Phase II:
Setting Up & Using the

SUPPLIESNETWORK

WE SUPPLY TRUST

PSN

ECi

ECi DDMS®

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Contents

Setting Up the Supplies Network PSN

When you have completed the steps in the handout *Phase 1: Setting Up PSN* for any vendor, you are ready to set the Supplies Network specific parameters. If you have any questions about PSN installation, email them to ddmssupport@ecisolutions.com.

Setting parameters to communicate with Supplies Network involves:

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

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

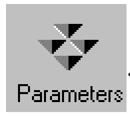
If you already have information in the EDI record of the (L6WB) screen, contact Supplies Network, as they need this information.

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.

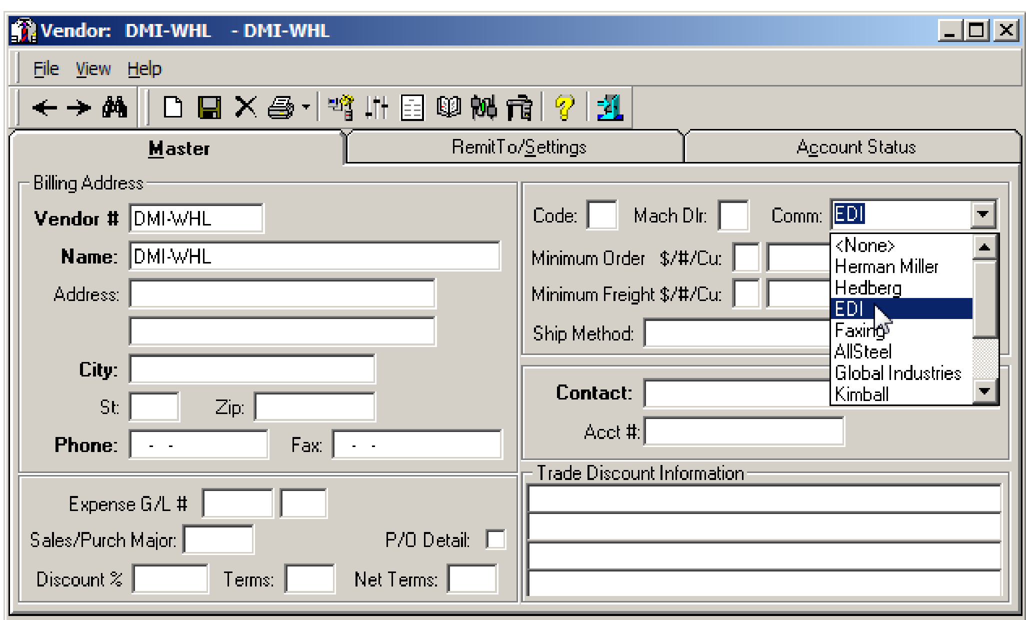


Figure 2: The Vendor Master Tab

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 Supplies Network and select the features to enable.

1 Set up DMI-WHL as a vendor.

- **1.1** In the Vendor Master tab, click .
- **1.2** Click the Vendor # box and type **DMI-WHL**.
- **1.3** Click the Name box and type **DMI-WHL**.
- **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 Supplies Network's ID exactly as follows: **DMI**

