



*Phase II:
Setting Up & Using
Pens Plus Inc.'s
PSN*



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Setting Up PPI's PSN

To use PPI's PSN, you must be using DDMS version 8.10.40 or greater.

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

Setting parameters to communicate with PPI involves:

- 1 Setting up the Vendor database for PPI and Pens Plus
- 2 Setting PPI's communication parameters
- 3 Setting up the Salesperson database.

Email PSN installation questions to support@eci2.com

Note: Do not perform the steps listed here until you have executed the steps listed in the handout *Phase I: Setting Up PSN*. It is available at www.ddms.com/support/doc/psn.htm.

Setting Up the Vendor Database

You must set up the appropriate destination ID for PPI and select the features to enable. You must also set up a Pens Plus vendor if you have not already done so.

For instructions on setting up modem communications with PPI rather than PSN communications, see your online help.

Setting Up the PPI Vendor Database


- 1 Set up PPI as a vendor. If you already have a PPI vendor, retrieve it and go to **Step 1.4** to set up the Comm box.
 - 1.1 In the Vendor Master tab, click .
 - 1.2 Click the Vendor # box and type PPI.

Figure 1: The Vendor Master Tab

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You can also set up your vendor database through the (C) Vendor Master screen and PSN parameters through the (CS) Vendor Private Supply Network screen.




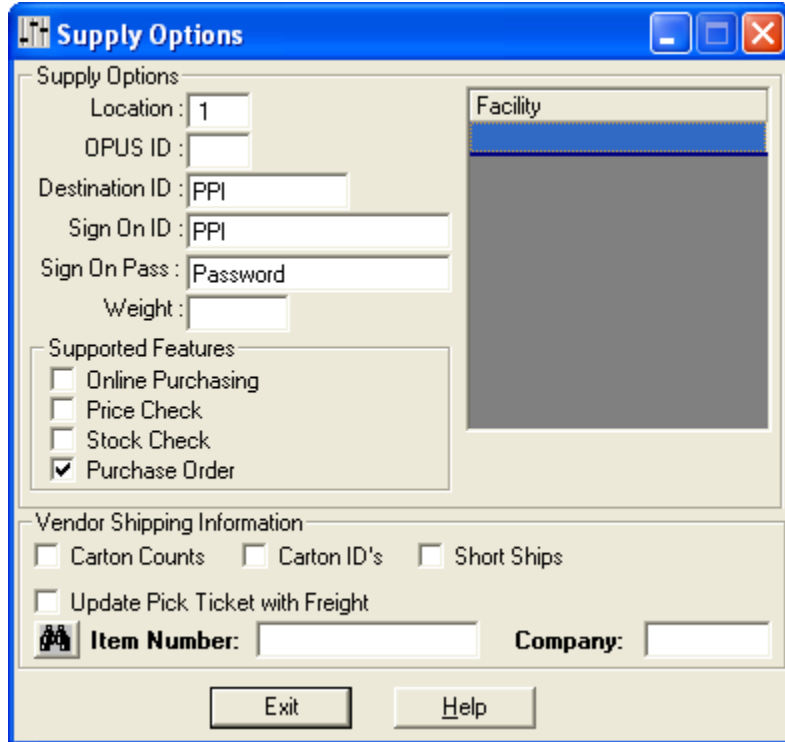
- 1.3 Click the Name box and enter a name for the PPI vendor.
- 1.4 Click the Comm box's down arrow and click EDI. See Figure 1.
- 1.5 Click .
- 2 Set PSN parameters for PPI.
 - 2.1 In the Vendor Master tab, click .
 - 2.2 The Supply Options dialog box opens, as shown in Figure 2. In the Location box, enter a G/L location, or accept the default of 1.
 - 2.3 In the Destination ID box, enter your PPI ID exactly as follows:
PPI
 - 2.4 In the Sign On ID box, enter your PPI ID.
 - 2.5 In the Sign On Pass box, enter your PPI password.
 - 2.4 From the Supported Features list, click Purchase Order.
 - 2.5 When you finish, click Exit.
- 3 Click .

