Phase II: Setting Up & Using the Lagasse PSN

ECi

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Contents

Setting Up the Lagasse PSN

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

Setting parameters to communicate with Lagasse involves:

1. Setting up your EDI record
2. Setting up your Vendor database
3. Creating a Lagasse customer record
4. Setting up trading partner parameters
5. Setting up the communication parameters.

You must have DDMS version 8.18.60 or higher to use the Lagasse PSN.

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.

Setting Up the EDI Record

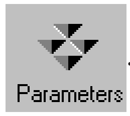
If you already have information in the EDI record of the (L6WB) screen, contact Lagasse, as they need this information. Then, go to **Setting Up Your Vendor Database.**

Figure 1: The (L6WB) AT&T EDI IMS Parameters Screen

```
14:51:07                    AT&T EDI IMS Parameters                     03/13/03
================================================================================
             Modem Parameters                 |          EDI Parameters
----------------------------------------------|---------------------------------
Hayes Only ?           Capture Log  ?  (Y/N)  |
Prefix     ?9,             Reliable ?Y        |   Code       :00
Phone Nbr  #18003520192    Baud     :9600     |   Logon Id   :OPD000004
                                              |   Password   :DDMS.OPUS
                                              |   Qualifier :ZZ
Phone Line #M1                                |   Id         :6203017821
   Custom String [                    ]       |   Code       :6203017821
                                              |   File Type :
                                              |   Backorders :      (SA = NO B/O)
                                              |                     (SS = B/O)
                                              |---------------------------------
                                              |      Location
                                              |   1 [________]
                                              |   2 [________]
                                              |   3 [________]
                                              |   4 [________]
                                              |   5 [________]
                                              |
================================================================================
```

If the EDI record is blank, complete it using these instructions:

1 From the DDMS Master Menu, double-click 

, then double-click 

. In the Parameter Editor window, double-click Text Base Parameters to access the (L) Parameters screen.

2 In the (L6WB) screen, tab to the Qualifier field, as shown in Figure 1. Enter your selection from the following:

Ø1 (This is the preferred qualifier.)

16

ZZ

3 In the ID and Code fields, enter information according to the following:

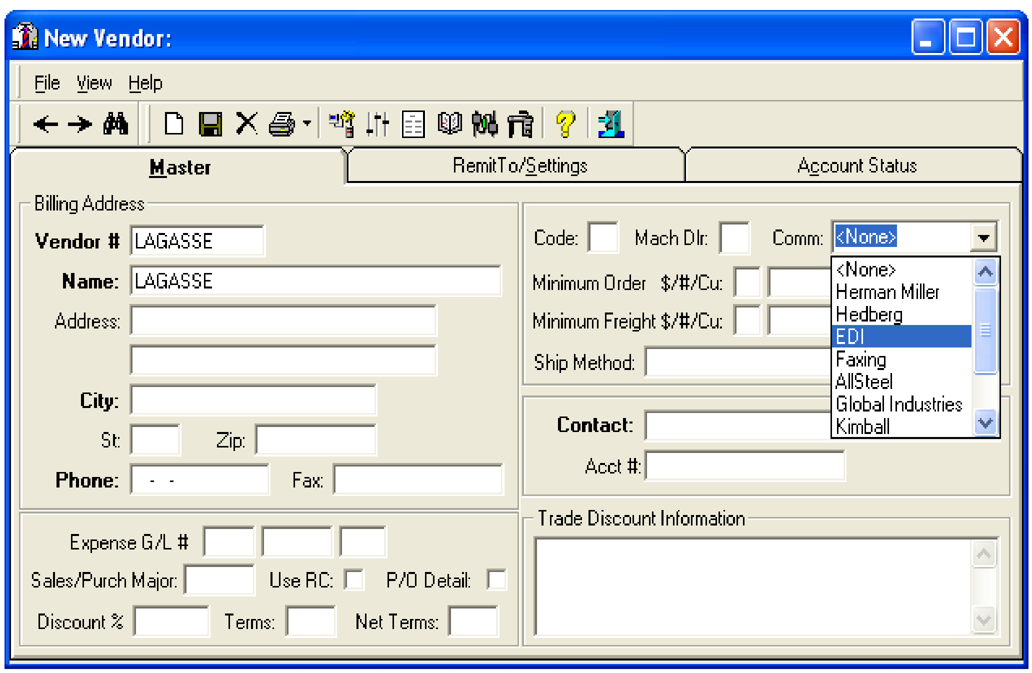
If your qualifier is Ø1, enter your DUNS number.

