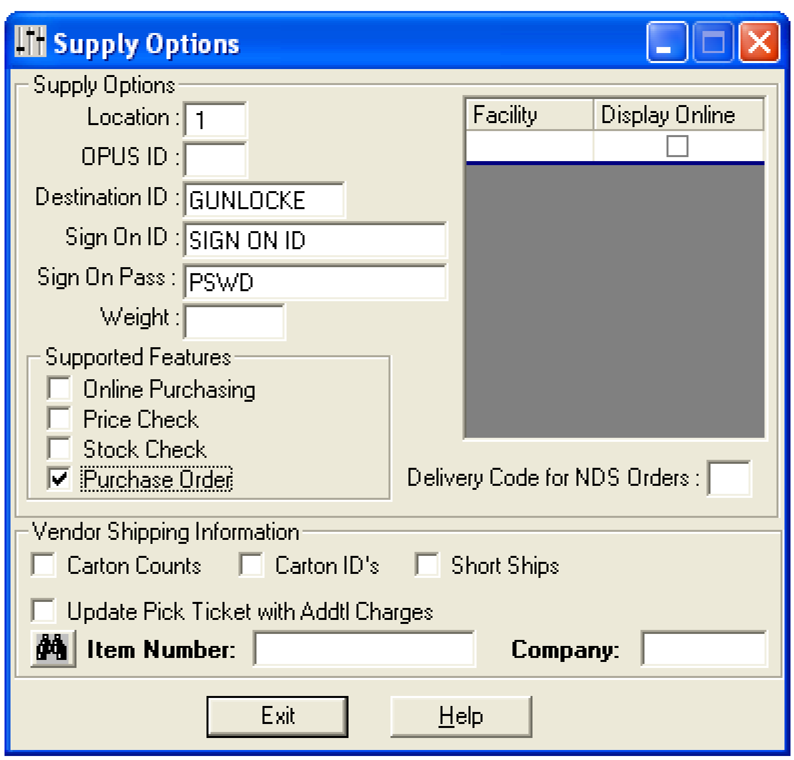


Figure 2: The Vendor Supply Options Dialog Box

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.

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 .

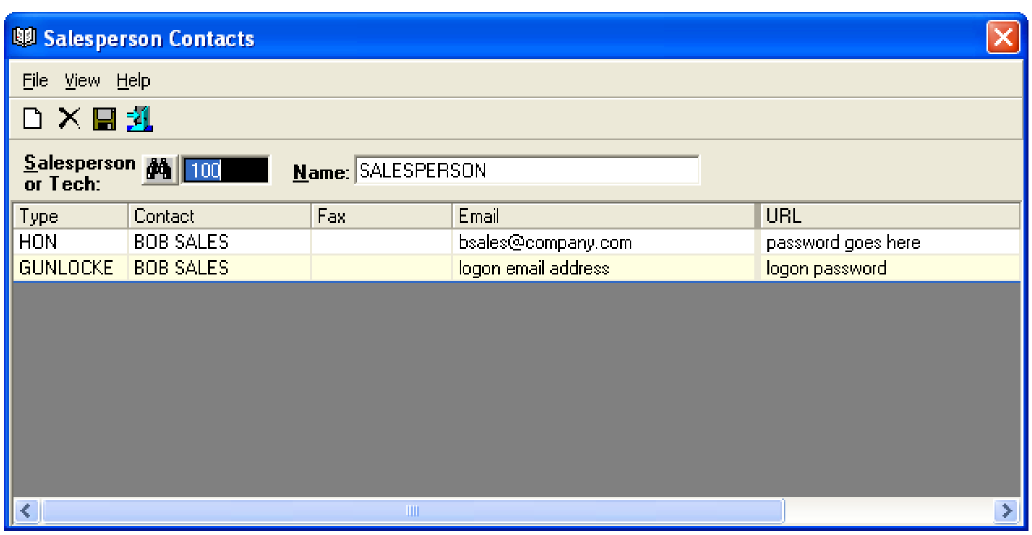


Figure 3: The Salesperson Contacts Window

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 HON, Gunlocke, or Paoli. *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 . The Salesperson Contacts window opens, as shown in Figure 3.

2 Set up each person who sends P/Os or receives acknowledgments from an HNI vendor via PSN.

2.1 In the Type box, enter the destination ID for your vendor (either HON, Gunlocke, or Paoli).

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

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 contract record.

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. Use the same password for each salesperson you set up with a contact record.

Note: 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 .

2.6 Repeat these steps for each salesperson who sends P/Os or receives acknowledgments from HON, Gunlocke, or Paoli. 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 Name 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 .
7. 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 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 [icon] to open the Furniture Contract Maintenance window. See Figure 5.
3. Click [icon] 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: 123110, for example. Press Enter. The date displays as 12/31/2010.
6. To add a description for this contract, click the Description box and enter the description.
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.