Figure 2: The Supply Options Dialog Box



Supply Options

Supply Options

Location : 1

OPUS ID :

Destination ID : PPI

Sign On ID : PPI

Sign On Pass : Password

Weight :

Facility

Supported Features

Online Purchasing

Price Check


Stock Check

Purchase Order

Vendor Shipping Information





Carton Counts Carton ID's Short Ships

Update Pick Ticket with Freight

 Item Number: Company:



Exit Help

Setting Up the Pens Plus Vendor Database

- 1 Set up PENS PLUS as a vendor. If you already have a PENS PLUS vendor, retrieve it and go to **Step 1.4** to set up the Comm box.
 - 1.1 In the Vendor Master tab, click .
 - 1.2 Click the Vendor # box and type **PENSPLUS**.
 - 1.3 Click the Name box and enter a name for the PENS PLUS vendor.
 - 1.4 Click the Comm box's down arrow and click EDI.
 - 1.5 Click .
- 2 Set PSN parameters.
 - 2.1 In the Vendor Master tab, click .
 - 2.2 The Supply Options dialog box opens. In the Location box, enter a G/L location, or accept the default of 1.
 - 2.3 In the Sign On ID box, enter your PENS PLUS ID provided by Pens Plus.
 - 2.4 In the Sign On Pass box, enter your PENS PLUS password provided by Pens Plus.
 - 2.5 From the Supported Features list, click Price Check and/or Stock Check, then click Purchase Order.
 - 2.6 When you finish, click Exit.
- 3 Click .

Setting PPI Communication Parameters

You must set up communication parameters for PPI.

- 1 In DDMS, double-click  , then double-click  .
- 2 In the Parameter Editor window, double-click Text Base Parameters to access the (L) Parameters screen.
- 3 In the (L) screen, type **6** in the Selection Code field. The (L6) Vendor & Wholesaler Communications screen opens.
- 4 In the (L6) screen, type **E** in the Selection Code field. The (L6E) Wholesaler Group Communications screen opens.
- 5 In the (L6E) screen, type **F** in the Selection Code field. PPI's Wholesaler Group Communications screen opens.

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- 6 Tab to the PSN field, shown in Figure 3. Type **Y**. This enables TCP/IP communications. All communications are via TCP/IP until you space through the Y to leave the field blank. You can switch between TCP/IP and modem communications at any time. This is especially helpful during server maintenance. When you switch between TCP/IP and modem communications, you do not need to reboot.
- 7 Tab to the Customer ID field and enter your customer ID.
- 8 Tab to the Password field and enter your PPI password.
- 9 Tab to the File Type field. Use the Ordering Parameters section to specify how you handle PPI orders.
 - 9.1 In the File Type field, enter the type of item file you load. Type **M** to use Moore. Type **B** to use O/PUS.
 - 9.2 In the Partial Ship field, type **Y** to accept partial shipments. Type **N** to accept only complete orders.
 - 9.3 In the Auto Subs field, type **Y** to allow substitutions. Type **N** to send the actual item ordered.
 - 9.4 Use the Min Qty field to specify whether to round up or to cancel an item if it is below the wholesaler's minimum.

For example, suppose you order six pencils and the minimum order quantity is 12. You could either cancel the item or round the quantity ordered up to 12.

Type **1** to cancel the item. Type **2** to round up the quantity ordered to the wholesaler's minimum.

Figure 3: Setting Up the (L6E) Screen

```

10:59:41                Wholesaler Group Communications Screens                01/24/07
=====
Communication Parameters                Wholesaler Group Parameters
-----
Hayes Only ?Y (Y/N)    Capture Log ?Y (Y/N)    Customer Id [00009  ]
Prefix ?9,            Reliable ?Y          Password [TEST99  ]
Batch #18009724929    Block Size #       Transmit Id [EXEC RWCEDI1 ]
On-Line #18007924928  Baud :19.2         Receive Id [EXEC RWCGRECON ]
Library [RWCGLIB  ]

Phone Line #M1                PSN ?Y
Custom String [                ]

----- Secondary Locations -----
2 #          3 #          4 #
5 #          6 #          7 #
8 #          9 #          10 #

----- Ordering Parameters -----
File Type ?W
Partial Ship ?Y (Y or N)
Auto Subs ?Y (Y or N)
Min Qty ?2 (1 or 2)
O/H Branch ?G (G or R)
Wrap-N-Pack ?N (Y or N)
Multiple D/S ? (Y or N)
Pre-Receive ?F (Y or N)
Backorders ?N (Y or N)
Label Option ?
Printer ?P1
=====



