

*Setting Up & Using the  
Knoll PSN  
for DDMS*



October 2011 Rev.

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## Setting Up the Knoll PSN

Before you can create P/Os to upload to Knoll's order management system, you must set Knoll-specific parameters. If you have any questions about PSN installation, email them to [ddmssupport@ecisolutions.com](mailto:ddmssupport@ecisolutions.com)

Setting parameters to communicate with Knoll involves:

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

### Receiving Authorization

Contact ECI Support at [ddmssupport@ecisolutions.com](mailto:ddmssupport@ecisolutions.com) to request authorization.

### Contacting Knoll

Contact Knoll to obtain all eligible contract numbers and expiration dates.

### Setting Up Your Vendor Database


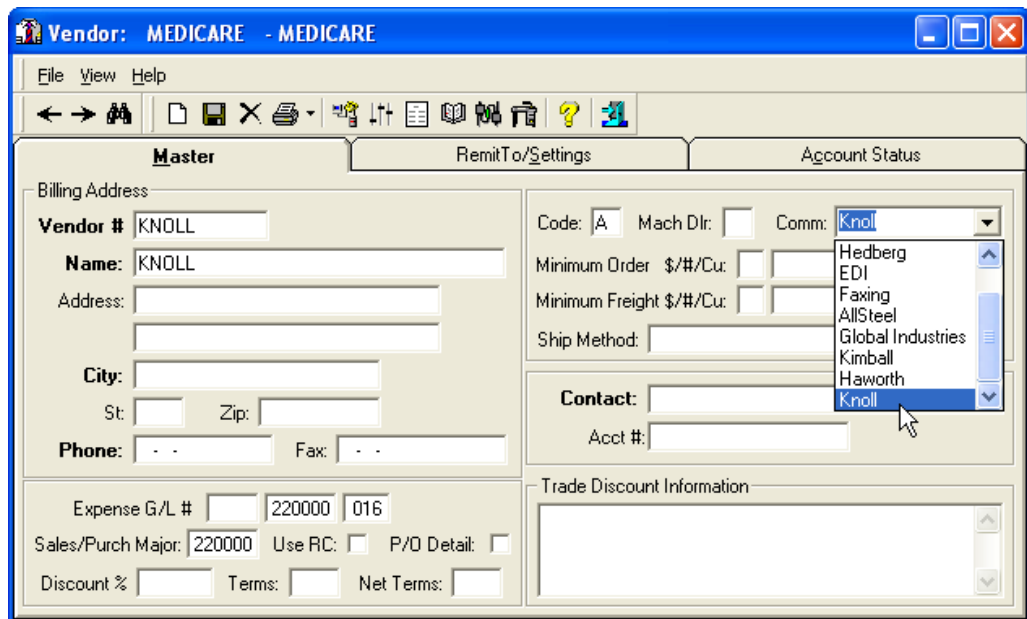



- 1 Set up Knoll as a vendor. If you already have a Knoll vendor, retrieve it and go to **Step 1.4**.
  - 1.1 In the Vendor Master tab, click .

