

*Phase II:
Setting Up & Using
the SP Richards PSN*



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Setting Up the SP Richards PSN

When you have completed the steps in the handout, *Phase I: Setting Up PSN* for any vendor, you are ready to set the SP Richards-specific parameters.

Setting parameters to communicate with SP Richards involves:

- 1 Setting SP Richards communication parameters
- 2 Setting up the Vendor database
- 3 Setting your Salesperson parameters.

To find instructions for another trading partner, go to www.ddms.com/support/doc/psn.htm

Note: Do not perform the steps listed here until you have configured the Utilex program and set up the (L6X) OPDX Parameter screen. For instructions, see the handout *Phase I: Setting Up PSN* available at www.ddms.com/support/doc/psn.htm.

Setting SP Richards Communication Parameters

Setting these parameters also enables electronic invoicing through PSN.

- 1 In the (L6) screen, select the [C] Sparco code.
- 2 Tab to the SPR Direct P/O field. Type Y, as shown in Figure 1. 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.

Figure 1: Setting Up the (L6C) Screen

```

13:10:20          Sparco Ez-Order / Interactive Parameters          10/14/08
-----
Modem Parameters | SPARCO Parameters [ /1 ]
-----
Hayes Only ?    Log ?Y    Canadian Dealer ? | Ship Code      ?0  Backorders ?N
Prefix ?        Reliable ?Y  SPS Printer ?    | SPARCO Subs    ?Y  Print Cost ?Y
Sp/Link #18004465507  Baud      :19.2 | Like Item Subs ?N  Pre-Recv  ?F
Sp/Order #18006340563  Terminal ? | Convert Units ?N  Prt Shorts ?N
Line #M1 Custom String [          ] | Ship Partial   ?Y  1 Ord/Inv ?N
Block Size #32  File Type ?S  Prefix [          ] | List on Pick ?  DC on Label ?
SPR Direct P/O ? | ASN Y/N ?Y     | Line Comments on D/S Orders ?
  Inv ? All Inv ? Credits Y/N/O ?Y | Multiple D/S ?N  Zip Routing ?Y
  Cust Nbr   Cust Id   Printer | Ignore NDS ?N  Alternate Whse ?Y
  1 [999999950] [TEST2000 ] [P1] | ----- Source Complete -----
  2 [999999950] [TEST   ] [  ] | Allow Y/N/D ?   Method Q/C ?
  3 [          ] [          ] [  ] | UPSable Only ?  X UPS Zones ?
  4 [          ] [          ] [  ] | -----
Compressed Ack. Format ?Y (Y/N) | WNP ?Y  Blind WNP?  SPS Y/N
Option Tag      Option Tag   Barcode | -----
1 [C] [CUSPO]   5 [2] [LBLZ2]   [N] | Primary Loc [99]   Shorts ?Y
2 [N] [CNAME]   6 [R] [ROUTE]   [N] |                   Short Locations
3 [I] [INVOI]   7 [F] [FSCPO]   [N] | [98] [  ] [  ] [  ]
4 [1] [LBLZ1]   =====

```

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- 3 In the Inv field, type **Y**
- 4 Tab to the Prefix field and enter the code assigned to you by Sparco. Press Enter. If you switch between modem and TCP/IP communications, do not change this field.
- 5 In the SPARCO Subs field, type **Y** to activate the substitution feature. The sell price remains the same as the original item, and the cost is updated with the substituted item.

Note: For more information on the substitution feature and to obtain a custom item substitution list, contact SP Richards.

Setting Up Source Complete

Using Source Complete, you can avoid backorders. Source Complete lets SP Richards drop ship your order from the nearest warehouse with the quantity to fill it. To set up Source Complete:

- 1 In the (L6C) screen, tab to the Allow field. See Figure 2. Type **Y** to ship all items on the P/O from the next closest warehouse. Type **N** to disable Source Complete. Type **D** to ship only the drop-ship items from the next closest warehouse. If you set this field to Y or D, Sparco's auto-shorts are disabled for the P/O. To use Source Complete for drop-ship orders only, and use auto-shorts for non-drop-ship orders, you must create separate P/Os for drop-ship and non-drop-ship items.
- 2 In the Method field, type **Q** to quick-fill the order from all SP Richards facilities. Type **C** to ship the complete order from one facility.

There is no charge to use Source Complete.

However, you must be authorized to use it. For authorization, call Support at 1-800-366-4778 or send an email to ddmssupport@ecisolutions.com.

