

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



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Setting Up the Kimball PSN

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

Note: If you are also a National dealer, keep in mind that you can use the same procedures to set up PSN for National.

Setting parameters to communicate with Kimball involves:

- 1 Contacting Kimball
- 2 Setting up your Vendor database
- 3 Setting up salesperson contacts
- 4 Setting up furniture contracts/ Kimball CDAs
- 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.

Email PSN installation questions to support@eci2.com

Contacting Kimball Office

Contact Kimball Office to register your user name and password. Also ask for all eligible contract (CDA) numbers and expiration dates, as well as your Kimball account numbers.

Figure 1: The Vendor Window


The screenshot shows a software window titled "Vendor: KIMBALL - KIMBALL". The window has a menu bar (File, View, Help) and a toolbar. 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 # (KIMBALL), Name (KIMBALL), Address (empty), City (empty), St (empty), Zip (empty), Phone (empty), Fax (empty).
- Code:** Mach Dir (checkbox), Comm (Kimball dropdown menu). The dropdown menu is open, showing options: Herman Miller, Hedberg, EDI, Faxing, AllSteel, Global Industries, Kimball (highlighted), and Haworth.
- Minimum Order \$/#/Cu:** (empty)
- Minimum Freight \$/#/Cu:** (empty)
- Ship Method:** (empty)
- Contact:** (empty)
- Acct #:** (empty)
- Trade Discount Information:** (empty)
- Expense G/L #:** (empty)
- Sales/Purch Major:** (empty), Use RC (checkbox), P/O Detail (checkbox)
- Discount %:** (empty), Terms: (empty), Net Terms: (empty)

Setting Up Your Vendor Database

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

Contact Kimball to get your User ID and password.

- 1.1 From the DDMS Master Menu, double-click . The Vendor Master tab opens.

- 1.2 In the Vendor Master tab, click .

- 1.3 Click the Vendor # box and enter an account number for Kimball. See Figure 1.

- 1.4 Click the Name box and enter a name for Kimball.

- 1.5 Click the Comm box's down arrow and click Kimball.

Note: Both Kimball and National share communication settings. You need to select Kimball in the Comm box for both vendors.

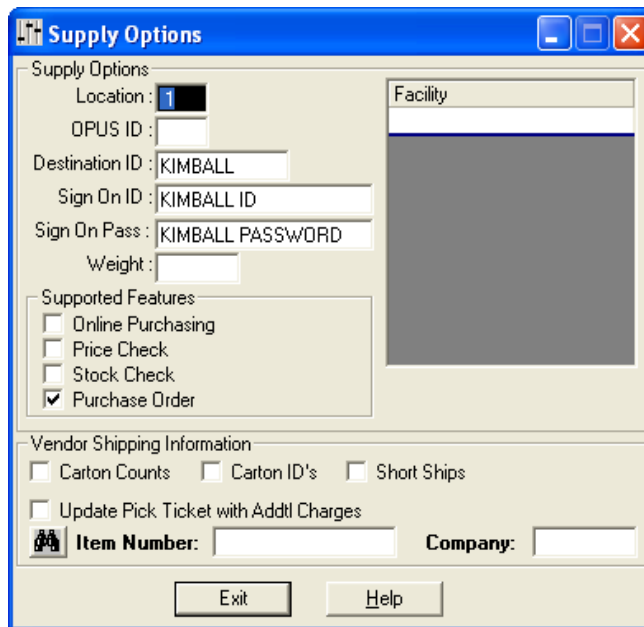
- 1.6 Click .

- 2 Set PSN parameters.

- 2.1 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.

Figure 2: The Vendor Supply Options Dialog Box



Supply Options

Supply Options

Location : 1

OPUS ID :

Destination ID : KIMBALL

Sign On ID : KIMBALL ID

Sign On Pass : KIMBALL PASSWORD

Weight :

Supported Features

Online Purchasing

Price Check

Stock Check

Purchase Order

Vendor Shipping Information


Carton Counts Carton ID's Short Ships

Update Pick Ticket with Addtl Charges

Item Number: Company:

Exit Help

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- 2.3 In the Destination ID box, enter your Kimball ID exactly as follows: **KIMBALL**
 - 2.4 In the Sign On ID box, enter your Kimball sign on ID number. You must contact Kimball for your sign on ID and password.
 - 2.5 In the Sign On Pass box, enter your Kimball sign on password.
 - 2.6 From the Supported Features list, click Purchase Order.
 - 2.7 When you finish, click Exit.
- 3 Click .






Note: If you are also a National dealer, use the same steps to set up your National vendor. Enter KIMBALL as your Destination ID but enter your National sign on ID and password.

Setting Up Salesperson Contacts


For Kimball, to set the order writer as the default contact on the purchase order, you must set up two contacts.

Setting Up a Salesperson Contact with No Type

First, you must set up the salesperson contact for the order writer that does not have a type specified. In this contact record, you record the name, e-mail address, and phone number of the order writer.

- 1 From the DDMS Master Menu, double-click . The Salesperson window opens.
- 2 In the Master tab, select the salesperson to set up as the order writer. Click  to create a new salesperson or  to browse. For more information, see your online help.
- 3 Click  to open the Salesperson Contacts window, and make sure the correct salesperson is displayed in the Salesperson or Tech box.
- 4 Click  to add a new contact.