```

- 9.5 In the O/H Branch field, type **G**.
- 9.6 In the Wrap-N-Pack field, type **Y** to ship the order to the customer directly from the wholesaler. Type **N** to ship it from your warehouse.
- 9.7 In the Multiple D/S field, type **Y** to place multiple drop ship orders on a single P/O. Type **N** to place a single drop ship order on a P/O.
- 9.8 In the Pre-Receive field, type **Y** to pre-receive the order when the acknowledgment prints. Type **N** if you are not pre-receiving the order. Type **F** to final-receive the P/O without pre-receiving. Typing **F** updates receipts and your ITEM AUX file. You can also use this field to set PPI Auto Flush. For more information see *Setting Up Auto Flush* located at http://www.ddms.com/Resources/Support/faq/purch_comm/PAutoFlush.pdf.
- 9.9 In the Backorders field, type **Y** to accept backorders for items not in stock. Type **N** to cancel items not in stock.
- 9.10 In the Label Option field, enter the label option to use.
 - Type **I** for Invoice Number
 - Type **C** for Customer Short PO.
 - Type **F** for Dealer PO Number.
 - Type **R** for Route Code.
 - Type **W** for Who Called.
 - Type **E** for End Line.
 - Type **S** for Customer Sort.
 - Type **N** for Customer Name.
 - Type **L** for Customer Long PO.
 - Type **A** for Attention Special.
 - Type **1** for Label Z Line 1.
 - Type **2** for Label Z Line 2.
- 9.11 In the Printer field, enter the name of the printer to use.
- 10 When you finish, press Enter to save your changes.

Setting Up the Salesperson Database

This setting lets the selected order-writer perform price and stock checks.

You can also set salesperson parameters through the text-based (HYL) Salesman Price Check Parameters screen.

- 1 From the DDMS Master Menu, double-click  .
- 2 In the Master tab, click the Salesperson # box and enter the number for the salesperson.
- 3 Click the Price Check tab, as shown in Figure 4.
- 4 In the Allow Online Vendor Checks box, type Y.
- 5 To allow price checks only, click Price. To allow stock checks only, click Stock. To allow both, click Both.
- 6 Click .

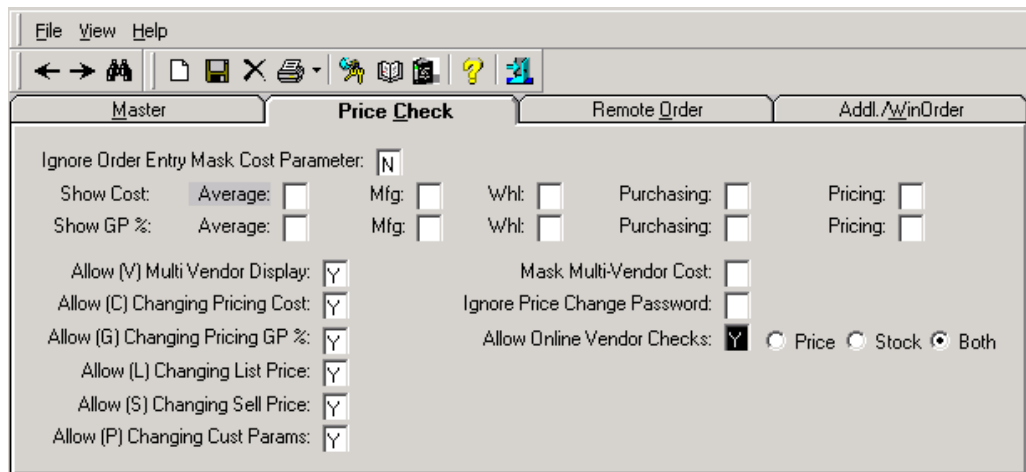
Using PSN

Before using PSN the first time, you must send test purchase orders to PPI to confirm proper setup. There may be slight differences in the acknowledgment format. If you experience any problems, email support@eci2.com.

Now that you've set up your system for PSN, you can:

- Check vendor stock/price
- Transmit P/Os to PPI
- Request acknowledgments.

Figure 4: The Price Check Tab in the Salesperson Window



Master	Price Check	Remote Order	Add./winOrder
Ignore Order Entry Mask Cost Parameter: <input type="checkbox"/> N			
Show Cost: Average: <input type="checkbox"/>	Mfg: <input type="checkbox"/>	Whl: <input type="checkbox"/>	Purchasing: <input type="checkbox"/>
Show GP %: Average: <input type="checkbox"/>	Mfg: <input type="checkbox"/>	Whl: <input type="checkbox"/>	Purchasing: <input type="checkbox"/>
Allow (V) Multi Vendor Display: <input checked="" type="checkbox"/> Y	Mask Multi-Vendor Cost: <input type="checkbox"/>		
Allow (C) Changing Pricing Cost: <input checked="" type="checkbox"/> Y	Ignore Price Change Password: <input type="checkbox"/>		
Allow (G) Changing Pricing GP %: <input checked="" type="checkbox"/> Y	Allow Online Vendor Checks: <input checked="" type="checkbox"/> Y <input type="radio"/> Price <input type="radio"/> Stock <input checked="" type="radio"/> Both		
Allow (L) Changing List Price: <input checked="" type="checkbox"/> Y			
Allow (S) Changing Sell Price: <input checked="" type="checkbox"/> Y			
Allow (P) Changing Cust Params: <input checked="" type="checkbox"/> Y			