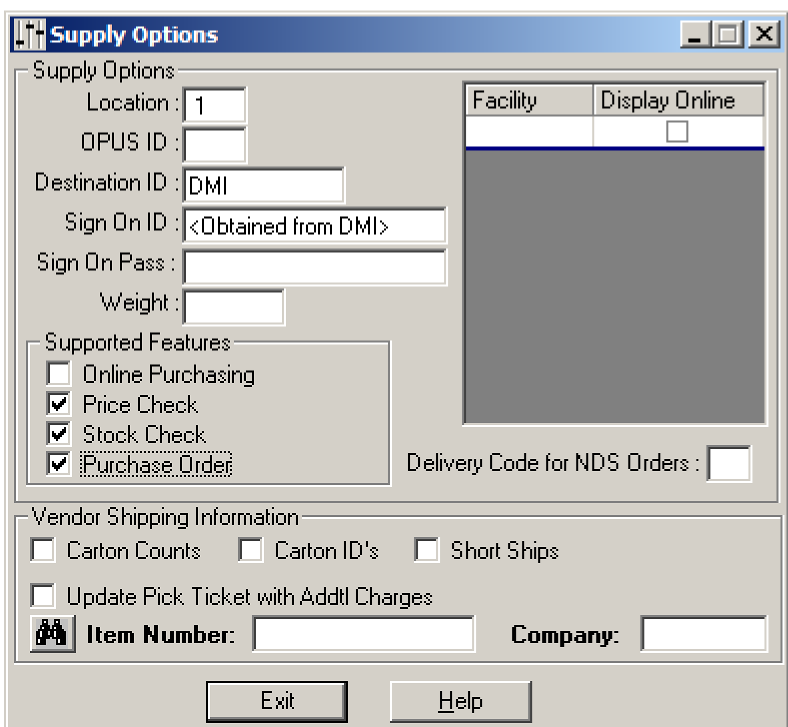


Figure 3: The Supply Options Dialog Box

2.4 In the Sign On ID box, enter the contact ID provided by your DMI sales representative.

2.5 From the Supported Features list, click those to enable. You can select Price Check, Stock Check, and/or Purchase Order.

2.6 To update the ticket with carton counts and carton ids, click the Carton Counts and Carton IDs boxes.

2.7 When finished, click Exit.

3 In the Vendor Master tab, click .

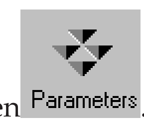
Creating a Customer Record

In the DDMS Customer Master tab, create a customer with DMI-WHL as the account number and name. Create a second customer with DMI as the account number and name.

Note: You must set up both a DMI-WHL and DMI customer before you can communicate with Supplies Network.

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.

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 ?
```

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.

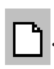
6 Press Esc multiple times to return to the Parameter Editor window.

Setting Up a Customer

In DDMS's Customer Master tab, create a DMI-WHL and DMI 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 DMI-WHL customer. See Figure 5.

4 In the Name box, enter a name for the DMI-WHL customer.

5 When you finish, click .

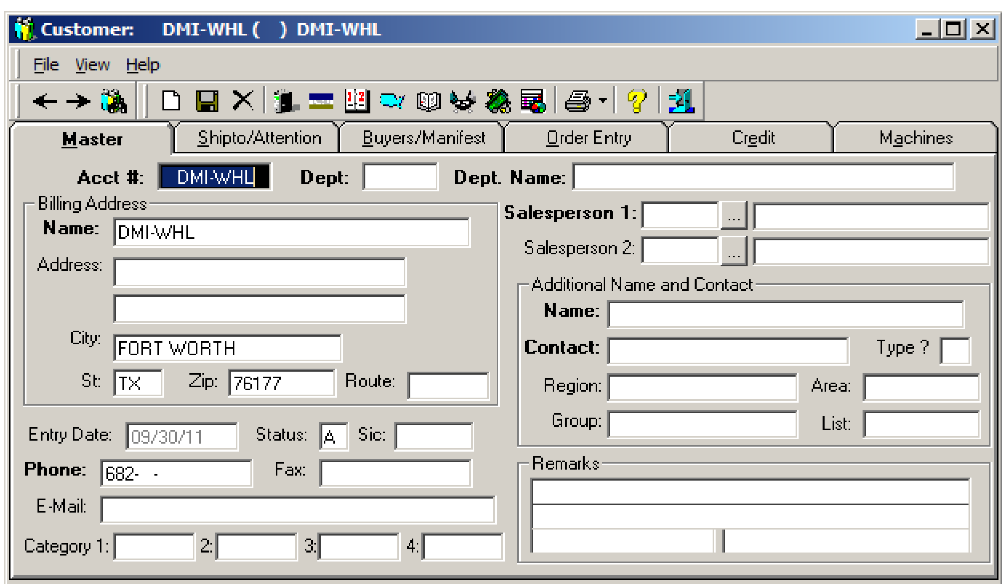


Figure 5: Creating a Customer Record

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

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

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 **DMI-WHL** and press Enter.

3 At the Correct Record prompt, press Enter.

4 Tab to the Interchange ID Qualif field, shown in Figure 6, and type **Ø1**

5 In the ID field, type **Ø64632888**

6 Tab to the Interchange Control Std field and type **U**

7 In the Version field, type **ØØ4Ø1**

8 In the Receivers Code Id field, type **SUPPLIESNET** and press Tab.

Figure 6: The (SGA) Trading Partner Parameters Screen