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- 5 Leave the Type box blank. See Figure 3.
- 6 In the Contact box, enter the name of the order writer.
- 7 In the Email box, enter the email address of the order writer.
- 8 In the Phone box, enter the phone number of the order writer.
- 9 Click .

Setting up a Salesperson Contact with a Type of Kimball

Next, you must create a salesperson contact with the type of Kimball. In this contact record, you record the order writer's information in all boxes except two: The Email and URL boxes. In these boxes, you enter your Kimball sign on ID number and password.




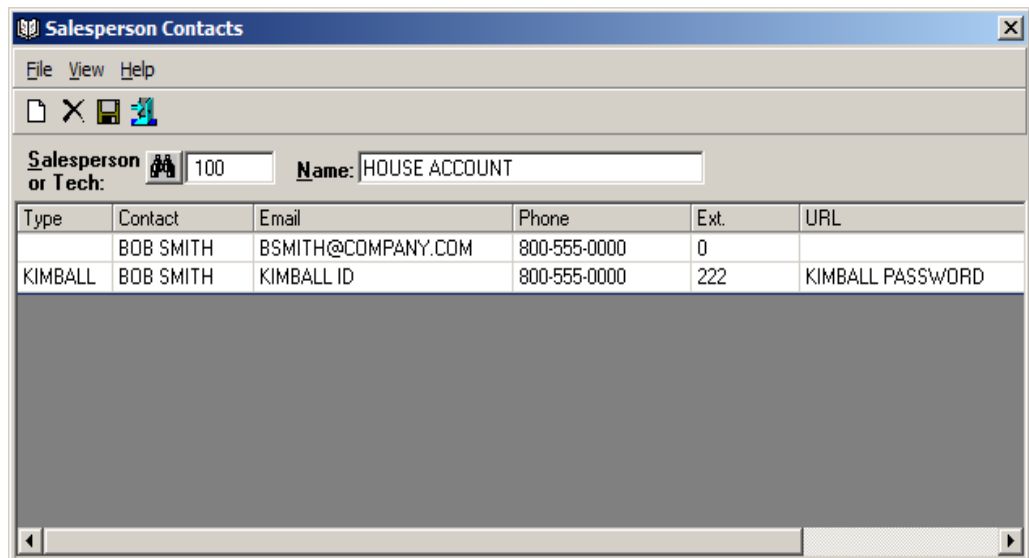
- 1 From the DDMS Master Menu, double-click . The Salesperson Master tab opens.
- 2 Select the salesperson that is the order writer.
- 3 Click  to open the Salesperson Contacts window.
- 4 Click  to add a new contact.
- 5 In the Type box, type **KIMBALL**
- 6 In the Contact box, enter the name of the order writer.

Figure 3: The Salesperson Contacts Window




The screenshot shows a window titled "Salesperson Contacts" with a menu bar (File, View, Help) and a toolbar with icons for file operations. Below the toolbar, there are input fields for "Salesperson or Tech:" (containing "100") and "Name:" (containing "HOUSE ACCOUNT"). A table with columns "Type", "Contact", "Email", "Phone", "Ext.", and "URL" is displayed. The table contains two rows: one for "BOB SMITH" with email "BSMITH@COMPANY.COM" and phone "800-555-0000", and another for "KIMBALL" with contact name "BOB SMITH", email "KIMBALL ID", phone "800-555-0000", extension "222", and URL "KIMBALL PASSWORD".

Type	Contact	Email	Phone	Ext.	URL
	BOB SMITH	BSMITH@COMPANY.COM	800-555-0000	0	
KIMBALL	BOB SMITH	KIMBALL ID	800-555-0000	222	KIMBALL PASSWORD

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- 7 In the Email box, enter your Kimball sign on ID number.
- 8 In the URL box, enter your Kimball sign on password.

Note: The sign on ID and password that you enter in these boxes are the same ones that you should have already obtained from Kimball and entered in the Supply Options dialog box.

- 9 Enter any additional information about the order writer, as necessary.
- 10 Click .

Setting Up Furniture Contracts

ECi recommends that you set up your Kimball contract/CDA numbers before communications. Use the Furniture Contract Maintenance window to create a furniture contract.