Figure 1: The Vendor Window

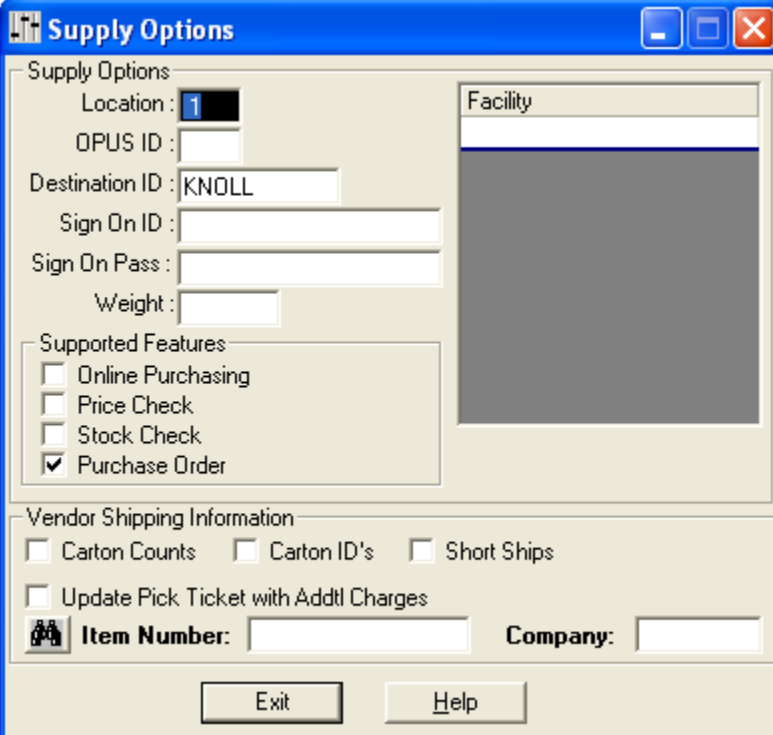


The screenshot shows the 'Vendor: MEDICARE - MEDICARE' window. The 'Master' tab is active. The 'Billing Address' section contains the following fields: Vendor # (KNOLL), Name (KNOLL), Address, City, St, Zip, Phone, and Fax. The 'RemitTo/Settings' section includes Code (A), Mach Dir, Comm (Knoll), Minimum Order \$/#/Cu, Minimum Freight \$/#/Cu, and Ship Method. The 'Account Status' section has Contact and Acct # fields. At the bottom, there are fields for Expense G/L # (220000 016), Sales/Purch Major (220000), Use RC, P/O Detail, Discount %, Terms, and Net Terms. A dropdown menu is open for the 'Comm' field, listing various vendors: Hedberg, EDI, Faxing, AllSteel, Global Industries, Kimball, Haworth, and Knoll (highlighted).

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- 1.2 Click the Vendor # box and enter an account number for Knoll.
- 1.3 Click the Name box and enter a name for Knoll.
- 1.4 Click the Comm box's down arrow and click Knoll. 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 Knoll ID exactly as follows:  
**KNOLL**
  - 2.4 From the Supported Features list, click Purchase Order.
  - 2.5 When you finish, click OK.
- 3 Click .



**Figure 2: The Vendor Supply Options Dialog Box**



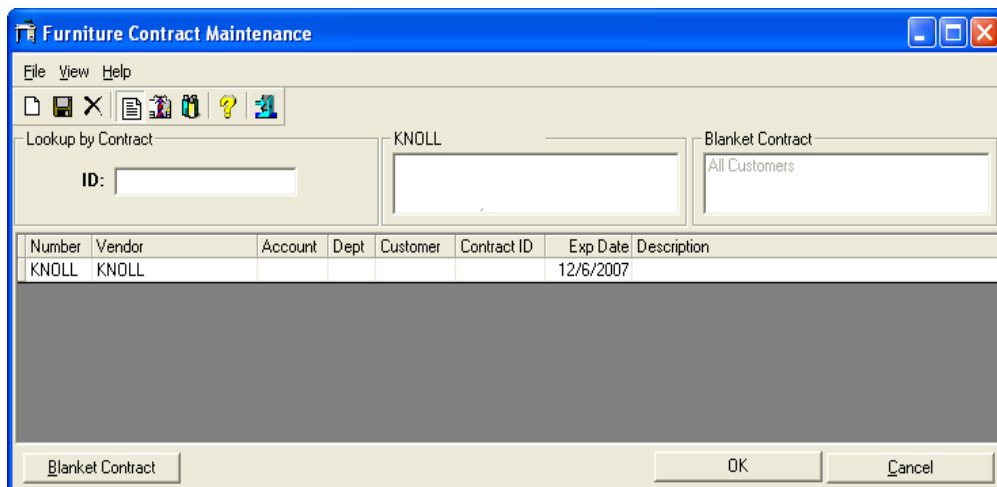
The screenshot shows the 'Supply Options' dialog box. The 'Location' field contains '1'. The 'Destination ID' field contains 'KNOLL'. The 'Supported Features' section has 'Purchase Order' checked. The 'Vendor Shipping Information' section has 'Update Pick Ticket with Addtl Charges' checked. The 'Item Number' and 'Company' fields are empty.