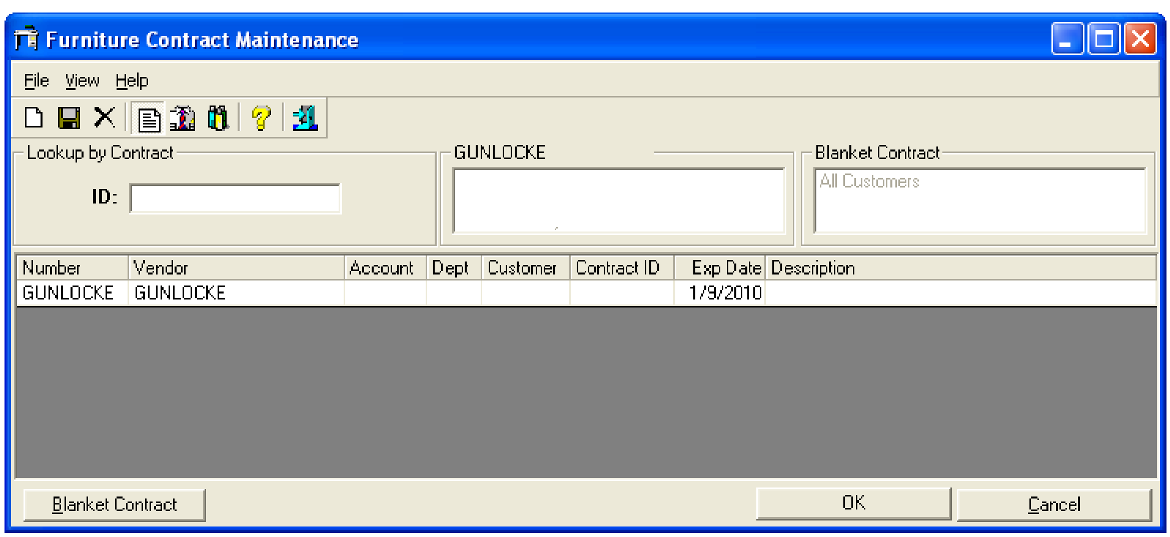


Figure 5: The Furniture Contract Maintenance Window

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.

1 Double-click 

. The Purchase Order Entry Master tab opens.

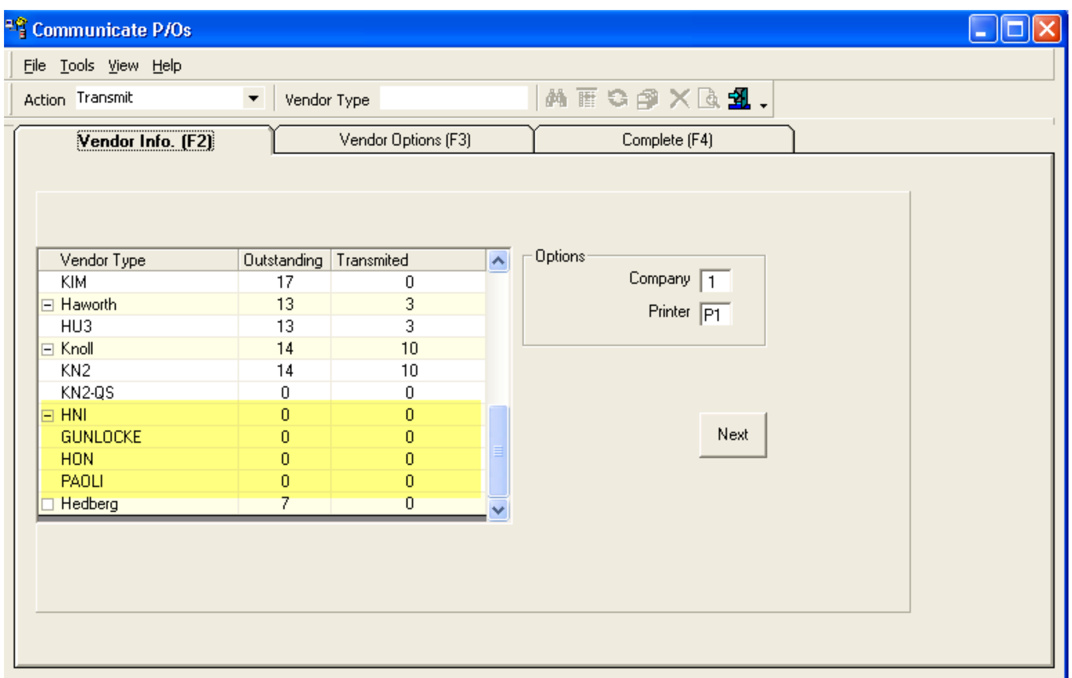
2 In the Action Code drop down list box, click Communicate. The Communicate P/Os window opens. See Figure 6.

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

4 Click the View menu and select Default Vendor Options. The Communications Options dialog box opens. See Figure 7. Be sure the correct vendor is selected in the Vendor drop down box.

5 Set up Bill To and Ship To IDs.

Figure 6: The Communicate P/Os Window



To add Bill To IDs:

5.1 Right-click the Bill To IDs box, then click Add Bill To ID. See Figure 8.

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** for each Bill To ID to set up.

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.