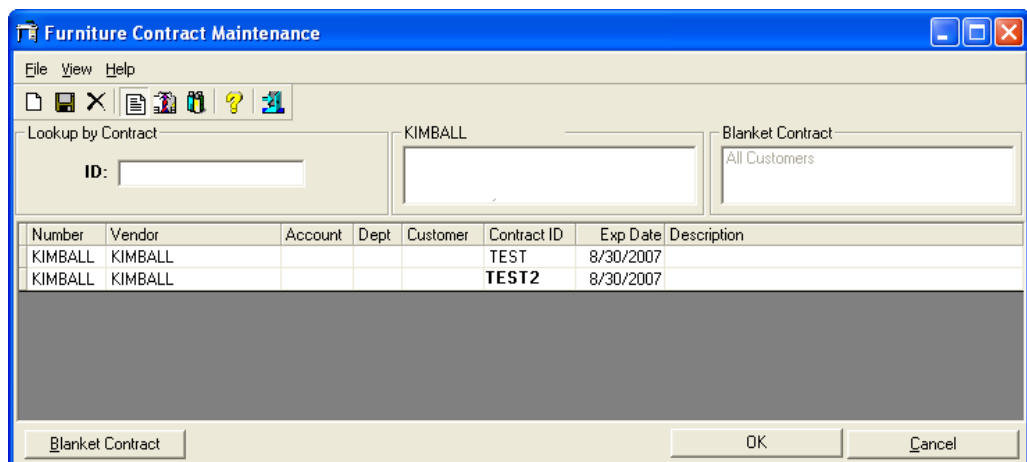
- 1 Retrieve your Kimball vendor.
- 2 In the Vendor window, click  to open the Furniture Contract Maintenance window. See Figure 4.
- 3 Click  to add a new contract.
- 4 In the Contract ID box, enter the new contract number.
- 5 If the contract has an expiration date, enter it in the Exp Date box.
- 6 To add a description for this contract, enter it in Description box.

Figure 4: The Furniture Contract Maintenance Window



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- 7 Continue adding all eligible contracts for Kimball. (If a contract is specific to a particular customer, you can put in their customer account number and/or department.)
- 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.

Note: If you are also a National dealer, follow this same procedure to enter your National contracts under your National vendor.

Setting Up P/O Communication Defaults

Before placing an order with Kimball, set up default parameters in the Communicate P/Os window. These parameters include information such as account number, contract number, and bill-to address. If you do not set any defaults, each time you build a P/O for Kimball, you must manually enter the information. These parameters are defaults only and may be overridden when you send the P/O to Kimball.

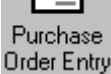
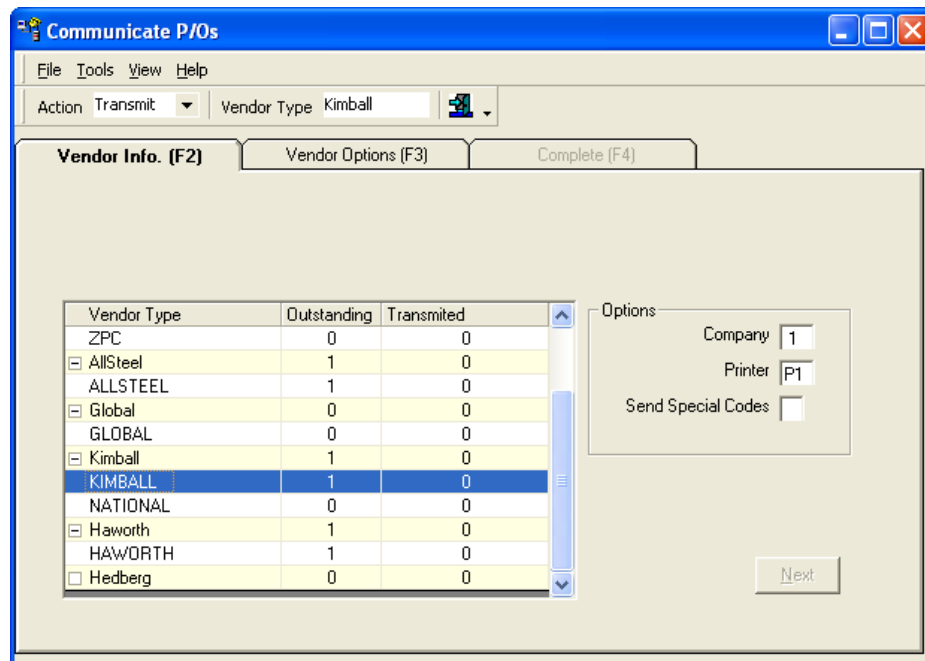
- 1 From the DDMS Master Menu, double-click . The Purchase Order Entry window opens.

Figure 5: The Communicate P/Os Window



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- 2 In the Master tab, click the down arrow in the Action Code box and select Communicate. The Communicate P/Os window opens. See Figure 5.
- 3 In the grid in the Vendor Info tab, highlight Kimball.
- 4 Click the View menu and select Default Vendor Options. The Communications Options dialog box opens. Be sure Kimball is the vendor selected in the Vendor box. See Figure 6.
- 5 Use the Dealer ID boxes in the Account Numbers section to add your Kimball account number. The first account number on the list is the default. Kimball account numbers are 10 digits in length. Be sure to input all 10 digits. For example, if your account number is 64764, enter 0000064764.

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 ten-digit account number.
- 5.3 Press Enter.
- 5.4 Repeat **Steps 5.1 - 5.3** for each account number to set up.

To delete an account number:

- 5.5 Click the line to delete.

The screenshot shows the 'Communication Options' dialog box for Vendor KIMBALL. The P/O # is 4321. The 'Header Information' section contains a table with the following data:

Options	Value
Division	TEST
Contract	
Salesperson	
BT Cust. Dept.	
BT Name	
BT Address	
BT Suite	
BT City	
BT State	
BT Zip	
S. Contact	
S. Cont. Phone	
ST Cust ID	
ST Cust Name	
ST Address	
ST Suite	
ST City	
ST State	
ST Zip	

The 'Account Numbers' section contains a 'Dealer ID' field with a text input area below it.