If your qualifier is 16, enter your DUNS number plus 4 letters.

If your qualifier is ZZ, enter your 10-digit business phone number.

4 Press Enter to save your changes.

Figure 2: The Vendor Master Tab



Setting Up Your Vendor Database

For more information on setting up a vendor, see your online help.

You must set up the appropriate destination ID for Lagasse and select the features to enable.

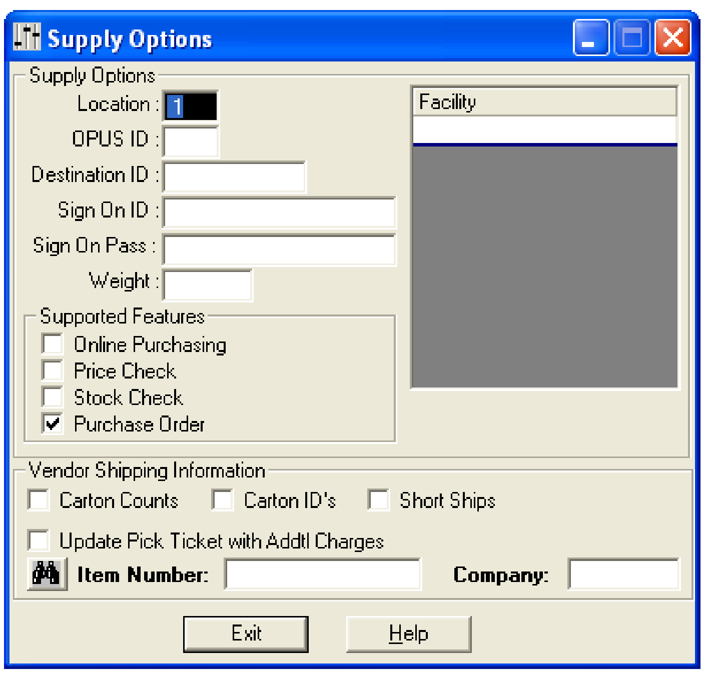
1 Set up Lagasse as a vendor.

- **1.1** In the Vendor Master tab, click .
- **1.2** Click the Vendor # box and type **LAGASSE**
- **1.3** Click the Name box and type **LAGASSE**
- **1.4** Click the Comm box's down arrow. From the menu, click EDI. See Figure 2.
- **1.5** Click .

2 Set PSN parameters.

- **2.1** Click .
- **2.2** The Supply Options dialog box opens, as shown in Figure 3. In the Location box, enter a G/L location, or accept the default of 1.
- **2.3** In the Destination ID box, enter your Lagasse ID exactly as follows: **LAGASSE**
- **2.4** In the Sign On ID box, enter the contact ID provided by your Lagasse sales representative.

Figure 3: The Supply Options Dialog Box



Note: If the contact ID provided by Lagasse contains a prefix of EDI, do not enter this prefix.

2.5 In the Supported Features list, click Purchase Order.

2.6 When finished, click Exit.

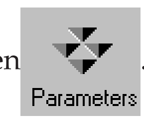
3 In the Vendor Master tab, click .

Creating a Customer Record

In the DDMS Customer Master tab, create a customer with LAGASSE as the account number and name.

Before you create the customer record, if your account numbers are automatically assigned, you must remove your Next Customer # in the (LA) Customer and A/R Parameters screen.

1 From the DDMS Master Menu, double-click 

, then 

.

Next, double-click Text Base Parameters. The (L) Parameters screen opens. Type **A** in the Selection Code field.

2 The (LA) screen opens. Type **C** in the Action field.

3 Tab to the Next Customer # field. Note the number in this field and save it for later. See Figure 4.

4 Space through the number in the Next Customer # field to remove it.

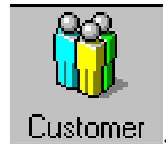
5 Press Enter until the Press Any Key to Continue prompt displays at the bottom of the screen.

