

*Phase II:  
Setting Up & Using  
the United PSN*



December 2011 Rev.

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## Setting Up United's PSN

To find instructions for another trading partner, go to [www.ddms.com/support/doc/psn.htm](http://www.ddms.com/support/doc/psn.htm)

If you have completed the steps in the handout, *Phase I: Setting Up PSN* for any vendor, you are ready to set the United-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 United involves:

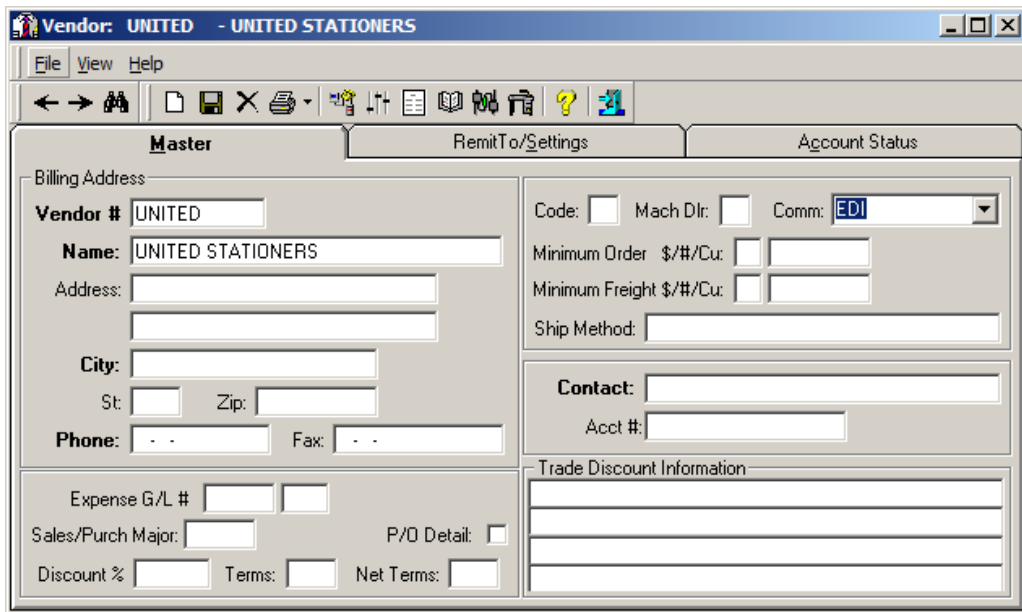
- 1 Setting up the Vendor database.
- 2 Setting United's communication parameters.
- 3 Setting up the Salesperson database.

**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](http://www.ddms.com/support/doc/psn.htm).

## Setting Up the Vendor Database

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

- 1 Set up United as a vendor. If you already have a United 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 **UNITED**. See Figure 1.
  - 1.3 Click the Name box and enter a name for the United vendor.





The screenshot shows a software window titled "Vendor: UNITED - UNITED STATIONERS". The window has a menu bar with "File", "View", and "Help". Below the menu bar is a toolbar with various icons. The main area is divided into three tabs: "Master", "RemitTo/Settings", and "Account Status". The "Master" tab is selected and contains the following fields:

- Billing Address:** Vendor # (UNITED), Name (UNITED STATIONERS), Address (empty), City (empty), St (empty), Zip (empty), Phone (empty), Fax (empty).
- Code:** (empty), **Mach Dir:** (empty), **Comm:** (EDI).
- Minimum Order \$/#/Cu:** (empty), **Minimum Freight \$/#/Cu:** (empty).
- Ship Method:** (empty).
- Contact:** (empty), **Acct #:** (empty).
- Trade Discount Information:** (empty table).
- Expense G/L #:** (empty), **Sales/Purch Major:** (empty), **P/O Detail:** (checkbox).
- Discount %:** (empty), **Terms:** (empty), **Net Terms:** (empty).

Figure 1: The Vendor Master Tab


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- 1.5 Click .
- 2 Set PSN parameters.
  - 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 United ID exactly as follows: **UNITED**
  - 2.4 From the Supported Features list, click Price Check and/or Stock Check. Purchase Order is required.
  - 2.5 Click the Update Pick Ticket with Addtl Charges box to process additional charges and post them to the pick ticket.
  - 2.6 In the Item Number box, enter the item number and company name.
  - 2.7 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.