Figure 6: The Communication Options Dialog Box

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- 5.6 Right-click the same line and click Delete Dealer ID.
- 5.7 In the Delete Dealer ID message box, click Yes. The account number is deleted.

Note: Add only account numbers for your Kimball Office account. If you are also a National dealer, you need to set up separate default communication options for your National Vendor.

- 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 Kimball.

To set defaults, click a box name and enter a value. ECI recommends you set up the following defaults:

- 6.1 In the Division box, type **KIMBALL**. This is a case-sensitive field.
- 6.2 In the Salesperson box, enter the salesperson for the order.
- 6.3 In the Ord Wtr Ph and Order Wtr Email boxes, enter the phone number and email address at which to contact the default order writer.

Figure 7:
Adding a Dealer
ID

The screenshot shows a software window titled "Communication Options". At the top, there is a "Vendor" dropdown menu set to "KIMBALL" and a "P/O #" field. Below this is a "Header Information" section containing a table of options and values. The table has two columns: "Options" and "Value". The options listed are: Division (KIMBALL), Contract (TEST), Salesperson (SALESPERSON), Ord. Wtr. Ph. (ORDER WRITER PHONE), Ord. Wtr. Email (ORDER WRITER EMAIL), BT Cust. Dept., BT Name (BOB), BT Address (234 STREET), BT Suite, BT City (FORT WORTH), BT State (TX), BT Zip (76177), BT Country (US), S. Contact (A/P CONTACT FOR DEALER), S. Cont. Phone (2148888888), ST Cust ID (000054764), ST Cust Name (ABC COMPANY), ST Address (123 STREET), and ST Suite. To the right of the table is an "Account Numbers" section with a "Dealer ID" field containing "000064764". Below the field are two buttons: a blue "Add Dealer ID" button with a plus sign and a red "Delete Dealer ID" button with a minus sign.

Options	Value
Division	KIMBALL
Contract	TEST
Salesperson	SALESPERSON
Ord. Wtr. Ph.	ORDER WRITER PHONE
Ord. Wtr. Email	ORDER WRITER EMAIL
BT Cust. Dept.	
BT Name	BOB
BT Address	234 STREET
BT Suite	
BT City	FORT WORTH
BT State	TX
BT Zip	76177
BT Country	US
S. Contact	A/P CONTACT FOR DEALER
S. Cont. Phone	2148888888
ST Cust ID	000054764
ST Cust Name	ABC COMPANY
ST Address	123 STREET
ST Suite	

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- 6.4** In the BT Name, BT Address, BT Suite, BT City, BT State, BT Zip, and BT County boxes, enter the billto information (the name and address to which to send your company's invoices).

Note: In any Country box, enter the two-digit country code.

- 6.5** In the S Contact and S Cont Phone boxes, enter the name and phone number of the default billto attention person, for example, your company's A/P clerk.

- 6.6** In the ST Cust ID box, enter your shipto account number with Kimball.


- 6.7** In the ST Cust Name, ST Address, ST Suite, ST City, ST State, ST Zip, and ST Country boxes, enter the shipto information (the name and address for where the shipment is to be delivered).

Note: If an order is designated as a Direct Ship, a ship to customer number (ST Cust ID box) is not required, but the ship to address information is required.

- 6.8** In the ST Contact and ST Cont Phone boxes, enter the name and phone number of the person to call in advance of delivery.

- 6.9** In the Output Path and Input Path boxes, enter the same value that is in the Outbound and Inbound Volume/Folder fields in the (L6X) PSN Parameter screen. Enter the true network path as \\ddmserver\path. For example, a valid path is \\ddmserver\ddms\w2.

Note: If you are also a National dealer, the same defaults should be set for National under your National Vendor.

- 7** When you finish, click .

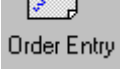
Using PSN

To place a P/O with Kimball using PSN:


- 1 Import the SIF to Order Entry
- 2 Build the P/O
- 3 Upload the P/O to Kimball
- 4 Receive Acknowledgments.

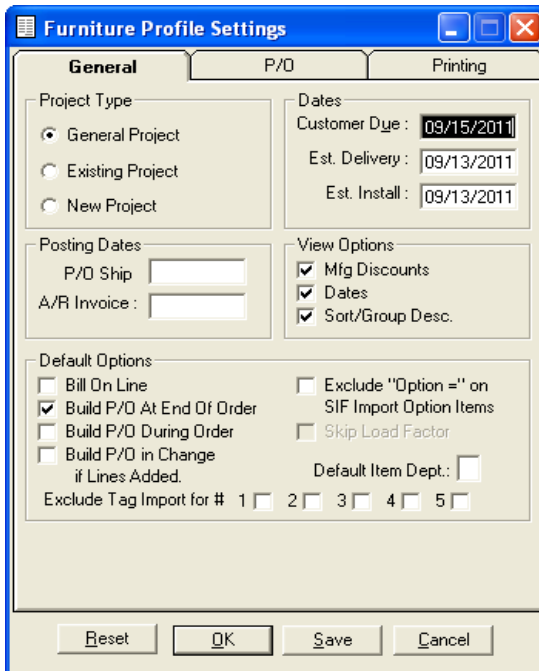
Importing the SIF

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 . The Order Entry window opens.
- 2 Click the down arrow in the Order Style box and select Furniture.
- 3 Click the down arrow in the Action Code box and select Order.
- 4 Select the customer for this furniture order. For instructions, see your DDMS online help.
- 5 In the Purchase Order # box, enter a project number for this order. The project number ties together all the customer's invoices and helps you easily track the project. For instructions, see your online help.