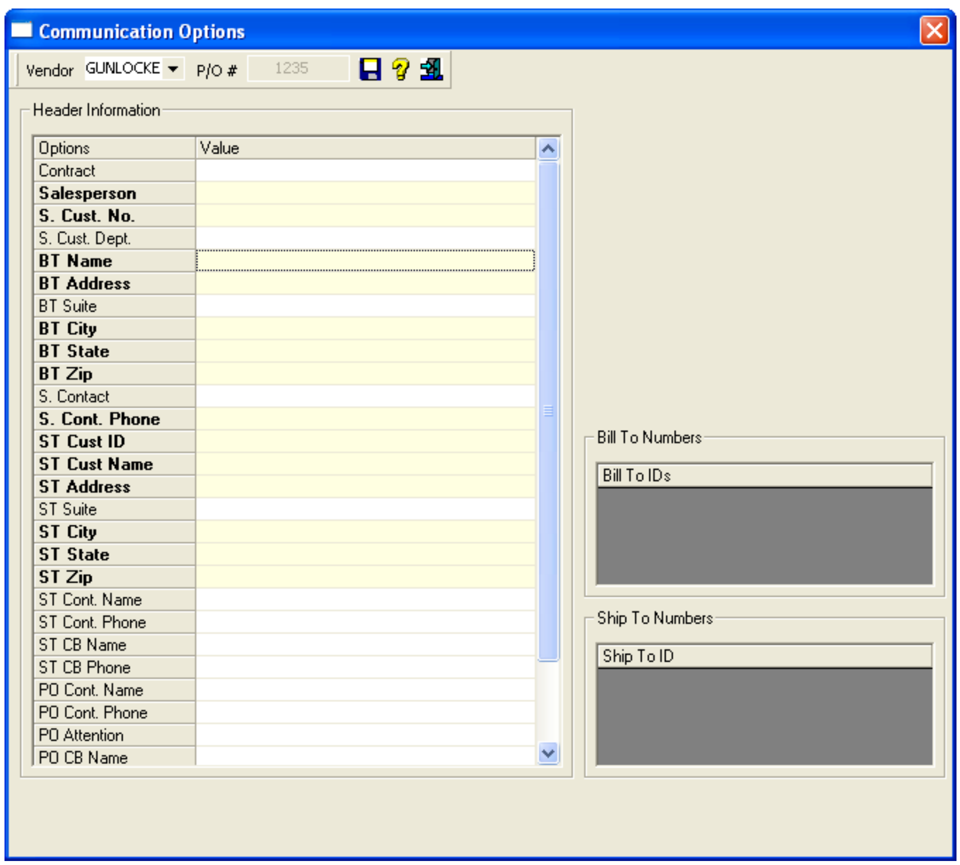


Figure 7: The Communication Options Dialog Box

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.

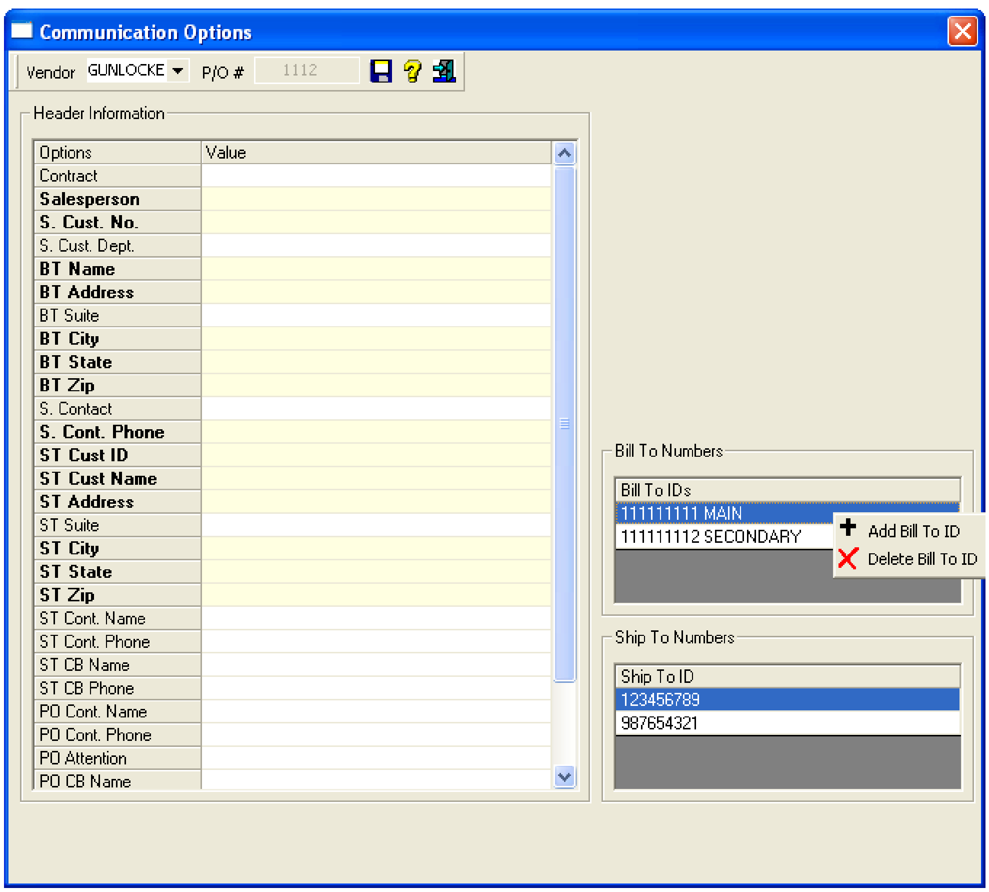
5.10 Right-click the same line and click Delete Bill To ID or Delete Ship to ID.