```
15:22:52        (SGA) TRADING PARTNER PARAMETERS REV. (06/13/03)        01/19/07
--------------------------------------------------------------------------------
 Action [C] ( C=Chg, D=Del, I=Inq, R=Ref Codes)
--------------------------------------------------------------------------------
Name :                                Account #   DMI-WHL Dept :
                                         KELLER                          TX
                                          817-   -
--------------------------------------------------------------------------------
EDI VAN  :                                         Auto Send          :    (Y/N)
Interchange ID Qualif  :01  ID :064632888          Negate Credit Inv. :
Auth. Info Qualif.     :    Info :                 Use Received Price :    (Y/N)
Security Info Qualif.  :    Info :                 Using 810          :
Interchange Control Std:U  Version :00401          Using 855          :
Receivers Code Id      :SUPPLIESNET                Auto Create Orders :    (Y/N)
Responsible Agency Code:X Version :004010          Sales Auto Group   :
Interchange Control#                              Auto 850 Sendfile  :
Group Control      #                              Default Selector   :850DMI
                                                    ======= 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 :
--------------------------------------------------------------------------------
** ENTER DATA OR <?> FOR HELP !!
```

9 In the Responsible Agency Code field, type **X**

10 In the Version field, type **ØØ4Ø1Ø**

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 Tab to the Default Selector field and type **85ØDMI**

Repeat these steps, substituting DMI in the Account # field.

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 DMI-WHL vendor.

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