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- 6 In the Furniture portion of the window, click Furniture Profile Settings. The Furniture Profile Settings dialog box opens. In this dialog box, you specify settings for the project and set defaults for your customers. See Figure 8.
 - 6.1 Enter the due date in the Customer Due box.
 - 6.2 Enter the estimated delivery date in the Est Delivery box.
 - 6.3 Enter the estimated installation date in the Est Install box.
-
- Note:** Enter dates in the YYYYMMDD format.
- 6.4 Check the Mfg Discounts, Dates, and Sort/Group Desc boxes to allow users to view dates, sort and group descriptions, and manufacturer discounts while placing orders. This also allows you to enter information in these sections in the Item Detail tab.
 - 6.5 Change posting dates, default options, dealer shipto information, and printing instructions as needed. For details, see your online help.
 - 6.6 Click Save.
- 7 Click the Item Detail tab.
 - 8 Click  to open the SIF Specifier, and perform the standard operations to create the item.



Furniture Profile Settings

General | P/O | Printing

Project Type

- General Project
- Existing Project
- New Project

Dates

Customer Due : 09/15/2011

Est. Delivery : 09/13/2011

Est. Install : 09/13/2011

Posting Dates

P/O Ship :

A/R Invoice :

View Options

- Mfg Discounts
- Dates
- Sort/Group Desc.

Default Options

- Bill On Line
- Build P/O At End Of Order
- Build P/O During Order
- Build P/O in Change if Lines Added.
- Exclude "Option =" on SIF Import Option Items
- Skip Load Factor
- Default Item Dept.:

Exclude Tag Import for # 1 2 3 4 5

Reset OK Save Cancel

Figure 8: The Furniture Profile Settings Dialog Box

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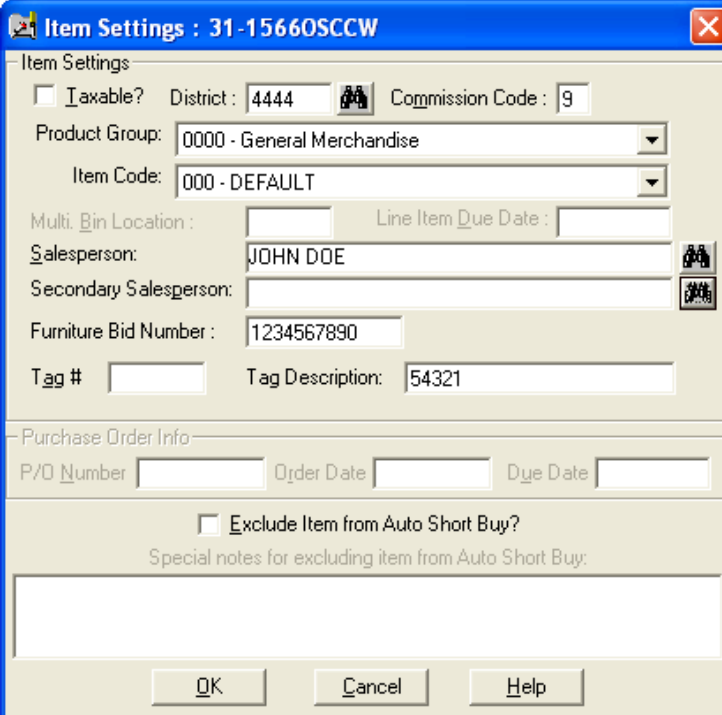
Note: Click  to open the Giza Specifier. Click  to open the CAP Specifier.

- 9 Scroll to the location on your network hard drive where the SIF file is stored, C:\SIF Files for example, and import the file.
- 10 At the Process prompt, click Yes. The items move from the file to a Furniture order.
- 11 To enter information about a specific item, click on the item and press F8. The Item Settings Dialog Box opens. See Figure 9.

If you reserve stock with Kimball, Kimball provides you with a stock reservation number and a stock line number. Input the stock reservation number in the Furniture Bid Number box and the stock line number in the Tag Description box.

- 12 Click the Order Totals tab.

Figure 9: The Item Settings Dialog Box



The screenshot shows the 'Item Settings : 31-15660SCCW' dialog box. It is divided into several sections:

- Item Settings:**
 - Taxable? District: 4444 Commission Code: 9
 - Product Group: 0000 - General Merchandise
 - Item Code: 000 - DEFAULT
 - Multi_Bin Location: Line Item Due Date:
 - Salesperson: JOHN DOE
 - Secondary Salesperson:
 - Furniture Bid Number: 1234567890
 - Tag #: Tag Description: 54321
- Purchase Order Info:**
 - P/O Number: Order Date: Due Date:
- Exclude Item from Auto Short Buy?
Special notes for excluding item from Auto Short Buy:

Buttons at the bottom: OK, Cancel, Help.