Checking Vendor Stock/Price

Using PSN, you can check vendor stock availability and price from within Order Entry. When you check an item's price or availability, PSN checks your I-CAT file (updated by your O/PUS load) to see which vendor(s) carries the item. Then it checks the Supply Options window in the Vendor database for trading partners with enabled stock and price checks. Finally, the program retrieves your ISA ID from the (L6X) PSN Parameter Screen. PSN then checks the trading partner's available quantities and pricing via the Internet and displays the results in Order Entry.

Note: By setting up the Salesperson database, an order-writer can check pricing and availability at any time. For more information, refer back to the heading **Setting Up the Salesperson Database**.

To check vendor stock availability and price from Order Entry:


- 1 From the DDMS Master Menu, double-click  Order Entry.
- 2 When the Order Entry window opens, begin placing an order in the usual manner. For details, see your online documentation.
- 3 Click the Item Detail tab, shown in Figure 5, or press F3. In the Item box, retrieve the item for which to check pricing or availability. You can retrieve items by item number, item description, or company. Or you can use the Item Query dialog box. For details, see your online documentation.

Figure 5: The Item Detail Tab in the Order Entry Window

Item Number	Company	Description	UM	Cts	Order	Ship	Extended Sell
00683							
00666	RIV	PAPER,ROLLS,DECOR	084001006667	UNITED	00666	UNC	EA
00669	FEL	POCKET,FILE,MAGAZIN	077511006692	UNITED	00669	829	EA
00670	FEL	POCKET,FILE,MAGAZIN	077511006708	UNITED	00670	829	EA
00671	FEL	POCKET,FILE,MAGAZIN	077511006715	UNITED	00671	829	EA
00672	FEL	POCKET,FILE,MAGAZIN	077511006722	UNITED	00672	714	EA
00674	FEL	POCKET,FILE,MAGAZIN	077511006746	UNITED	00674	829	EA
00680	BOS	MACHINE,NUMB REGA	077914006800	UNITED	00680		EA

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- 4 At any time after you retrieve the item, right-click the item and click Vendor Stock Check, as shown in Figure 6.
- 5 The Stock/Price Check dialog box opens. Click the check box of the vendor(s) you prefer.
- 6 Click Check Vendor.
 - The Qty column under the Factored heading refers to the dealer's quantity and unit of measure.
 - The Qty column under the Vendor heading shows how many the vendor has in stock.
- 7 When you finish, click OK.

Note: To check pricing or availability in text-based order entry, type **S** in the Sell field. The Stock/Price Check screen opens.

Transmitting the P/O

After building a P/O for PPI, you can transmit it online.

- 1 In the (SR) Purchase Order Reports screen, type **B** in the Request field.

Note: To access the (SR) Purchase Order Reports screen in DDMS,



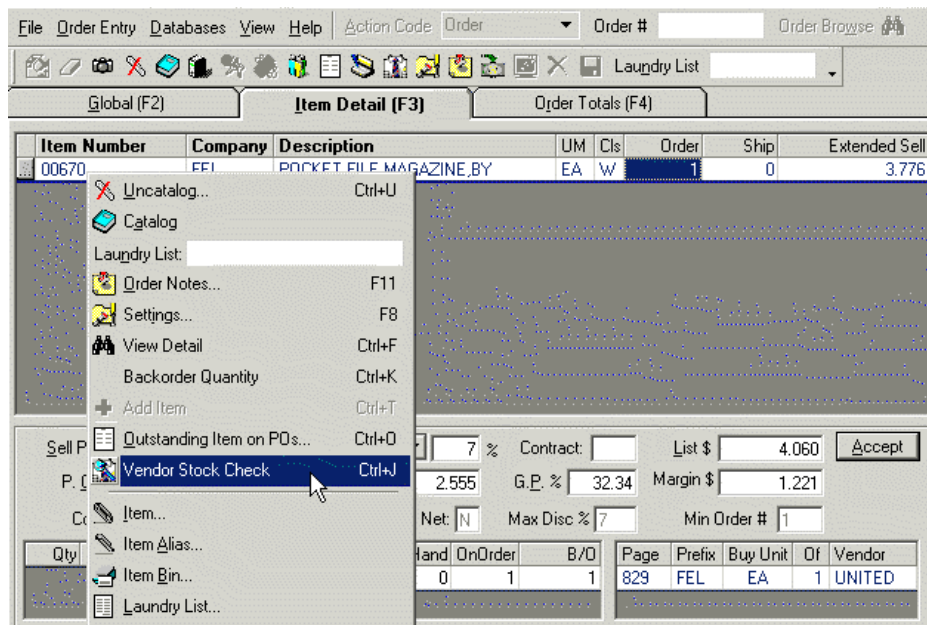
double-click  Reports Menu, then double-click  Standard P/O.