5.11 In the message box, click Yes. See Figure 9.

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.

Figure 8: Adding a Bill To ID



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:

- Click the S Cust No box to access the drop down arrow. Click the arrow and select the default Bill To ID from the IDs set up in the Bill To IDs box in **Step 5**.
- 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.
- Click the ST Cust ID box to access the drop down arrow. Click the arrow and select the default Ship To ID from the IDs set up in the Ship To IDs box in **Step 5**.

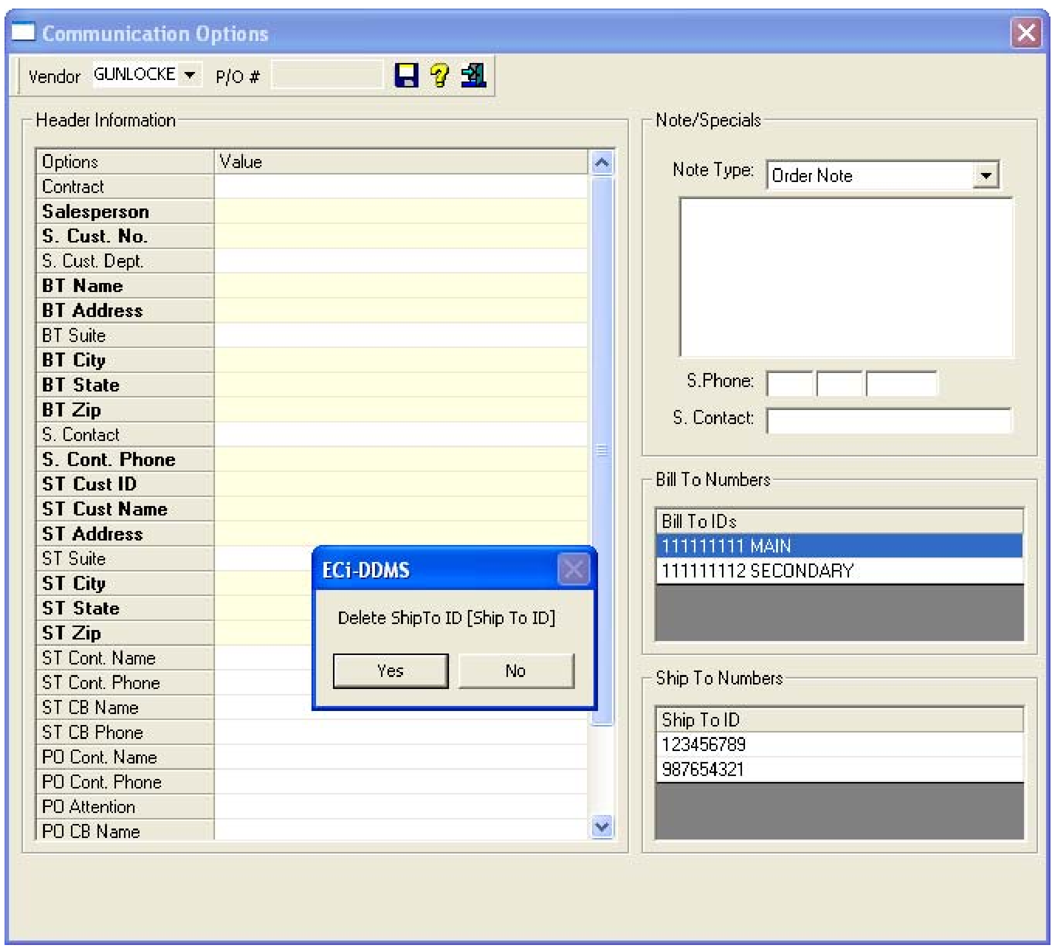
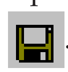


Figure 9: The Delete Ship To ID Message Box

- 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. The Furniture Profile Settings box displays. See Figure 10. 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.