## Setting Up Furniture Contracts

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

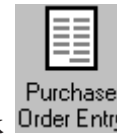
- 1 Go to the Vendor window, and retrieve your Knoll vendor.
- 2 In the Vendor window, click  to open the Furniture Contract Maintenance dialog box. See Figure 3.
- 3 Click  to add a new contract.
- 4 In the Contract ID box, enter the new contract number.
- 5 If the contract has an expiration date, enter 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 Knoll. (If a contract is specific to a particular customer, you can put in their ECi account number and/or department. Start typing in the Account field 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**

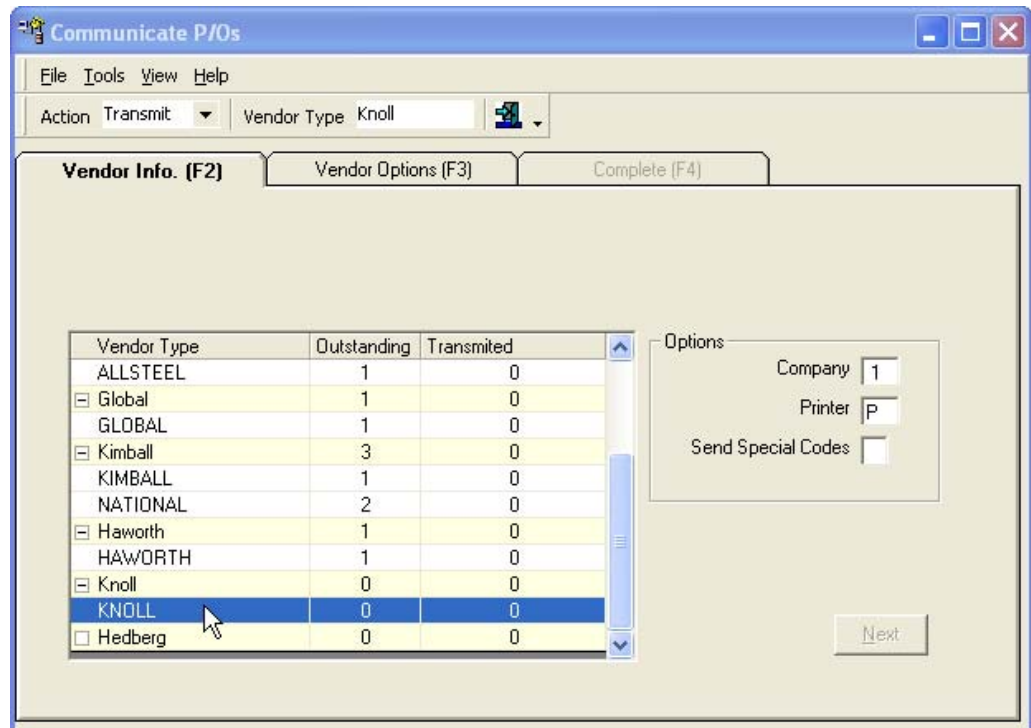


## Setting Up P/O Communication Defaults

To place an order with Knoll, you must set up default parameters in the Communicate P/Os dialog box. 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 Knoll.



- 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 dialog box opens. See Figure 4.
- 3 From the Vendor Type grid, click Knoll.
- 4 Click the View menu and select Default Vendor Options. The Communication Options dialog box opens. See Figure 5. Be sure Knoll is the vendor selected in the Vendor drop down box.
- 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 Knoll.