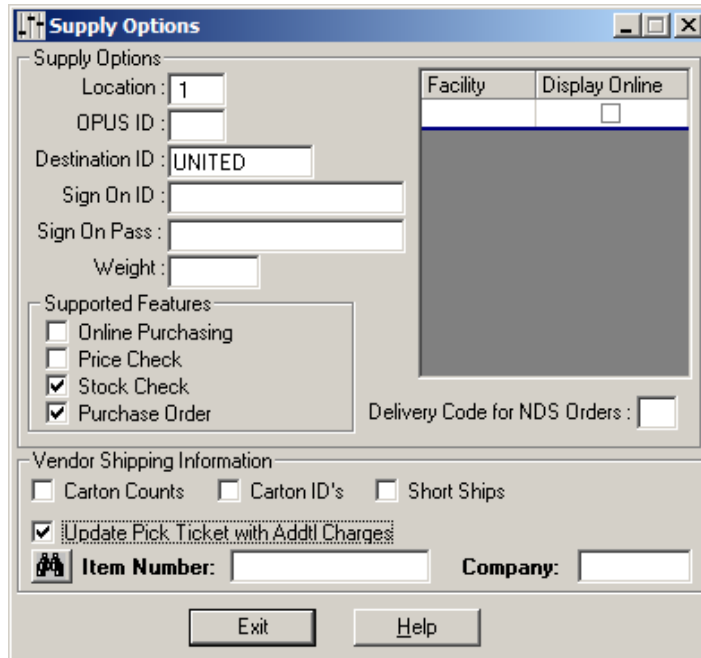
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**Note:** For information on valid facility codes, contact your wholesaler.

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- 2.8 When you finish, click Exit.
- 3 Click .

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



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

## Setting United Communication Parameters

You must set up communication parameters for United.



- 1 In DDMS, double-click **Keyop Menu**, then double-click **Parameters**.
- 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 **F** in the Selection Code field. The (L6F) United Communications screen opens.
- 5 Tab to the first PSN field shown in Figure 3. Type **Y**. This field works with the Interlink System Id field.
- 6 Tab to the second PSN field. Type **Y** to download electronic invoices using PSN.
- 7 Tab to the Transmission # field. Enter a transmission number. If you do not have a transmission number, type **001**
- 8 Tab to the Update Cost field. Leave this field blank or type **Y** to update cost. Selecting **N** does not update cost, which may cause the invoice and the purchase order to show different amounts. Before changing this field to **N**, contact support.

**Figure 3: Setting (L6F) Screen Parameters**

| Communication Parameters             |              |                       |        | United Parameters [ 1 ]         |                  |       |  |
|--------------------------------------|--------------|-----------------------|--------|---------------------------------|------------------|-------|--|
| Hayes Only ?                         | Log ?Y       | Canadian Dealer ?     |        | Acct Id [000004]                | Pass [DDMSDDMS]  |       |  |
| Prefix ?9,                           |              | Reliable ?Y           |        | Account #1                      | [000001]         | [X98] |  |
| Uni -Link #18007334067               | Baud : 19.2  | PSN ?Y                |        | Account #2                      | [ ]              | [ ]   |  |
| Score #18007334066                   | Baud : 19200 |                       |        | Account #3                      | [ ]              | [ ]   |  |
| Elec. Inv #                          |              | Credits ?             | PSN ?Y | Account #4                      | [ ]              | [ ]   |  |
| Block Size #32                       |              | Time Out #            |        | Account #5                      | [000001]         | [X98] |  |
| Phone Line #M1                       |              | Transmission #00001   |        | E. Inv [ ]                      | Pass [ ]         |       |  |
| Custom String [ ]                    |              |                       |        | Interlink System Id [ ]         |                  |       |  |
| Order Type ?12                       |              | File Type ?U          |        | Shipping Inst. O, R, F, S, C, E |                  |       |  |
| ADOT ?Y                              | W-N-L ?Y     | Consolidated W-N-L ?N |        | Consumer Text N, W, L, O, ,     |                  |       |  |
| Multiple Drop Ships ?N               |              | Zipcode Routing ?Y    |        | Barcode ?                       | Sub. List ?Y     |       |  |
| Allow Backorders ?FP                 |              | Ignore NDS ?N         |        | ASI Label ?                     | Line Comments ?Y |       |  |
| Exc. Mfg [ ] [ ] [ ] [ ]             |              |                       |        | Label Format [ ]                |                  |       |  |
| Consolidate Locations on Orders ?    |              |                       |        | Route : (R/S/Z) Tag [ ]         |                  |       |  |
| Item Description on Acknowledgment ? |              |                       |        | Ref# : (I/C/P) Tag [ ]          |                  |       |  |
| Break Page Between Each Order ?Z     |              |                       |        | P/O# : (C/P) Tag [ ]            |                  |       |  |
| Pre-Receive ?G                       |              | Update Cost ?         |        | Terminal Type #04               | Control ?Y       |       |  |
| Printer [P1]                         |              |                       |        | Region ID ?WEST                 |                  |       |  |