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

1.4 From the Template drop down list, select DMI PCN Communications.

2 Set the general communications parameters in 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.

Add a default value by entering it in the Value column. Check the corresponding Override box to allow these parameters to be changed at the time of communication.

You may set these parameters as you choose with the following exceptions:

2.2 Check the Pre-Receive Override box. In the Value box, type **Y**

2.3 In the Acknowledgment Printer Value box, enter the name of the printer on which to print the acknowledgment.

2.4 Leave the Shipping Code Override box blank. The default is next-day delivery. Choosing another option places your order on hold on the Supplies Network side.

2.5 Check the 850 P/O Format Override box. In the Value box, type **85ØDMI**

2.6 Check the Wrap and Label Override box. In the Value box, type **Y** to activate Wrap and Label orders for Supplies Network.

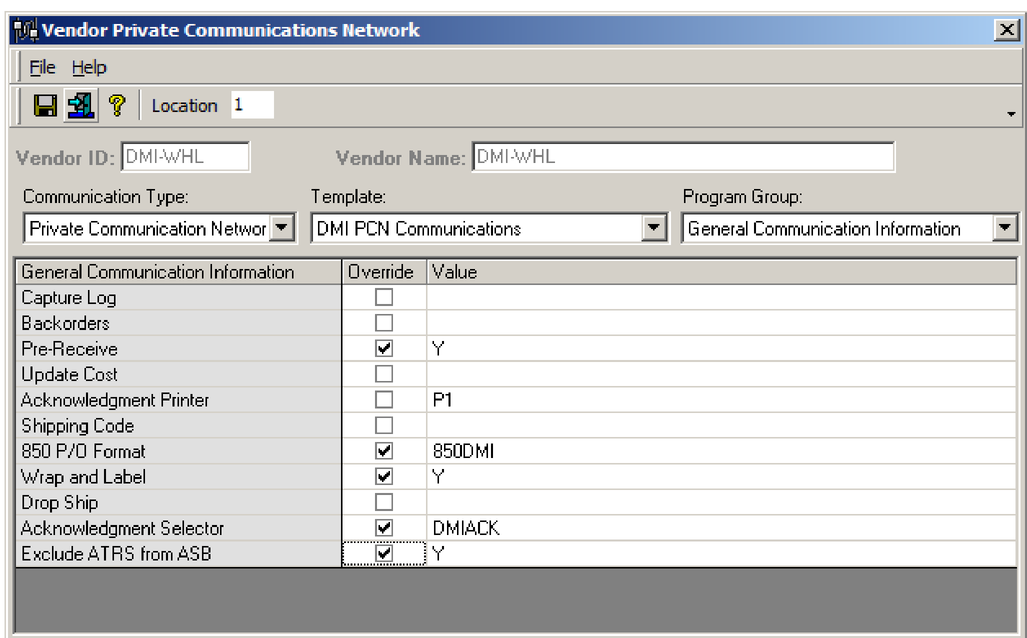
Note: Before applying this setting, verify with Supplies Network that your account is eligible for Wrap and Label delivery.

2.7 Leave the Drop Ship Value field blank to default to the dealer's shipping address. Check the corresponding Override box to allow the drop ship flag to be changed at the time of transmission.

2.8 Check the Acknowledgement Selector Override box. In the Value box, type **DMIACK**

2.9 If you are using the Auto Toner Replenishment Service (ATRS) feature with Supplies Network, check the Exclude ATRS from ASB Override box. Type **Y** in the corresponding Value box to exclude ATRS items when using the automated short buy feature. To include ATRS items, leave the Override and corresponding Value boxes blank.