**Figure 4: The Communicate P/Os Dialog Box**

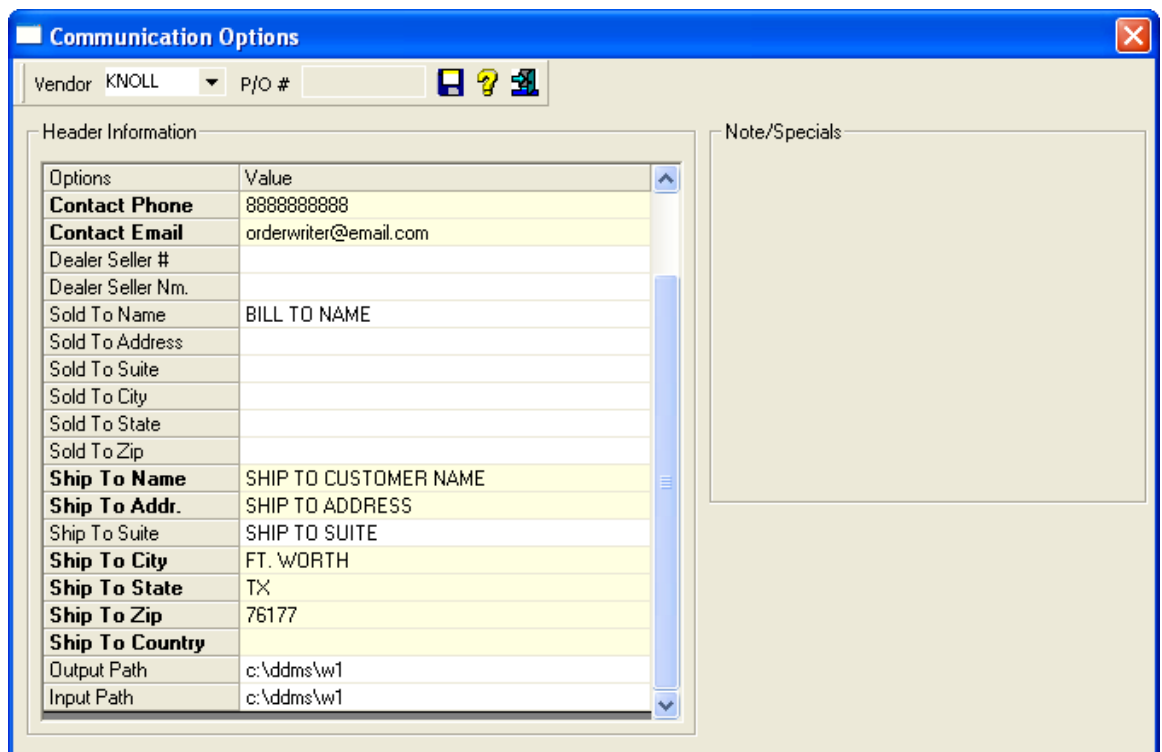
## Setting Up & Using the Knoll PSN for DDMS

If you do not set any defaults, each time you build a P/O for Knoll, 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 the following defaults:


- Order Type is specified by the following codes:  
SO Standard Order  
SQ Knoll Now
- In the Contract box, click  to look up the contract number and set a default contract.
- Dealer Seller boxes are for order writer information. Enter your phone number and e-mail address.
- In the Ship To boxes, enter your company's warehouse address where the shipment is to be delivered. If there is an alternate ship to address on the purchase order, the system populates these boxes with the customer's ship to address from the ticket.



Options	Value
<b>Contact Phone</b>	8888888888
<b>Contact Email</b>	orderwriter@email.com
Dealer Seller #	
Dealer Seller Nm.	
Sold To Name	BILL TO NAME
Sold To Address	
Sold To Suite	
Sold To City	
Sold To State	
Sold To Zip	
<b>Ship To Name</b>	SHIP TO CUSTOMER NAME
<b>Ship To Addr.</b>	SHIP TO ADDRESS
Ship To Suite	SHIP TO SUITE
<b>Ship To City</b>	FT. WORTH
<b>Ship To State</b>	TX
<b>Ship To Zip</b>	76177
<b>Ship To Country</b>	
Output Path	c:\ddms\w1
Input Path	c:\ddms\w1

**Figure 5: The  
Communication  
Options Dialog  
Box**

## Setting Up & Using the Knoll PSN for DDMS


- 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 \\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 \\ddmserver name\path. For example, a valid path is \\ddmserver\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

- 1 Import the SIF to Order Entry
- 2 Build the P/O
- 3 Upload the P/O to Knoll
- 4 Finish the order using Knoll's e-ordering site.