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- 13 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.

- 14 The Order Totals tab opens. See Figure 10. 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.
- 15 To automatically build the purchase order when the order is ended, click Build P/O.
- 16 Click Accept Order.

Figure 10: The Order Totals Tab

Ordered		Shipped	
Subtotal \$	117.45	Subtotal \$	
Discount \$		Discount \$	
Tax \$	9.54	Tax \$	
Total \$	126.99	Total \$	

Formats And Printers			
Copies	Format Type	Format	Printer
	Pick Ticket		
	Pro Forma		
	Acknowledgn		
	Delivery		
	Install Ticket		
	Quote		
	Invoice		
	P/O's		

Ending Order Status

(B) - Invoiced

(8) - Final Verified

(6) - Initial Verified

(4) - Not Verified

Don't Print ?

Fax Order ?

E-mail Order ?

Build P/O ?

Terms And Conditions ?

Buttons: Add On Items, Accept Order

End Line : _____

Status Bar: F6 - Order Settings, F11 - Order Notes # 3 \$ 117.45

Building the P/O

- 1 After following the previous steps to import the SIF, the Purchase Order Info dialog box opens. See Figure 11.

In this dialog box, enter the following information about the purchase order:


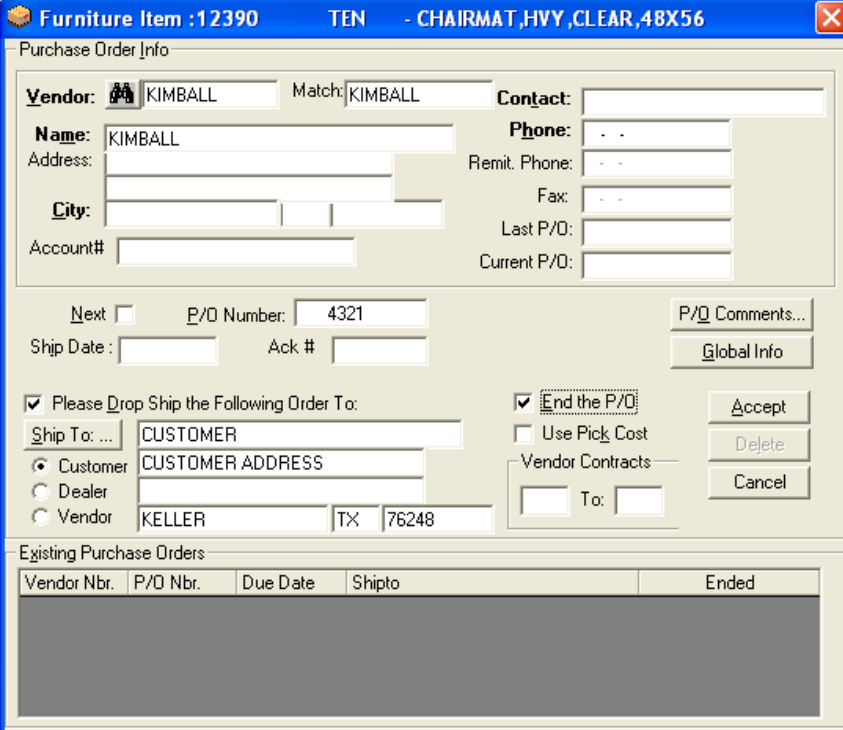

- 1.1 The vendor for the last item on the order populates the Vendor box. You can change the vendor by entering the new vendor over the existing one or clicking  to query for a different vendor.
- 1.2 In the P/O Number box, enter the number for this purchase order.
- 1.3 In the Ship Date box, enter the date this order is due to ship. This value is sent to Kimball as the Requested Delivery Date.
- 1.4 In the Ship To boxes, enter the address to which to ship the order.
- 1.5 Check the End the P/O box to end this purchase order. You must check this box before you can transmit it to Kimball.

Figure 11: The Purchase Order Info Dialog Box



Furniture Item :12390 TEN - CHAIRMAT,HVY,CLEAR,48X56

Purchase Order Info

Vendor:  KIMBALL **Match:** KIMBALL **Contact:** _____

Name: KIMBALL **Phone:** - -

Address: _____ **Remit. Phone:** - -

City: _____ **Fax:** - -

Account#: _____ **Last P/O:** _____

Current P/O: _____

Next P/O Number: 4321

Ship Date: _____ **Ack #:** _____

Please Drop Ship the Following Order To: End the P/O

Ship To: ... CUSTOMER Use Pick Cost

Customer CUSTOMER ADDRESS Vendor Contracts

Dealer _____ To: _____

Vendor KELLER TX 76248

Existing Purchase Orders

Vendor Nbr.	P/O Nbr.	Due Date	Shipto	Ended

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- 2 To enter notes about the purchase order, click P/O Comments. The Order Notes dialog box opens. See Figure 12. In this dialog box, you can specify notes to print at the start of the ticket invoice.
 - 2.1 If you select Order Notes, these are sent to Kimball as Order History.
 - 2.2 If you select Shipping Instructions, the shipping name is sent to Kimball as the Delivery Contact Name, the phone number as the Delivery Contact Phone Number, and the instructions as Load Planning. You can enter instructions about specific delivery times (for example, deliver between 8 AM and 10 AM), which dock to use for delivery (for example, use dock at back of building), or about trailer size (for example, use 48 ft trailer).
 - 2.3 If you select Shipping Tag, this is sent to Kimball as a Header Tagging. This information becomes a global tag for the purchase order and works with the line item tagging that is sent. For example, you might have a header tag of "Third Floor" with a Line Item tag of "Conf R3."