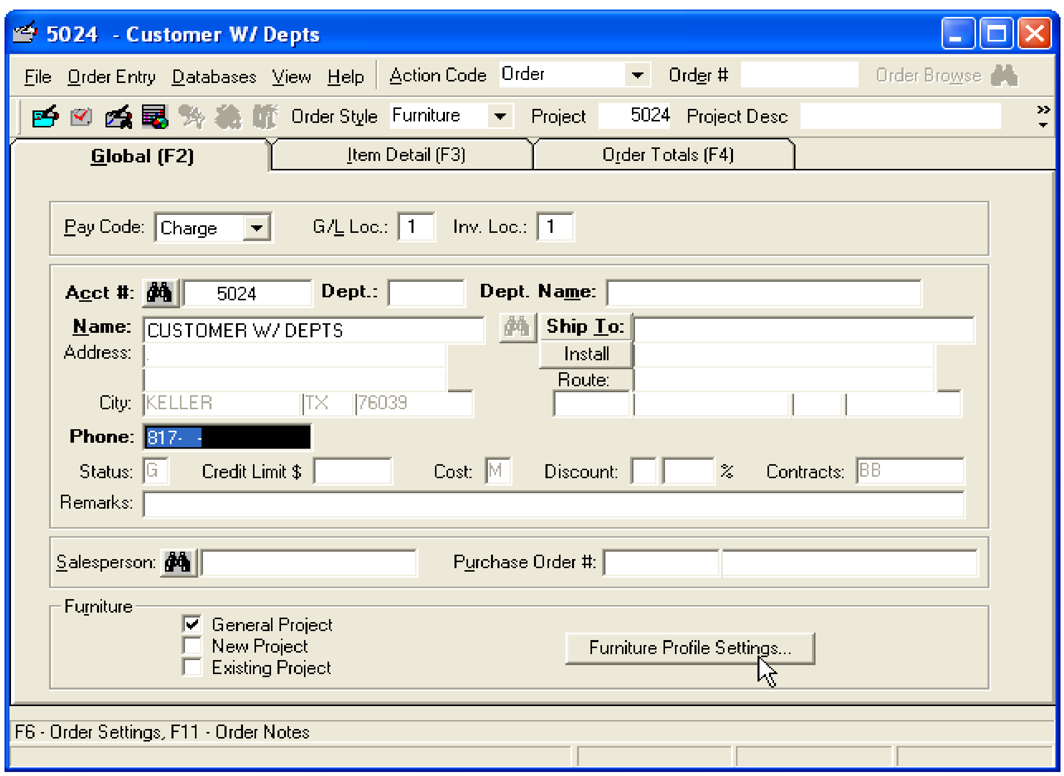


Figure 10: Selecting Furniture Profile Settings

9 Click the Item Detail tab. See Figure 11.

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 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.

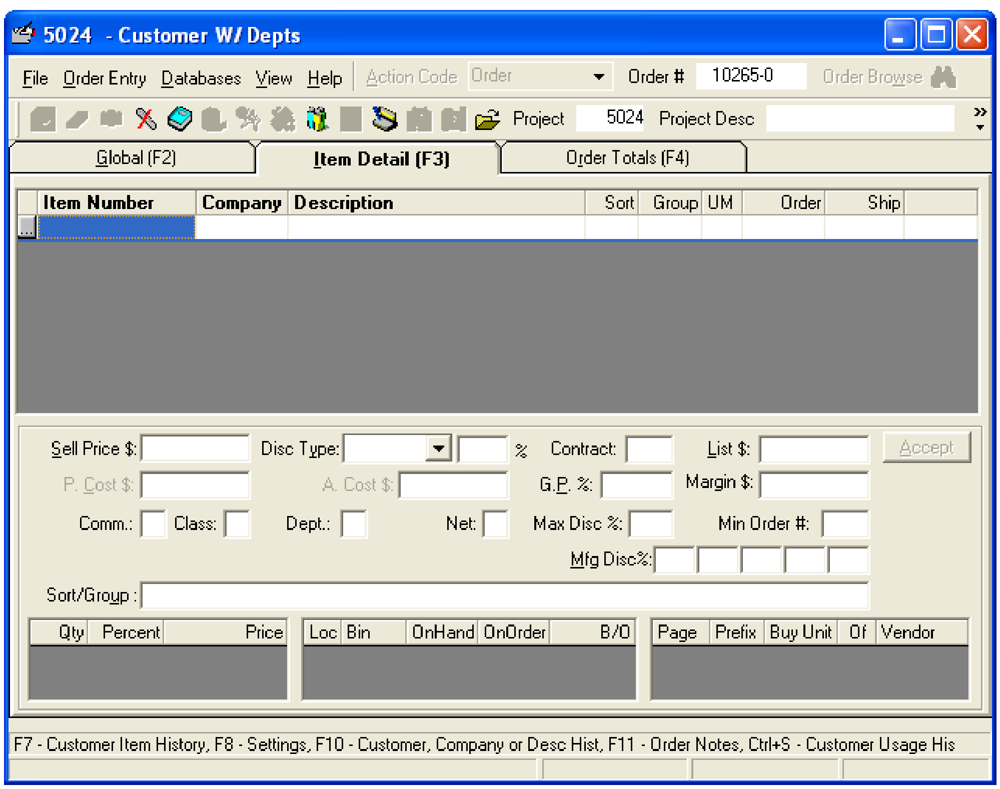
13.1 Select an item on the order.

13.2 Press F8. The Item Settings dialog box opens. See Figure 12.

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

13.4 Click OK.

Figure 11: The Item Detail Tab



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.

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)

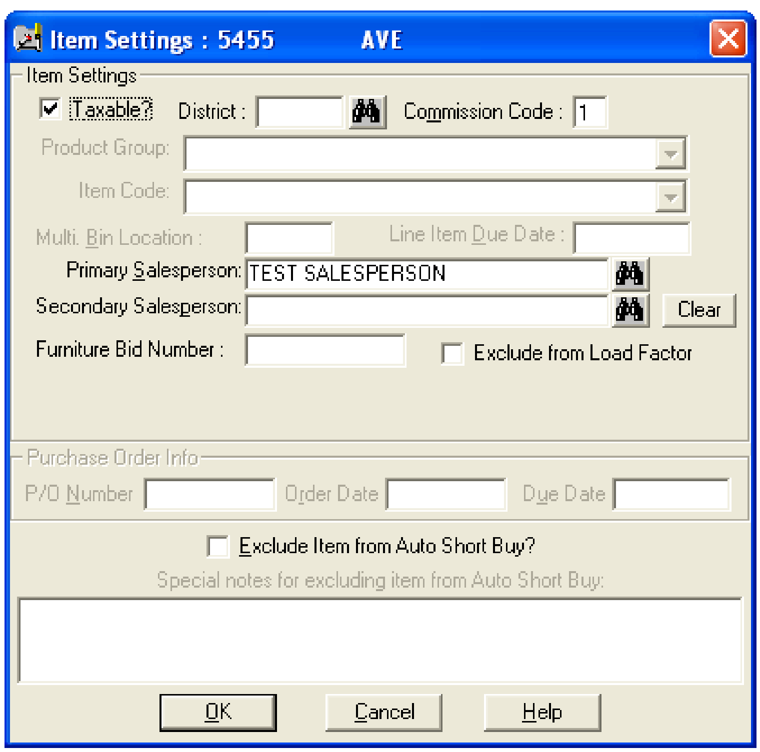
Tag 5: L3 (Alias 3)