## 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 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.
- 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, as shown in Figure 6. You should complete the following date boxes each time you begin an order: Customer Due, Est Delivery, and Est Install.

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**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.

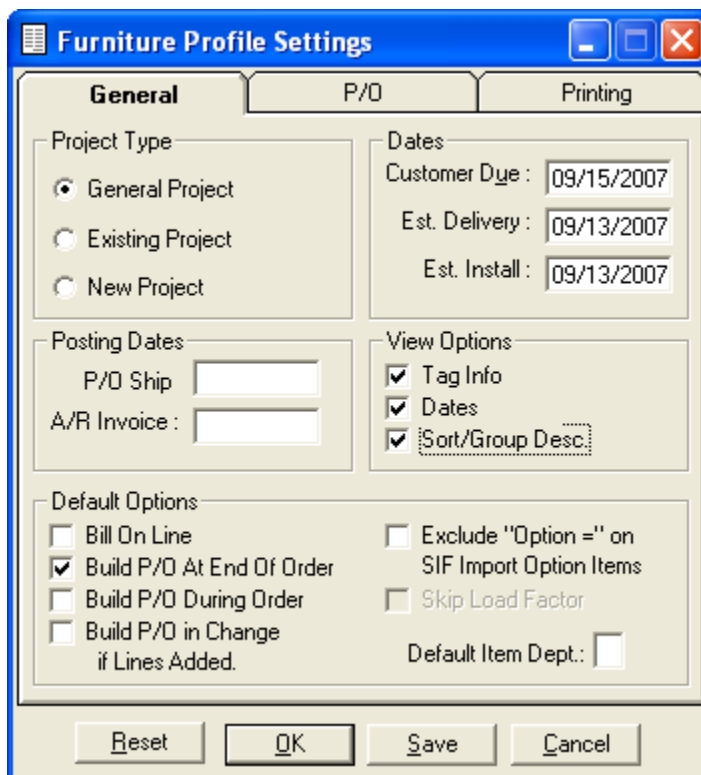
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- 7 In addition to the date and Tag Info options, you can also change posting dates and printing information. For details concerning all the boxes in this dialog box, see your online help.
- 8 When you complete the changes, click OK.
- 9 Click the Item Detail tab. See Figure 7.
- 10 Click  to open the SIF Specifier, and perform the standard operations to create the item.

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

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**Figure 6: The Furniture Profile Settings Dialog Box**

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- 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. Click the Order Totals tab.
- 14 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.

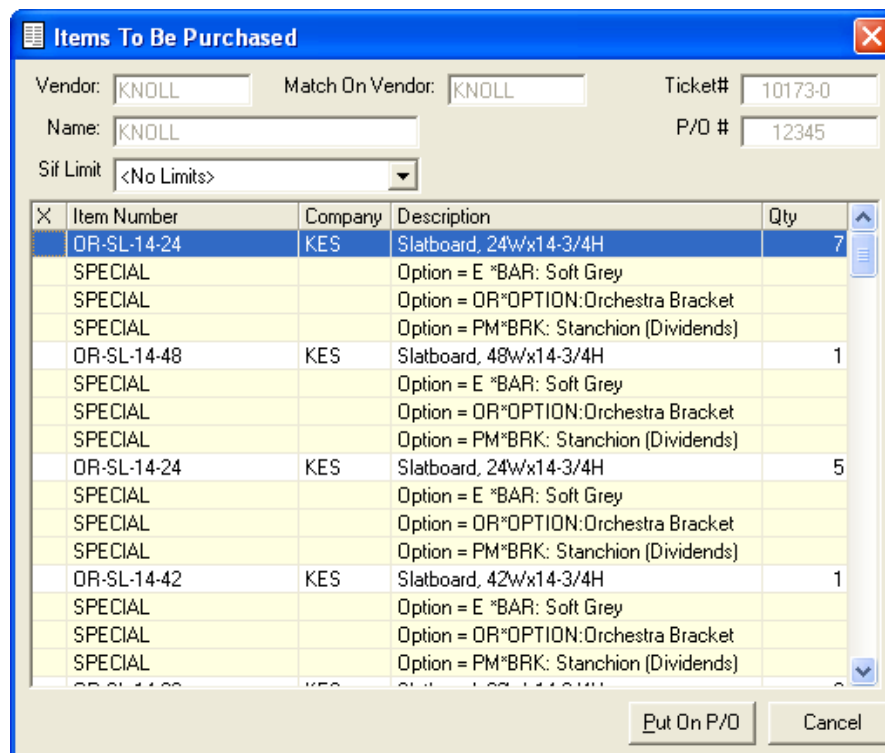
- 15 The Order Totals tab opens. At this point, you can end the order or make changes to the ending order status or printer information, and enter an end line special. For details on changing this information, see your online help.