Figure 2: Setting Up Source Complete

```

13:10:20          Sparco Ez-Order / Interactive Parameters          10/14/08
-----
Modem Parameters | SPARCO Parameters [ /1 ]
-----
Hayes Only ?    Log ?Y    Canadian Dealer ? | Ship Code    ?0    Backorders ?N
Prefix    ? 9,          Reliable ?Y | SPARCO Subs  ?Y    Print Cost ?Y
Sp/Link    #18004465507    Baud      :19.2 | Like Item Subs ?N    Pre-Recv  ?F
Sp/Order   #18006340563    Terminal ? | Convert Units ?N    Prt Shorts ?N
Line #M1 Custom String [          ] | Ship Partial  ?Y    1 Ord/Inv ?N
Block Size #32  File Type ?S Prefix [          ] | List on Pick ?    DC on Label ?
SPR Direct P/O ?          ASN Y/N ?Y | Line Comments on D/S Orders ?
          Inv ? All Inv ? Credits Y/N/O ?Y | Multiple D/S ?N    Zip Routing ?Y
          Cust Nbr   Cust Id   Printer | Ignore NDS ?N    Alternate Whse ?Y
          1 [999999950] [TEST2000 ] [P1] | ----- Source Complete -----
          2 [999999950] [TEST          ] [          ] | Allow Y/N/D ?    Method Q/C ?
          3 [          ] [          ] [          ] | UPSable Only ?    X UPS Zones ?
          4 [          ] [          ] [          ] | -----
          Compressed Ack. Format ?Y (Y/N) | Wrap-N-Pack ?Y    Blind W-N-P ?
Option Tag      Option Tag      Barcode | -----
1 [C] [CUSPO]   5 [2] [LBLZ2]   [N] | Primary Loc [99]   Shorts ?Y
2 [N] [CNAME]   6 [R] [ROUTE]   [N] | Short Locations
3 [I] [INVOI]   7 [F] [FSCPO]   [N] | [98] [          ] [          ] [          ]
4 [1] [LBLZ1]   =====

```

- 3 Type **Y** in the UPSable Only field to use Source Complete to fill items flagged as UPSable. Type **N** to use an alternate method. The parameter that determines if an item can be shipped via UPS is set in the Item Vendor tab's UPS Available box.
- 4 In the X UPS Zones field, type **Y** to pull items from warehouses across UPS zones. Type **N** to only pull from warehouses in the dealer's zone.

Setting Up the Vendor Database

You must set up the appropriate destination ID for each PSN wholesaler and select the features to enable.

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 wholesaler's available quantities and pricing via the Internet. The results display in Order Entry.

- 1 In the Vendor # box, enter the vendor number.
- 2 From the View menu, click Supply Options.
- 3 The Supply Options window opens, as shown in Figure 3. In the Location box, enter a G/L location, or accept the default of 1.
- 4 In the Destination ID box, type **SPARCO**

Supply Options

Supply Options

Location : 1

OPUS ID :

Destination ID : SPARCO

Sign On ID :

Sign On Pass :

Weight :

Supported Features

Online Purchasing

Price Check

Stock Check

Purchase Order

Delivery Code for NDS Orders :

Facility	Display Online
	<input type="checkbox"/>

Vendor Shipping Information

Carton Counts Carton ID's Short Ships

Update Pick Ticket with Addtl Charges

Item Number: Company:

Exit Help

Figure 3: The Supply Options Window

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- 5 From the Supported Features list, check those to enable.
 - Price Check
 - Stock Check
 - Purchase Order.
- 6 Use the Facility box to limit price and stock checks to specific wholesaler facilities. To do this, in the Facility box, enter the location ID. To display on hand quantities from this facility on the Web, check the Display Online box.
- 7 Use the Delivery Code for NDS Orders box to define the number of lead days. Contact SP Richards to obtain a list of delivery codes.
- 8 To update the ticket with carton counts and carton ids, click the Carton Counts and Carton IDs boxes.
- 9 To process freight charges and post them to the pick ticket, click the Update Pick Ticket with Addtl Charges box. Then, enter the item number and company name in the following boxes.
- 10 When you are finished, click Exit.
- 11 Click Save.

Note: For information on valid facility codes, contact your wholesaler.

Setting Salesperson Parameters



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

Figure 4: The Price Check Tab in the Salesperson Window

The screenshot shows a window titled "Salesperson : 100 - HOUSE ACCOUNT". The window has a menu bar with "File", "View", and "Help". Below the menu bar is a toolbar with various icons. The main area of the window is divided into tabs: "Master", "Price Check", "Remote Order", "Addl./WinOrder", and "Technician". The "Price Check" tab is selected and active. The content of the "Price Check" tab includes the following options:

- Ignore Order Entry Mask Cost Parameter: N
- Show Cost: Average: Mfg: Whl: Purchasing: Pricing:
- Show GP %: Average: Mfg: Whl: Purchasing: Pricing:
- Allow (V) Multi Vendor Display: Y
- Mask Multi-Vendor Cost:
- Allow (C) Changing Pricing Cost: Y
- Ignore Price Change Password:
- Allow (G) Changing Pricing GP %: Y
- Allow Online Vendor Checks: Y Price Stock Both
- Allow (L) Changing List Price: Y
- Allow Preferred Vendor:
- Allow (S) Changing Sell Price: Y
- Allow Order Code:
- Allow (P) Changing Cust Params: Y



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

Note: You can also set salesperson parameters through the (HYL) Salesman Price Check Parameters screen.