Figure 4: The (LA) Customer and A/R Parameters Screen

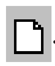
```
11:27:32               (LA)  Customer And A/R Parameters              01/25/05
================================================================================
Action [C] (C=Chg,I=Inq,1=Sales,2=A/R,3=Statement,4=Jour,5=Deposit) G/L Loc [ 1]
================================================================================
Next Customer #     10018  Allow Manual Input ?N  Save Changes ?N  Swap Name ?Y
Inc/Exc In (B) ?I   From ?  To ?    From ?  To ?   Add In (B) Y/N ?N  Status ?A
Inc/Exc In (G) ?I   From ?  To ?    From ?  To ?   Add In (G) Y/N ?N  Status ?A
Passwords:   Reindex ?DDMS   Release ?DDMS      Purge ?DDMS       EOM ?DDMS
             Delete  ?DDMS   Credit Card ?      Mask Inquiry ?N   EOY ?DDMS
Monthly Usage From ?M To ?M   Quarterly Usage From ?Q To ?Q
Print Copies With Original Invoice Y/N ?Y       National Drop Ship Route [NDS ]
In O/E on Customer Query, Display Shipto Address instead of Billto Y/N ?Y
In Gateway Set Shipto Name to ?  (A=Add. Name, C=Add. Contact, S=Shipto Contact)
    Set Dept Name to ?  (B=Billto Name, A=Add. Name, C=Add. Cont., S=Ship Cont.)
Keep Service Quality Statistics for Customer Status : [A] to [Z] + [ , , , , ]
Locs.to Exclude from Service Quality Statistics [  ] to [  ] + [  ,  ,  ,  ,  ]
Auto-Bill Invoices:   Print, Fax, Neither P/F/N ?N  Formats: Invoice :   Fax :
Sort Order ?N (#=Customer Nbr, N=Customer Name, R=Route, Z=Zip Code)
Only Bill Auto-Bill records that have a Quantity greater than Zero Y/N ?
Create Line Item Special from Auto-Bill Remarks Y/N ?
Advanced Customer Queries Y/N ?         Suite instead of Street on Queries Y/N ?
Show Master Shipto's if none on Dept. Y/N ?
```

6 Press Esc multiple times to return to the Parameter Editor window.

In the Customer Master tab, create a Lagasse customer.

1 From the DDMS Master Menu, double-click 

. The Customer window opens, displaying the information for the last customer selected.

2 Click . The boxes in the window are cleared.

3 Click the Account # box and enter an account number for the LAGASSE customer. See Figure 5.

4 In the Name box, enter a name for the LAGASSE customer.

5 When you finish, click .

6 If you removed the number from the Next Customer # field in the (LA) screen when you started setting up the customer, follow these instructions to replace it now.