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- 9 Tab to the Interlink System Id field and enter your Interlink ID. This information comes from United. Press Enter. If you switch between modem and TCP/IP communications, do not change this field.
- 10 In the Shipping Inst and Consumer Text boxes, type **O** to send the first line of the AAAA special for the invoice.
- 11 In the Sub List field, type **Y** to activate the substitution feature. When this is activated, the original item on the pick ticket and purchase order is replaced with the substitution item. The sell price remains the same as the original item, and the cost is updated with the substituted item. This feature works with National Drop Ship (NDS) accounts and any of your standard delivery accounts.

**Notes:** For more information on the substitution feature and to obtain a custom item substitution list, contact United technical support.

When the Sub List parameter is activated, changes are made in the way that orders are processed and displayed in DDMS. For more information on how United's substitution program works with the PSN service and your DDMS system see *Setting Up and Using United Substitutions* at [www.ddms.com/support/doc/psn.htm](http://www.ddms.com/support/doc/psn.htm).

Most dealers list multiple accounts in the (L6F) screen. Since parameters do not allow you to specify which account number uses the substitution list, contact United to assign the substitution list to a specific account in the United system.

**Figure 4: The Price Check Tab in the Salesperson Window**

The screenshot shows a software 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", "Add./WinOrder", and "Technician". The "Price Check" tab is currently selected and active. It contains several settings and checkboxes:



- 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:  Mask Multi-Vendor Cost:
- Allow (C) Changing Pricing Cost:  Ignore Price Change Password:
- Allow (G) Changing Pricing GP %:  Allow Online Vendor Checks:   Price  Stock  Both
- Allow (L) Changing List Price:  Allow Preferred Vendor:
- Allow (S) Changing Sell Price:  Allow Order Code:
- Allow (P) Changing Cust Params:

- 12 In the Line Comments field, type **Y** to send line item comments on Wrap-N-Label and drop ship orders.
- 13 Press Enter to return to the Action field.

## Setting Up the Salesperson Database

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



- 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 for the first time, you must send test purchase orders to United to confirm proper setup. There may be slight differences in the acknowledgment format. If you experience any problems, email [ddmssupport@ecisolutions.com](mailto:ddmssupport@ecisolutions.com).*

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

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 dialog box in the Vendor database for trading partners with enabled stock and price checks. Finally, the program retrieves your ISA ID from the (L6X) 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**.

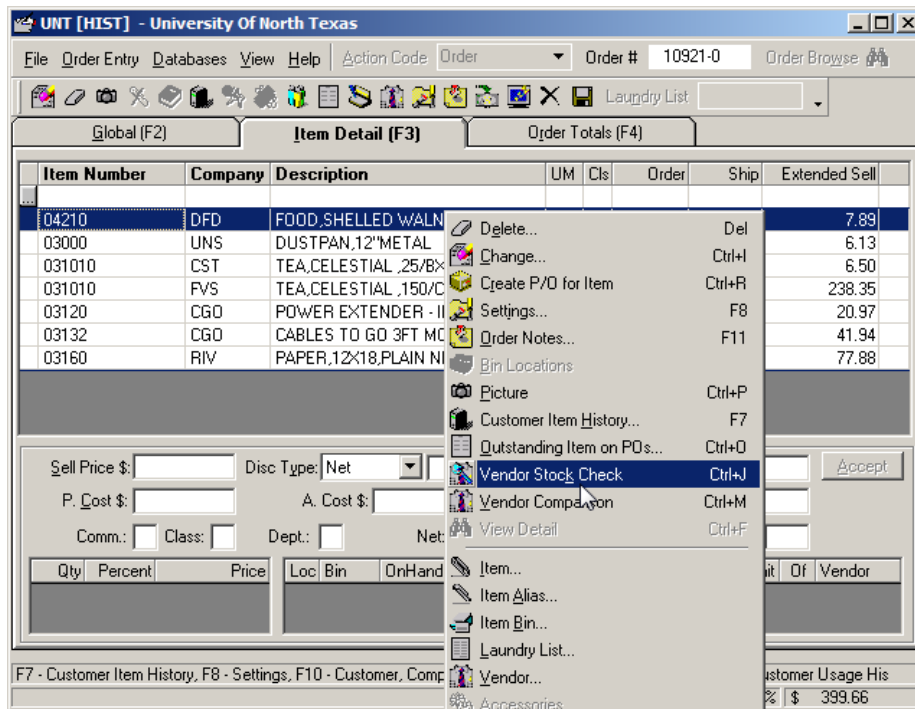
**Figure 5: The Item Detail Tab in the Order Entry Window**