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.

Figure 12: The Item Settings Dialog Box



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.

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 13. 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 14. 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.

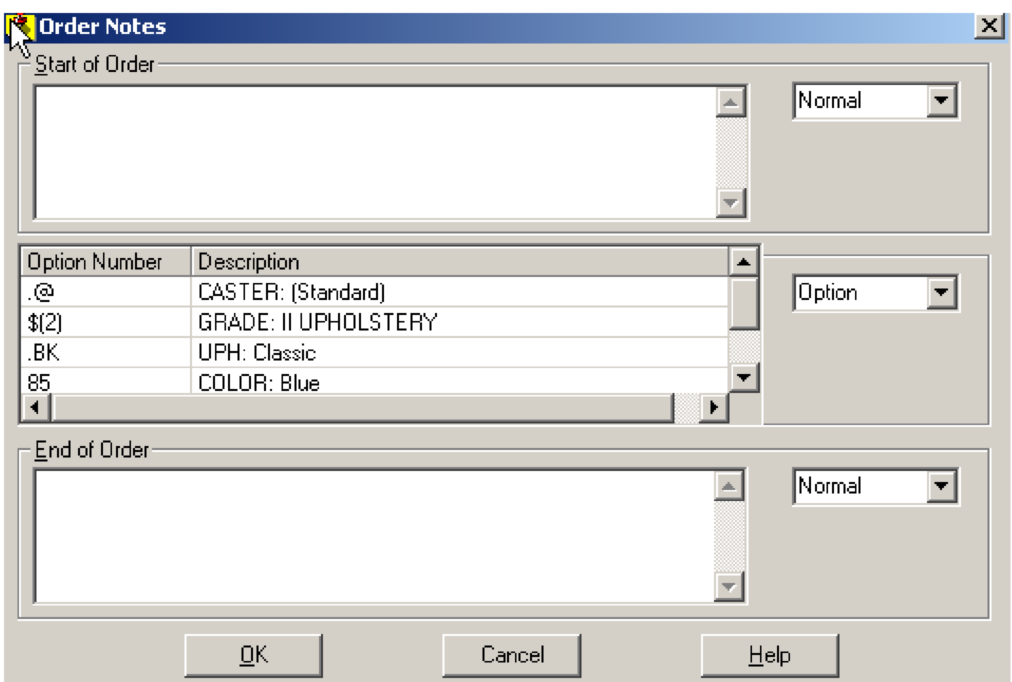


Figure 13: The Order Notes Dialog Box

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.

2 To view global information, click Global Info. The P/O Global Settings dialog box opens. See Figure 15. 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.

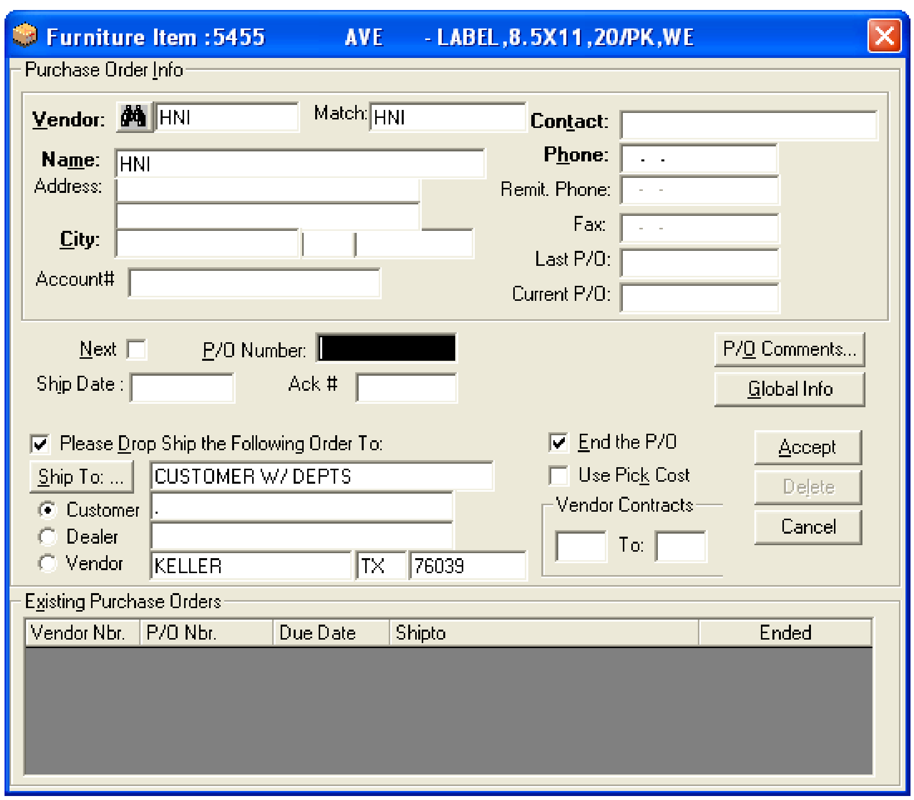


Figure 14: The Purchase Order Info Dialog Box

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 16. 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.