   6.1 In the (LA) screen, type **C** in the Action field.

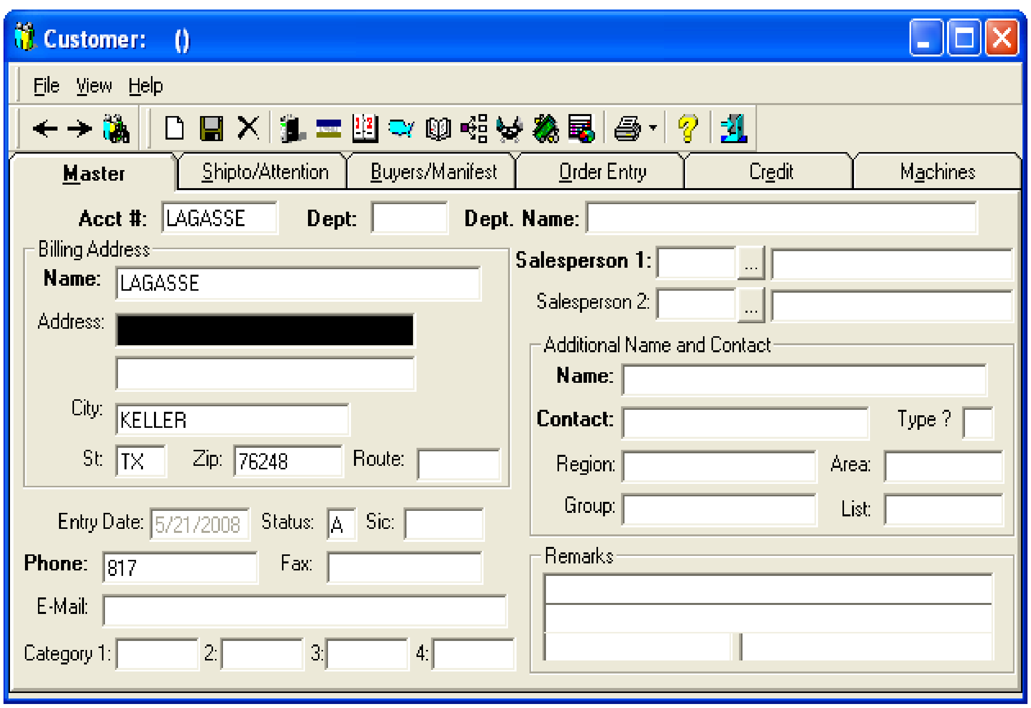


Figure 5: Creating a Customer Record

6.2 Tab to the Next Customer # field. Enter the number you noted previously and press Enter.

6.3 Press Enter until the Press Any Key to Continue prompt displays at the bottom of the screen.

6.4 Press Esc multiple times to return to the Parameter Editor window.

Setting Up Trading Partner Parameters

Set up trading partner parameters in the (SGA) screen, which is text-based. Open your TBL client to access the Master Menu and type **SGA**. To set up your trading partner parameters:

1. In the (SGA) screen, select the [C] Change action code.
2. Tab to the Account # field. Type **LAGASSE** and press Enter.
3. At the Correct Record prompt, press Enter.
4. Tab to the Interchange ID Qualif field and type **Ø1**. See Figure 6.
5. In the ID field, type **5047365684**
6. Tab to the Interchange Control Std field and type **X**
7. In the Version field, type **ØØ4Ø1**
8. In the Receivers Code Id field, type **5047365684** and press Tab.
9. In the Responsible Agency Code field, type **X**
10. In the Version field, type **ØØ4Ø1Ø**

Figure 6: The (SGA) Trading Partner Parameters Screen

```
10:27:36        (SGA) TRADING PARTNER PARAMETERS REV. (06/13/03)        05/22/08
--------------------------------------------------------------------------------
 Action [C] ( C=Chg, D=Del, I=Inq, R=Ref Codes)
--------------------------------------------------------------------------------
Name :LAGASSE                          Account #   LAGASSE Dept :
                                          KELLER                      TX
                                           817-   -
--------------------------------------------------------------------------------
EDI VAN  :N                                        Auto Send          :    (Y/N)
Interchange ID Qualif  :01  ID :5047365684         Negate Credit Inv. :
Auth. Info Qualif.     :    Info :                 Use Received Price :    (Y/N)
Security Info Qualif.  :    Info :                 Using 810          :
Interchange Control Std:X  Version :00401          Using 855          :
Receivers Code Id      :5047365684                 Auto Create Orders :    (Y/N)
Responsible Agency Code:X Version :004010          Sales Auto Group   :
Interchange Control#    10046                      Auto 850 Sendfile  :
Group Control      #    20046                      Default Selector   :
                                                    ======= Shipping Info =======
Test Indicator  :P (T/P)  Buy Unit:  (S/M/W)      | Contract #
Acknowledgement :         Customer Ref :          | Delivering Dlr #
Release/Contract:         1:  2:                  | Contracting Dealer #
Round Quantities when Needed U/D/R ?  Seg Term:~~ | 2nd Party Delivery :
--------------------------------------------------------------------------------
                    CORRECT RECORD Y/N ?Y
```

11 Tab to the Test Indicator field and type **P**

12 Tab to the Seg Term field and enter two tildes (type ~~).

Note: The tilde key (~) is usually located in the upper left portion of the keyboard.