Figure 7: Setting the General Communication Information



2.10 When finished, click .

3 Set the account parameters in the Vendor Private Communications Network window.

3.1 From the Program Group drop down list, click Account Information. See Figure 8.

Contact IDs are numbered and listed in the Account Information column. Add a default contact ID by entering it in the Value column. Check the corresponding Override box to allow the ID to be changed at the time of communication.

You may set these as you choose with the following exception:

3.2 Check the Contact ID #1 Override box. In the Value box, enter your contact ID number. This number is obtained from Supplies Network.

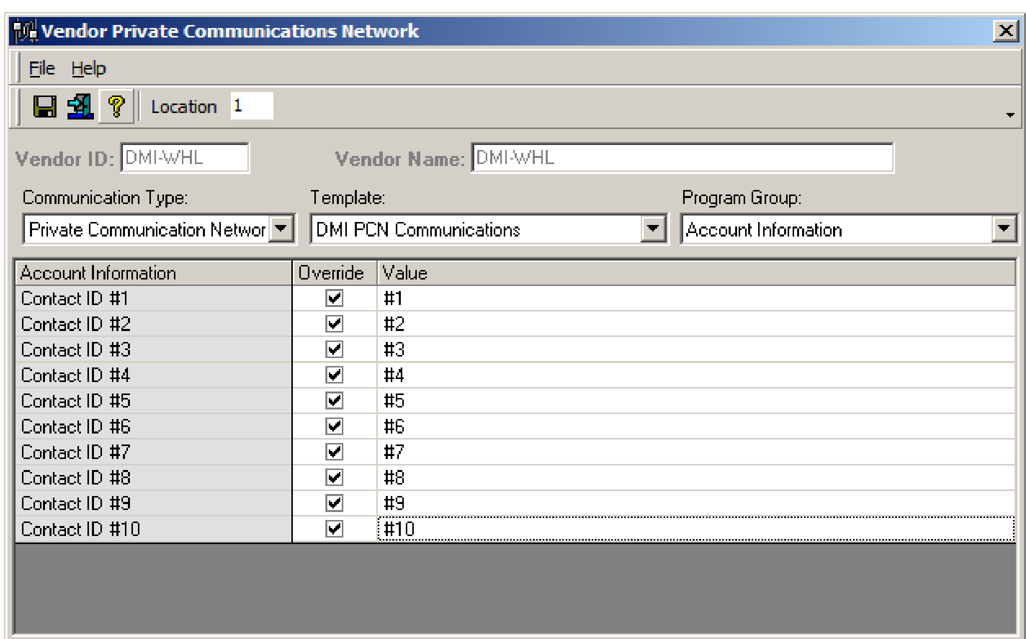
3.3 Repeat Step 3.2 to enter up to 10 contact ID numbers.

3.4 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.

Figure 8: Setting the Account Information



Add a default by entering the default information in the Value column. For example, to store the name of a business, enter the business name in the Name Value box.. Check the corresponding Override box to allow the ID to be changed at the time of communication.

Note: You must set a default shipto. If the order is flagged as dropship, the customers address is sent to Supplies Network.

4.2 When you finish, click .

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 by entering default information in the Value column. For example, to store the name of a business, enter the business name in the Name Value box. Check the corresponding Override box to allow the ID to be changed at the time of communication.

Note: You must set a default billto address.

5.3 When you finish, click .

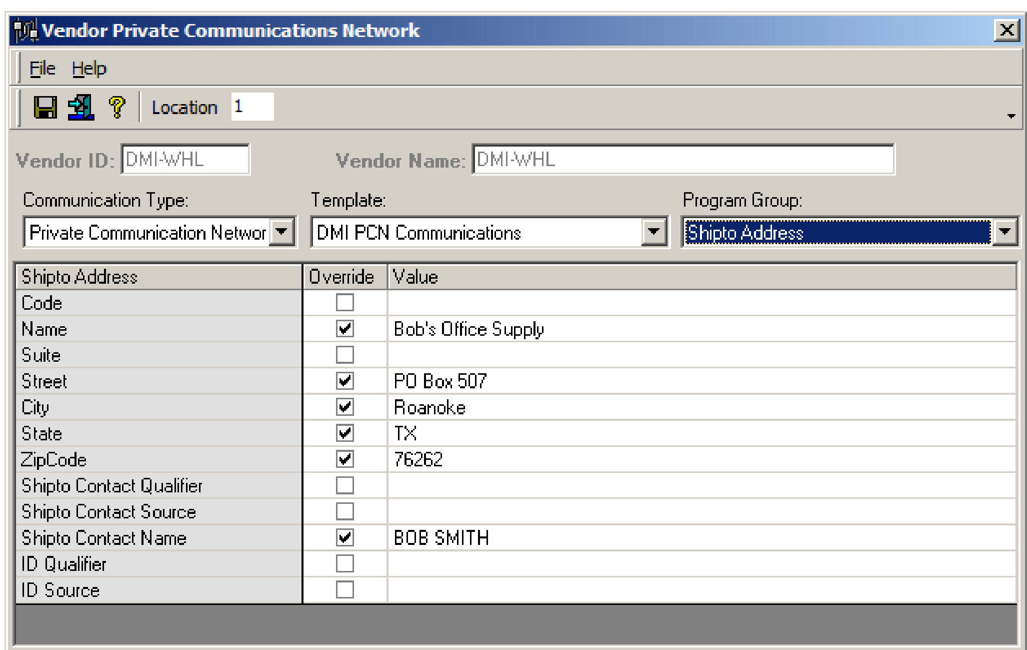


Figure 9: Setting the Shipto Address Information

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, as shown in Figure 10.