| 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       | CGO     | POWER EXTENDER - IEC 320 EN 60 | EA | N   | 3     | 0    | 20.97         |
| 03132       | CGO     | 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         |

- 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.
- 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 finish, click OK.

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

**Figure 6:**  
Opening the  
Stock/Price  
Check Window



## Requesting Acknowledgments

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

- 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 P/O Number field, enter the number of the P/O for which to obtain an acknowledgment 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 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**

**Figure 7: The Status Field in the (SRC) Acknowledgement Request Screen**

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

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

Transmi ssi on Date [.....] Transmi ssi on Ti me [.....]

Transmi ssi on Status

[.....]

? - P/O Not Found N - Not Recei ved F - Fi nal Recei ved P - Pre-Recei ved

| PO Nbr  | Status | PO Nbr  | Status | PO Nbr  | Status | PO Nbr  | Status |
|---------|--------|---------|--------|---------|--------|---------|--------|
| [.....] | [.]    | [.....] | [.]    | [.....] | [.]    | [.....] | [.]    |
| [.....] | [.]    | [.....] | [.]    | [.....] | [.]    | [.....] | [.]    |
| [.....] | [.]    | [.....] | [.]    | [.....] | [.]    | [.....] | [.]    |
| [.....] | [.]    | [.....] | [.]    | [.....] | [.]    | [.....] | [.]    |
| [.....] | [.]    | [.....] | [.]    | [.....] | [.]    | [.....] | [.]    |
| [.....] | [.]    | [.....] | [.]    | [.....] | [.]    | [.....] | [.]    |
| [.....] | [.]    | [.....] | [.]    | [.....] | [.]    | [.....] | [.]    |

P=Pri nt Acknowl edgment R=Pre-Recei ve and Pri nt Acknowl edgment [P] Pri nter [\_\_]

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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**

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**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.

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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**

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**Note:** If you are using the substitution feature set up in the (L6F) screen, a special prints on the acknowledgment showing that a substitution took place.

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**Figure 8:  
Printing and  
Pre-Receiving  
an  
Acknowledgment**

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

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

Transmi ssi on Date [.....]                      Transmi ssi on Ti me [.....]

Transmi ssi on Status

[.....]

? - P/O Not Found    N - Not Recei ved    F - Fi nal Recei ved    P - Pre-Recei ved

| PO Nbr  | Status | PO Nbr  | Status | PO Nbr  | Status | PO Nbr  | Status |
|---------|--------|---------|--------|---------|--------|---------|--------|
| [.....] | [.]    | [.....] | [.]    | [.....] | [.]    | [.....] | [.]    |
| [.....] | [.]    | [.....] | [.]    | [.....] | [.]    | [.....] | [.]    |
| [.....] | [.]    | [.....] | [.]    | [.....] | [.]    | [.....] | [.]    |
| [.....] | [.]    | [.....] | [.]    | [.....] | [.]    | [.....] | [.]    |
| [.....] | [.]    | [.....] | [.]    | [.....] | [.]    | [.....] | [.]    |
| [.....] | [.]    | [.....] | [.]    | [.....] | [.]    | [.....] | [.]    |
| [.....] | [.]    | [.....] | [.]    | [.....] | [.]    | [.....] | [.]    |

P=Pri nt Acknowl edgment    R=Pre-Recei ve and Pri nt Acknowl edgment [P]    Pri nter [\_\_\_]

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