Figure 6:
Opening the
Stock/Price
Check Window





- 2 Tab to the Who field and type E to select the Wholesaler Group. See Figure 7.
- 3 In the Regional Wholesaler field, type F.
- 4 Press Enter until the Are You Sure prompt appears. Type Y. The P/O is transmitted to PPI.

Requesting Acknowledgments

If you missed an acknowledgment, you can request another from PPI.

- 1 In the (SR) Purchase Order Reports screen, type C in the Request field.

Note: To access the (SR) Purchase Order Reports screen in DDMS,

double-click  , then double-click .

- 2 At the Are You Using Private Supply Network query, type Y.
- 3 The (SRC) Acknowledgment Request screen opens. In the P/O Number field, enter the number of the P/O for which you want an acknowledgment and press Enter.

Figure 7: The Who and Regional Wholesaler Fields in the (SR) Purchase Order Reports Screen

```

16:07:24          (SR) Purchase Order Reports  rev. (12/16/04)          07/07/06
=====
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 ?
C. Receive P/O Transmission From Vendor.          A=O Henry          F=PPI
D. Print P/O Receipts From Vendor.   Delete File Y/N ?. B=Action          H=Mid Cont
F. Talk To Wholesaler.              Who ?E C=Std-Paper N=PSN
I. Receive Electronic Invoice.       Regional Wholesaler ?. E=C-2-F

E. Backorder Reports.              Short Buy Report Y/N ?.
  Keep Short Buy File for P/O's ?.   Print All ?.      Match Against P/O's A/E ?.
M. Debit Memo Report.
P. Purge Purchase Orders.          Archive Purge to Journal Y/N ?.
  From File [PO-MASTER ] Vol. [W1 ]          E=Dept
  To File [JOUR-PO ] Vol. [W1 ]              D=Date   P=Prefix   V=Vendor
                                              S=Sism   R=Route   N=Item Nbr
R. Inquire or Report on Archive   Reindex Y/N ?.   C=Cust   L=Class   I=Invoice
S. Compare Vendor Purchases with Daisytek      Sort Codes 1(.), 2(.), 3(.)

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

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- 4 The requested P/O's information fills the Vendor #, Transmission Date and Transmission Time fields. The P/O's status appears in the Status field next to the PO Nbr field, as shown in Figure 8. If the status is one of the following, go to **Step 5**.

- N The order has not been pre-received.
- F The vendor has shipped your order.
- P The vendor has allocated inventory to fill your order.

If the status field is blank or is set to ? (question mark), the P/O you requested was not found. Re-enter the P/O number. If the record is still not found, call your vendor for a verbal acknowledgment. Your order may not have been transmitted.

- 5 At the Get Acknowledgment prompt, type **Y**.

To pre-receive and/or print the acknowledgment:

- 1 Use the fields at the bottom of the screen, shown in Figure 9, to print an acknowledgment or pre-receive a P/O.

To pre-receive a P/O and print an acknowledgment, type **R**.

To print an acknowledgment, type **P**.

Note: If you don't know if your order has been received, try to pre-receive the order while you print the acknowledgment. You can only pre-receive once, but you can print an acknowledgment as many times as necessary.

Figure 8: The Status Field in the (SRC) Acknowledgement Request Screen

```

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 [__]
=====
    
```

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

**Figure 9:
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
[.....] [.] [.....] [.] [.....] [.] [.....] [.]
[.....] [.] [.....] [.] [.....] [.] [.....] [.]
[.....] [.] [.....] [.] [.....] [.] [.....] [.]
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[.....] [.] [.....] [.] [.....] [.] [.....] [.]

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