Add a default value by entering it in the Value column. Check the corresponding Override box to allow the ID to be changed at the time of communication.

You can set these as you choose with the following exceptions:

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

6.3 In the Purchase Order Number Source Value box, type **P** if your customer's P/O numbers have 10 characters. Type **L** if they have 30.

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

6.5 Click the Route Override box. Type **Y** in the Value box.

6.6 When you finish, click .

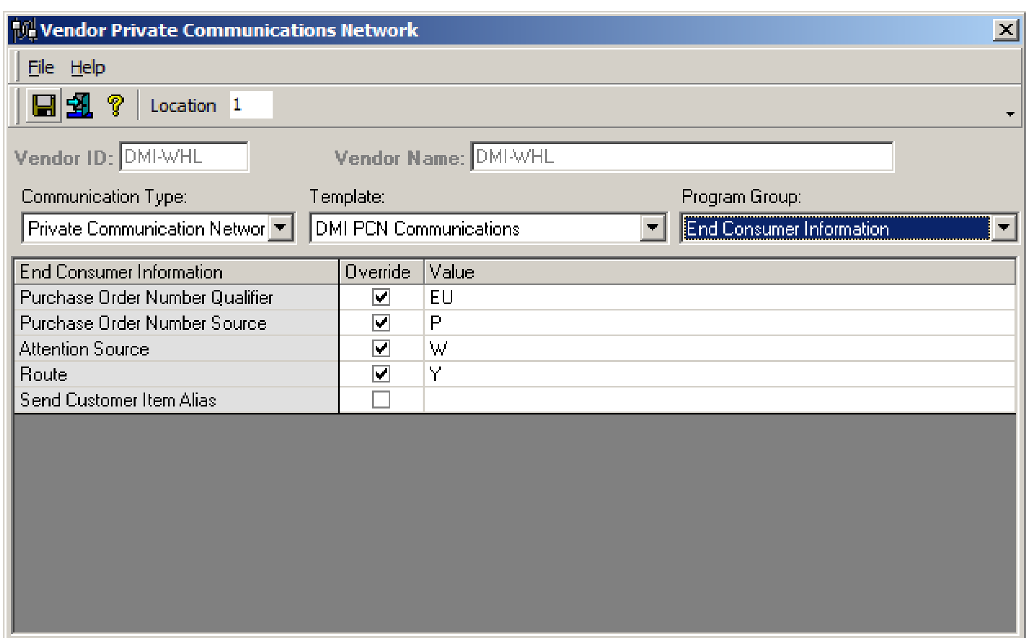


Figure 10: Setting the End Consumer Information

7 Set the supplier information parameters in the Vendor Private Communications Network window.

7.1 From the Program Group drop down list, click Supplier Information. The available parameters are listed in the Supplier Information column, as shown in Figure 11.

Add a default by entering the default information in the Value column. Check the corresponding Override box to allow the parameters to be changed at the time of communication.

You may set these as you choose with the following exception:

7.2 Check the Wrap and Label Order Type Override box. Type **RL** in the Value box.

7.3 When you finish, click .

Using PSN

After building a P/O for Supplies Network, you can transmit it online to Supplies Network.

1 In the (SR) Purchase Order Reports screen, type **B** in the Request field. See Figure 12.

2 Tab to the Who field and type **N** to display the list of vendors. The cursor moves to the P/O field.

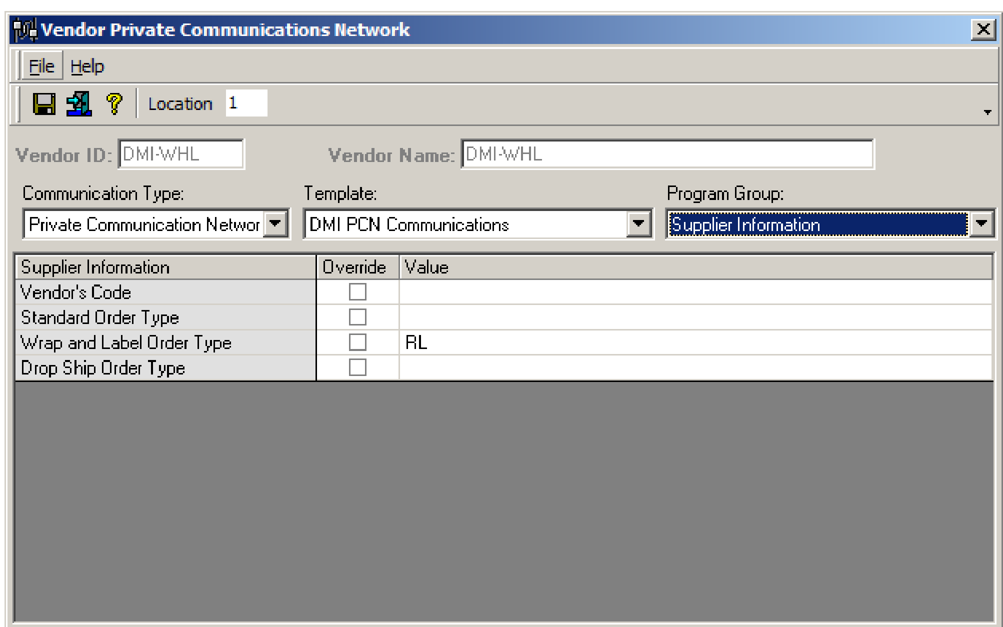


Figure 11: Setting the Supplier Information

3 In the P/O Numbers field, enter the number of the DMI-WHL 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**

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

Figure 12: Transmitting P/Os Online