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.

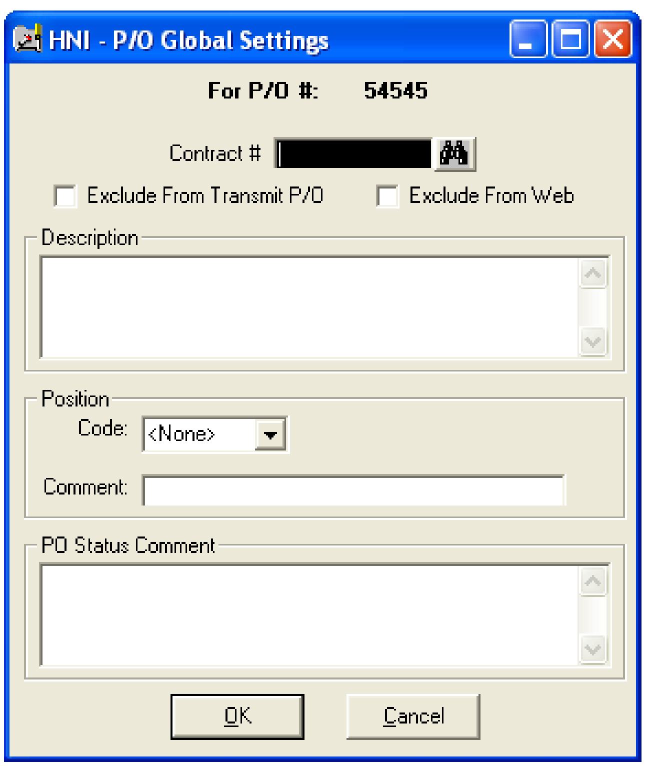


Figure 15: The P/O Global Settings Dialog Box

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.

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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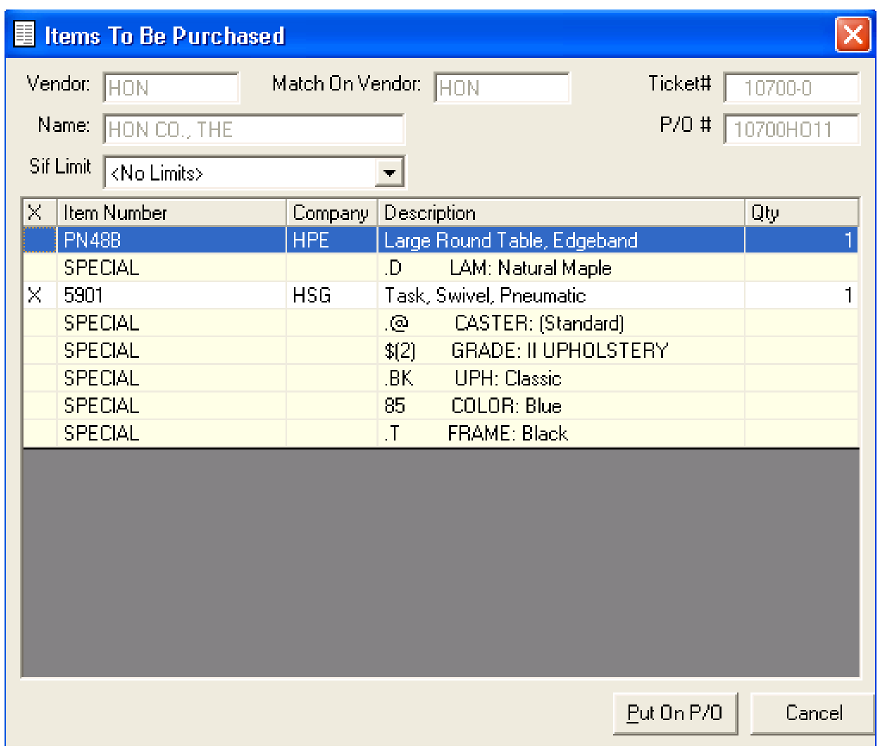
4 Click the appropriate vendor. The Purchase Order Browse dialog box opens. See Figure 17.

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 #, Vendor Name, Location (G/L location), Acknowledgment (acknowledgment #), Order Date,

Figure 16: The Items To Be Purchased Dialog Box



Due Date (P/O requested ship date), Total (total amount of the P/O), and Line (number of lines on the P/O).

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6 Click OK.