Note: These comments are displayed in PO Communicate when you transmit the P/O. These can be overridden at that time.

- 3 To view global information, click Global Info. The system displays information for the vendor (manufacturer). You can use this dialog box to specify a vendor contract.

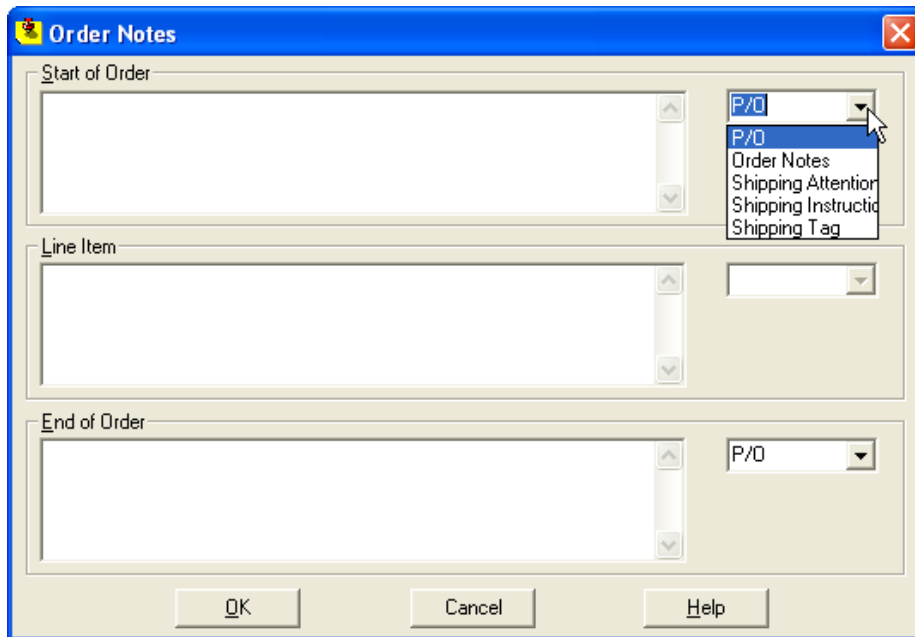



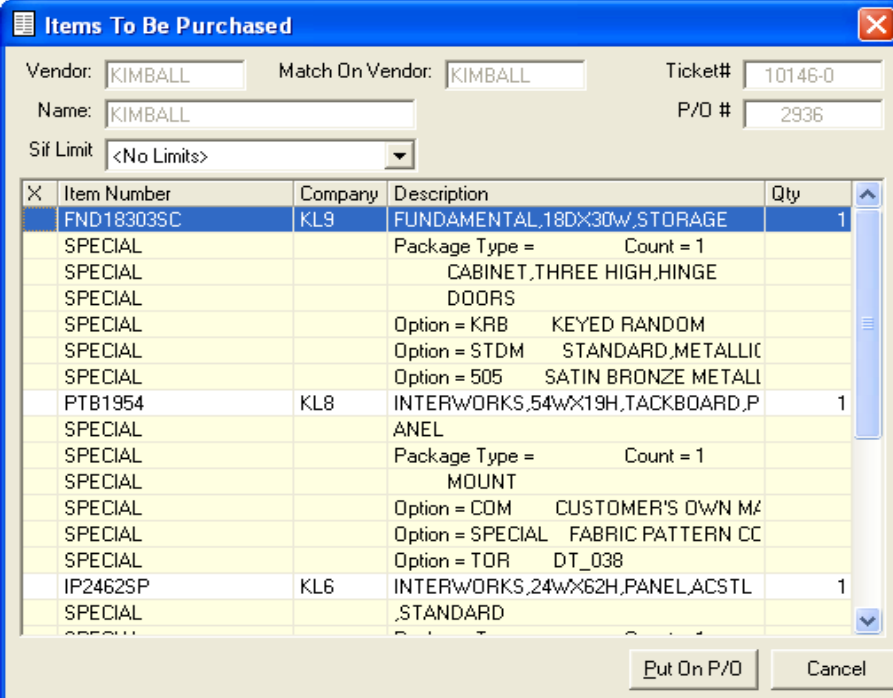
Figure 12: The Order Notes Dialog Box

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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.

- 4 The cursor returns to the Purchase Order Information dialog box. When you finish specifying information, click Accept.
- 5 The Items to Be Purchased dialog box opens. See Figure 13. The system automatically checks the items that match the vendor alias, KL6, for example, and displays them in this box. To deselect an item, click it. To reselect an item, click it again.
- 6 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.
- 7 Click Put On P/O.
- 8 At the Finished Adding Items to P/O message, click OK.