---

13 Press Enter through the screen to accept changes.

Setting Communication Parameters

To set up communication parameters in DDMS:

1 Set up the Vendor Private Communications Network window.

1.1 In the Vendor window, select the LAGASSE vendor.

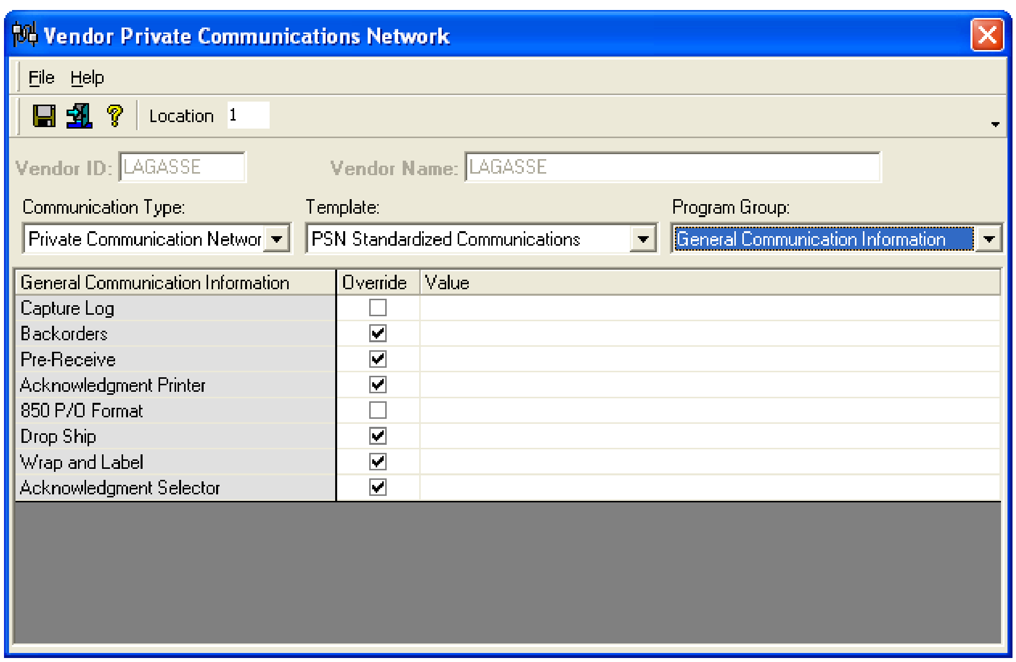
1.2 Open the Vendor Private Communications Network window. To do so, click View and select PCN; press Ctrl + U; or click .

1.3 From the Communication Type drop down list, select Private Communication Network.

1.4 From the Template drop down list, select PSN Standardized Communications.

2 Set the general communications parameters in the Vendor Private Communications Network window.

Figure 7: The Vendor Private Communications Network Window



2.1 From the Program Group drop down list, click General Communication Information. The available parameters are listed in the General Communication Information column. See Figure 7.

2.2 Add a default value by entering it in the Value column. Check the corresponding Override box to allow this information to be changed during communication. You can set these parameters as you choose, with the following exceptions:

2.3 Set Pre-Receive to **Y**

2.4 Set Acknowledgment Print to the printer on which you want to print the acknowledgment.

2.5 Set the 850 P/O Format to **850GEN**

2.6 In the Drop Ship Value box, type **Y** to use the drop ship feature.

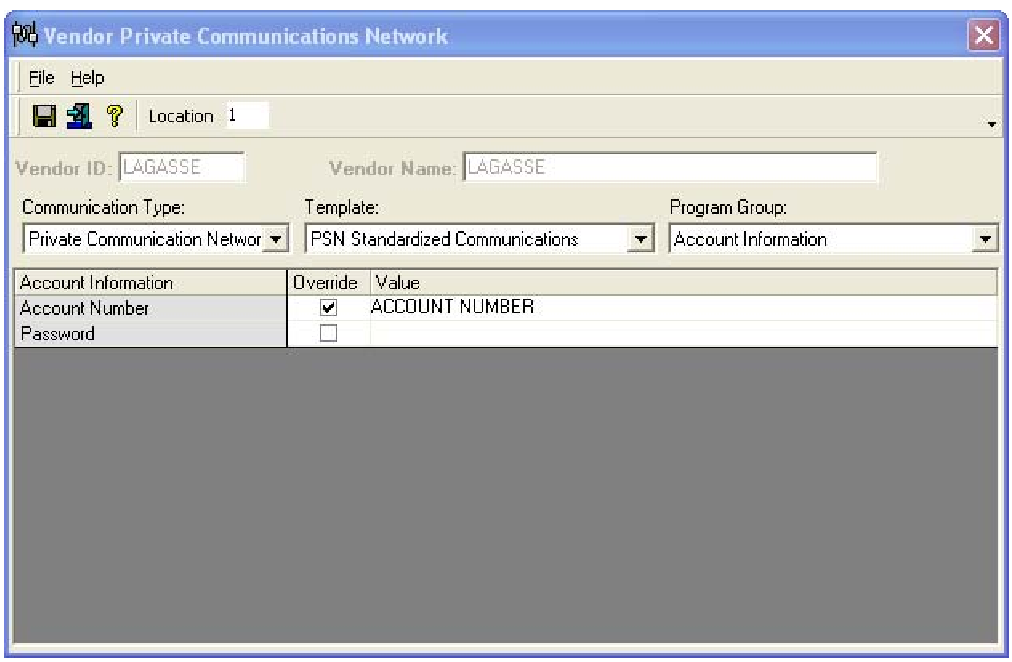
2.7 In the Acknowledgment Select Value box, type **LAGACK**