7 Click Next.

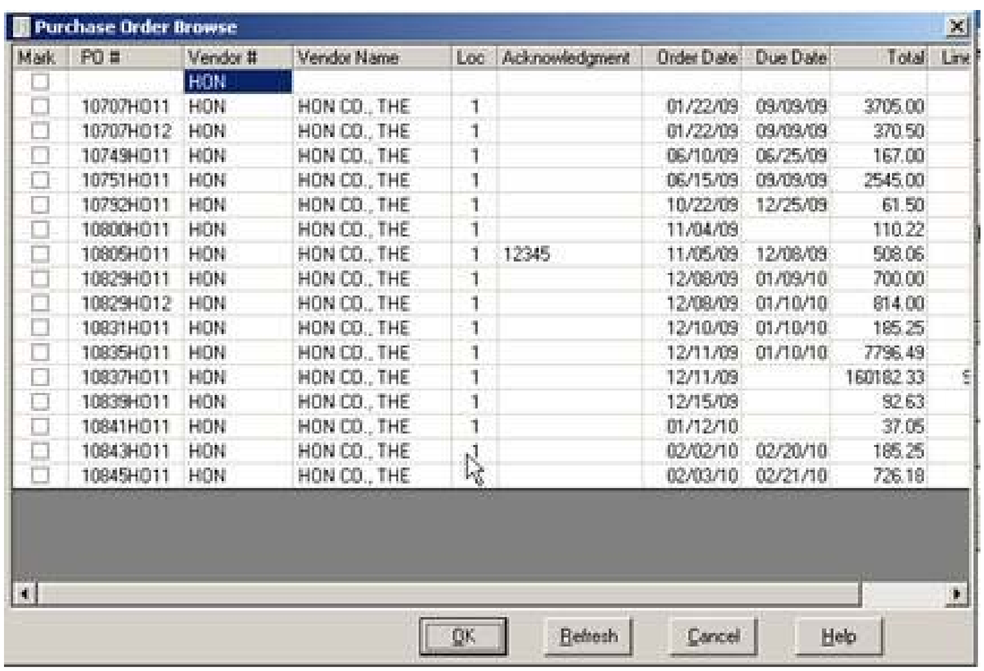
8 The Vendor Options tab opens, as shown in Figure 18. You can change the default settings. All required boxes are bold and must be filled before you can continue.

In the S Cust No box, the default Bill To ID displays. Click the drop down arrow to select a different Bill To ID.

In the ST Cust ID box, the default Ship To ID for the default Bill To displays. If you change the Bill To ID, the Ship To ID box becomes blank, and you must select a new Ship To ID. Use the drop down arrow to select a Ship To ID.

Note: All Bill To IDs and corresponding Ship To IDs must be set up in the Default Vendor Options dialog box.

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.



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	[illegible]
☐	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	

Figure 17: The Purchase Order Browse Dialog Box

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, as shown in Figure 18.) 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 19.

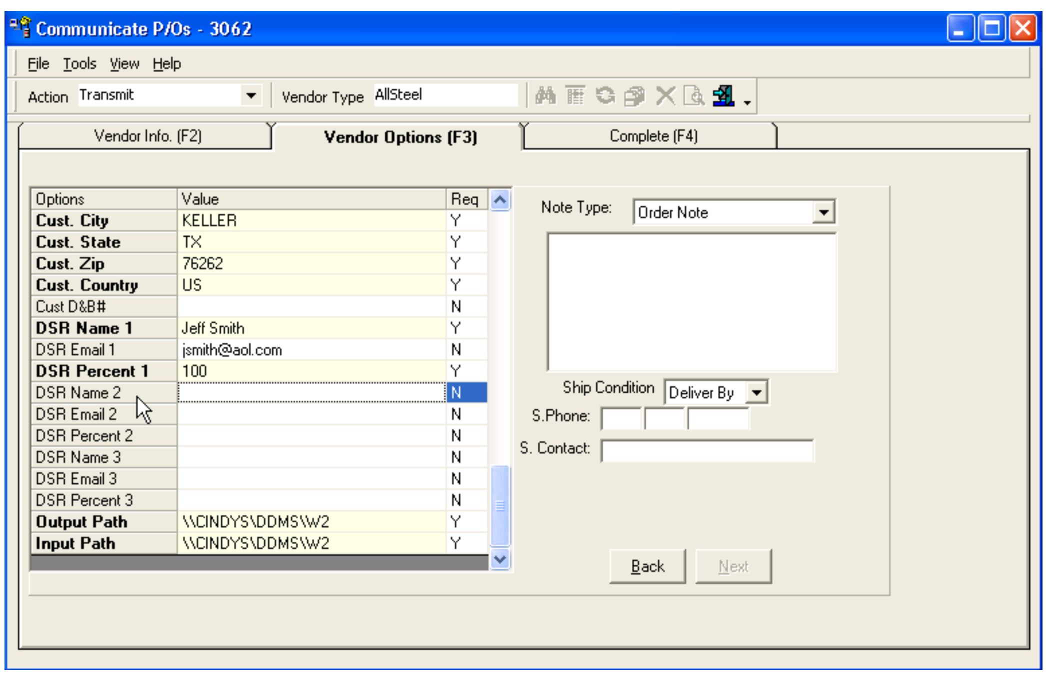
9 Use the Notes/Specials section to add notes or specials to the P/O. These appear on the HNI site in the Comments box.

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.

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.

Figure 18: Selecting the DSR Name 2 Box



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

12 The Complete tab opens. Click Build. 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 19: The Adjusted Percentage in the DSR Percent 1 Box