Figure 13: The Items To Be Purchased Dialog Box

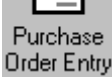


Item Number	Company	Description	Qty
FND18303SC	KL9	FUNDAMENTAL,18DX30W,STORAGE	1
SPECIAL		Package Type = Count = 1	
SPECIAL		CABINET,THREE HIGH,HINGE	
SPECIAL		DOORS	
SPECIAL		Option = KRB KEYED RANDOM	
SPECIAL		Option = STDN STANDARD,METALLIC	
SPECIAL		Option = 505 SATIN BRONZE METALL	
PTB1954	KL8	INTERWORKS,54wX19H,TACKBOARD,P	1
SPECIAL		ANEL	
SPECIAL		Package Type = Count = 1	
SPECIAL		MOUNT	
SPECIAL		Option = COM CUSTOMER'S OWN M/	
SPECIAL		Option = SPECIAL FABRIC PATTERN CC	
SPECIAL		Option = TOR DT_038	
IP2462SP	KL6	INTERWORKS,24wX62H,PANELACSTL	1
SPECIAL		,STANDARD	

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- 9 The Purchase Order Information dialog box reopens for every vendor alias match on the order. 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.
- 10 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 Kimball

- 1 From the DDMS Master Menu, double-click . The Purchase Order Entry window opens, with the Global tab displaying.
- 2 Click the down arrow in the Action Code box and select Communicate. The Communicate P/Os dialog box opens, with the Vendor Info tab displaying.
- 3 In the Vendor Type grid, click the plus sign next to Kimball, if available, to expand the list to include all of your Kimball vendors.
- 4 Double-click KIMBALL. The Purchase Order Browse dialog box opens.
- 5 Check the box that corresponds to the purchase order to transmit, then click OK. The Purchase Order Browse dialog box closes.
- 6 In the Communicate P/O's Vendor Info tab, click Next. The Vendor Options tab opens.
- 7 In the boxes outside of the grid, specify the Dealer ID, Distribution Channel, Order Type, Pack Service, Ship Complete, Ship Condition, and Ship Service.

Note: The Distribution Channel box is automatically set to Direct if you selected third-party billing during order entry. If you select direct shipping, a ship to customer number is not required, but the P/O ship to address information and a partnering dealer is required.

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In the Options grid, all required boxes are labeled in bold and have a highlighted Value box. See Figure 14.

If you previously entered default values in the Communication Options dialog box, these values display. For more information, see the heading **Setting up P/O Communication Defaults**. You can change these values if necessary.

In addition, you can enter any information that does not have a default value. In particular, the following required boxes for the Direct Distribution Channel may not have default values:

- 7.1 In the Dealer ID box, enter the dealer's ID number.
- 7.2 In the Part Dealer box, enter the ID number of the partnering dealer. If you do not have a partnering dealer, enter your own dealer ID.
- 7.3 In the Ref Dealer box, enter the ID number of the reference dealer.
- 7.4 In the BT Cust No box, enter the billto customer number.

Figure 14: The Vendor Options Tab

The screenshot shows the 'Communicate P/Os - 10838KIM1' dialog box with the 'Vendor Options (F3)' tab selected. The 'Action' is 'Transmit' and 'Vendor Type' is 'Kimball'. The dialog is divided into three sections: 'Vendor Info. (F2)', 'Vendor Options (F3)', and 'Complete (F4)'. The 'Vendor Options (F3)' section contains a table of options and a form for required fields.

Options	Value	Req
Type	PO	Y
Division	KIMBALL	Y
P/O	10838KIM1	Y
Dealer ID	0000000000	Y
Due Date		N
Contract		N
Proj. Number	TEST	N
Proj. Name	TEST PROJECT	N
Salesperson	SALESPERSON NAME	Y
Ord. Wtr.	555	Y
Ord. Wtr. Ph.	8000000000	Y
Ord. Wtr. Email	ORDERWRITER@COMPANY.COM	Y
PE Partner No.		N
GPD1 No.		N
GPD2 No.		N
GPD3 No.		N
Arrival Time		N

The 'Complete (F4)' section contains the following fields:

- Dealer Id: []
- Distrib. Channel: Direct
- Order Type: Standard
- Pack Serv.: Blanket Wrap
- Ship Complete: Yes
- Ship Condition: Deliver By
- Ship Serv.: Inside Delivery

Buttons: Back, Next

Note: If an order is designated as a Direct Ship, a ship to customer number (ST Cust ID box) is not required, but the ship to address information (the ST Cust Name, ST Address, ST City, ST State, ST Zip, and ST Country) is required.

7.5 In the Cust P/O and Cust Cont Name boxes, enter the purchase order number and the contact person for this customer.

Note: If you enter values in any date field, use the YYYYMMDD format. When entering times, enter the hours, minutes, and seconds. For countries, enter two-digit country codes.

- 8 When all the required boxes are populated, click Next. The Complete tab opens. See Figure 15.
- 9 Click Build. The P/O is transmitted to the Kimball Office and National website.
- 10 The header line of the P/O is updated with Kimball's SCN#. This is the number you use to reference your PO if you need to contact Kimball before the P/O is processed.

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.

Figure 15: The Complete Tab