2.8 When finished, click .

3 Set the account parameters in the Vendor Private Communications Network window. The information in this box comes from Lagasse.

3.1 From the Program Group drop down list, click Account Information. The available parameters are listed in the General Communication Information column. See Figure 8.

Figure 8: Setting the Account ID



3.2 Add a default value by entering it in the Value column. Check the corresponding Override box to allow this information to be changed during communication. You can set these parameters as you choose, with the following exceptions:

3.3 Enter your account number in the Account Number Value box.

3.4 In the Password Value box, enter your password.

3.5 When you finish, click .

4 Set the shipping address parameters in the Vendor Private Communications Network window.

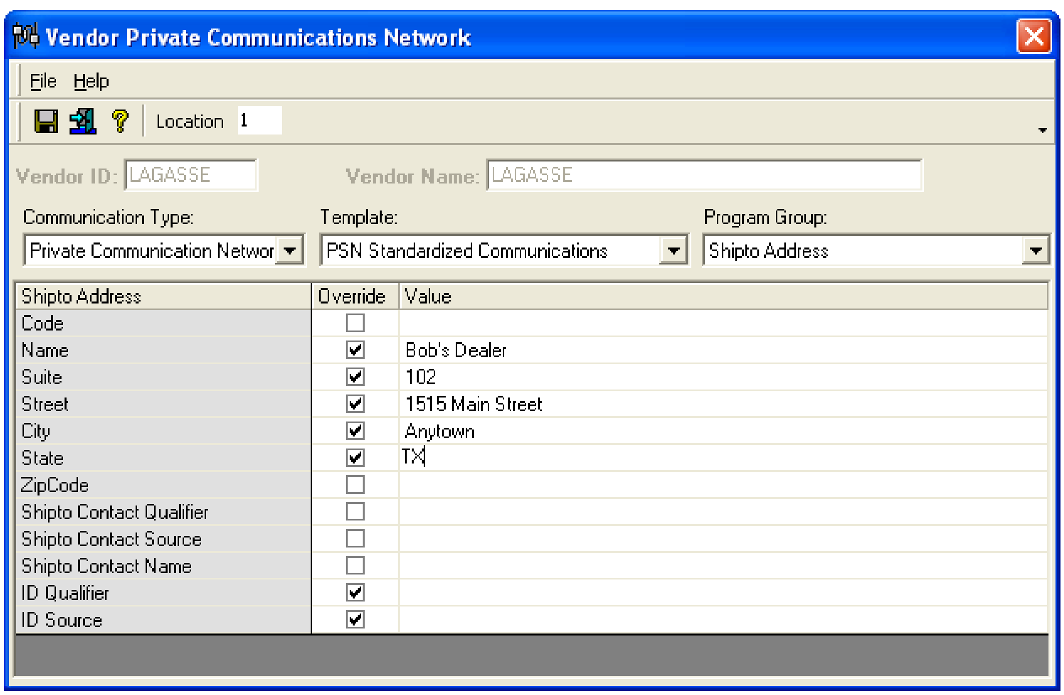
4.1 From the Program Group drop down list, click Shipto Address. The available parameters are listed in the Shipto Address column. See Figure 9.

4.2 Add a default value by entering it in the Value column. Check the corresponding Override box to allow this information to be changed during communication.