```
16:38:23        (SR) Purchase Order Reports  rev. (Ø7/28/1Ø)         Ø8/23/11
================================================================================
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/ASN          Wholesaler ?   AOPD          WEST POINT
                                                          DCS           DIGITEK
E. Backorder Reports.            Short Buy Report Y/N ?   HONDAILY      TRODAT
   Keep Short Buy File for P/O's ?.   Print All ?         TOPS          COSCO
M. Debit Memo Report.                                     KATUN         OFFICE MAX
P. Purge Purchase Orders.                                 IMAGE STAR    AVERY
       From File [PO-MASTER ] Vol. [W3??]
         To File [JOUR-PO   ] Vol. [W3??]
            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
```

Figure 13: Selecting the General Communication Parameter Group

```
14:22:27 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 ] [DMI ] [ ]
Parameter
[________________________________________] 1-20 [____________________]
Override [_] 21-40 [____________________]
41-60 [____________________]
0 [General Communication Information ] 61-80 [____________________]
1 [Account Information ]
2 [Shipto Address ]
3 [Billto Address ]

=================================================================================
Enter Number for Selection "C" - Complete, "A" - Abort [Ø]
```

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. To change the shipping information:

1 The Parameter Group options appear, as shown in Figure 13. Note the Parameter Group field is blank. At the Enter Number For Selection prompt, type **Ø** to select the General Communication Information parameter group.

Figure 14: 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 ] [DMI ] [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]
```

Figure 15: 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 The General Communication Information parameter group appears, as shown in Figure 14. At the Enter Number For Selection prompt, enter the number that corresponds to the Drop Ship line. This number may differ, depending on the boxes you checked in the Vendor Private Communications Network window.

3 In the 1-20 field, type **Y** to drop ship the order. Type **N** to use the Shipto information.

4 Tab to the Override field. Type **Y** then press Enter.

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

6 The P/O is transmitted to Supplies Network.

Requesting Acknowledgements

If you missed an acknowledgement, you can request another from Supplies Network. 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 you are requesting an acknowledgement and press Enter.

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 15.

Figure 16: 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 [__]
===============================================================================
```

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 acknowledgement. Your order may not have been transmitted.

5 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 16, to print an acknowledgement or pre-receive a P/O.

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

To print an acknowledgement, type **P**

Note: If you do not 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.

---

2 In the Printer field, enter the name of the printer to use.

3 At the Are You Sure prompt, type **Y**