**Figure 7: The Item Detail Tab**



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- End the P/O, which you must check to end the P/O before you can transmit it to Knoll.
- 2 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. 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. To exclude a P/O from being transmitted to Knoll, click the Exclude from Transmit P/O box. 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 9. The system automatically checks the items that match the vendor alias, KES, 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.



X	Item Number	Company	Description	Qty
	OR-SL-14-24	KES	Slatboard, 24w x 14-3/4H	7
	SPECIAL		Option = E *BAR: Soft Grey	
	SPECIAL		Option = OR*OPTION:Orchestra Bracket	
	SPECIAL		Option = PM*BRK: Stanchion (Dividends)	
	OR-SL-14-48	KES	Slatboard, 48w x 14-3/4H	1
	SPECIAL		Option = E *BAR: Soft Grey	
	SPECIAL		Option = OR*OPTION:Orchestra Bracket	
	SPECIAL		Option = PM*BRK: Stanchion (Dividends)	
	OR-SL-14-24	KES	Slatboard, 24w x 14-3/4H	5
	SPECIAL		Option = E *BAR: Soft Grey	
	SPECIAL		Option = OR*OPTION:Orchestra Bracket	
	SPECIAL		Option = PM*BRK: Stanchion (Dividends)	
	OR-SL-14-42	KES	Slatboard, 42w x 14-3/4H	1
	SPECIAL		Option = E *BAR: Soft Grey	
	SPECIAL		Option = OR*OPTION:Orchestra Bracket	
	SPECIAL		Option = PM*BRK: Stanchion (Dividends)	

**Figure 9: Items To Be Purchased Dialog Box**

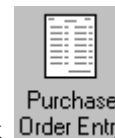
- 7 At the Finished Adding Items to P/O message, click OK.
- 8 The Purchase Order Information dialog box reopens for every vendor alias match on the order. After you select the vendor to which to send this purchase order, enter the appropriate information. When the Items to Be Purchased dialog box reopens, select the items to purchase and click Put On P/O.
- 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.

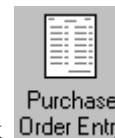
## Uploading P/Os

Purchase orders are exported from DDMS to a text file using the Transmit action in the Purchase Order Entry Communicate dialog box.

The text file is usually stored on the dealer's network server in a shared folder (\\TKI-SERVER\1TO1\APPEND). The text file is imported and sent to Knoll.

To build the exported text file:



- 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 Knoll.
- 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.
- 6 When you finish, click OK.
- 7 Click Next. The Vendor Options (F3) tab opens, displaying the vendor default options. There are certain boxes that must be completed before you can build the purchase order. The required boxes are marked with a Y in the Required column and appear in yellow. To add to the vendor options, click the line to add or change and enter the new text. You can also add or change the vendor default information.
  - Inst. boxes are for the Installation Ship To information. Enter the name and address to which to ship the product to be installed.

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- 8 When you finish, click Next. If the Next button is dimmed, make sure all the required boxes are complete. You cannot build the purchase order until these boxes are complete.
- 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 Once the purchase order is built, a Complete message appears in the box on the left side of the tab. See Figure 10.

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**Note:** For more information on Knoll's Orderline process visit <http://exchange.knoll.com>.

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- 11 Visit <http://exchange.knoll.com> to upload the file.

**Figure 10:**  
**Complete**  
**Message**