Note: You must set a default ship to. If the order is flagged as drop ship, the customers' address is sent to Lagasse.

4.3 When you finish, click .

Figure 9: Setting the Shipto Address Information



5 Set the billing address parameters in the Vendor Private Communications Network dialog box.

5.1 From the Program Group drop down list, click Billto Address. The available parameters are listed in the Billto Address column.

5.2 Add a default value by entering it in the Value column. Check the corresponding Override box to allow this information to be changed during communication.

Note: You must set a default billto address or the billto address is pulled from the LØ screen.

5.3 When you finish, click .

6 Set the end consumer parameters in the Vendor Private Communications Network window.

6.1 From the Program Group drop down list, click End Consumer Information. The available parameters are listed in the End Consumer Information column.

6.2 Add a default value by entering it in the Value column. Check the corresponding Override box to allow this information to be changed during communication. You can set these parameters as you choose, with the following exceptions:

6.3 In the Purchase Order Number Qualifier Value box, type **EU**

Figure 10: Transmitting P/Os Online

```
11:02:33        (SR) Purchase Order Reports  rev. (03/31/08)          05/22/08
================================================================================
A. Print P/O's.  P/O Form Format Y/R/B/S ?.  Past Due Y/N ?.  Outstanding Y/N ?.

B. Transmit P/O To Vendor          Send Special Codes ?   DMI         TPA
C. Receive P/O Transmission From Vendor.                  TECHDATA    XSTAMPER
D. Print P/O Receipts From Vendor.    Delete File Y/N ?   ISG         LAGASSE
F. Talk To Wholesaler.                            Who ?   ARLINGTON   EDUCATORS
I. Receive Electronic Invoice.    Regional Wholesaler ?   AOPD        OFFICE MAX

E. Backorder Reports.            Short Buy Report Y/N ?
   Keep Short Buy File for P/O's ?.   Print All ?.
M. Debit Memo Report.
P. Purge Purchase Orders.
       From File [PO-MASTER ] Vol. [W1  ]
         To File [JOUR-PO   ] Vol. [W1  ]
            Up to Receive Date   ../../..
R. Inquire or Report on Archive   Reindex Y/N ?.
S. Compare Vendor Purchases with Daisytek

     P/O Numbers  #..........  To #..........
     Vendor Nbr   #..........  To #..........
Request [B]   Location ? 1   Printer ?P1  COMPANY ?     Totals Only ?N Y/N
```

6.4 In the Purchase Order Number Source Override Value box, type **P** if your customers use standard P/O numbers (10 characters). Type **L** if customers use long P/Os (30 characters).

6.5 In the Attention Source Value box, type **A** to use the additional name information from the Attention Special, **W** to use the additional name information from the Who Called Special, or **E** to use the additional name information from the End Line Special.

6.6 In the Route Value box, type **Y** to send the route or **N** to not send the route.

6.7 When you finish, click .

Using PSN

After building a P/O, you can transmit it online to Lagasse.

1. In the (SR) Purchase Order Reports screen, type **B** in the Request field. See Figure 10.
2. Tab to the Who field and type **N** to select General PSN Vendor Communications.
3. In the P/O Numbers field, enter the number of the P/O to send. To send more than one P/O, enter the number of the first P/O in the P/O Numbers field. Enter the number of the last P/O in the To # field.
4. Press Enter until the Are You Sure prompt appears. Type **Y**

Figure 11: Selecting the General Communication Parameter Group

```
11:07:08      Vendor Private Communication Network Rev. (01/16/08)      05/22/08
================================================================================
 ACTION [C]  A=Add, C=Change, I=Inquire                            Location [ 1]
================================================================================
Vendor#LAGASSE      LAGASSE                            Code :     G/L #   -

   Comm. Type        Template                      Parameter Group
  [PCN       ]      [PSNSTD    ]      [                                        ]
                 Parameter
[                                        ]      1-20 [                    ]
            Override [ ]                        21-40 [                    ]
                                               41-60 [                    ]
0 [General Communication Information      ]    61-80 [                    ]
1 [Account Information                    ]
2 [Shipto Address                         ]
3 [Billto Address                         ]
4 [Supplier Information                   ]
5 [End Consumer Information               ]



================================================================================
Enter Number for Selection [ ]
```

5 Now you can change shipping information or complete the transmission using the (CX) screen.

Changing Shipping Information

Before completing transmission of the purchase order, you can change the shipping information. Once you've completed the (SR) screen, the (CX) screen opens. Only the parameters that have the Override flag set in the Vendor Private Communications Network window are displayed. You can override any of these parameters in this screen.