Using PSN

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

Now that you've set up your system to send batch P/Os, all you have to do is process them as usual. PSN takes care of the rest.

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

Item Number	Company	Description	UM	Cls	Order	Ship	Extended Sell
04210	DFD	FOOD,SHELLED WALNUTS 1LB	EA	N	1	0	7.89
03000	UNS	DUSTPAN,12"METAL	EA	W	1	0	6.13
031010	CST	TEA,CELESTIAL ,25/BX,AST	BX	N	1	0	6.50
031010	FVS	TEA,CELESTIAL ,150/CT,AST	CT	N	7	0	238.35
03120	CGD	POWER EXTENDER - IEC 320 EN 60	EA	N	3	0	20.97
03132	CGD	CABLES TO GO 3FT MONITOR PO...	EA	N	6	0	41.94
03160	RIV	PAPER,12X18,PLAIN NEWS,WE	PK	W	6	0	77.88

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When 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 tab for wholesalers with enabled stock and price checks. Finally, the program retrieves your ISA ID from the (L6X) screen. PSN then checks the wholesaler's available quantities and pricing via the Internet and displays the results in Order Entry.

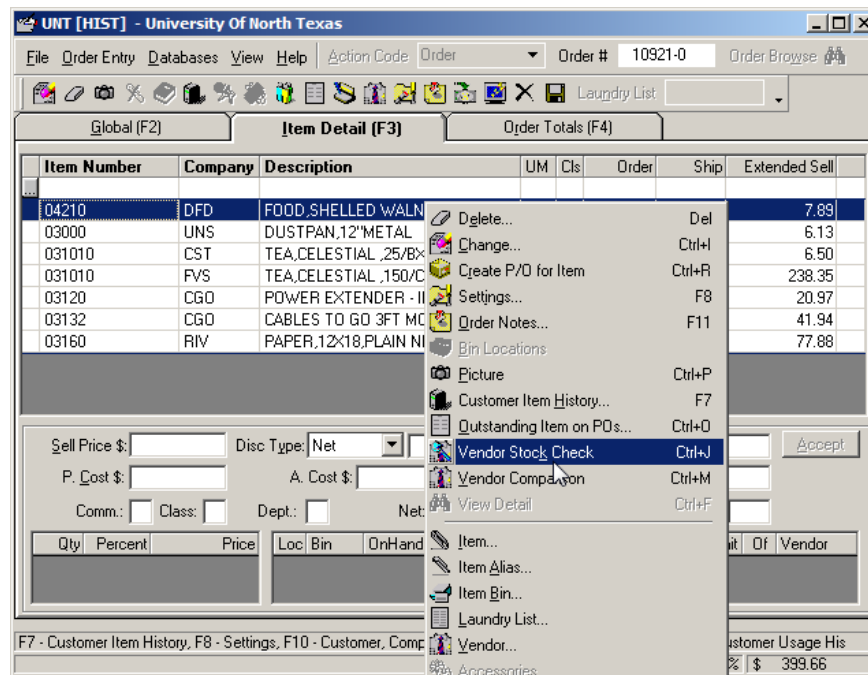
Note: By setting certain parameters in the Salesperson database, an order-writer can check pricing and availability at any time. For more information, refer back to the heading **Setting Salesperson Parameters**.

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 6:
Opening the
Stock/Price
Check Window



- 4 At any time after you retrieve the item, right-click the item to open the Stock/Price Check window, shown in Figure 6.
- 5 Click Check Vendor. The pricing and/or stock information appears. Click the vendor you prefer.
 - 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.
- 6 When you are finished checking stock or pricing, click OK.

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

Requesting Acknowledgments

If you missed an acknowledgment, you can request another from your wholesaler. To do so:

- 1 In the (SR) Purchase Order Reports screen, type **C** in the Request field.
- 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 to request an acknowledgment and press Enter.

Figure 7: 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 [__]
=====
    
```

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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 7. If the status is one of the following, go to **Step 5**.

If the status is **N**, the order has not been pre-received

If the status is **F**, the vendor has shipped your order.

If the status is **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, follow these steps:

- 1 Use the fields at the bottom of the screen, shown in Figure 8, 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:
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 [__]
=====
    
```

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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**

Note: If you are using the substitution feature set up in the (L6C) screen, a special prints on the acknowledgment showing that a substitution took place. The acknowledgment prints the actual item shipped as the acknowledged item with the original item printed below it.