For example, to change shipping information:

1 The Parameter Group options appear, as shown in Figure 11. Note the Parameter Group field is blank. At the Enter Number For Selection prompt, type **Ø** to select the General Communication Information parameter group.

2 The General Communication Information parameter group appears. At the Enter Number For Selection prompt, type the number that corresponds to the Drop Ship line, as shown in Figure 12.

3 In the 1-20 field, type **Y** to drop ship the order. Type **N** to use the default Shipto information set in the Vendor Private Communication Network dialog box.

4 At the Enter Number For Selection prompt, type **C** to complete the transmission.

5 The P/O is transmitted to Lagasse.

Figure 12: Selecting the Drop Ship Line

```
14:25:25 Vendor Private Communication Network Rev. (02/07/03) 10/27/03
================================================================================
ACTION [ ] A=Add, C=Change, I=Inquire Location [ 1]
================================================================================
Vendor#__________ ______________________________ Code :_ G/L #___-__
Comm. Type Template Parameter Group
[PCN ] [LAGASSE] [General Communication Information ]
Parameter
[Drop Ship ] 1-20 [ ]
Override [Y] 21-40 [ ]
41-60 [ ]
0 [Backorders ] 61-80 [ ]
1 [Pre-Receive ]
2 [Acknowledgment Printer ]
3 [Shipping Code ]
4 [Drop Ship ]
5 [Acknowledgment Selector ]

================================================================================
Enter Number for Selection “C” - Complete, “A” - Abort [4]
```

Requesting Acknowledgements

To obtain an acknowledgment for a P/O, you must send a request to Lagasse.

1. In the (SR) Purchase Order Reports screen, type **C** in the Request field.
2. At the Are You Using Private Supply Network prompt, type **Y**
3. The (SRC) Acknowledgment Request screen opens. In the Vendor # field, type **LAGASSE**. All available acknowledgments from Lagasse are downloaded. Requests cannot be P/O specific.
4. At the Get Acknowledgement prompt, type **Y**

To pre-receive and/or print the acknowledgement:

1. Use the fields at the bottom of the screen, shown in Figure 13, to print an acknowledgement or pre-receive a P/O. Type **R** to pre-receive a P/O and print an acknowledgement. To print an acknowledgement, type **P**

Note: If you don't know if your order has been received, try to pre-receive the order while you print the acknowledgement. You can only pre-receive once, but you can print an acknowledgement as many times as necessary. You can only pre-receive or print acknowledgments that are available for downloading. Once orders are received, it takes approximately 30 minutes for Lagasse to process the orders and generate an acknowledgment.

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2. In the Printer field, enter the name of the printer to use.
3. At the Are You Sure prompt, type **Y**

Figure 13: Printing and Pre-Receiving an Acknowledgement

```
15:35:55          Acknowledgment Request Screen (04/23/03)          05/08/03
================================================================================

         P/O Number #..........                  Vendor #..........

      Transmission Date [........]          Transmission Time [........]

                              Transmission Status
         [..............................................................]

   ? - P/O Not Found   N - Not Received  F - Final Received  P - Pre-Received

    PO Nbr    Status    PO Nbr    Status    PO Nbr    Status    PO Nbr    Status
 [..........]  [.]   [..........]  [.]   [..........]  [.]   [..........]  [.]
 [..........]  [.]   [..........]  [.]   [..........]  [.]   [..........]  [.]
 [..........]  [.]   [..........]  [.]   [..........]  [.]   [..........]  [.]
 [..........]  [.]   [..........]  [.]   [..........]  [.]   [..........]  [.]
 [..........]  [.]   [..........]  [.]   [..........]  [.]   [..........]  [.]
 [..........]  [.]   [..........]  [.]   [..........]  [.]   [..........]  [.]
 [..........]  [.]   [..........]  [.]   [..........]  [.]   [..........]  [.]

P=Print Acknowledgment  R=Pre-Receive and Print Acknowledgment [P]  Printer [__]
===============================================================================
```